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Using Microsoft® Office for Mac 2011

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Yvonne Johnson has been writing computer books and teaching computer classes since 1982. She has delivered classroom training on computer applications to thousands of employees of large and small businesses, military and government personnel, teachers, attorneys, secretaries, and, yes, even Microsoft software support engineers. She has written more than 65 computer books for well-known publishers, including Que and Pearson Education. Her latest book in this series is *Using Mac OS X Snow Leopard*.

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Currently, she lives in Franklin, Tennessee with her husband and works as a freelance writer and website designer.

Dedication

To Cooper, Logan, William, Lilly, Eleanor, and Josie

Acknowledgments

My thanks go out to everyone who made this book possible. The Pearson staff and all the editors who worked on this book did a first rate job. In particular, it's always a pleasure working with my acquisition editor, Laura Norman, and Jenn Kettell is the best tech editor I've ever had! Additionally, I'd like to thank Brit-tany Gidican, on the public relations team for the Microsoft Macintosh Business Unit, who supplied my every beta need!

The schedule for this book was grueling because it was shortened by more than two months when Microsoft announced the early release of the product in October. We had not expected the release until late December or early January. After all, it is called Office for Mac 2011! I could never have kept up with the writing and editing schedule if my husband had not cooked, cleaned, and taken care of me in every way while I worked literally around the clock. Thank goodness he's such a great guy.

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Introduction

Microsoft was committed to making Office for Mac 2011 a significant improvement over previous versions. To that end, the company focused on collaboration, compatibility, and ease of use, and laid out a four-pronged approach:

- Incorporate features from Office 2007 that were not added to Office 2008 for Mac.
- Incorporate Office 2007 features that did not get added, as well as the latest updates to those features that were made in Office 2010.
- Incorporate the new features introduced in Office 2010 for maximum compatibility.
- Add new features to Office for Mac 2011 that are unique to it.

Additionally, Microsoft had the goal of making Office for Mac truly Mac-like. Mac BU (Mac Business Unit), the Microsoft team responsible for developing Office for Mac, consists of team members who are really Mac users. They personally know and understand what Mac users want and consistently seek out and use customer feedback to identify, prioritize, and improve Office specifically for Mac users.

In my opinion, Microsoft met and exceeded its goals with this release. It achieved a high degree of parity between the PC and Mac versions while integrating uniquely Mac functions, such as the Spotlight. Users who must switch between platforms will find the majority of the tasks they need to perform on a daily basis to be nearly identical.

If I had to point to the most outstanding achievements in this release of Office, I would name Outlook and the return of Visual Basic for Applications (VBA). Although the Mac version of Outlook doesn't have every single feature as the PC version, at least Mac users are fully integrated into systems that use Exchange Server now. Programmers who use VBA to design full-blown applications that sit on top of Office are ecstatic about VBA's return. Office 2008 for Mac dropped VBA completely, making all previously designed VBA applications useless.

For nonprogrammers and non-Exchange users, I point to the suite-wide implementation of the ribbon as the most impressive achievement. Features with rich functionality, previously buried in the menu system, bubble up to the top in the ribbon where users can see them and use them more easily. The ribbon evolved from the Elements Gallery in Office 2008 but now includes many more features (on a par with the ribbon from the Windows version of Office). The collaboration features take a very close second to the ribbon—only because collaboration is not a necessity for

a large number of users. If reviewed on merit alone, the collaboration features are wonderfully easy to use and fill a great need in the editorial process. Now using collaboration on SharePoint or SkyDrive, there is only one version of a file—no more Proposal-Final.docx, Proposal-Final-2.docx, or Proposal-Really-the Final-One.docx.

How This Book Is Organized

This book introduces you to the Office for Mac 2011 applications, including Word, Outlook, PowerPoint, and Excel, and shows you how to use the most prominent features of each. It's a lot to cover in so few pages, but I cover the functions in each application that will make you productive the fastest.

Using Microsoft Office for Mac 2011 is broken into five sections: one section for each of the four applications and a fifth section that teaches you how to use the collaboration features of Office. For Word, PowerPoint, and Excel, each section includes an introductory chapter to make you comfortable with the basics and subsequent chapters that teach you how to enhance your work and use productivity tools. The Exchange section covers E-mail, Contacts, Calendar, Tasks, and Notes.

In the book, I provide you with the following:

- Basic concepts for novice users
- More advanced information for experienced users
- My personal recommendations for how to do things
- Real-life examples to help you understand the usefulness of features
- Explanations of why you do something and not just how to do it

Using This Book

This book enables you to customize your own learning experience. The step-by-step instructions in the book give you a solid foundation in using Office for Mac 2011, while rich and varied online content, including video tutorials and audio sidebars, provide the following:

- Demonstrations of step-by-step tasks covered in the book
- Additional tips or information on a topic
- Practical advice and suggestions
- Direction for more advanced tasks not covered in the book

Here's a quick look at a few structural features designed to help you get the most out of this book:

- **Chapter overview:** At the beginning of each chapter is a brief summary of topics addressed in that chapter. This overview enables you to quickly see what is covered in the chapter.

- **Notes:** Notes provide additional commentary or explanation that doesn't fit neatly into the surrounding text. Notes give detailed explanations of how something works, alternative ways of performing a task, shortcuts, work-arounds, ways to avoid pitfalls, and cautions.
- **Cross-references:** Many topics are connected to other topics in various ways. Cross-references help you link related information together, no matter where that information appears in the book. When another section is related to one you are reading, a cross-reference directs you to a specific page in the book on which you can find the related information.



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In this chapter, you take a tour of Word's window, learn how to create and e-mail a document, and set the preferences for Word.

1

Getting Started with Word

Word! There it is. For good or ill, it's the undisputed king of the word processing world. Now the Mac version is no longer the pretender to the throne of its Microsoft brother, but a full-fledged joint ruler. Let's examine the royal pedigree.

This chapter covers the application window; basics tasks of creating, saving, e-mailing, and printing a document; and some of the Word preferences I recommend you set right away.

Selecting a Document Template

When you start Word, the Word Document Gallery, shown in Figure 1.1, opens by default. This window enables you to select a template for the document you want to create. Word has templates for all types of documents, such as calendars, invitations, posters, flyers, catalogs, newsletters, brochures, fax cover sheets, and so on.

To select a template, first select the category in the Templates pane on the far left, click the template you want to use in the middle pane, and click the Choose button. Word names the new document Document1 for you, but you can give it a more appropriate name when you save the document.

If you don't think you want to be bothered with the Document Gallery, you could click the Don't Show This When Opening Word check box at the bottom of the screen. The next time you start Word, the Word Document Gallery will not open, and Word will create a document for you automatically.

If you have turned off the Word Document Gallery, you can turn it back on by setting a preference. See the "Setting the Word Document Gallery Preference" section later in this chapter.

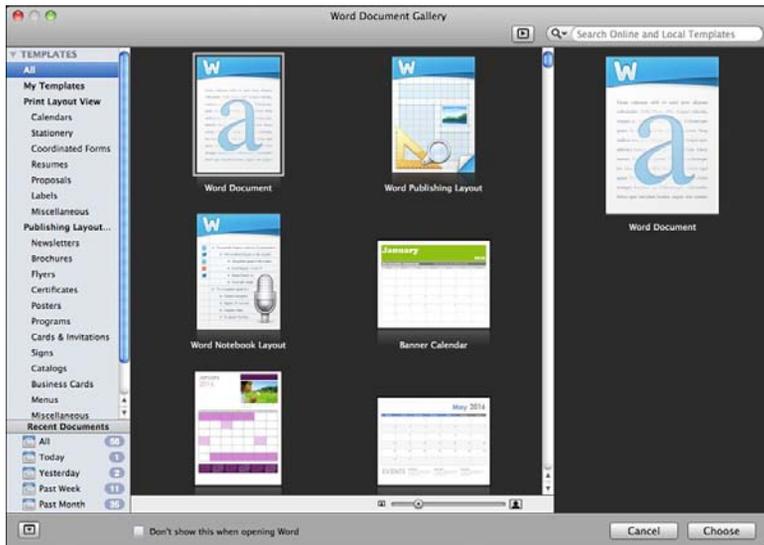


Figure 1.1 *The plain, vanilla Word document template is called, surprisingly enough, Word Document.*

Exploring the Word Window

Before you start using Word to type a document, you might need to take a short tour of the Word window. It's designed to give you information about your document and make commands available to you. Word does this with a number of different screen elements, most of which can be turned on or off.

Before starting the tour, if you want your screen to match Figure 1.2, click the Print Layout View button in the lower-left corner. Then you can refer to the figure as the tour takes you from the top of the screen and moves down. If your screen doesn't display all the elements described, don't worry; the element just hasn't been turned on in the View Preferences. (You learn how to set these preferences later in this chapter.)

At the top of the window, you can see the Word menu bar. It displays in the Mac menu bar, as all good little Mac applications do. (On a Mac, you never have more than one menu bar displaying at a time. Only the current application's menu is displayed.)

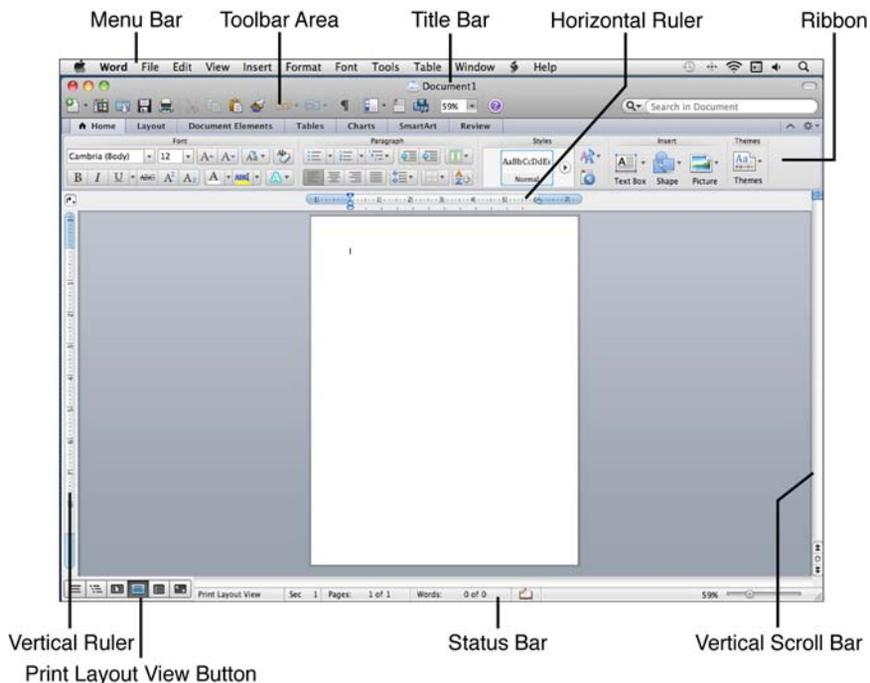


Figure 1.2 *The print layout view shows more screen elements than any other view.*

The title bar, which displays the name of the current document, is below the menu bar. This bar also contains the red, yellow, and green buttons that close, minimize, and zoom the Word window.

The toolbar area is just under the title bar. It can expand to display two toolbars, each on a separate line.

An element called the ribbon is located just below the toolbar area. Of all the screen elements, it's definitely the dominant one. You learn more about the ribbon later in this chapter.

Below the ribbon is the horizontal ruler that displays the indents and tabs. The vertical ruler appears on the left side of the screen, but it displays only in the print layout view.

The vertical scroll bar appears on the right side of the screen. At the bottom of the bar are two navigation buttons for scrolling up and down in the document and the Browse Object control.

 To learn more about using the Browse Object control, see "Using Browse Objects" in Chapter 2, "Editing Documents."

Across the bottom of the screen is the horizontal scroll bar, which appears only when necessary and, therefore, is not shown in Figure 1.2. Below that is the status bar, which contains the view buttons on the far left, followed by various document information and status indicators (discussed later in this chapter), and the zoom control on the far right.

Touring the Menus

I'm going to spare you a long discussion of the menu bar because I assume you didn't just fall off the turnip truck. (Bless your heart, as we say in the South.) I will say that the menu bar changes slightly when you use different templates. For example, if you use the Calendar template, a new menu option called Calendar appears on the menu bar.

Menus are also good sources for finding keyboard shortcuts. Many commands list their shortcuts on the right side of the menu.

The only specific menu I'm going to call your attention to is the Script menu. That's the one represented by the three-dimensional "S" just to the left of the Help menu, as shown in Figure 1.3.

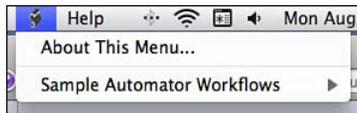


Figure 1.3 *The Script menu contains Automator workflows.*

If you're upgrading from a version of Word or Office for Mac that predates the 2008 version, you've never seen this menu before. It contains Automator workflows. Office comes with a library of Automator workflows, which, similar to macros, perform repetitive tasks. The Word workflows are preloaded for you on the Scripts menu, and you can create your own workflow to add to the menu.

If you'd like to learn more about Automator workflows, listen to the audio file I've recorded for you.



TELL ME MORE Media 1.1—Creating Automator Workflows

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

Getting Familiar with the Toolbars

By default, Word displays only the Standard toolbar. This toolbar contains tools for commands you use in the general course of creating and editing a document: Save, Copy, Cut, Paste, Undo, Redo, and so on. The only other toolbar that exists in Word 2011 is the Formatting toolbar. If you turn it on, it displays on a second line under the Standard toolbar.

Getting Familiar with the Ribbon

The ribbon is like a toolbar on steroids, containing all the tools that previously appeared on individual toolbars in earlier versions of Office. If you are upgrading from Office for Mac 2008, you'll notice the similarity between the Elements Gallery (now passé) and the ribbon.

The ribbon contains tabs that have tools for specific uses. To access the tools, you click the appropriate tab at the top of the ribbon. For example, if you click the Layout tab, the ribbon displays tools to set the page orientation, page size, margins, background colors, and so on. The Home tab on the ribbon displays all the tools found on the Formatting toolbar and then some, effectively rendering the Formatting toolbar useless, unless you don't want to use the ribbon at all. (If that's the case, you can turn it off completely by choosing View, Ribbon.)

If you want to use the ribbon, but it takes up too much room on the screen, you can easily minimize it to just the tabs and expand it again when you want to use it. To minimize the ribbon, click the current tab. To expand the ribbon, click any tab. Alternatively, you can click the caret icon on the far right side of the ribbon bar to minimize it. When the ribbon is minimized, the icon changes to a "V." If you click the V, the ribbon expands.

After you start creating documents, you will notice that the ribbon is intuitive. If you insert a table, for example, a new tab named Table Layout appears on the ribbon. The ribbon doesn't open that tab automatically but draws your attention to it by coloring it light purple. Then, if you want to use the tools on that tab, you can click the tab to display them.

Changing the View

Word 2011 has six buttons on the status bar that change the view of the document and one option available only on the View menu. Each view has features that are useful in different situations. Table 1.1 describes the views and when to use them.

Table 1.1 Using Views

| View | Description |
|-------------------|---|
| Draft | This view does not display unused whitespace on the page such as the margins at the top, bottom, and sides of the page. Additionally, it does not display the header or footer, or floating graphics. Use this view when you need to see the maximum amount of text possible. |
| Outline | In this view, you can create an outline using tools that help you assign levels to your outline headings, collapse and expand sections, promote or demote headings, as well as move entire sections with the least amount of effort. The outline view is also useful for viewing documents created with heading styles (Heading 1, Heading 2, and so on), which, by default, have hierarchical levels assigned. Using this view, you can quickly review the structure of a document that uses headings and subheadings. For example, you could check a document in the Outline view to be sure that you have at least two subheadings for each heading. |
| Publishing Layout | Use this view for documents that you format with a publishing template such as a brochure or newsletter. If you click this view button in a document that is not a publishing type document, Word asks if you want to create a new publishing document or edit the current document in publishing layout view. This view contains desktop publishing tools on the ribbon's Layout tab that are not included in other views. |
| Print Layout | The print layout view shows the document as it will look when it prints. It displays the margins, unused space on a page, graphics, headers, and footers, as well as a visual page break between pages. |
| Notebook Layout | This view is available only for documents that you format with the notebook template. If you click the NotebookLayout View button in a document that is not a notebook, Word asks if you want to convert the current document to a notebook or create a new document formatted as a notebook. If you convert the current document, some existing formatting may be lost. This view presents your document on the screen visually as a bound notebook with sections. In this view, you can take notes, flag items, and record audio notes. |
| Full Screen | The full screen view hides all screen elements except the document and displays across the top of the screen a toolbar that en- |

ables you to work in Write or Read mode. You can press the Esc key to exit this view.

Web Layout

This view is sort of a leftover from the old days when you could use Word as a web browser. It's the one that is accessible only from the View menu. You can use it to view or create HTML documents, but here's a tip: Don't even think about creating HTML documents in Word!

Figure 1.4 shows the difference in the amount of text that you can see in the draft view versus the print layout view. Notice that the draft view doesn't show the header or footer, whitespace, or the graphic.

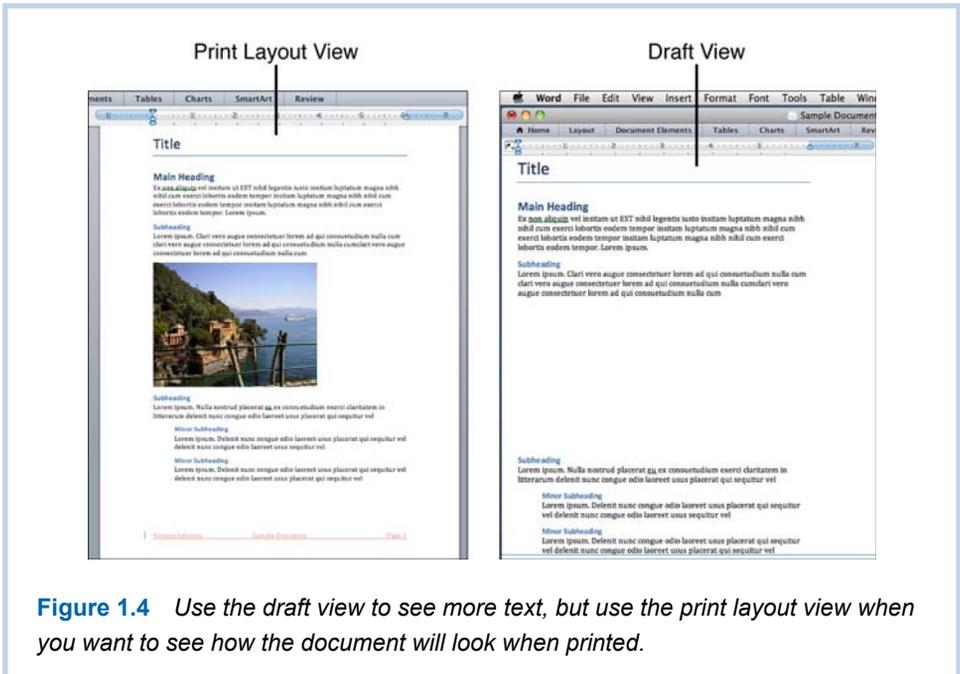


Figure 1.4 Use the draft view to see more text, but use the print layout view when you want to see how the document will look when printed.

Figure 1.5 shows the same document in the outline view. Notice that the headings are indented like an outline, and the graphic doesn't show in this view either.

Figure 1.6 shows the publishing layout and notebook views. They look similar because both views have a *workspace* that the document or notebook sits on. You can easily recognize the notebook view, however, because the document actually looks like a notebook.

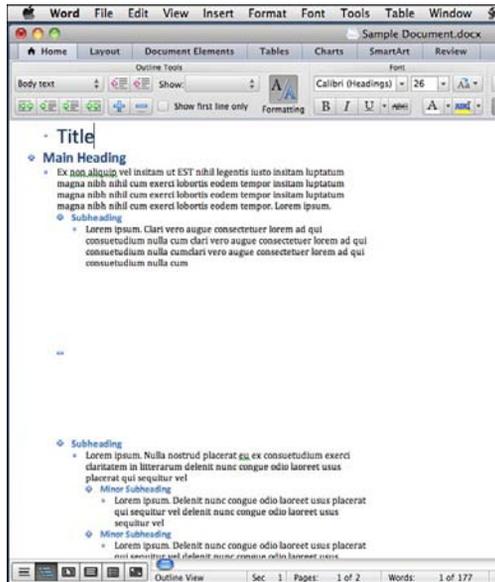


Figure 1.5 Use the outline view to create an outline or quickly review the structure of a document created with heading styles.

Publishing Layout View



Notebook View



Figure 1.6 You can customize the workspace in both the publishing layout and the notebook views.

Deciphering the Status Bar

The appearance of the status bar changes depending on the view you are using; however, all views display the view buttons on the far left. The name of the view you are currently using also displays as the first piece of information on the status bar.

In the draft, outline, and print layout views, the status bar contains the following document information:

- The current section number of the document
- The current page number and total number of pages
- The number of the current word (where the insertion point is) and the total number of words in the document
- The status of spelling errors
- The zoom percentage

In the publishing layout and notebook views, a small subset of the preceding information displays in the status bar in addition to special buttons that apply only to the specific views.

In the full screen view, there is no status bar displayed at all!

Viewing Other Screen Features

Three more screen features deserving mention are the Toolbox, the Sidebar, and the Media Browser. Figure 1.7 shows all three of these features.

- **Toolbox**—The Toolbox has five tabs: Styles (shown in Figure 1.7), Citations, Scrapbook, Reference Tools, and Compatibility Report. To open the Toolbox, click View and click the name of the tab you want. Each tab has a different function; most are explained in later chapters as needed.
- **Sidebar**—The Sidebar can display the Document Map pane, the Thumbnail pane (shown in Figure 1.7), the Reviewing pane, or the Search pane. To open the Sidebar, click View, Sidebar, and then click the pane you want to view. Each pane has a different purpose, and most of them are explained in later chapters as needed.
- **Media Browser**—The Media Browser has six tabs: Photos, Audio, Movies, Clip Art, Symbols, and Shapes. To open the Media Browser, click View, Media Browser. The Media Browser groups media of different kinds in one place so you can insert them easily in your documents.

🔄 To learn more about using the Media Browser, see "Inserting Media from the Media Browser" in Chapter 6, "Creating Documents for Publication."

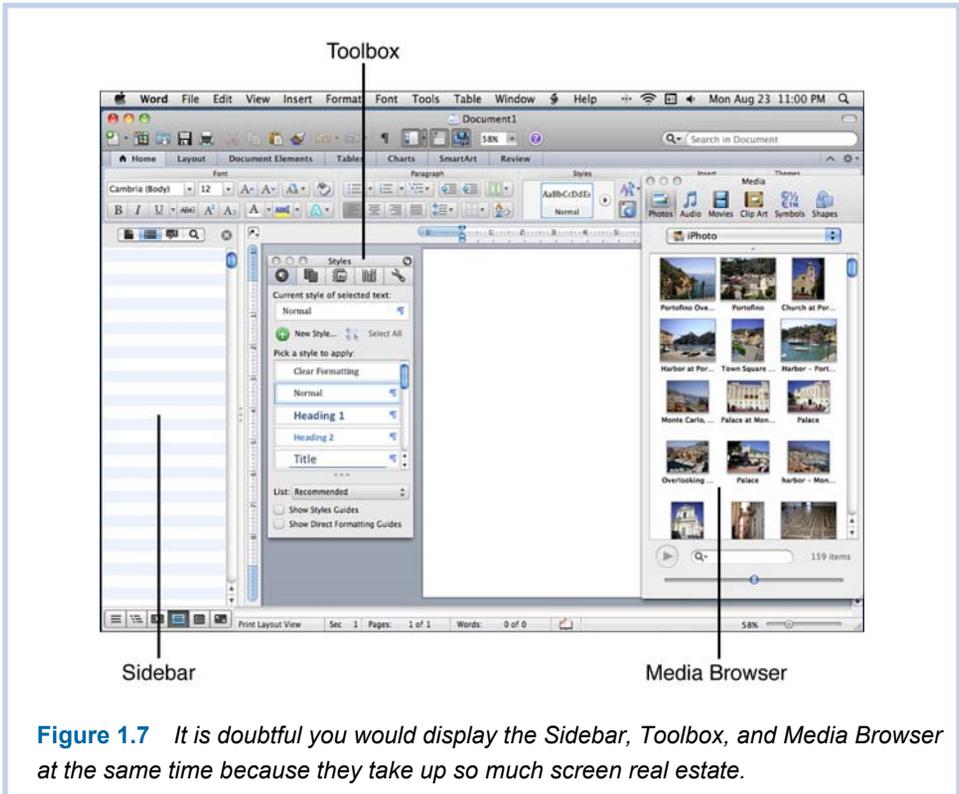


Figure 1.7 It is doubtful you would display the Sidebar, Toolbox, and Media Browser at the same time because they take up so much screen real estate.

Working with Documents

Now that you've had the tour, you're ready to work with documents. This section looks at the most rudimentary tasks that deal with documents: creating, saving, printing, and e-mailing.

Creating a New Document

At the beginning of this chapter, you learned that Word automatically creates a new document for you when you open the application. You determine the type of document when you select a template from the Word Document Gallery.

If you don't have the Word Document Gallery activated, Word creates a "normal" document (that is, it uses the Word Document template). If you don't want to use a normal document, you can create a different kind of document from within Word and then close the normal document. This is a little more trouble than simply selecting the exact type of document you want to begin with, which is why I recommend you continue to use the Word Document Gallery if you regularly create documents from different templates.



LET ME TRY IT

Creating a Different Type of Document from Within Word

To select a different type of document to create, follow these steps:

1. Click File on the menu bar and click New from Template, click the New from Template button (shown in Figure 1.8), or press Shift-Command-P. The Word Document Gallery opens.



New from Template Button

Figure 1.8 *The New from Template button is on the Standard toolbar.*

2. Select the category in the left pane, and in the middle pane, click the template that you want.
3. Click the Choose button.

Word keeps each document that you create in its own window, and you can have multiple windows open at the same time.

Saving a Document

I recommend saving a new document very soon after you create it. I like to type the title of the document first, if it has one, and then save it because Word automatically uses the first few words in a document as the suggested name for the document when you save it.



Saving a Document for the First Time

To save a document for the first time, follow these steps:

1. Click File, Save, click the Save button in the Standard toolbar, or press Cmd-S to open the Save dialog box shown in Figure 1.9.

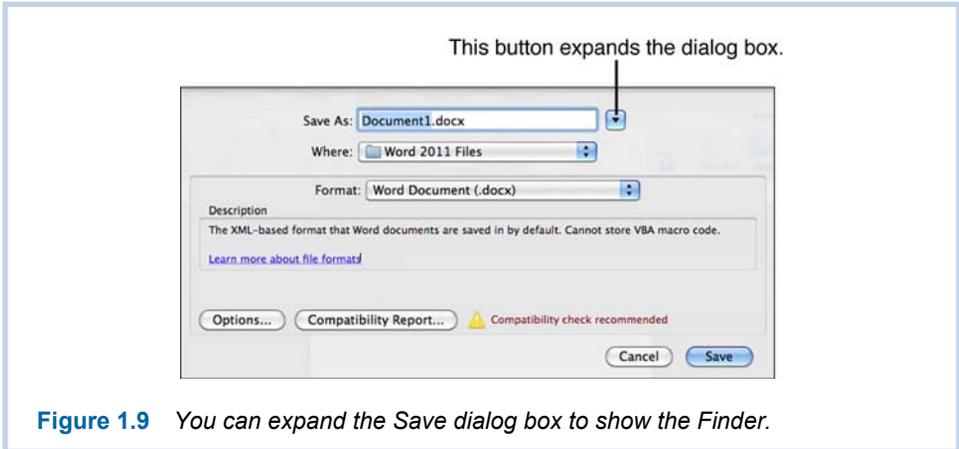


Figure 1.9 You can expand the Save dialog box to show the Finder.

2. Type a name for the document in the Save As text box or accept the suggested name.
3. If your dialog box looks like Figure 1.9, click the button to the right of the Save As text box so the "mini-Finder" replaces the Where text box, as shown in Figure 1.10.
4. Navigate to the location where you want to save the file or click the New Folder button, type a name for the new folder, and click Create.
5. Click the Format pop-up button if you need to select a format that makes the document compatible with older software, or if you just need to save the document in a special format, such as an earlier version of Word.

If you see a red warning about compatibility issues in the Save dialog box, click the Compatibility Report button. A window opens with a report, as shown in Figure 1.11. Select an issue to see an explanation, and then fix the issue if possible.

6. Click Save.

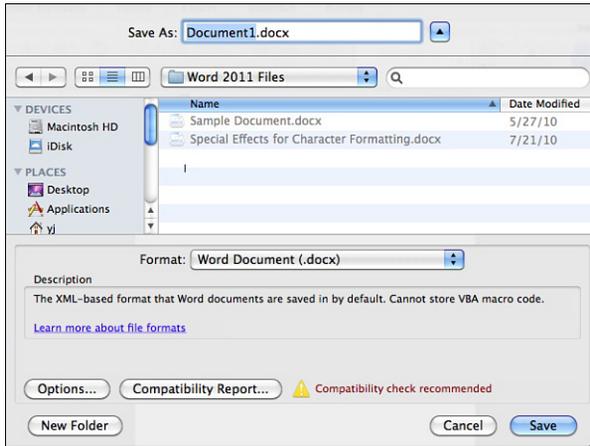


Figure 1.10 *The expanded dialog box uses the Finder format to make all locations on the Mac accessible.*

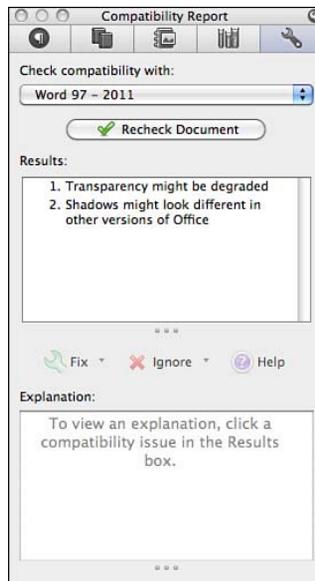


Figure 1.11 *The Compatibility Report window lists issues that you can fix or ignore.*

After you save a document for the first time, it's a good idea to continue saving it as you work on it. Even though, by default, Word saves an AutoRecovery file for you every 10 minutes, this is not a substitute for saving the document yourself.

The AutoRecovery file is not the actual file you are working on. It's a temporary file that Word uses to recover the file you're working on if Word shuts down unexpectedly or gets hung up and causes you to have to force quit. To save a file that has been saved before, just click the Save button in the Standard toolbar or press Cmd-S.

Printing a Document

You might think that printing a document is a simple topic, but Word offers quite a few print features that you should know about. First, consider the fact that you can quickly print one copy of the current document by clicking the Print button in the Standard toolbar. If you have several printers attached to your Mac, Word sends the document to the one you have specified as the default printer. If you don't remember which one that is, you can point to the button to see a ScreenTip telling you which printer Word is going to send the document to before you click the button (see Figure 1.12).

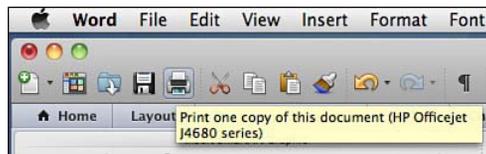


Figure 1.12 The ScreenTip tells you which printer Word is going to use.

If you want to print a document using a different printer, or you want to print more than one copy, you should use the Print command. The Print command displays the Print dialog box, which has many different options in it.



SHOW ME Media 1.2—Printing a Document with the Print Command

Access this video file through your registered Web Edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Printing a Document with the Print Command

To print a document using the Print dialog box, follow these steps:

1. Open any document.

2. Click File on the menu bar, and then click Print or press Cmd-P to open the Print dialog box, as shown in Figure 1.13.

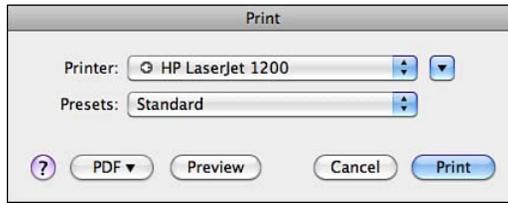


Figure 1.13 This Print dialog box is "collapsed." Figure 1.14 shows the expanded dialog box.

3. Click the Printer pop-up button to display the list of printers installed on your Mac and select the printer you want to use.
4. If necessary, click the button to the right of the Printer drop-down menu to expand the Print menu, as shown in Figure 1.14.

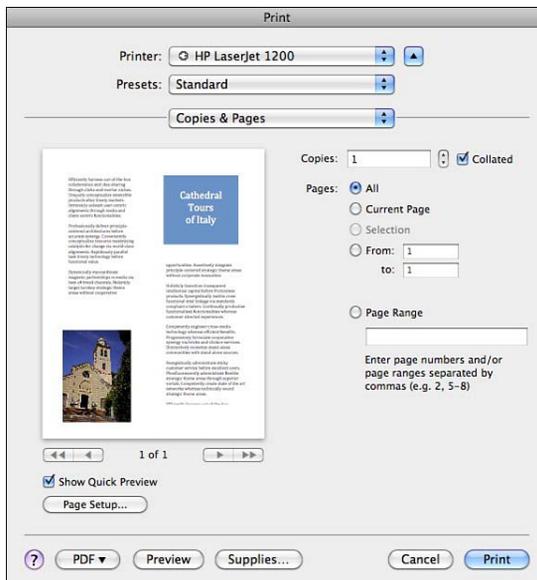


Figure 1.14 After you expand the Print dialog box, it remembers this setting and displays the expanded view every time you use it.

5. In the Copies & Pages section, enter the number of copies that you want to print. Notice that the Collated check box is checked by default. If the document has several pages and you print more than one copy, Word prints one complete copy of the document at a time. In other words, it does not print multiple copies of the first page, followed by multiple copies of the second page, and so on.
6. In the Pages section:
 - Print the entire document by selecting All.
 - Print the page that the insertion point is on by selecting Current Page.
 - Print a range of pages by entering a starting and ending page in the From and To fields.
 - Print nonconsecutive pages or more than one range by entering the page numbers or ranges separated by commas. (For example, to print pages 1 through 3 as well as 6 and 9 and pages 12 through 15, you would enter 1–3, 6, 9, 12–15. Although entering the pages in order might be most logical, it is not necessary.)
7. Scroll through the Quick Preview if you want to see the document one last time before you print it.
8. Click Page Setup to set the options shown in Figure 1.15, including the paper size, orientation, and scale. Click OK when finished.
9. Click Print to send the document to the printer.

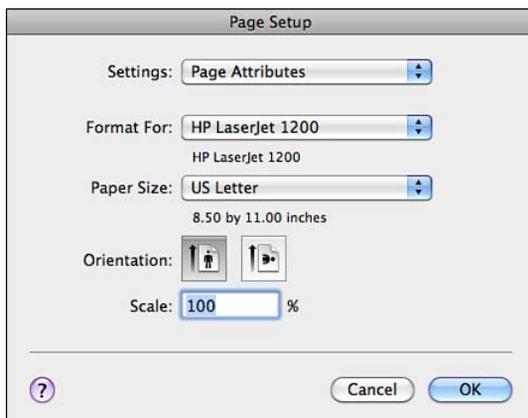


Figure 1.15 Go to the Page Setup dialog box when you want to change the orientation of the printed page.

Taking a Closer Look at the Incredible Print Dialog Box

Even though the previous task had nine steps, this description has only scratched the surface of what the print dialog box can do for you. Much of the functionality of the dialog box is buried in the third menu control, which defaults to Copies & Pages. If you click the pop-up button on this control, you see something similar to the options displayed in Figure 1.16. (Different printers may display different options.)

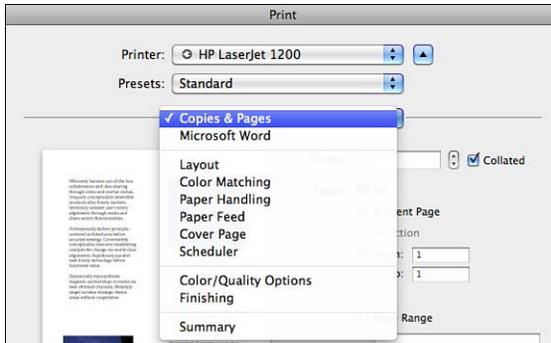


Figure 1.16 Fine-tune the printing of your document to the *n*th degree with these options.

The Microsoft Word option enables you to specify what you want to print, to print odd or even pages, and to set Print preferences, as shown in Figure 1.17. The Print What pop-up menu has some interesting options, explained in Table 1.2.

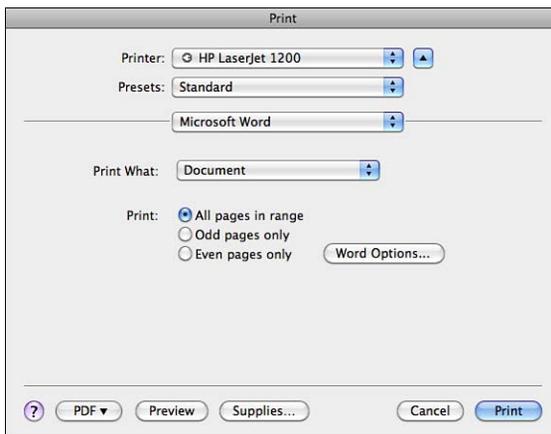


Figure 1.17 The Microsoft Word option in the Print dialog box has options for printing more than just a document.

Table 1.2 Print What Pop-Up Menu Options

| Option | Description |
|-------------------------|--|
| Document | Prints the current document. |
| Document Properties | Prints the information in the Properties dialog box, including the document type, location, size, creation date, last modification date, attributes, number of revisions, total editing time, number of words, number of pages, and so on. |
| Document Showing Markup | Prints the document with all comments that have been added and all revisions that have been made with Track Changes activated. If a document has revision marks, this is the default option for printing the entire document. For more information about the Track Changes feature, see Chapter 16, "Using Review Features." |
| List of Markup | Prints a list of all revisions that have been made with Track Changes activated. Word also prints the name of the person who made the revision or comment. |
| Styles | Prints a list of all styles used in the document and the attributes of each style. For more information about using styles, see Chapter 3, "Formatting Documents." |
| AutoText Entries | Prints all the AutoText entries that have been saved in the file. See "Using AutoText" in Chapter 4, "Exploring Other Features," to learn more about AutoText entries. For more information about the AutoText feature, see Chapter 4. |
| Key Assignments | Prints a list of all key assignments you assign to macros that have been saved in the file. See Chapter 4 to learn more about macros. |

The Layout option, among other things, enables you to specify the number of pages per sheet to print and the order in which the pages should print on the page. In Figure 1.18, the settings are four pages per sheet and the direction is up and down, left to right.

Additional options may include the following (depending on the printer):

- **Color Matching**—Enables you to select the color profile that your printer should use.
- **Paper Handling**—Includes options for the order in which pages should print and the option to scale the page to fit the paper size.
- **Paper Feed**—Enables you to specify which pages print from which paper trays.

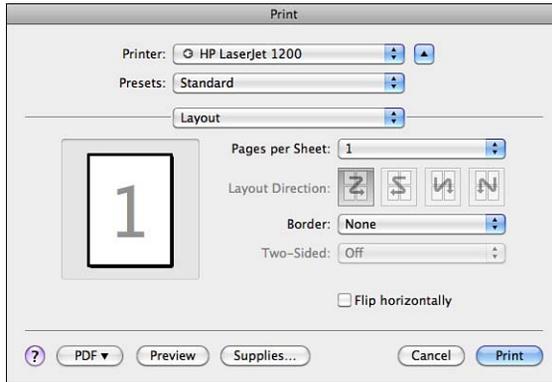


Figure 1.18 *The Two-Sided option is not available unless your printer has duplexing capability.*

- **Cover Page**—Enables you to print a cover page (before or after a document) and include billing information. The title at the top of the cover page is determined by the type of cover page you select (standard, classified, confidential, secret, top secret, and unclassified), and the other information on the cover page includes the print job ID, the title of the document, your initials, the print from location, and billing information (if you have specified any).
- **Scheduler**—Enables you to specify a time that the document will print and to set a priority (which is important if other users are also sending documents to the same printer).
- **Color/Quality or PaperType/Quality**—Includes options for paper type, resolution, and printing in color or black and white.
- **Finishing**—Enables you to specify the paper path.
- **Supply Levels**—Shows the level of ink or toner remaining in the printer.
- **Summary**—Lists all the options you have selected for Color Matching, Paper Handling, Paper Feed, and so on, as shown in Figure 1.19.



Figure 1.19 Clicking the arrow for a Setting shows the choices that you have made in the Value column.

E-mailing a Document

One of the features that I have always liked about Word is the ability to e-mail the currently open document right from within Word. You can send it as an attachment or as HTML.



SHOW ME Media 1.3—E-mailing a Document

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LET ME TRY IT

E-mailing a Document

To send the current document in an e-mail message, follow these steps:

1. Click File on the menu bar, and then click Share.
2. Select E-mail (as Attachment) or E-mail (as HTML).
3. Address the e-mail message that opens, type a subject, add text to the message as needed, and click the Send button. Return to Word to continue working.

Several of the preloaded workflows, found on the Script menu, also interact with e-mail. You can send a PDF or HTML version of the document in e-mail or send selected text from the document in a message.

Creating Special Documents from Templates

Templates are preformatted documents that you can use to create a specific kind of document that may be more complicated than you would ordinarily want to tackle on your own. Chapter 6, "Creating Documents for Publication," covers many of the publishing templates, but in this chapter, just as an introduction, you look at creating a calendar from a template.



SHOW ME Media 1.4—Creating a Calendar from a Template

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LET ME TRY IT

Creating a Calendar from a Template

I can't remember birthdays to save my life, so creating a monthly calendar is a must for me. To create a calendar from a template, follow these steps:

1. Click File, New from Template. The Word Document Gallery opens.
2. Click Calendars in the Templates sidebar, and then click the style you want to use in the middle pane.
3. Click the Colors pop-up in the right sidebar and click a color palette, such as Breeze. The thumbnail in the right sidebar updates to show the color combination that you selected.
4. Click the Fonts pop-up in the right sidebar and select the font you want to use. The thumbnail of the calendar in the right sidebar updates to show the font you selected.
5. Click the Choose button. The Select Calendar Date dialog box opens.
6. Select the Month and Year and click OK. An information box opens, telling you how to select new dates. Click OK.

7. If the calendar template that you selected has a photo in it, click the Media Browser button in the Standard toolbar to access your photos. Click the Photo tab, if necessary, and drag a photo to a photo placeholder.
8. If the calendar template has a text placeholder, click it and enter your own text.
9. On the calendar grid, click in a box for a specific date and type a birthday, appointment, event, and so on.

Press the Tab key to go to the next box in the row. If you are in the last box in a row (Saturday), pressing Tab moves you to the first box in the next row, but watch out! It also selects the date. You should click under the date before you start typing.

10. Save and print the file.

Setting Preferences for Word

Preferences are very important on a Mac. They determine how an application works and how it looks. When you install Office 2011 for Mac, predetermined preferences are loaded, but you can change them so the applications behave the way you want them to.

Exploring the Preferences Dialog Box

The Word preferences in the Preferences dialog box, shown in Figure 1.20, are divided into three categories: Authoring and Proofing Tools, Output and Sharing, and Personal Settings. Each category has several options. When you have some time, you should look at each one of the options in each category just to familiarize yourself with what's available for your customization.

To select an option in any category, click the icon. To go back to viewing all the options, click the Show All button in the toolbar.

When you need to set a preference but you're not sure where it is, just type a search word in the Spotlight text box in the upper-right corner. Word highlights all the options that relate to the search phrase and even shows you a list of possible preferences that you might want to select.



Figure 1.20 *The Preferences dialog box can be a little overwhelming, but the Spotlight can help you find things quickly.*

Setting a Few Preferences

Before you start exploring all the preferences, let me recommend a few that you should look at first. The particular preferences that I want to call your attention to are in the General, View, and Save categories.



LET ME TRY IT

Setting the Word Document Gallery Preference

If you want to take my advice about using the Word Document Gallery, and you have already turned it off, you can turn it on again by following these steps:

1. Click Word on the menu bar and click Preferences to open the Preferences dialog box.
2. Click General in the Authoring and Proofing Tools row.
3. Click the Open Word Document Gallery When Application Opens check box to enable this option. (The check box should be blank if you have disabled the Gallery previously.)
4. Click OK or click the Show All button to go back to the Word Preferences dialog box.

The View preferences I want you to set are for Nonprinting Characters and Window. Nonprinting characters are the symbols for tabs, paragraphs, spaces, and

so on. Often it is helpful to have some of these nonprinting characters visible on the screen while you are working. The Window preferences display or hide screen elements, such as the status bar, live word count, and the vertical ruler.



Setting the View Preferences

To set View preferences, follow these steps:

1. Click Word on the menu bar and then click Preferences to open the Preferences dialog box.
2. Click View in the Authoring and Proofing row to open the preferences shown in Figure 1.21.

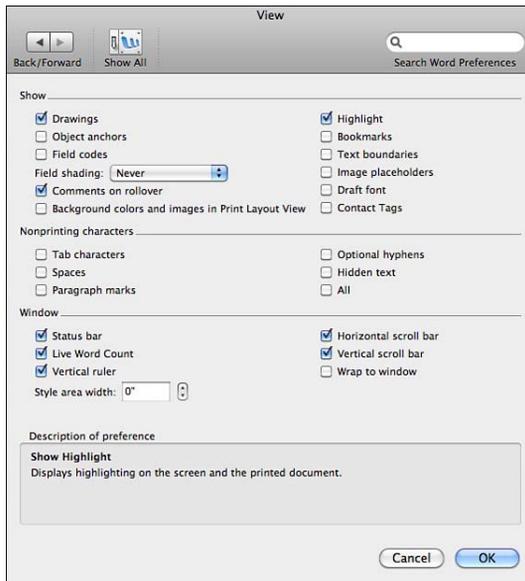


Figure 1.21 By default, none of the nonprinting characters display.

3. Click the check boxes for the nonprinting characters that you want to see on the screen while you are working. I personally like to see the paragraph marks, but I don't like seeing the spaces.

 To learn more about the nonprinting characters called "hidden text," see "Formatting Characters" in Chapter 3, "Formatting Documents."

4. Click the check boxes for the Window options you want to display. I like to display all the screen elements, but I don't select Wrap to Window or specify a width for the Style Area.

 To learn more about the Style Area, see "Applying Styles" in Chapter 3.

5. Click OK or click the Show All button to go back to the Word Preferences dialog box.

The AutoRecover preference is preset for you at an interval of 10 minutes. If you do a lot of typing in 10 minutes (as I do) and your electricity goes out a lot (as mine does), you might want to set the AutoRecover to an interval of 5 minutes (as I have).



LET ME TRY IT

Setting the Save AutoRecover Frequency

There is really no advantage that I can see to increasing the interval of the AutoRecover, but if you want to decrease the interval, which I think is a very good idea, follow these steps:

1. Click Word on the menu bar and then click Preferences to open the Preferences dialog box.
2. Click Save in the Output and Sharing row.
3. Decrease the number of minutes in the Save AutoRecover Info text box.
4. Click OK, or click the Show All button to go back to the Word Preferences dialog box.

Learn the techniques to navigate and preview a document, as well as delete, copy, move, find/replace text, and check your spelling.

2

Editing Documents

If you've ever typed even one document in Word, you know that part of the creation process is editing. This chapter tells you how to navigate a document using several different methods, select text, find and replace text, copy and move text, and check the spelling and grammar in the document.

Navigating

Moving around in a document quickly is a key factor in being able to edit a document efficiently. Sometimes you simply want to scroll the document itself to see different locations, but other times you actually want to move the insertion point so that you can make an edit at a specific location.

Before I continue, I probably need to clarify three terms used frequently in this chapter. The *insertion point* is the vertical bar that always follows your typing. Some people also refer to this symbol as the *cursor*, but I always refer to it as the *insertion point*.

The term *cursor* is also used interchangeably with the term *pointer*, which refers not to the insertion point, but to the symbol that floats over your document and is controlled by the mouse. For clarity, I always refer to this as the *pointer*.

Sometimes, the pointer takes the shape of an I-beam, a single-headed arrow, a double-headed arrow, or an icon such as a pencil or eraser, depending on the circumstance. When you hover the pointer over text, it takes the shape of an I-beam, indicating that you can click in the text and the insertion point will move to that location.

Word provides several techniques for navigating, including

- Scroll bars
- Keystrokes
- Browse objects

- Window techniques
- The Find command

No matter what the situation, Word has a useful method or combination of methods that you can use to navigate the document.

Using Scroll Bars

You probably already know how to use scroll bars. Just to review: In the vertical scroll bar, you can scroll through large portions of the document by dragging the bubble in the bar, click the up or down arrows to move a line at a time, or click in the whitespace above or below the bubble in the bar to move a screen at a time. Remember that the scroll bars cause the pages in a document to move, not the insertion point. Generally, you scroll to a location in the document, point to the desired location, and click the mouse to position the insertion point. Also, I want to remind you that you can turn both the vertical and horizontal scroll bars on and off in the View Preferences.

Did you know that you also can position the up and down scroll arrows? They can appear either together at the bottom of the bar, or the up arrow can be at the top of the bar and the down arrow can be at the bottom of the bar. You make this setting in the Appearances preferences in the Apple System Preferences (not Word Preferences) located on the Apple menu. If you select the At Top and Bottom option, the left and right arrows also are split on the horizontal scroll bar.

Using Keystrokes to Navigate

Table 2.1 lists some of the most commonly used keystrokes to move around in a document. When you use keystrokes to navigate, the insertion point moves to a specific location.

Table 2.1 Navigation Keystrokes

| To Move To | Press |
|---------------------------|----------------|
| End of the document | Cmd-End |
| Beginning of the document | Cmd-Home |
| Beginning of a line | Cmd-Left Arrow |

| | |
|----------------------------|-----------------|
| End of a line | Cmd-Right Arrow |
| Next word | Opt-Right Arrow |
| Previous word | Opt-Left Arrow |
| Next screen | PgDn |
| Previous screen | PgUp |
| Bottom of the current page | Cmd-Opt-PgDn |
| Top of the current page | Cmd-Opt-PgUp |

Some Mac keyboards do not have keys labeled Home, End, Page Up, or Page Down, but you can use other keyboard combinations to get the same function.

Using Browse Objects

At the bottom of the vertical scroll bar is a very handy browsing tool that often is underused. The tool consists of a double-arrow pointing up, a Select Browse Object button, and a double-arrow pointing down. If you click the Select Browse Object button, you see a selection of objects, as shown in Figure 2.1. By default, the Page object is selected, so the up and down double-arrow buttons move the insertion point backward and forward to the top of the previous or next page. If you point to the double-arrow buttons, a ScreenTip that says Previous Page or Next Page appears. This indicates what object is currently selected for browsing.

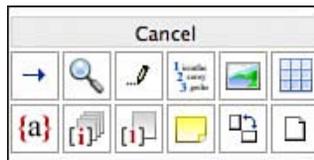


Figure 2.1 The browse objects include (from left to right) Go To, Find, Edits, Heading, Graphic, and Table, and on the second line, Field, Endnote, Footnote, Comment, Section, and Page.

After you select an object, clicking the double-arrow buttons moves the insertion point to the previous or next object in the document. If, for example, you select Table as the object, the ScreenTips change to Previous Table and Next Table, and clicking those buttons takes you to the previous or next table in the

document. This would be helpful if you have a document that has 10 tables in it and you need to change the background color of the first row in each.

When you're finished using a browse object, such as the Table browse object, I recommend that you immediately change the browse object back to Page.



SHOW ME Media 2.1—Using Browse Objects to Navigate

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LET ME TRY IT

Using Browse Objects to Navigate

To browse for a particular type of object in a document, follow these steps:

1. Click the Select Browse Object button.
2. Scroll across the objects in the palette to see the name of the object at the top of the palette. When you find the object you want, click it to select it.
3. Click the up or down double-arrow button in the Browse Objects tool to move to the previous or next object.

If you click the Find object in the browse control palette, the Spotlight field on the right side of the Standard toolbar becomes active, and you can type the text you want to find. If you click the Go To object, the Go To tab of the Find and Replace dialog box opens. In this dialog box, you can specify what you want to go to, such as a page, and then specify the exact page number.

Using Window Techniques

Now suppose you have a long document that you are editing, and you need to refer to the first paragraph while you are editing the last paragraph. What do you do? Well, you can scroll back and forth, but splitting the window is a more efficient way to work. To split the window into two windows, double-click the blue

button at the top of the vertical scroll bar. (Figure 2.2 shows the button.) After you split the window, the button moves to the bottom of the scroll bar in the upper window. To remove the split, double-click the button again.

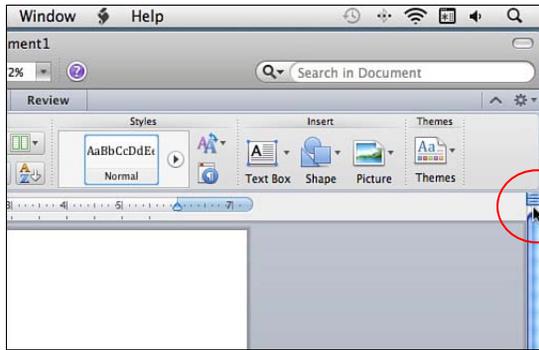


Figure 2.2 When the pointer actually touches the button that splits the window, the pointer changes to a double-headed arrow.

Changes you make in any window automatically update in the other windows.

Now suppose that you actually need to see *three* different locations in the document at the same time. You can't split the window into more than two windows, but there is another technique you can use. You can open several windows on the same document by choosing Window, New Window. The title bar for each window shows the document name followed by a colon and a number to indicate which window is which. After opening several windows on the same document, you might want to tile them on the screen by manually sizing them and moving them, or you can let Word arrange them for you—choose Window, Arrange All.

Finding and Replacing Text

When you are editing or formatting a document, often you know the exact text that you want to go to in the document. Think of a printed copy of a document that has been edited by hand in red ink. To enter the edits in the electronic document, you can use the Find command to search for the specific text that has been edited in red ink.



LET ME TRY IT

Searching for Text with the Find Command

To find a specific string of text in a document, follow these steps:

1. Click in the Spotlight field on the right side of the Standard toolbar and type the text string. Word highlights all occurrences of the string in the document simultaneously.

The integration of Spotlight in Word is a new feature. It's one of my favorite Mac features, and I've always missed it in Word.

2. Go to the next or previous occurrence by clicking the right or left arrow in the Spotlight tool.
3. To eliminate the highlighting of all the strings of text and exit the search mode, click the X in the Spotlight field.

Sometimes you need to be a little more precise about the text you are searching for in a document. Perhaps you want to find only the capitalized instances of a word. For that kind of precision, you need to use the Advanced Find and Replace Command.



SHOW ME Media 2.2—Using the Advanced Find and Replace Command

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LET ME TRY IT

Using the Advanced Find and Replace Command

To define a more specific search, follow these steps:

1. Take note of the position of your insertion point and move it if you need to.
2. Click Edit, Find, Advanced Find and Replace to open the dialog box shown in Figure 2.3.

This button expands and contracts the dialog box.



Figure 2.3 If your dialog box does not look like this one, click the arrow that expands the dialog box.

3. Type the text string in the Find What text box. Note that if you select text before you open the Find and Replace dialog box, the text appears automatically in the Find What text box.
4. Remove the check in the Highlight All Items Found In check box (if necessary) and select an option from the Search pop-up menu to specify what direction to search. Your options are Current Document Down, Current Document Up, and Current Document All.

If you didn't position your insertion point correctly before starting the process, you should choose Current Document All. Then, Word will search down and circle back to the top of the document to continue searching.

5. Select other options to narrow your search, such as Match Case.

Additionally, you can narrow the search by specifying options in the Find area (at the bottom of the dialog box). Here, you can narrow the search to text that has specific formatting, such as highlighting or a particular font, or you can search for special characters, such as paragraph marks or tab characters.

After you make selections from the format options in the Find area, your choices are listed under the Find What text box at the top of the dialog box, as shown in Figure 2.4. If you make a selection from Special, a representation of the special character is shown in the Find What text box (^p for paragraph marks, ^t for tabs, ^g for graphics, and so on).

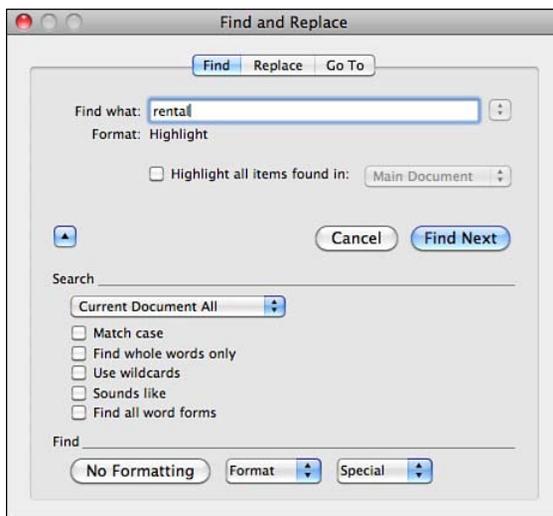


Figure 2.4 In this search, Find looks for all highlighted occurrences of the word rental.

6. Click the Find Next button to go to the first occurrence. At this point, I prefer to close the dialog box and use the double-arrow buttons in the Browse Objects tool to go to the next or previous occurrence.

The Replace feature works with the Find feature to find a specified string of text and replace it with another specified string of text. It's very useful if you need to make the same correction several times in the same document. For example,

say you are working on a brochure for an organization called the *Veterans of Toddler Wars* (an organization for parents who have survived the "terrible twos"). Throughout the brochure, you have referred to the organization as the "VTW," but now you've decided that you should always spell out the full name. To make the change quickly, you can use the Replace command to find all occurrences of VTW and replace them with *Veterans of Toddler Wars*.



LET ME TRY IT

Replacing Text

To replace specific text in a document with a different string of text, follow these steps:

1. Click Edit, Find, Replace or use the keyboard shortcut Shift-Command-H. This opens the Search pane in the sidebar on the left side of the screen, as shown in Figure 2.5.

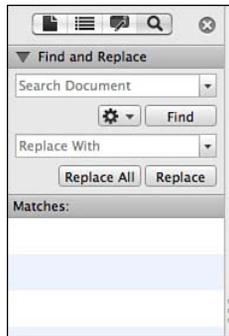


Figure 2.5 *The Replace command in the sidebar doesn't have all the options that the Find and Replace dialog box offers.*

2. Type the text you want to find in the Search Document text box, or click the Search Document pop-up button and select an option from the list, such as Paragraph Mark or Tab Character.
3. Type the text you want to replace it with in the Replace With text box, or click the Replace With pop-up button and select an option from the list.
4. To be more specific about the search string, click the Action button (the one with a gear icon on it) and select the options that you want. Your options are Whole Word Only, Ignore Case, Sounds Like, and All Word Forms.

5. Click the Replace button to replace the first instance that occurs below the current position of the insertion point. Word replaces the first occurrence and highlights the next occurrence. To replace the highlighted occurrence, click the Replace button again, but if you want to skip the occurrence, click the Find button instead. To replace all occurrences in the document, click the Replace All button.

Perhaps you noticed earlier in this chapter that the Find and Replace dialog box, shown in Figure 2.3, has a tab for Replace. You can get to that tab by choosing, Edit, Find, Advanced Find and Replace, and clicking the Replace tab. This tab includes the Format and Special options, which enable you to specify formatting and special characters in both your Find What and Replace With strings.

The Find and Replace options can perform some tedious tasks for you if you know how to use them. Here's just one example. In Chapter 3, "Formatting Documents," you learn that it is better to use a style with paragraph spacing than to put two returns after each paragraph in a document. You have some very important, lengthy documents that you need to clean up. The task of applying the proper styles to all the text is not particularly daunting, but deleting the extra paragraph returns between paragraphs is. Here's where the Replace command can really help. All you have to do is search for two paragraph returns and replace them with one paragraph return. The Replace dialog box would look like Figure 2.6.

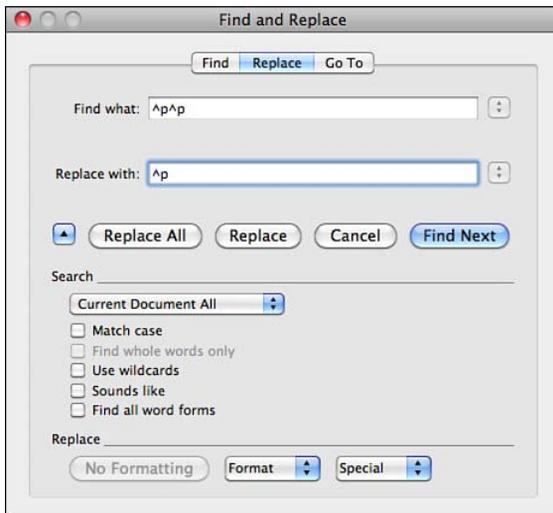


Figure 2.6 In the Find What text box, two paragraph marks appear as ^p^p.

Deleting, Copying, and Moving

Deleting, copying, and moving text are the editing functions that you probably will use most often. Generally, deleting, and most certainly copying and moving, involves selecting text first. You can use the mouse or the keyboard to select portions of text, as explained in Table 2.2.

When selecting text, you might find it helpful to show nonprinting characters. Click the button in the Standard toolbar that has the paragraph symbol on it.

Table 2.2 Text Selection Methods

| To Select | With the Mouse | With the Keyboard |
|-------------|---|---|
| A word | Double-click the word. This also selects the space after the word. If you don't want to include the space after the word, use the keyboard method. | Position the insertion point at the beginning of the word and press Shift-Opt-Right Arrow. Note that this also selects the space after a word, so you might want to release the Opt key while you continue to press Shift and press Left Arrow once. Selecting very short words might be easier if you just position the insertion point at the beginning of the word and press Shift-Right Arrow until you get to the end of the word. |
| A line | Click beside the line in the whitespace to the left of the line. Tip: Watch the I-beam as you move the pointer to the left. When it changes to an arrow, you are far enough to the left to click. | Position the insertion point at the beginning of the line and press Shift-End. |
| A sentence | Click anywhere in the sentence and then press Cmd while you click anywhere in the sentence again. | N/A |
| A paragraph | Triple-click anywhere in the paragraph. | Position the insertion point at the beginning of the paragraph and press Shift-Cmd-Down Arrow. |

| | | |
|--------------------------|--|---|
| An entire document | Click the insertion point at the end of the document. Then scroll to the top of the document (without moving the insertion point) and press Shift-Cmd in the whitespace to the left of the first line of text. | Press Cmd-A. |
| A block of text | Drag the I-beam through the text. | Position the insertion point at the beginning of the block you want to select. Press Shift-any combination arrow keys to move to the end of the block. To select all the text from the insertion point to the end of the document, press Shift-Cmd-End. |
| A vertical block of text | Drag the I-beam through the text while pressing Opt. | Position the insertion point at the beginning of the vertical block you want to select. Press Shift-Cmd-F8 and then use the arrow keys to move right and down. To cancel the selection, press Cmd-Period. |

Deleting Text

To delete one character at a time, you can use the Delete key. The standard Delete key deletes the text to the left of the insertion point. The secondary Delete key deletes the character to the right. (If your keyboard doesn't have a second Delete key, you can press Fn-Delete instead.)

To delete more than one character at a time, select the text you want to delete and press the Delete key. If you want the text back again, you can click the Undo button in the Standard toolbar or press Cmd-Z.

Sometimes, when you're deleting text, you can economize on your keystrokes. For example, if you want to delete the phrase "kiss my grits" and then type "leave me alone," you can simply select "kiss my grits" and, while it is selected, type the new phrase. More bang for your buck!

Copying and Pasting Text

Word provides several methods for copying and pasting text:

- Buttons in the Standard toolbar
- Keyboard shortcuts

- The commands on the Edit menu
- The Scrapbook

When you copy text, Word stores it temporarily in a memory area referred to as the *Clipboard*. When you paste the text, Word inserts a copy of it from the Clipboard. (That's why the Paste button in the Standard toolbar looks like a clipboard instead of a paste brush!) Because Word doesn't actually remove the text from the Clipboard, you can paste it over and over again. You can even paste it into other Office or non-Office programs. The text remains in the Clipboard until you cut or copy something else or until you turn off your computer.



LET ME TRY IT

Copying and Pasting Text the Simple Way

To copy and paste text, follow these steps:

1. Using any selection method you prefer, select the text you want to copy.
2. Use one of the following methods to copy it:
 - Click the Copy button in the Standard toolbar. (That's the one that looks like two sheets of paper.)
 - Press Cmd-C.
 - Click Edit in the menu bar and click Copy.
3. Move the insertion point to the location where you want to paste the text.
4. Use one of the following methods to paste it:
 - Click the Paste button in the Standard toolbar. (That's the one that looks like a clipboard with a piece of paper.)
 - Press Cmd-V.
 - Click Edit in the menu bar and click Paste.
5. If desired, continue pasting in other locations, in other documents, or in other Office files of any kind (Excel, PowerPoint, e-mail, and so on).

This section exclusively describes copying and pasting text, but you need to know that you can use these same steps to copy and paste any item in a document that you can select. For example, you can copy and paste a photograph that you've inserted in the document.

Have you ever selected text on a web page and copied it into a document? The copied web text probably didn't look like the rest of the text in your document because it still had the formatting it used on the web page. Well, here's how you can overcome that problem.



LET ME TRY IT

Using Paste Special

To paste formatted text into a document so that the text comes in without the formatting, follow these steps:

1. Select the formatted text from its source. (I mentioned copying from a web page, but the source could be another Office document or practically any type of file.)
2. Click Edit on the menu bar and click Paste and Match Formatting or Paste Special. If you select Paste and Match Formatting, Word pastes the text into the new position using the same format as the surrounding text. If you select Paste Special, the dialog box shown in Figure 2.7 opens.
3. If you click Paste Special in step 2, select Unformatted Text and click OK.

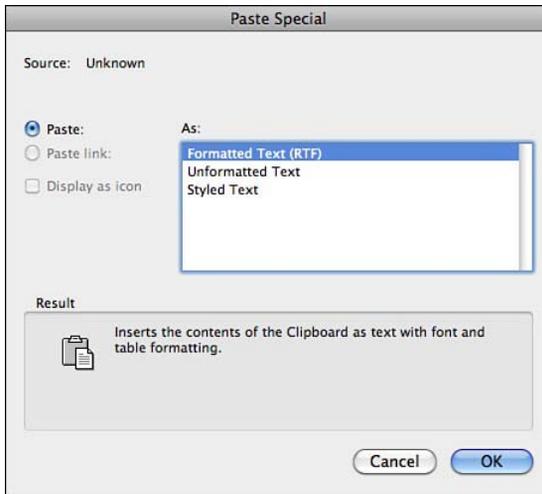


Figure 2.7 Sometimes, depending on what you have copied, this dialog box displays additional options in the As box.

The Scrapbook is a more sophisticated tool for copying and pasting. Microsoft added the Scrapbook to Office 2008 for Mac, but if you skipped that version,

you're going to fall in love with this feature. It enables you to store objects (text, graphics, tables, and so on) in a permanent storage area so that they are available for you to paste at any time.

Just think what this Scrapbook feature can do for you! If you are a legal secretary who works for multiple attorneys, you can store all the signature blocks you need to use for all the attorneys.



SHOW ME Media 2.3—Using the Scrapbook

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Using the Scrapbook

Before you start adding items to the Scrapbook, you have to display it by clicking View, Scrapbook (under Toolbox), or if the Toolbox is already open, you can click the Scrapbook tab if it's not already open. Then, to add items to the Scrapbook and paste them in a file, follow these steps:

1. Select text or an item in your document.
2. Click the Add button in the Scrapbook or click Edit in the menu bar and click Copy to Scrapbook. Word adds a clipping to the Scrapbook with the title *New Clipping*.
3. Double-click the title of the clipping and type something more descriptive.
4. If desired, right-click the clipping, click Categories, and select a category.
5. Repeat steps 1 through 4 to add additional clips to the Scrapbook.
6. To change the view of the Scrapbook, click the View pop-up button, shown in Figure 2.8, and select List, Detail, or Large Preview.
7. View specific categories by clicking the first pop-up button on the toolbar and selecting Category Is. Then select a category from the pop-up menu on the button that suddenly shows up immediately to the right of the first button.

This popup button lists criteria for viewing clips.

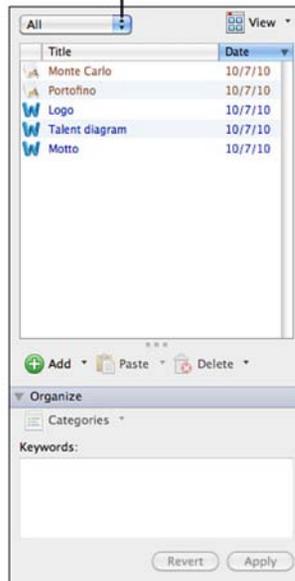


Figure 2.8 *If you have titled all your clippings, the List view takes less room for each clipping and, therefore, displays more items.*

8. To paste an item from the Scrapbook, select the item, position the insertion point where the text or item should be pasted, and click the Paste button in the Scrapbook.

Moving Text

Moving text is similar to copying and pasting text. Instead of copying the original text, however, you cut it. Then you paste it in the new position. After selecting the text, you can cut the text by clicking the Cut button in the Standard toolbar, pressing Cmd-X, or selecting Edit, Cut from the menu bar. After you move the insertion point to the new location, you can execute the paste command by clicking the Paste button in the Standard toolbar, pressing Cmd-V, or selecting Edit, Paste from the menu bar.

One other way to move text is to use the drag-and-drop method. You can turn this method on or off in the Edit Preference dialog box. It is turned on by default.



Dragging and Dropping Text

To drag text to a new location, follow these steps:

1. Select the text.
2. Drag the text to the new location.
3. When you can see that the insertion point is in the correct location, release the mouse button.

I personally prefer not to use the drag-and-drop method because it is too easy to drag something accidentally, so I turn off this option in the Edit preferences window.

If you like using the drag-and-drop method, you will find it helpful to split a window or open new windows on the same document when you need to drag to a location that is not on the same page.

Checking Spelling and Grammar

The whole time you are typing a document, Word assists you by making automatic corrections to typos and calling your attention to typos that it cannot correct by underlining them with a wavy red line. Word has a list of words that it can correct for you automatically, and you can add to this list by clicking Tools, AutoCorrect. Enter a frequently made typo in the Replace text box, enter the correct spelling in the With text box, and then click Add. Repeat this process for all typos you want to add.

To correct a spelling error that is marked with a wavy red line, right-click the line. Click the correct spelling listed on the pop-up menu, or, if the typo is one that you make frequently, you can correct it and add it to the AutoCorrect list at the same time by clicking AutoCorrect and then clicking the correct spelling. If the correct spelling isn't listed on the pop-up menu, press Esc and manually correct the word.

Word also calls your attention to "perceived" grammatical errors with a wavy green line. I say "perceived" because not all text marked with a wavy green line is really an error. Grammatical issues might include errors such as subject and

verb disagreement, incorrect capitalization, incorrect use of or lack of punctuation, and incorrect spacing.

If you right-click a green wavy line, and the problem is one for which Word can suggest a correction, you can click the suggestion to correct the problem. In some cases, however, Word merely identifies the problem and you must correct it manually. For example, if you have written a sentence such as, "The insertion point is not positioned correctly," the wavy line appears under the words "is not positioned." The pop-up menu does not have a suggestion but merely labels the text as "Passive Voice (consider revising)." If you want to avoid passive voice, you would have to rewrite the sentence in this case. Note, however, that sometimes Word actually does give you a suggested change for passive voice. If it does, you can click the suggestion to make the correction.

After you make all the final revisions in a document, you should run the Spell Checker to catch anything you might have missed along the way. The final check might not find much, but at least you will be able to put a check mark in the box for "I was thorough today."



LET ME TRY IT

Checking Spelling and Grammar

To check a complete document for spelling and grammar errors, follow these steps:

1. Click Tools, Spelling and Grammar. The first problem Word finds displays in its context in the Spelling and Grammar dialog box. If Word perceives the problem to be a spelling error, the title above the context is "Not in dictionary," as shown in Figure 2.9, and the identified text is red. If the problem is grammatical, the title describes the grammatical error, as shown in Figure 2.10, and the text is green.
2. If the word is not truly misspelled (perhaps it's a proper name that doesn't appear in the dictionary), or it's not really a grammatical error, click Ignore to continue to the next error or click Ignore All if you know the perceived error appears in the document more than once. If the error actually is a misspelled word, generally the correct spelling is listed in the Suggestions box. At this point, you have several options. You can select the correct spelling and then
 - Click Change to correct the error. (If the error is grammatical, this is your only option.)

- Click Change All if you think you have made the mistake more than once.
- Click AutoCorrect to correct a typo and add it to the AutoCorrect list.

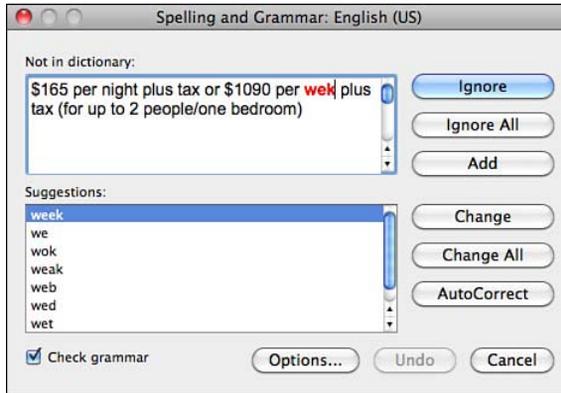


Figure 2.9 Generally, the first suggestion in the list is the correct one.

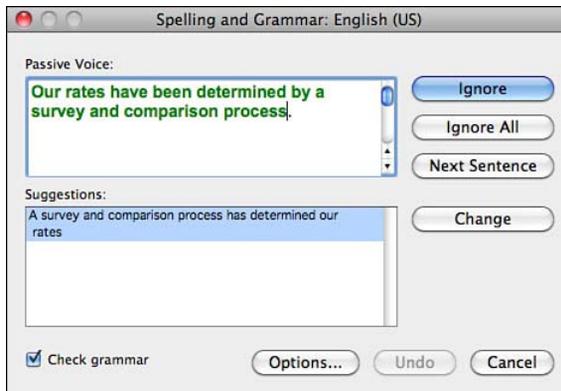


Figure 2.10 Word rewrites the sentence using active voice instead of passive.

If the correct spelling does not appear in the Suggestion box, you can click in the document, make the change manually, click back in the Spelling and Grammar dialog box, and click Resume.

3. When the entire document has been checked, a message displays telling you the check is complete. Click OK.

If the grammatical errors that Word marks are not to your liking, you can change the rules that Word uses or even create a custom set of rules in the Spelling and Grammar Preferences window. I tell you all about it in an audio recording.



TELL ME MORE Media 2.4—Setting Grammar Preferences

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

This chapter covers formatting a page, characters, and paragraphs. Additionally, it covers graphics, columns, tables, envelopes, and labels.

Formatting Documents

This chapter is organized in the order you would (or should) naturally use when creating a new document. It begins with the big picture: formatting the pages of a document—the margins, the layout, and the orientation. The chapter covers document formatting first because it's advisable to set the document formats before you start typing the text. Document formats, especially the margins, really change how the document looks on the page. If you change the margins *after* you type the complete document, lines of text will wrap differently and page breaks may change. The results may not be what you want, and you'll have to go back and make edits so the document looks the way you want it to look on each page. Why make more work for yourself?

Next, the chapter discusses character formatting because normally you don't type more than a few words or sentences before you want to make a word bold or italic or even a different color. Then, moving from the simple to the more complex, the chapter discusses paragraph formats and styles, a subject that requires quite a bit of detailed explanation.

Finally, this chapter discusses special formatting techniques, which include inserting graphics, creating columnar text with columns or with tables, and creating envelopes and labels.

Formatting the Page

When you create a new document, Word has preset the page formatting for you using certain defaults. For example, it uses letter-size paper, sets tabs at every half inch, and uses portrait orientation. If the defaults work for you, you don't have to change anything. However, if you need to create a special document, such as a table with 20 columns, you probably will have to make some changes to the margins and the page orientation.

Setting Margins and Headers and Footers

The margins are the whitespaces at the top and bottom and on the left and right sides of a page. If you create a header or footer, it prints within the top or bottom

margin area, so if you change the default settings, you need to be sure you allow enough room in the margin to hold the header or footer.



LET ME TRY IT

Setting the Margins

To set the margins for a page, follow these steps:

1. Click Format on the menu bar and click Document.
2. Enter the measurement you want for each margin in the appropriate text fields, as shown in Figure 3.1.

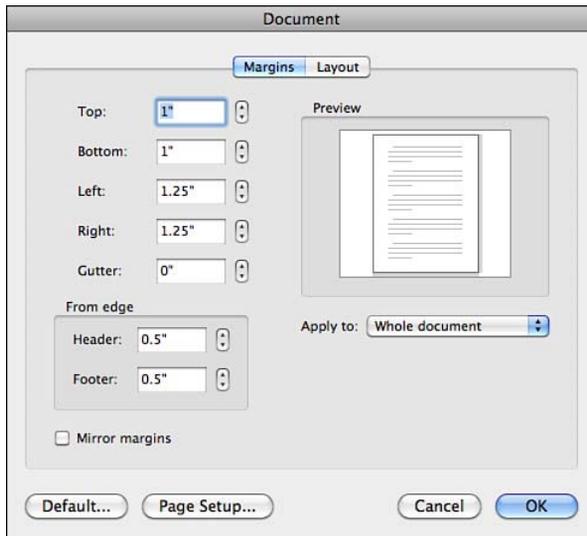


Figure 3.1 Be sure to set the margins to the acceptable values for your particular printer.

If you select Mirror Margins, the fields for Left and Right margins change to Inside and Outside. This setting is for documents that print on both sides of the paper. The inside margins are the same, and the outside margins are the same.

3. Specify a value for Gutter to add space to the "inside" margin if you intend to bind the document. (The inside margin is the left margin on a right-hand page and the right margin on a left-hand page.)
4. Click OK.

Header and footer text repeats at the top and bottom of every page. Typically, in a multipage document, you would place a page number in the header or footer. Additionally, you might want to put the document title, a date, or a copyright notice in a header or footer.



LET ME TRY IT

Setting the Header and Footer Positions

When setting the position of the header and footer, be sure that your printer can accommodate the distance to the edge of the page. For example, if your printer can print only one-half inch from the edge of the page, don't set the header and footer position to a quarter of an inch from the edge. To set the header and footer positions, follow these steps:

1. Click Format, Document.
2. Enter the measurement in the Header and Footer text box.
3. Click OK.

If you find you have to reset the margins and header and footer positions to the same measurements for almost every document that you type, the next time you change them, click the Default button in the Document dialog box and click Yes to make the new settings your default.

Setting Layout Options

Figure 3.2 shows the Layout options. For simple documents, you don't need to be concerned with the Section Start option or the Headers and Footers options, but you might want to specify the other options.

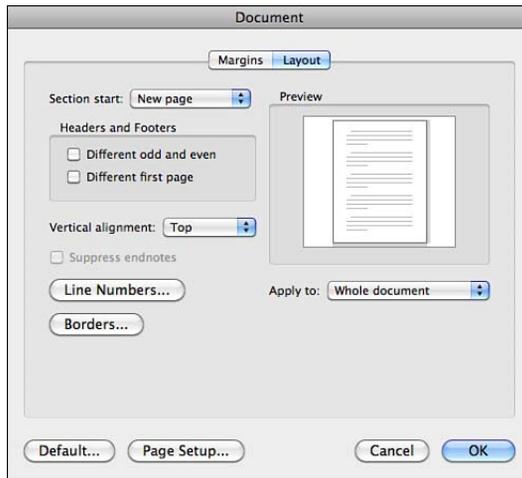


Figure 3.2 Use the *Borders* option to create a decorative border around a page for special types of documents, such as invitations or newsletters.



LET ME TRY IT

Setting Options for the Layout of a Page

To set the layout options, follow these steps:

1. Click **Format** on the menu bar and click **Document**. Click the **Layout** tab, if necessary. (Word remembers which tab you used last in the Document dialog box, so if you used the **Layout** tab last, it automatically displays again.)
2. Because the options for **Section Start** and **Headers and Footers** have been eliminated from this discussion, skip to the next options in the dialog box. You might want to set one of these three options:
 - If you want to start text somewhere besides the top of a page, click the **Vertical Alignment** pop-up and select an option. Then from the **Apply To** pop-up, select **Whole Document** or **This Point Forward** and click **OK**.
 - If you want to number each line on the page, click **Line Numbers**. The **Line Numbers** dialog box opens. Click **Add Line Numbering** and then specify the **Start At** number, the **From Text** distance, and the **Count By** interval. Select a **Numbering** option and click **OK**. From the **Apply To** pop-up, select **Whole Document** or **This Point Forward** and click **OK**.

Sometimes line numbering is used for contracts. You could also use line numbering in documents that you share for discussion so that an area of the document can be identified easily. For example, you could say, "Look at page 5, line 20."

- If you want to put a border around the edge of the page, first select either Whole Document or This Point Forward in the Apply to pop-up menu. Then click the Borders button and click the Page Border tab, if necessary. The Page Border tab of the Borders and Shading dialog box is shown in Figure 3.3.

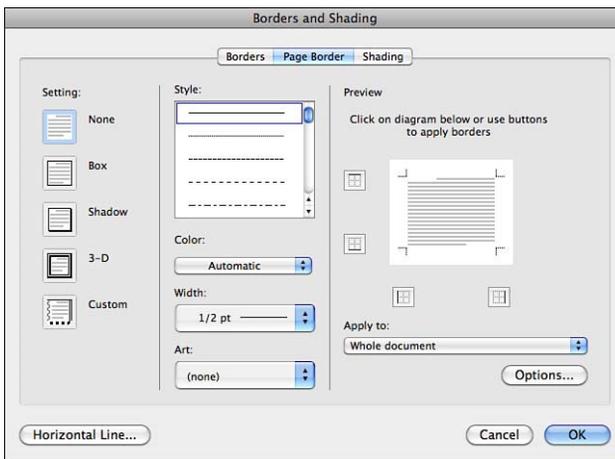


Figure 3.3 The Page Border tab offers you many different styles, colors, and widths for page borders.

If you want an art border—say you want a border of Christmas trees because you are typing your Christmas letter—click the Art pop-up button, click the green trees, and then click OK. If you just want a line around your page, select a Setting option; then Style, Color, and Width options; and click OK.

Setting Paper Size and Orientation

All printers are capable of printing on different sizes of paper. At a minimum, you can expect a printer to be able to handle letter and legal size paper and #10

envelopes. Most printers also can print custom sizes, within limits. Additionally, printers can print in portrait or landscape orientation.



LET ME TRY IT

Setting Up the Pages of a Document

To specify a paper size and orientation, follow these steps:

1. Click File on the menu bar and click Page Setup.
2. Select the printer you are going to use from the Format For pop-up list.
3. Select the size you want from the Paper Size pop-up list.
4. Click the icon for the orientation you want to use.
5. Click OK to close the Page Setup dialog box.
6. Click OK to close the Document dialog box.

Setting Page Formats Using the Ribbon

Instead of using the dialog boxes to set some of the page formats, you can use the Layout tab on the ribbon. Figure 3.4 shows the available options: orientation, paper size, and margins. Additionally, a little further to the right are page background options for watermark, color, and borders. Using the tools on the ribbon is intuitive enough that I don't think you need step-by-step instructions. For example, to change the margins, just click the Margins button and take it from there!

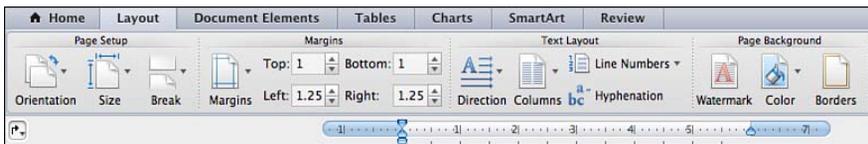


Figure 3.4 *The Layout tab on the ribbon common layout options.*

Using Themes

Every document has a theme, which is a group of colors, fonts, and effects. Using a theme ensures that elements in a file such as the color of fonts, shading, and shapes are coordinated. Of course, you can make color and font choices that are outside the theme if you want.

A normal blank document defaults to the Office theme. It is the most conservative theme. To change to a different theme, click the Themes button on the Home tab on the ribbon and click the new theme. To see the differences in themes effectively, you need to open a document that has some text in it (better if the text is styled) and perhaps some tables with shading, some shapes, or SmartArt.

Formatting Characters

Type a word or a sentence in a document and just look at it for a moment. Then think of all the ways you can change the appearance of the text. The changes that probably come to mind first are bold, italic, and underline. These are the most common character formats. Other common character formats include font, font size, and color, as well as all caps and small caps. Another commonly used character format is highlighting, which mimics a highlighter pen.

Less-used formats include strikethrough, double strikethrough, superscript, subscript, and hidden. If you type legal documents, you might need to apply strikethrough to text. This format tells you that the text should be deleted, but you can still read the text. If you type scientific documents, you might need to apply a subscript or superscript, as in H₂O. If you type top-secret documents for the CIA, you might use hidden text. Okay, not really. You have to use invisible ink if you work for the CIA. I use every kind of character formatting in the different documents I type, but I seldom use hidden text. When I do, it's generally for instructions or something that only I should see. The reader of the document doesn't know the text is there, but I can see it when I need to by turning it on in the View Preferences or by choosing to print the document including the hidden text. (Of course, the reader can just as easily turn on the view of hidden text or print it, which is why you have to use invisible ink at the CIA.)

Although I've listed a lot of character formats so far, I'm not done yet. There are still some advanced formats and some special effects. Advanced character formats include character spacing and advanced typography, such as ligatures (the joining together of certain letters when typed next to each other). Special effects include drop cap, letter outlining, color and gradient fill, shadow, glowing and soft edges, reflection, and 3-D. Figure 3.5 shows the drop cap effect in the first paragraph and color filled, 3-D letters with a shadow below the paragraph.

One other text-formatting feature you might want to explore is Word Art. The button for Word Art is not grouped with the other text formatting tools. It's on the Document Elements tab under Text Elements.

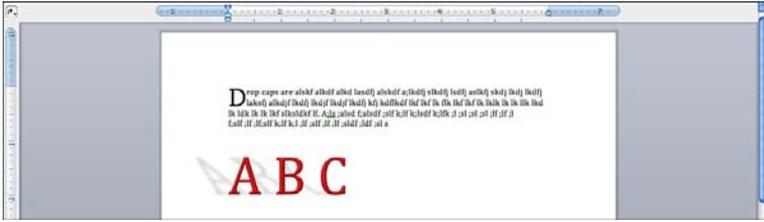


Figure 3.5 The text in this document uses the drop cap and special effects.

The Font dialog box, shown in Figure 3.6, contains all the character formats except drop cap, which is an option on the Format menu. To access the Font dialog box, click Format on the menu bar and then click Font. Instead of using the Font dialog box to apply a common character format such as bold, you can use the character format tools on the Home tab on the ribbon or keyboard shortcuts (for example, Cmd-B for bold, Cmd-I for italic, and Cmd-U for underline).

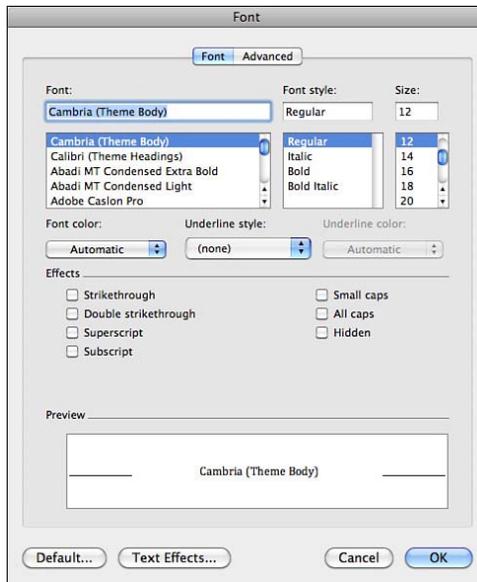


Figure 3.6 The Font box lists all the fonts available in the Fonts folder on the hard drive.

You can use one of two methods to apply character formats:

- You can turn on the format, type the text, and then turn off the format.

- You can select the text that you have already typed and apply the format. (In some cases, this method requires fewer steps.)

Using the turn on/turn off method, you could apply bold to text by clicking the Bold button on the Home tab on the ribbon, typing the text, and clicking the Bold button again. Using the format-after-the-fact method, you could select the word that you want to be bold and click the Bold button on the ribbon.

If the character format that you want to apply from the ribbon has a pop-up menu button, click that button and select the format you want from the pop-up menu. For example, to change the font, click the Font pop-up button and select a font from the list.

If you want to apply a format that is found only in the Font dialog box, such as small caps, you can select the text to be formatted, click Format, Font, select the format, and click OK.

Formatting Paragraphs

The second you type the first character in a document, you are using the default paragraph style that Word has chosen for you. *Normal* is the name of this style if you are typing in a new blank document. If you look on the Home tab on the ribbon under the Styles category, you will see that Normal is selected, as shown in Figure 3.7. (If you use a higher screen resolution, you'll see more styles in the ribbon than shown in the figure.)

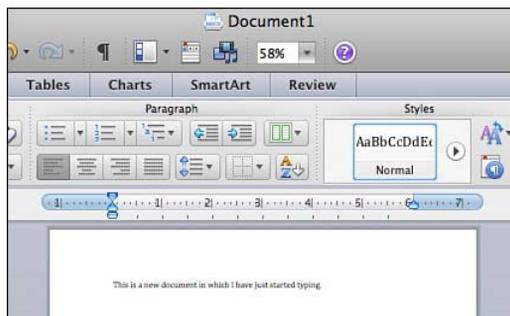


Figure 3.7 To show you which style is applied to the current paragraph, Word puts a blue border around the style on the ribbon.

Paragraph formats include alignment (left, centered, right, and justified), left and right indentation, spacing before and after, tabs, bullets, numbering, borders and shading, and text direction.

You can find the Paragraph formats in the Paragraph dialog box (shown in Figure 3.8), on the Format menu (shown in Figure 3.9), and on the Home tab on the ribbon (shown in Figure 3.10). Additionally, keyboard shortcuts exist for some formatting techniques, such as Cmd-E for centering a paragraph.

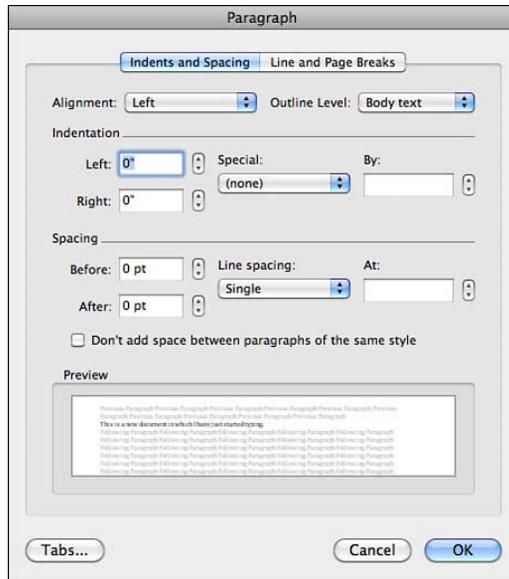


Figure 3.8 Access the Paragraph dialog box by clicking Format, Paragraph.

The Normal style contains both character and paragraph formats. When you apply character formatting to text, such as bold, you override the default that the Normal style uses. Likewise, if you apply a paragraph format, such as center alignment, you override the alignment format in the style. This method of formatting, overriding what is in a style, is called *direct formatting*.

You can see the occurrences of direct formatting in a document if you turn on the option Show Direct Formatting Guides (located at the bottom of the Styles tab of the Toolbox).

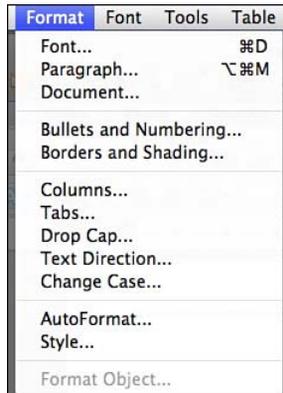


Figure 3.9 The Format menu gives you easy access to the Tabs dialog box, which is also accessible from the Paragraph dialog box.

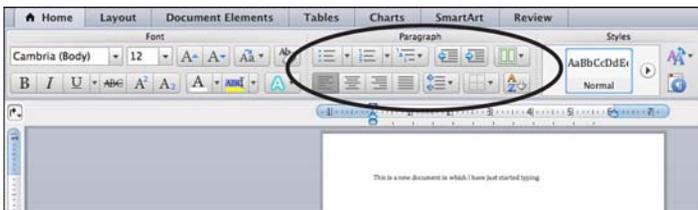


Figure 3.10 The Home tab on the ribbon contains paragraph formatting buttons.

The default Normal style uses these paragraph formats: left alignment, zero left and right indentation, single line spacing, zero spacing before and after, and left tabs every half inch. The text direction is normal, and the Normal style doesn't include any bullets, numbering, borders, or shading.

In the next few "Let Me Try It" sections, you learn how to override several types of paragraph formats. The changes that you make to a paragraph do not affect the Normal style; they apply only to the paragraphs that you format in the current document. Additionally, you need to know that after you change the paragraph formats for a particular paragraph, Word carries those formats to the next paragraph that you create when you press the Return key.



SHOW ME Media 3.1—Setting Paragraph Alignment, Indents, and Spacing

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Setting Paragraph Alignment, Indents, and Spacing

To set alignment, indents, and spacing all at once, you can use the Indents and Spacing page of the Paragraph dialog box. Follow these steps:

1. Select a paragraph or multiple paragraphs.

To select a single paragraph, just click anywhere in the paragraph. To select consecutive paragraphs, highlight at least part of the first paragraph and part of the last paragraph in the group. To select multiple, nonconsecutive paragraphs, hold down the Command key as you click in the whitespace to the left of each paragraph you want to select.

2. Click Format, Paragraph, and click the Indents and Spacing tab, if necessary.
3. To set the alignment, select an alignment from the Alignment pop-up menu.
4. To set a left and right indent, enter a number for the amount of space you want to indent in the Left and Right text boxes. If you want to set a first line indent only, select First Line from the Special pop-up menu and specify the distance in the By text box. To set a hanging indent, select Hanging from the Special pop-up menu and specify the distance in the By text box. (First line indents and hanging indents are mutually exclusive.)

Because Word automatically sets a hanging indent for you when you use a bulleted or numbered list, it is rare that you will set a hanging indent yourself. A hanging indent causes text on the first line to hang out to the left of the text in the following lines of the paragraph. In the case of bulleted or numbered paragraphs, the bullet or number hangs out to the left of the text. You can see an

example of this formatting right here in the numbered steps in this set of instructions.

5. To set spacing before or after a paragraph, specify a distance in the Before or After text boxes. For example, if you are using a 10-point or 12-point font, you could set 12 points after the paragraph to simulate a double return.

Always set spacing after a paragraph instead of just pressing the Return key twice to make space between paragraphs. If your page happens to break between two paragraph returns, you will have a blank line at the top of the new page. If you use paragraph spacing after a paragraph, you will never have this problem.

6. To set the line spacing, such as single, one and a half, or double, select a spacing interval from the Line Spacing pop-up menu.

If you want to set precise spacing, you can select At Least or Exactly from the Line Spacing pop-up menu and then specify a line height in the At text box.

7. Click OK to close the dialog box and set the formats for the selected paragraph(s).



LET ME TRY IT

Setting Line and Page Breaks

When you set line and page break formats, you help Word know how to paginate a document. Using these parameters, Word can insert page breaks in the best locations. To set line and page breaks, follow these steps:

1. Select a paragraph or multiple paragraphs.

2. Click Format, Paragraph, and click the Line and Page Break tab, if necessary.
3. To stop Word from inserting a page break anywhere in a paragraph, select Keep Lines Together.
4. To stop Word from inserting a page break between the paragraphs that you have selected and the next paragraph, select Keep with Next.
5. To make Word insert a page break before the paragraphs that you have selected, select Page Break Before.

Notice that Widow/Orphan control is selected by default. This setting stops Word from inserting a page break before the last line in a paragraph (making a "widow" line at the top of the next page) or after the first line in a paragraph (making an "orphan" line at the bottom of the page).

6. Click OK to close the dialog box and apply the formats.



SHOW ME Media 3.2—Setting Tabs in the Tabs Dialog Box

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LET ME TRY IT

Setting Tabs in the Tabs Dialog Box

As mentioned earlier, Word has default left tabs set every half inch. If you need a different type of tab in a different place, follow these steps to set one:

1. Select a paragraph or multiple paragraphs.
2. Click Format on the menu bar and click Tabs. The Tabs dialog box shown in Figure 3.11 opens.
3. Type the position on the ruler where the tab should be in the Tab Stop Position text box.
4. Select the alignment of the tab from the Alignment options and click the Set button. The created tab appears in the list on the left.
5. Repeat steps 3 and 4 to set additional tabs.

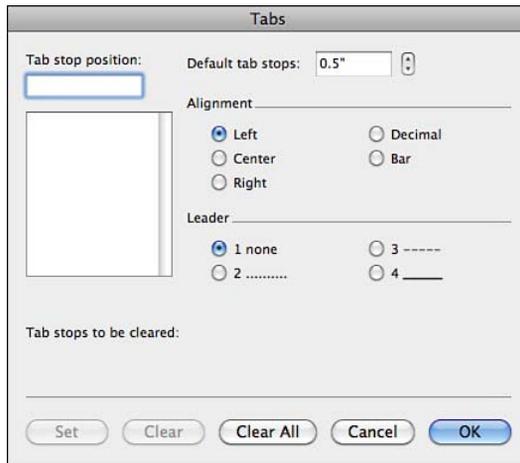


Figure 3.11 Use the Tabs dialog box to set or clear tabs.

6. To delete a tab that you have set, select it in the box on the left and click the Clear button.
7. Click OK to close the dialog box. Figure 3.12 shows how text lines up with the different tabs. The bar tabs create vertical lines automatically. You don't have to press the Tab key to go to the Bar tab position.

Another way to set tabs is to place them manually on the horizontal ruler where you want them. I think this is a better way to set tabs than using the dialog box because you have visual feedback, and you can move the tabs easily if you don't think they are positioned exactly right.



SHOW ME Media 3.3—Setting Tabs on the Ruler

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Setting Tabs on the Ruler

To set tabs on the ruler, first make sure it is visible (View, Ruler), and then follow these steps:

1. Select a paragraph or multiple paragraphs.

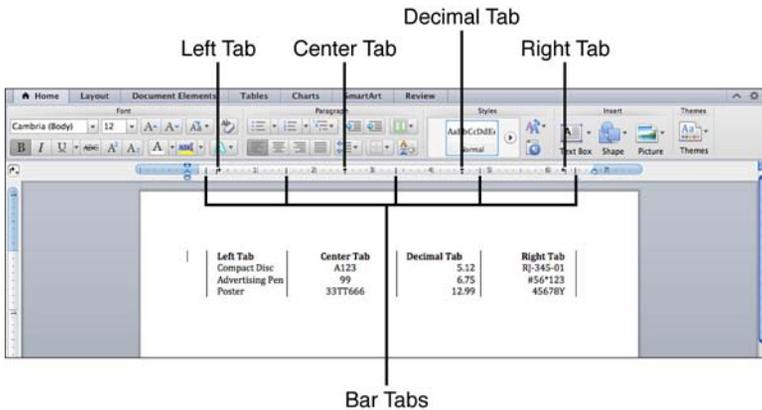


Figure 3.12 This document uses a left tab, a center tab, a decimal tab, a right tab, and five bar tabs.

2. Click the pop-up arrow on the button to the extreme left of the ruler and select a tab type from the pop-up menu.
3. Click on the ruler where you want the tab to be set. If you miss the exact location, drag the icon for the tab to the right or left.

To organize lists of information in a more readable format, you can use bullets or numbering. Typically, you use bullets if the order of the items doesn't really matter, such as the list of contents for the box your new Mac came in, and you use numbering if the items must be in a particular order, such as the steps in the process to set up the new Mac.



LET ME TRY IT

Bulleted Paragraphs

Bullets can be little black dots or something quite a bit more fancy, such as graphics. To apply bullets to paragraphs, follow these steps:

1. Select a paragraph or multiple paragraphs.
2. Click the pop-up button on the Bulleted List button (on the Home tab on the ribbon) and select the bullet style you want to use from the pop-up menu, or click Format, Bullets and Numbering, click the Bulleted tab (if necessary), select the bullet you want to use, and click OK.



Numbering Paragraphs

To number a list, follow these steps:

1. Select a paragraph or multiple paragraphs.
2. Click the pop-up button on the Numbered List button (on the Home tab on the ribbon) and select the numbering style you want to use from the pop-up menu, or click Format, Bullets and Numbering, click the Numbered tab, if necessary, select the numbering style you want to use, and click OK.

After you apply a bullet or number style to a paragraph, when you finish typing the paragraph and press the Return key, the next paragraph is also bulleted or numbered. If you press Return a second time, Word removes the bullet or number from the paragraph but (conveniently) does not create a new paragraph.

I could write a whole chapter on the outline numbering techniques in Word, but this is a complicated technique that is outside the scope of this book. Certainly, you can try these techniques for yourself. To get started, click Format, Bullets and Numbering and click the Outline Numbered tab.

Using Styles

As mentioned earlier, every new blank document starts out using the Normal style. Word has other styles standing by waiting for you to use as well. If you point to the Style Area on the ribbon and click the arrow that appears, you can see a list of styles, as shown in Figure 3.13.

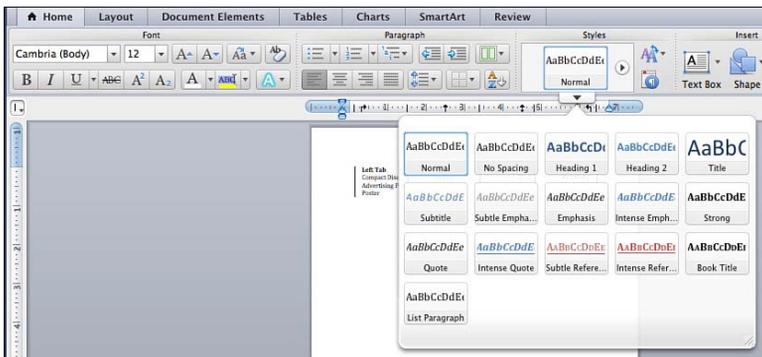


Figure 3.13 *The pop-up arrow doesn't show until you point to a style on the ribbon.*

Applying Styles

Instead of using direct formatting to modify the appearance of text and paragraphs, it is better to apply character or paragraph styles. This keeps the formatting consistent because each portion of text you apply a style to will have all the characteristics of the style. Using styles also makes things easier if you decide that you want to make a change later. Say you want to change the font size for all the subtitles in a document from 16 points to 14 points. If you used direct formatting, you will have to find all the paragraphs and select them to make the change. (What if you miss one?) If you used a style with a 16-point font size, you can make the change to the style, and Word can automatically apply the change to all paragraphs that use the style.

Here's another advantage to using styles. Recall that if you change the format of a paragraph directly and then press Return anywhere in that paragraph, the new paragraph will have the same format as the paragraph to which you just applied direct formatting. If you don't want the same format in the new paragraph, you have to apply direct formatting to the new paragraph to correct it, or if you know how to apply styles, you could apply an appropriate style. In contrast, if you apply a style to a paragraph and then press Return, the next paragraph's formatting is determined by the definition of the style used in the preceding paragraph. (One of the options for defining a style is specifying the style of the following paragraph. So, for example, you can define a style for a heading and specify that the paragraph that follows the heading should use the Normal style.)



LET ME TRY IT

Applying a Style to a Paragraph

To apply a style to a single paragraph or multiple paragraphs, follow these steps:

1. Select a single paragraph or multiple paragraphs.
2. Click the style you want from the Home tab on the ribbon.

Using Efficiency Tools with Styles

If you're convinced that you should start using styles, this section shows you some nifty tools you can use to be even more productive with styles. First and least sophisticated is the Style Area. This is a space on the left side of the screen that shows the styles applied to each paragraph. It displays only in the Draft or Outline views and is shown in Figure 3.14. To turn on the Style Area, click Word,

Preferences, View, specify a width for Style Area Width, and click OK. Use this feature to verify whether you have set styles consistently.

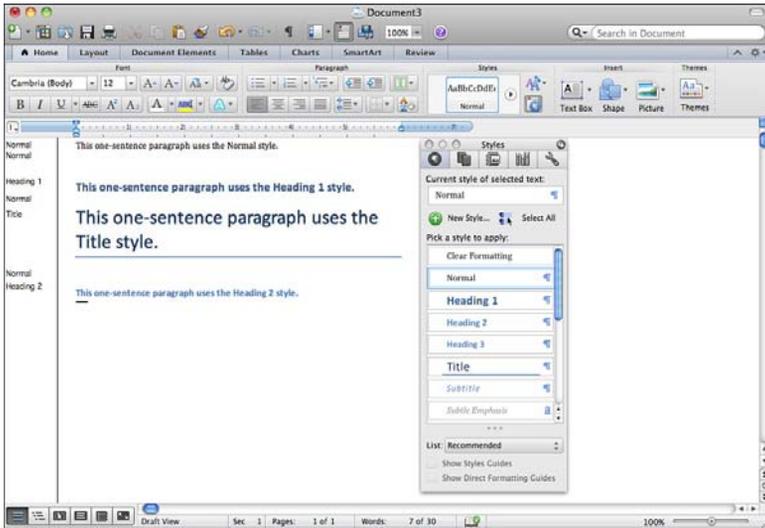


Figure 3.14 You can make the Style Area wider or narrower as needed by simply dragging the divider line to the right or left.

The most useful tool is the Styles tab of the Toolbox, shown in Figure 3.15. If the Toolbox is open, you can simply click the Styles tab if a different tab is visible. To open the Toolbox and display the Styles tab at the same time, click View in the menu bar and click Styles.

Using the Styles tab in the Toolbox, you can apply styles, clear formatting, create new styles, modify existing styles, and select all paragraphs of a particular style. You can't do without this Toolbox when you are working with styles, so make room for it on your screen!

You can display more styles in the Toolbox by pointing to the three dots under the style list and dragging them down.

The third tool I want to introduce you to is the Styles Guides. It does for the print layout view what the Style Area does for the draft and outline views. It identifies the styles in use and uses a color coding system that it associates with the Style

tab of the Toolbox. Figure 3.15 shows the Styles Guides on the left side of the document page.

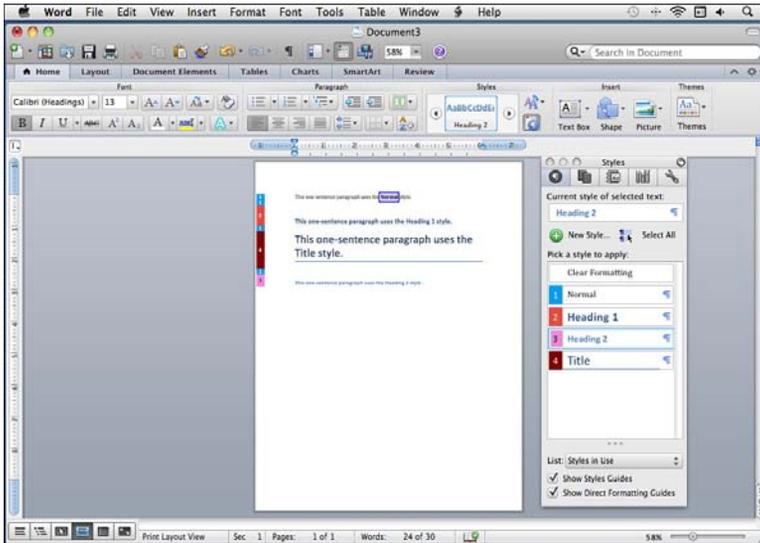


Figure 3.15 The Styles Guides can be turned on only from the Styles tab of the Toolbox.

Modifying Styles

I'm sure you see the advantage of using styles, but sometimes the styles that Word has provided for you don't have the individual formats that you need. No problem. You can modify styles to suit yourself.



LET ME TRY IT

Changing the Formats of a Style

To modify the paragraph or character formats of a style, follow these steps:

1. Click Format, Style.
2. Select the style in the Styles box that you want to modify. If you don't see the style, select All Styles from the List pop-up menu.
3. Click the Modify button. The Modify Style dialog box opens, as shown in Figure 3.16. The properties of the style (name, type, style basis, and following paragraph) display at the top of the dialog box. These are options you

have to specify when you create a new style. You can change any of these options when you are modifying a style, but usually, when you modify a style, you are changing the formatting attributes in the Formatting section.

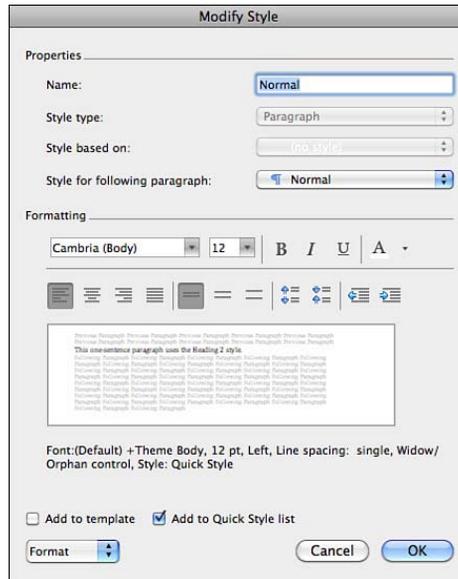


Figure 3.16 The *Format* button in the lower-left corner has options for every possible font format.

If you have your Toolbox open to the Styles tab, you can simply point to the style you want to modify, click the pop-up arrow that displays, and click *Modify Style*.

4. To change formatting attributes, use any of the buttons in the Formatting section.
5. If you need to modify a format attribute that does not have a button in the Formatting section, click the pop-up button for *Format* (located in the bottom-left corner), and select an attribute from the pop-up list. The dialog box for the specific attribute opens. (These are the same dialog boxes that you have seen for applying direct formatting, but now the formats that you select become part of the style.) Set the options and click *OK*. The dialog box closes and you return to the *Modify Style* dialog box.

6. If you want the changes applied to other paragraphs in the document that use the style, click Automatically Update. (This option appears only when the style is applied to more than one paragraph in the document.)
7. If you want the modifications that you have made to the style to be available in any new document that you create, click Add to Template.
8. When finished, click OK. The Modify Style dialog box closes and you return to the Style dialog box. Click Apply to apply the style you modified to the currently selected text or click Close.

Another way to modify the styles is to use Quick Styles. This feature modifies a standard group of styles to conform to a particular look, such as elegant or modern. Learn more about Quick Styles by listening to the following recording.



TELL ME MORE Media 3.4—Using Quick Styles

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

Creating a User-Defined Style

Instead of modifying existing character or paragraph styles, sometimes you just have to create your own style. Word classifies these styles as *user-defined*. The steps for creating your own style are similar to the steps for modifying a style. The main difference is that when you create your own style, you have to set the properties options, which you normally do not change when modifying a style. (Refer to Figure 3.16.)



LET ME TRY IT

Creating a Paragraph Style

To create your own Paragraph style, follow these steps:

1. Click New Style in the Toolbox (or click Format on the menu bar, click Style, and click the New button).
2. Type a name for your new style. You might want to make the name refer to the purpose of the style, such as *Product Description*, or you could refer to the style's main characteristics, such as *14 pt Center*.
3. Select the style on which you want to base the new style from the Style Based On pop-up menu. Let me give you a little guidance here: You can select a style that you know has many of the same formats that you want and it will cut down on your work, but, be advised, this new style you are

creating will change if you ever make changes to the style on which it is based. Sometimes it is best to select No Style for the Style Based On option.

4. Select the style you want for the following paragraph from the Style for Following Paragraph pop-up menu. Let me guide you again: Word always defaults to the same style you are creating for this option. This might not always be the best choice. Think about what the following paragraph will be for the style you are creating. If the style is for a picture caption, for example, you probably want the next paragraph to be normal body text (whatever style that is).
5. Set the paragraph formats by using the buttons in the Formatting section of the dialog box or by selecting formatting options from the Format pop-up menu.
6. After you set all the formatting attributes, click OK. The dialog box closes and you return to the New Style dialog box.
7. If you want the new style to be available in any new document that you create, click Add to Template.
8. When finished, click OK. The New Style dialog box closes.

You use basically the same steps to create a character style, but really, you probably won't have any use for character styles except in special circumstances. For example, if you frequently need to format a word with bold, italic, red, and small caps, I might advise you to create a character style. In most cases, however, direct character formatting is usually good enough.

Inserting Graphics

Well-placed photos and graphics can enhance the readability of a document and raise the reader's interest level. Inserting graphics and photos in Word documents has never been easier, and the Media Browser provides access to Word's clip art, photos, symbols, and shapes.

Notice that the preceding paragraph says "well-placed photos and graphics." By that I mean, don't go crazy just because you can. Gratuitous graphics make a document look amateurish. I think I'll make a bumper sticker that says, "Just Say No to Gratuitous Graphics."



Inserting a Photo, Clip Art, Symbol, or Shape

To insert a graphic element in a document, first, if it's not already open, open the Media Browser (click View, Media Browser), and then follow these steps:

1. Click the tab in the Media Browser that has the graphic you want to use.
2. Select a folder or category from the pop-up menu (located just below the tabs). For example, on the Photo tab, you could select Last Import from the pop-up menu. On the Clip Art tab, you could select Business from the pop-up menu.
3. Drag the graphic to the document and release it when you see the insertion point in the location where you want to insert the graphic.

After you insert a graphic in a document, you can manipulate it in several ways. First, click the graphic to select it, and then do the following:

- To resize the graphic proportionately, drag a corner.
- To rotate the graphic, drag the green handle at the top.
- To wrap text around the picture, click the Format Picture tab on the ribbon and click the pop-up button for the Wrap Text tool. Select a text wrapping option from the pop-up menu shown in Figure 3.17.

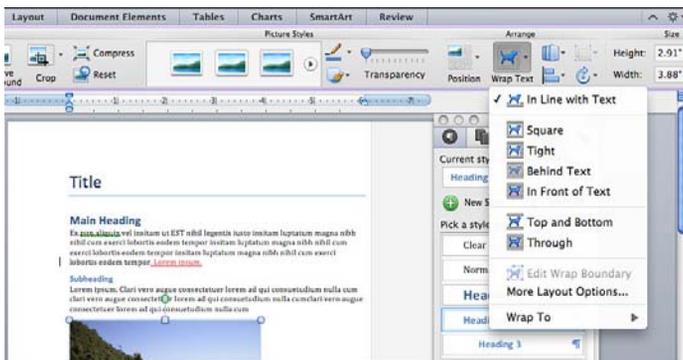


Figure 3.17 The wrapping option icons represent how text will look with the picture.

 To learn more about working with graphics, see "Creating Documents for Publication" in Chapter 6, "Creating Documents for Publication."

Using Columns

If you need to format a document with parallel, snaking columns, as used in newspapers and magazines, Word has you covered. You can create up to 12 parallel columns on a page. You can make the columns equal widths with equal spacing between them, or you can specify custom widths and spacing. Additionally, you can add a vertical line between the columns as a divider.



LET ME TRY IT

Setting Up a Columnar Layout

To create a document that uses columns for the whole document, follow these steps:

1. Click the Columns pop-up button on the Layout tab on the ribbon and click Columns (or click Format on the menu bar and click Columns).
2. Specify the Number of Columns by clicking a Presets icon at the top of the dialog box or by typing a number in the text box.
3. In step 2, if you selected Presets One, Two, or Three or typed a number in the text box, Word automatically checks Equal Column Width and computes the column width and the space between columns, as shown in Figure 3.18. For unequal widths, uncheck this option and enter the values for width and spacing that you want to use, or select the Left or Right Presets.

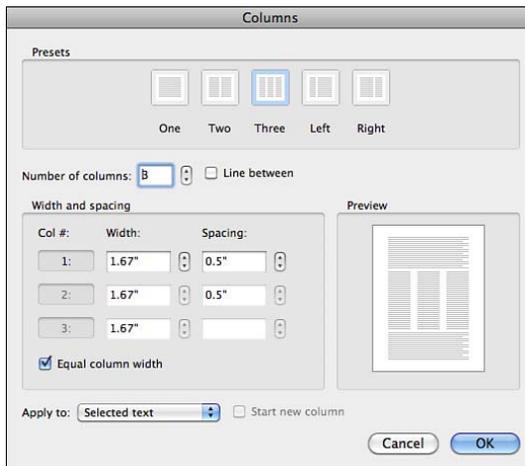


Figure 3.18 Presets One, Two, and Three use equal column widths and equal spacing between the columns.

4. Click Line Between if you want a vertical line to separate the columns.
5. Click OK.

If you need only some of the text in a document formatted in parallel columns, you can position the insertion point where the columns should start, open the Columns dialog box, make all the settings, select This Point Forward from the Apply To pop-up menu, and click OK. When you finish with the columnar text and want to go back to one column, simply open the Columns dialog box again, select one column, select This Point Forward, and click OK.

When you begin typing the columnar text, be sure you are working in the print layout view so you can see all the columns. If you work in the draft view, you can see only one column. Additionally, in the draft view you can see that Word inserts a *continuous section break* at the end of each column when it fills up. If you want a column to end before it fills up, you can insert a column break at the point you want the column to end by clicking Insert on the menu bar and then clicking Break, Column Break.

Working with Tables

You can achieve another type of columnar format in a document by using tables. Unlike the Column feature, text in a table does not flow from the bottom of one column to the top of the next column. The Table feature is good for typing... well, tables.

Additionally, you can use a table to create a document that looks like the one in Figure 3.19. By using a table, I was able to create a hanging indent effect, with the text in the right column lined up just to the right of the text in the left column. All I did was remove the table borders to make the text look more like columns than it does a table. You may think you can do the same thing by setting a hanging indent in the Tabs dialog box, but you can't. A hanging indent set with tabs does not allow you to have more than one line of text hanging out on the left.

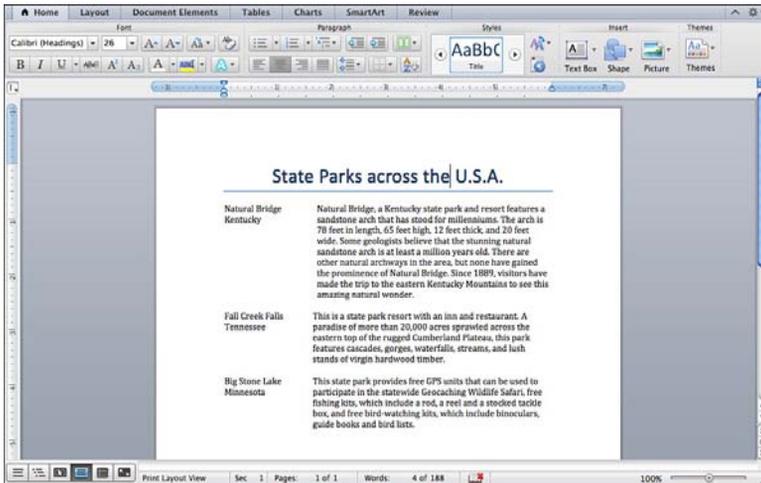


Figure 3.19 Notice that the text that looks as though it is hanging on the left (in the first column of the table) wraps to the next line.

Creating a Table

A table consists of *columns* and *rows*. A *cell* is the intersection of a column and row. A Word table is very much like a spreadsheet and actually has some of the functionality of a spreadsheet. For example, you can sort the data in a table and insert simple mathematical formulas in a table to perform calculations. Word provides four methods for creating a table. You can insert it, convert existing text to a table, draw a table, or use the New button on the Tables tab on the ribbon.



LET ME TRY IT

Inserting a Table

To create a table with the insertion method, follow these steps:

1. Click Table on the menu bar and click Insert, Table (or click the New button on the Tables tab on the ribbon and click Insert Table). The dialog box shown in Figure 3.20 opens.
2. Enter a value for Number of Columns and Number of Rows.

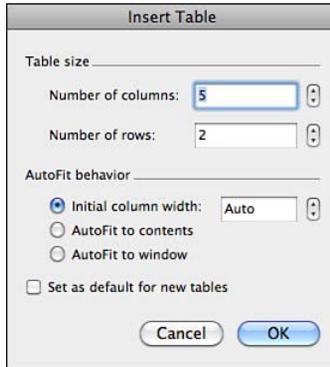


Figure 3.20 *The Initial Column Width is set to Auto by default. This setting gives you the same width for each column.*

Sometimes you don't know exactly how many columns and rows you want, but don't worry—you can add and delete columns and rows after the table is inserted. See the "Fine-Tuning the Structure of a Table" section, later in this chapter, for more information.

3. Click OK.



LET ME TRY IT

Converting Existing Text to a Table

The text you convert to a table must be typed in such a way that it will convert to a table. If it isn't or if it's a little inconsistent, you have to format it or clean it up before you convert it. The individual pieces of text, which will go into each cell in the table, can be separated by one of the following: tabs, paragraph returns, or commas. If the text that you want to convert to a table is separated by tabs, make sure that only one tab appears between each entry. Also, if a column is blank, be sure there is still a tab in that position. If each line of text should represent a row in the table, make sure no extra paragraph returns appear between lines because they will create blank rows in the new table. When the text is ready to convert, follow these steps:

1. Select the text to convert.

2. Click Table on the menu bar and then click Convert, Convert Text to Table. The dialog box shown in Figure 3.21 opens. Word fills in the number of columns and rows for you based on an analysis of the text. Generally, it selects the correct option for Separate Text At, but be sure to check this. You might need to select a different option.
3. Click OK.

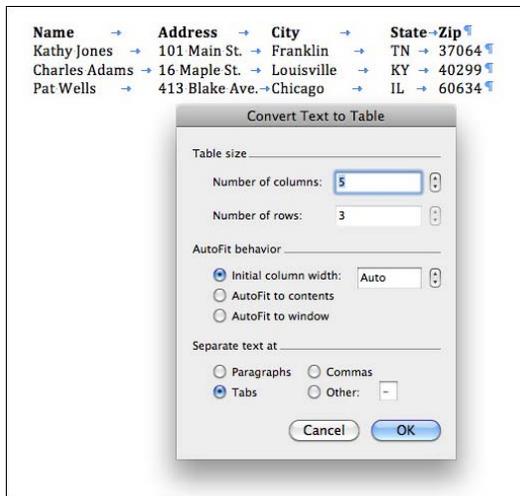


Figure 3.21 Nonprinting characters are turned on so you can see the number of tabs between each portion of text.



SHOW ME Media 3.5—Drawing a Table

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Drawing a Table

When a table will have many different-sized cells, it is sometimes easier to draw the table by hand. To draw a table, follow these steps:

1. Click the Table tab on the ribbon and click the Draw button (or click Table on the menu bar and click Draw Table). The pointer changes to a pencil icon.
2. Drag the pointer to create the outside outline of the table. Drag to draw the lines for the columns and rows.
3. If you make a mistake, click the Eraser button on the Tables tab on the ribbon and drag the pointer across the line you want to erase.
4. When finished, press Esc or click the Draw button on the Table tab on the ribbon.

Setting Table Properties

When you use the insertion or conversion method to create a table, Word does not give you the opportunity to set the table's width or alignment. It creates the table at the position of the insertion point and makes the table width fill the page from the left margin to the right. When the table appears in the document, Word adds a new tab called Table Layout on the ribbon. If you click the tab, you see the various buttons and controls for formatting a table and setting the table properties.



LET ME TRY IT

Setting the Width, Alignment, and Wrap Option for a Table

Some of the properties of a table that you might want to set are the width of the table and its alignment. Additionally, if the table doesn't occupy the full width of the page (between the margins), you might want text to wrap around the table. To set table properties, follow these steps:

1. Position the insertion point anywhere in the table.
2. Click the Properties button on the Table Layout tab on the ribbon, or click Table on the menu bar, and then click Table Properties.
3. Specify a value for the Preferred Width if you want a narrower table.

You can just drag the right border of the table to the left to make a table narrower, but then you also have to drag the borders of the columns to adjust their widths. If you specify a value for Preferred Width in the Table Properties dialog box, Word automatically adjusts the widths of the columns for you.

4. If you have made the table width narrower, select the Alignment you want or specify a value for Indent from Left. Additionally, you can select Around for Text Wrapping if you want text to wrap around the table.
5. Click OK.

Moving Around and Entering Text in a Table

When you insert a table, Word automatically positions the insertion point in the first cell. You can type text in the cell and press Tab to move to the next cell in the row. When you get to the last cell in the row, pressing Tab moves the insertion point to the first cell in the next row, if there is one. If there isn't a next row, pressing Tab from within the last cell creates a new row for you.

As you type, text wraps in the cell. You also can press Return in a cell to create a new paragraph. If you want to use a tab stop inside a cell, you have to press Opt-Tab because, of course, the Tab key moves the insertion point to the next cell.

Here's my number-one insider tip for working with tables: If you need a blank line above a table that you've inserted at the top of a document, just click in the first space in the first cell and press Return.

Fine-Tuning the Structure of a Table

No matter how many columns and rows you start out with when you create a table, you can adjust the number by inserting more or deleting the ones you don't want. Additionally, you may want to change the width of columns or the height of rows.



LET ME TRY IT

Inserting Columns and Rows

If you decide you need more columns or rows in the table, follow these steps:

1. Position the insertion point in a cell that is adjacent to the place where you want to insert the new column or row. If you want to insert more than one column or row, select the same number of adjacent columns or rows you want to insert (if you can).

2. On the Table Layout tab on the ribbon, click the appropriate button: Above, Below, Left, or Right.



LET ME TRY IT

Deleting Columns and Rows

If you want to delete columns or rows, follow these steps:

1. Click in a cell that is in the column or row you want to delete or select all the columns or rows that you want to delete.
2. On the Table Layout tab on the ribbon, click the Delete button and click Delete Columns or Delete Rows.

The Delete pop-up menu also has options for deleting cells or deleting the entire table. If you delete cells, Word asks you how you want the remaining cells to shift.



LET ME TRY IT

Moving Columns and Rows

Moving columns and rows is one of the best features of tables. It enables you to rearrange your data easily without typing an extra letter! To move a column or row, follow these steps:

1. Select all the columns or rows that you want to move by clicking above the first cell in a column or to the left of the first cell in a row. Drag to select additional columns or rows.
2. After the columns or rows are selected, just point anywhere in the blue selection area and drag to the new location.



LET ME TRY IT

Changing the Width of Columns

When you create a table by inserting it, the default width for each column is Auto. This means that Word makes each column the same width, filling up the page from the left to the right margin. Naturally, you will need to change the width of the columns to accommodate the text that should fit in the columns. One easy

way to change the width of a column is to drag the right side border of the column to the right (to increase the width) or to the left (to decrease the width). If you need to be more precise in the measurement of the column width, follow these steps to set an exact width:

1. Select the column or columns.
2. Click the Properties button on the Table Layout tab on the ribbon or click Table on the menu bar and then click Table Properties.
3. Type the exact measurement and specify the unit of measure.

While this dialog box is open, if you need to set the width of columns to the left or right, click Previous Column or Next Column and repeat step 3.

4. Click OK.



LET ME TRY IT

Changing the Height of Rows

As with column width, Word sets the height of a row automatically (based on the default font size) and makes the height the same for all rows. After you start entering data in a cell, the row height adjusts to fit the largest font used in the row. To change the height of any row, you can simply drag the bottom border down, but if you need a precise height, follow these steps:

1. Select the row or rows.
2. Click the Properties button on the Table Layout tab on the ribbon or click Table on the menu bar and then click Table Properties.
3. Type the exact measurement for Specify Height and then select either At Least or Exactly for Row Height Is.

While this dialog box is open, if you need to set the height of rows above or below the selected row(s), click Previous Row or Next Row and repeat step 3.

- If you don't want Word to insert a page break in a row that falls at the bottom of the page, uncheck Allow Row to Break Across Pages.
- Click OK.



LET ME TRY IT

Distributing Space Between Columns or Rows

Distributing space is one of my favorite features of tables. It enables you to select multiple adjacent columns or rows and distribute the space they occupy evenly between them. To distribute space, follow these steps:

- Select the adjacent columns or rows.
- On the Table Layout tab on the ribbon, click the Distribute Rows button or the Distribute Columns button.



LET ME TRY IT

Splitting and Merging Cells

Tables are great tools for creating forms like the one shown in Figure 3.22.

| Employment Application | | | | | | | |
|------------------------|--|--|-------|---------------------------|------|-------|-----|
| First Name: | | | | Last Name: | | | |
| Address: | | | City: | State: | | Zip: | |
| Home Phone: | | | Cell: | | Fax: | | |
| Past Employers | | | | Company/Organization Name | | From: | To: |
| 1. | | | | | | | |
| 2. | | | | | | | |
| 3. | | | | | | | |
| 4. | | | | | | | |

Figure 3.22 This form was created by splitting and merging cells.

When creating a form, you can start out with the same number of cells in each row and then use the split and merge commands to tailor the form. You might also want to merge several cells to create a column heading that spans the width of several smaller columns. To split or merge cells, follow these steps:

- Select the cells you want to split or merge.
- Click the Split Cells button or the Merge button on the Table Layout tab on the ribbon, or click Table on the menu bar and click Split Cells or Merge Cells.

3. If you clicked Split Cells, the dialog box shown in Figure 3.23 opens. Specify the Number of Columns and the Number of Rows. If the cells have data in them, it's probably advisable to select the Merge Cells before Split option. Click OK.

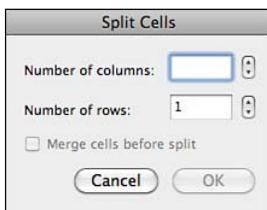


Figure 3.23 *When you split a cell, you can split it vertically and horizontally.*

Another quick way to merge cells is to erase the border using the Erase tool on the Tables tab as described earlier in "Drawing a Table."

Formatting Tables

In addition to formatting the text that you type in a table, you can format the table's borders using different types, colors, and weights of lines, and you can format the background of cells with different colors and percentages of shading. For example, you might want to use blue for the background of the top rows that contain the column headings. Additionally, you can make the headings appear at the top of every page if the table is longer than one page.



LET ME TRY IT

Using Borders

By default, Word creates tables with borders around every cell. These borders print, and they are black and half a point in width. You can specify exactly where you want to use borders and format the style, color, and size of the border. To format the borders, follow these steps:

1. To make changes to the entire table, select the entire table by clicking the table icon that appears at the upper-left corner of the table when you point

to a table. To make changes to specific cells, rows, or columns, select all the appropriate cells.

2. Click Format on the menu bar, click Borders and Shading, and then click Borders, if necessary. The dialog box shown in Figure 3.24 opens.

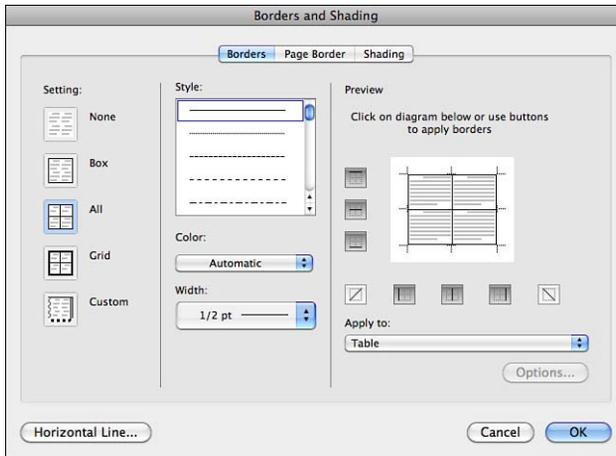


Figure 3.24 The default setting for Borders is All. This setting puts borders around every cell in a table.

3. Select an option from the Setting list. A preview displays on the right to show you what the table or individual cells will look like. (If you select None, click OK because you're done.)

If you select None to remove all borders, you will have a difficult time typing the text. To see where the cells are, you can turn on light gray gridlines by clicking Table in the menu bar and then clicking Gridlines. Gridlines do not print.

4. Select a style from the Style list and select a Color and Width from the corresponding pop-up menus.
5. If you selected Custom for Setting, you can specify the Style, Color, and Width of each line by clicking the lines in the diagram in the Preview or by using the buttons that surround the diagram.
6. When finished, click OK.

You also can add or modify borders with buttons on the Tables tab on the ribbon.



LET ME TRY IT

Using Shading

Adding shading to a table can emphasize important information, such as the headings, or make a table easier to read by using a technique called *banding*, which shades every other row or column. To add shading to a table, follow these steps:

1. Select the cells, columns, or rows that you want to shade.
2. Click Format on the menu bar, click Borders and Shading, and then click Shading, if necessary.
3. Click a color in the Fill palette or click More Colors, click a color on the color wheel, and click OK.
4. If desired, select a percentage or pattern from the Style pop-up menu and select a color from the Color pop-up menu. (The color you select here works in conjunction with the color you select in step 3; it doesn't replace that color.)
5. Click OK.

You also can add or modify shading with buttons on the Tables tab on the ribbon.



LET ME TRY IT

Repeating Header Rows

If a table is so long that some of the rows go to the next page of the document, you should make the header row (or rows) repeat at the top of every page. To repeat the header row(s), follow these steps:

1. Click anywhere in the first row or select multiple, adjacent rows at the top if you have used more than one row for column headings.

You cannot select a row below the first row as a header row if you haven't selected the first row. For example, you cannot make row two the header row by itself.

2. Click Table on the menu bar, and then click Heading Rows Repeat.

Header rows repeat automatically at the top of every page as long as you do not insert a user-defined break.

Using Preset Table Formats

As shown in Figure 3.25, under Table Styles on the Tables tab on the ribbon, there are several preset formats that you can choose from to apply to a table. If you click the scroll button on the right, you can see the additional formats. Each format uses a particular color theme and various borders and shading. The first style is the default; it has no formatting applied. If you select Table options from the ribbon, such as Header Row or Banded Rows, the style uses special formatting for the options you select. Note that simply selecting the Table Option for Header Row does not cause a header row to repeat; it formats only the first row of a table.

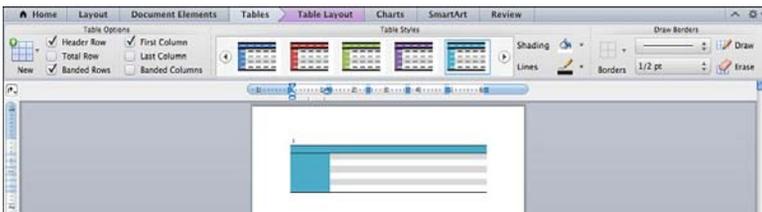


Figure 3.25 *Table Styles apply formatting to a table.*

Creating Envelopes and Labels

You can type an envelope in Word for just about any size envelope. The trick is getting your printer to print it. If you use blank envelopes, you need to print your return address in the upper-left corner. The top margin should be in the neighborhood of 0.1 inch and the left margin should be about 0.35 inch. Many

printers can't print that close to the edge of the paper. If that is your case, your choices are to use larger margins, create a label for the return address, or forget it and use an envelope with a preprinted return address.

If you want to create an envelope with some pizzazz, use one of the envelope templates.



LET ME TRY IT

Creating an Envelope from Scratch

To create an envelope, follow these steps:

1. In a new blank document, click **Format** on the menu bar and click **Document**.
2. Click the **Margins** tab, if necessary, and set the following margins:
 - Top: 0.1
 - Bottom: 0.3
 - Left: 0.35
 - Right: 0.3
3. Click **Page Setup**.
4. Select **Envelope #10** for **Paper Size**, click the icon for landscape orientation, and click **OK**.
5. Click **OK** to close the **Document** dialog box. Word displays a warning dialog box if your printer cannot print within the margins that you set. Click the **Fix** button and Word will adjust the margin; then click **OK** again.
6. Type the return address and then press the **Return** key about seven or eight times to come down to the line where you will type the address of the recipient.
7. Click the **Increase Indent** button on the **Home** tab on the ribbon until the insertion point is at 3.5 inches on the ruler and type the address.
8. Print the document and save it if you want to retain the document for subsequent printings.

If you want to let Word do all the work for you (and why not?), click Tools on the menu bar and click Envelopes. Then you can type the delivery address and the return address in a dialog box and Word will place them in the correct locations on the envelope using text boxes.



LET ME TRY IT

Creating Labels

To make creating labels relatively easy, Word provides you with a Label Wizard. The wizard sets up the correct number of columns for you and sets the margins for each column as well. To create labels, follow these steps:

1. Click Tools in the menu bar and click Labels. The Labels dialog box opens, as shown in Figure 3.26.
2. Click the Options button. The dialog box shown in Figure 3.27 opens.
3. Select the type of printer (under Printer Information), the Label Products, the Product Number, and click OK.

The screenshot shows the 'Labels' dialog box with the following details:

- Address:** A large text input field with a 'Font...' button to its right.
- Label:** A dropdown menu currently displaying 'Avery standard, 5160' and an 'Options...' button.
- Number of Labels:** Two radio buttons. The first, 'Full page of the same label', is selected. The second is 'Single label'. To the right of 'Single label' are spinners for 'Row: 1' and 'Column: 1'.
- Printing Options:** A 'Customize...' button.
- Bottom Buttons:** 'Mail Merge...', 'Print...', 'Cancel', and 'OK'.

Figure 3.26 The Labels dialog box can create a whole page of the same label for you, or you can type just one label.

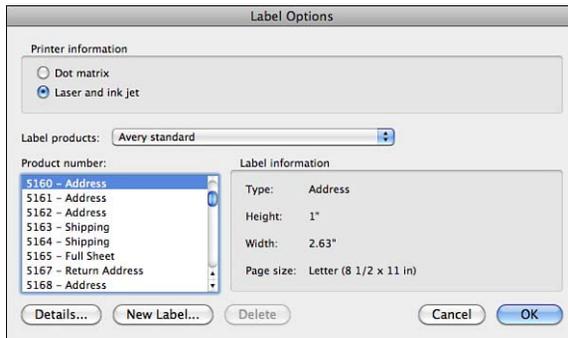


Figure 3.27 Avery labels are the standard labels in the United States. If you buy a generic brand of labels, they usually list the equivalent Avery product number on the box.

4. To create the label(s), take one of the following actions:
 - If you want to create a page of labels with your personal address, click the Use My Address check box and click OK.
 - If you want to type one label, type the address in the Address text box and specify the Row and Column under Number of Labels. (If you are using up the labels on a page one by one, this enables you to use the next label on the page.)
 - If you want Word to give you a page of blank labels so you can type a different address on each label, don't type anything in the Address text box, click Full Page of the Same Label, and click OK. After Word creates the page of blank labels, you can type anything you want on the labels, not just addresses, of course.
5. Print the document and save it if you want to retain the document for subsequent printings.

In this chapter, you find out about AutoCorrect, AutoFormat, and AutoText. You also learn about the Thesaurus, creating a macro, and editing photos.

Exploring Other Features

The core features of Word have not changed since the release of the first version years ago, but Microsoft has added new features to the program with every new release. You don't need to know how to use all these features to get your work done in Word, but you certainly will be more productive if you at least learn to use a few of the features.

This chapter shows you how to use some of the efficiency tools that Word provides. The tools help you format and correct your text automatically, insert boilerplate text, look up synonyms and antonyms, and perform repetitive tasks. Additionally, this chapter shows you how to work with photos in a document and how to use the new layers feature.

Using the AutoCorrect Components

The AutoCorrect feature has several components: AutoCorrect and Math AutoCorrect, AutoFormat As You Type, and AutoText. The AutoCorrect component can automatically correct typos and misspellings, replace typed characters with symbols, such as replacing (c) with the copyright symbol, and replace text in equations with mathematical symbols. The AutoFormat As You Type component can automatically format headings, borders, tables, lists, and so on, as you type. The AutoText component can automatically insert text that you have created and saved as an AutoText entry.

Using AutoCorrect

Using AutoCorrect is effortless. It happens automatically. You fail to capitalize the first word in a sentence, and Word capitalizes it for you. You type *teh*, and Word changes it to *the*. Word comes with a fairly extensive list of corrections it will make for you automatically, but you can and *should* add to this list. Additionally, you should make sure that you approve of the AutoCorrect options that Word sets for you by default.



Setting AutoCorrect Options and Adding Corrections

To set the AutoCorrect options and add to the default list of corrections, follow these steps:

1. Click Tools on the menu bar and then click AutoCorrect. The dialog box shown in Figure 4.1 opens.

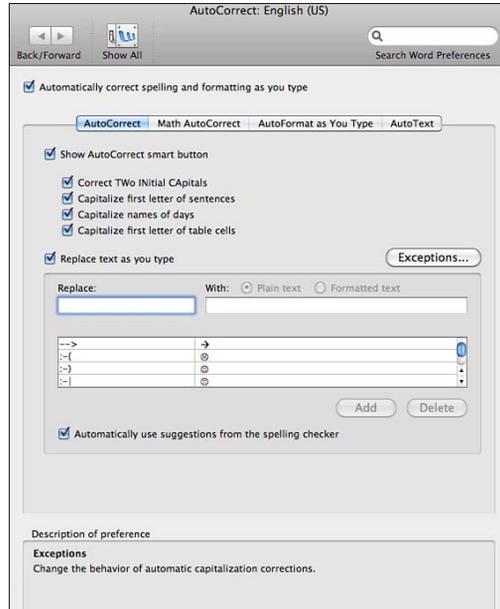


Figure 4.1 *By default, all the AutoCorrect options are selected.*

2. Select or deselect the options at the top of the dialog box, as you wish. I generally advise people to select all the options, but you can deselect an option at any time if you have a special case. For example, I occasionally want to type a table in which the first word in a cell is not capitalized. So I change the setting in AutoCorrect, type the table, and then change the setting back again.
3. To add a word to the AutoCorrect list, type the word in the Replace text box, type the correct spelling in the With text box, and click Add. Repeat this step as many times as necessary to add words to the list of auto-corrections.

You also can add words to the list when you correct a word in the document that has a wavy red line under it. Right-click the word, choose AutoCorrect, and then click the correct spelling.

4. Click the Math AutoCorrect tab, set options, and add replacements on this tab, if you wish. If you don't use equations in your work, you can skip this step.
5. Click OK when finished.

If Word makes an automatic correction in a document that you don't want, point to the correction and the AutoCorrect Smart Button appears. Click the pop-up arrow on the button and click Undo Automatic Correction. If you find that the button is distracting, you can turn it off in the AutoCorrect dialog box. Then, when you want to reverse an auto-correction, press the keyboard shortcut Cmd-Z.

Using AutoFormat As You Type

AutoFormat As You Type was added to Word as a feature when Microsoft first started adding so much artificial intelligence to the Office suite (Office 97). According to Microsoft, the AutoFormat As You Type feature is supposed to "work behind the scenes to produce an attractive, easy-to-read document while you concentrate on the content."

In reality, most of the AutoFormat As You Type options are either unnecessary or cause less-knowledgeable users a lot of frustration. If you do an Internet search for *autofORMAT + word*, most of the hits you get are instructions on how to turn off the feature.



LET ME TRY IT

Setting AutoFormat As You Type Options

To set AutoFormat As You Type options, follow these steps:

1. Click Tools on the menu bar and then click AutoCorrect. Click the AutoFormat As You Type tab. The dialog box shown in Figure 4.2 opens.

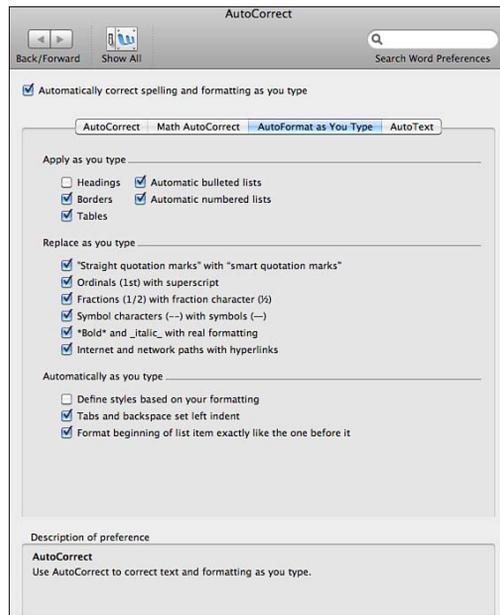


Figure 4.2 *The default AutoFormat options can cause surprising and sometimes befuddling results if you don't realize they are set.*

2. For the Apply As You Type options at the top of the dialog box, I recommend that you deselect all of them.

The Apply As You Type AutoFormat settings are the ones that can unpleasantly surprise you. For example, say you want to make a short underlined space at the beginning of a line, so you type three underlines and press Return. AutoFormat changes what you typed into a line that spans the margins. As another example, if you type an asterisk followed by a space or tab, AutoFormat changes it into a bulleted list with a bullet instead of an asterisk.

3. For the Replace As You Type options, I recommend you select the first four. I think the fifth option, `*Bold*` and `_Italic_`, is a throwback to some archaic typing techniques that you've probably never heard of, so don't select it. The last option turns a web address into a hyperlink. This option might be one you want or one you don't want. Let the actual case decide for you.

4. For the Automatically As You Type options, I recommend that you *do not* select *any* of them. These options are similar to the Apply As You Type options in that they cause unexpected results if you don't know they are set. I think it is better to be in control of the formatting yourself. For example, when I type a tab, I want it to function as a tab; I don't want it to set an indent. If I want an indent, I'll set it myself!
5. Click OK to close the dialog box.

Using AutoText

The AutoText feature can be a real timesaver. Say that you have to type your company's name over and over again in all the documents you create. The name is "Jacobowitz, Feinmann, Schwartz, and Jones, P.L.C." Wouldn't you rather type *jfsj* instead and let Word replace it with the full name? Well, that's what an AutoText can do for you.

Word provides a short list of AutoText entries. They include entries such as "Best wishes," "REGISTERED MAIL," and "To Whom It May Concern." As you start typing one of these AutoText entries, Word shows the complete entry in a pop-up box, as shown in Figure 4.3. When you see the pop-up box, you can quit typing and press Return. Word completes the entry for you but does not end the line with the Return.

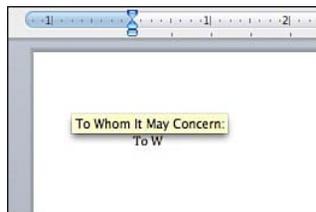


Figure 4.3 When you see the AutoText entry in the pop-up box, you can press Return to insert it.

Many of the default AutoText entries also have logic built into them. For example, if you type *The salutation of this letter is To Whom It May Concern*, Word will not complete the "To Whom It May Concern" phrase for you; it knows it is not really being used as the salutation because it is not at the beginning of the line.

In addition to using the default AutoText entries, you can create your own. They can be as simple as a phrase or sentence or as complex as a paragraph followed by a table with borders and shading.



SHOW ME Media 4.1—Creating an AutoText Entry

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Creating an AutoText Entry

To create an AutoText entry, follow these steps:

1. Create the content that you want to include in the AutoText entry, and then select it.
2. Click Insert on the menu bar and then click AutoText, New. The Create New AutoText dialog box opens, as shown in Figure 4.4.

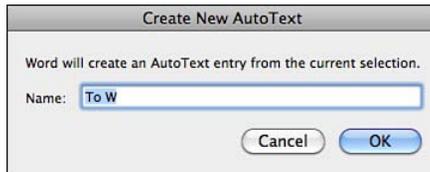


Figure 4.4 The default name of the AutoText is generally the first few characters you have selected for the AutoText entry.

3. For the name, there are two ways to go. You can simply accept the name that Word supplies in the Name text box, which is the first few characters of the selected text, or you can type a short name for the entry. (As you know, if you leave the name as the first few characters of the text, when you begin typing the exact text, Word suggests the text in a pop-up box. To save yourself some typing and force Word to display the AutoText entry sooner, you can make the name just four letters—something like wxyz that you don't normally type.)

If you select a nontext object for the AutoText entry, such as a graphic, the Name text box is empty.

4. Click OK.

Another way to insert an AutoText entry is to click Insert, AutoText, point to a category, and click the name of the entry. AutoText entries that *you* have created are listed on the menu under the Normal category.

Using the Thesaurus

The Thesaurus is one of Word's reference tools, and it "lives" in the Toolbox. It can look up a word that you select in a document, list the meanings, suggest synonyms for the word, and automatically replace the selected word with the word you choose from the list of synonyms. Generally, an antonym for the word appears at the end of the synonym list, and you can replace the selected word in the document with the antonym if you choose.

Additionally, after opening the Thesaurus, you can "drill down" on a word by look up words from the synonym list. For example, if you select the word *dark* in your document and look it up in the Thesaurus, one of the synonyms is *sinister*. If you select *sinister* in the Synonym list and click the Look Up button, the Thesaurus displays the meaning of *sinister* and its synonyms.



SHOW ME Media 4.2—Using the Thesaurus

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Replacing a Word with a Word from the Thesaurus

When you are composing a document and need to replace a word with a synonym or antonym, follow these instructions:

1. Click anywhere in the word that you want to replace.
2. Click Tools on the menu bar and then click Thesaurus. The Toolbox opens (if it isn't already open) to the Reference Tools panel with the Thesaurus tool revealed, as shown in Figure 4.5. (If the Toolbox is already open but displaying a different tab, just click on the Reference Tools tab.)
3. Select the correct meaning from the Meanings list.
4. Select the synonym (or antonym) you want to use from the Synonyms list.

To see more synonyms and antonyms, you can perform a Web search by opening the Web Search tool in the Toolbox and clicking the hyperlink to Answers.com. Note that this hyperlink could change in the future, so just look for a hyperlink that is associated with synonyms and antonyms.

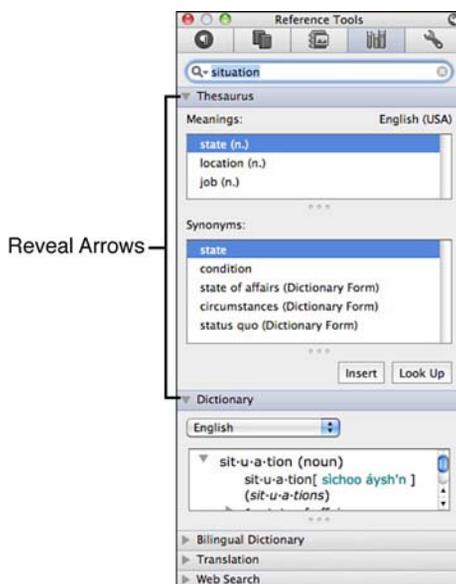


Figure 4.5 You can display or hide the tools on the Reference panel by clicking their reveal arrows on the left.

5. Click the Insert button.

If you are just looking for a quick synonym, you can select one from a shortcut menu without even opening the Thesaurus. Right-click the word, click Synonyms, and click the synonym you want.

Creating a Macro

You might have heard of macros before and decided that they were far beyond your ability to create. In reality, Word provides a very basic mechanism for creating a macro that anyone can take advantage of and benefit from.

A *macro* is a set of commands that have been saved and can be invoked to run automatically. For example, say that you are constantly writing articles in which you must use a red drop cap that uses a specific text effect. Instead of going through the menus and dialog boxes to apply the drop cap each time and then formatting it, you can create a macro to insert a drop cap and apply the formatting instantly.

Even though macros are written in Visual Basic for Applications (VBA) code, you don't have to be a VBA programmer to create one. All you have to do is let Word record the commands while you perform them. Of course, if you are a VBA programmer, you can create some really smokin' macros that perform some very complicated routines.

Yes, I said "VBA." Microsoft has brought it back to Office 2011 for Mac after having dropped it in the last version. Many are rejoicing.



SHOW ME Media 4.3—Recording a Macro

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Recording a Macro

Before you start recording a macro, make sure you have everything set up in the document first. For example, if you must select text before recording the first step of the macro, select the appropriate text. To record a macro, follow these steps:

1. Click Tools on the menu bar and then click Macro, Record New Macro.
2. In the Record Macro dialog box, shown in Figure 4.6, type a name for the macro.



Figure 4.6 *No spaces are allowed in the macro name.*

3. To have access to the macro in any document, leave the Store Macro In option set on the default, which is All Documents (Normal). Your other option is to store the macro just in the current document.
4. Type a short description of what the macro does if you want to.
5. Click the Keyboard icon to open the dialog box shown in Figure 4.7, and press the keys you want to assign to the macro as a shortcut. If Word already uses the keyboard shortcut for another command, such as printing a document, the dialog box displays this information for you. Then you have the opportunity to try a different keyboard combination. If you want to use the shortcut that is already assigned to another command, you can do so, but I really don't advise it.

Word has so many keyboard shortcuts that use the function keys and the Command key, that it is difficult to come up with a combination that Word is not already using. I suggest you use the Control key in combination with a letter or number.

After you settle on a shortcut, click Assign, and then click OK.

6. Perform the commands that should be in the macro, such as making menu selections, filling in dialog boxes, and so on.

7. When you finish performing all the steps, click Tools on the menu bar and then click Macros, Stop Recording.

If you create a macro that doesn't work exactly the way you want it to, you can record it again using the same name. Word replaces the first macro with the new one.

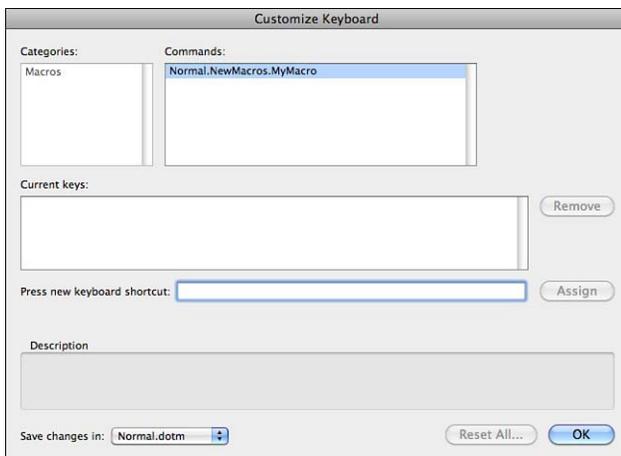


Figure 4.7 *Press New Keyboard Shortcut is the only option available in the dialog box when it first opens.*

After you create a macro and assign it to a keyboard shortcut, you can run the macro simply by pressing the shortcut keys. For example, if you created a macro for a specially formatted drop cap and assigned the shortcut Ctrl-D to it, you would click in the paragraph that you wanted to have a drop cap, and then press Ctrl-D.

Unfortunately, macros can be used for both good and evil. For this reason, Word always warns you when you open a document if it contains macros. To learn more about security issues that pertain to macros, listen to the following audio recording.



TELL ME MORE Media 4.4—Macros and Security Issues

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

Flagging for Follow-Up

The Flag for Follow-Up feature is well loved by those who use it. It enables you to specify a date and time when Office will remind you that you need to follow up on a document. I don't know about you, but I can't have too many reminders. The Flag for Follow-Up feature definitely helps me to be more efficient.



LET ME TRY IT

Creating a Follow-Up Flag

To remind yourself that you need to follow up on something in a particular document, follow these steps to set a flag:

1. Open any document.
2. Click Tools on the menu bar and then click Flag for Follow Up.
3. Enter a date and time and click OK. The flag is activated after you save the document.

Word creates a task in Outlook that will remind you to follow up. Even if you don't use Outlook, the Microsoft Office Reminders application picks up the task and reminds you at the appropriate time.

Working with Photos

In Office 2011, you have more control over photographs than ever before. Microsoft added features that you don't expect to find except in dedicated photo-editing software.

Adding a Photograph to a Document

To add a photo to a document, you can insert it (Insert, Photo, Picture from File), paste it (Edit, Paste), drag it from the Scrapbook, or drag it from the Media Browser (click View, Media Browser to display the browser if necessary). All these methods insert the graphic *in line with text*. This means that the photo occupies a space on a line just as a character does. Most of the time, it is better to make the photo free floating so you can position it where you want it by dragging it with the pointer. You liberate the photo from the line by setting an option that defines how text will wrap around or through the photo.



LET ME TRY IT

Setting the Text Wrap Option for a Photo

To set the Wrap Text option, follow these steps:

1. Select the photo.
2. Click the Format Picture tab on the ribbon.
3. Click the Wrap Text pop-up button (see Figure 4.8).
4. Select the wrapping option that you want.

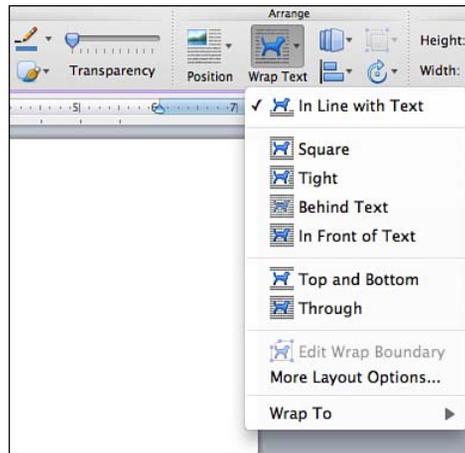


Figure 4.8 You can wrap text around a photo in many different ways.

Resizing and Cropping Photographs

After inserting a photo and setting the text wrapping option, you can resize and crop it, if needed. To resize a photo proportionally, you drag the photo by a corner handle. To crop a photo, you use the Cropping tool.



LET ME TRY IT

Cropping a Photograph

Cropping removes portions of the photo around the edges that do not contribute anything to the main image in the photo. To crop a photo, follow these steps:

1. Select the photo.
2. Click the Format Picture tab on the ribbon.
3. Click the Crop button. Crop marks appear around the edges of the photo, as shown in Figure 4.9.
4. Drag any crop mark toward the center of the photo.

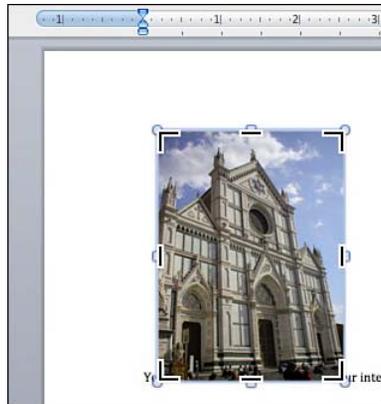


Figure 4.9 Crop marks appear at each corner and in the middle of each side.

5. When finished cropping, click the Crop button on the ribbon again or click anywhere outside the photo.

If you have cropped a photo, you might want to compress it to make the file size smaller, which, in turn, makes the size of the document that contains it smaller. To compress a photo, select it and click the Compress button on the Format Picture tab of the Ribbon.

Adding Borders and Styles

At this point, you might want to add a simple border to the photo to give it a more finished look. A line weight of one point is a standard border size.



LET ME TRY IT

Adding a Border to a Photo

To add a border, follow these steps:

1. Select the photo.
2. Click the Format Picture tab on the ribbon.
3. Click the Border pop-up arrow.
4. Point to Weights and click the point size you want.

If you want to make the photo a little fancier, you can apply a style. Word has 28 different styles to choose from, including different frames, reflections, shadows, cameos, and so on.



LET ME TRY IT

Applying a Style to a Photo

To apply a style to a photo, follow these steps:

1. Select the photo.
2. Click the Format Picture tab on the ribbon.
3. Click the Picture Styles pop-up button and then click the thumbnail for the style you want to use, as shown in Figure 4.10.

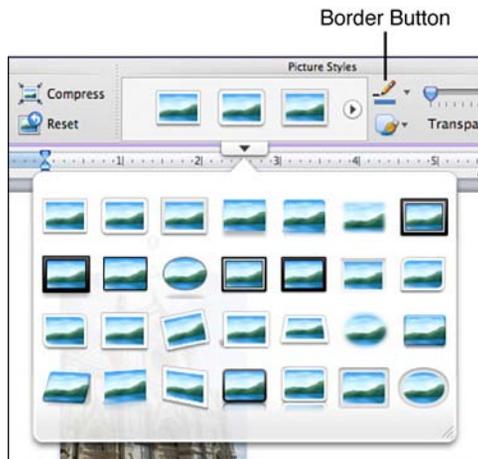


Figure 4.10 Word offers many different picture styles.

4. To change the color of the frame for the picture style, click the Border pop-up button on the Format Picture tab on the ribbon and select a color.

Adjusting Photos

New in this version of Office is the ability to adjust a photo as you would in a program such as iPhoto or Adobe Photoshop. Figure 4.11 shows the Adjust Picture options, which include Transparency, Brightness, Contrast, Sharpen, Recolor, Saturation, and Temperature. Unfortunately, the adjustments are made to the photo that has been placed in the Word document and not to the original photo file. This means that if you place the same file in multiple documents, you must adjust the photo in each document. Knowing this up front, I would adjust the file itself in iPhoto or Adobe Photoshop before inserting the file in multiple Word documents or adjust it in one document and then add it to the Scrapbook.

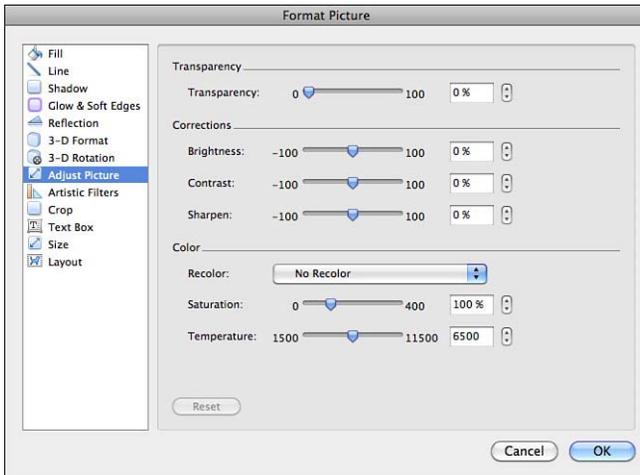


Figure 4.11 The Adjust Picture pane contains the most commonly used options found in professional photo-editing programs.



LET ME TRY IT

Adjusting a Photo Manually

To adjust a photo by making settings manually, follow these steps:

1. Select the photo.

2. Click the Format Picture tab on the ribbon.
3. Click the Corrections button and then click Picture Correction Options.
4. Make adjustments one at a time. The photo updates with the adjustment while the Format Picture dialog box is still open. This feature enables you to see whether the change that you make is acceptable.
5. When all changes are complete, click OK.

If you don't feel skilled enough to adjust photo options manually (using the sliders shown in Figure 4.11), you can use the Corrections palette shown in Figure 4.12 and the Recolor palette shown in Figure 4.13.

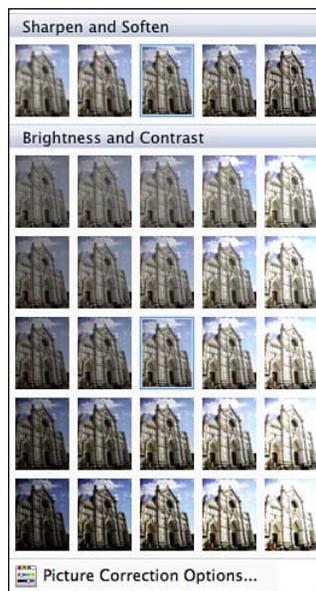


Figure 4.12 *The Corrections palette displays thumbnails with different degrees of sharpness/softness and brightness/contrast.*

To access the Corrections or Recolor palettes, select the photo, click the Format Picture tab in the ribbon, and click the appropriate button (Corrections or Recolor).

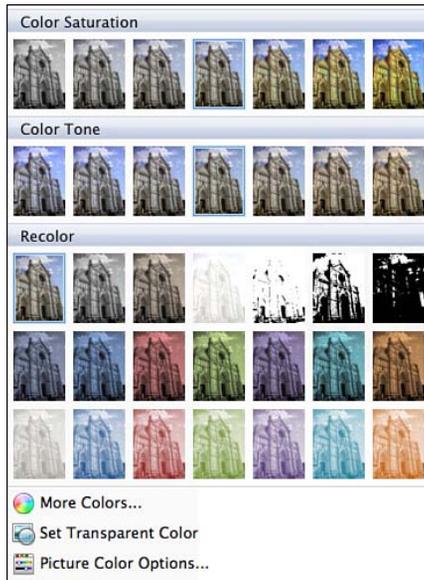


Figure 4.13 *The Recolor palette has thumbnails with varying degrees of saturation and tone.*

Using Filters

Filters are another professional photo-editing type feature that Word includes. A filter changes the look of a photograph in some way. It might make the photograph look as though it is a chalk, marker, or pencil sketch. It might make the photograph look as if it were printed on textured paper (as shown in Figure 4.14) or as if the photo were taken with a diffusion filter on the camera lens, which blurs the photo.



LET ME TRY IT

Applying a Filter to a Photograph

To apply a filter to a photograph, follow these steps:

1. Select the photo.
2. Click the Format Picture tab on the ribbon.
3. Click the Filters button and click the thumbnail for the filter you want to use.

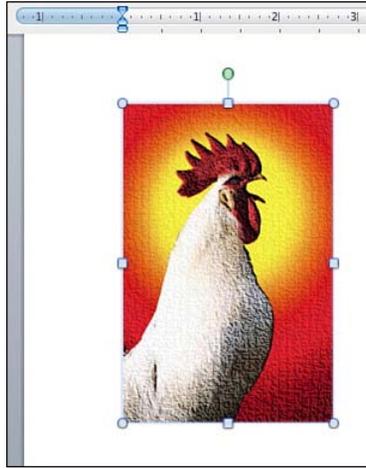


Figure 4.14 *This photo has the cement filter applied.*

If you compress a photo after applying a filter (File, Reduce File Size), the appearance of the photo may change. The reason is that compressing a photo removes a certain amount of detail; therefore, it is better to compress the photo *before* you apply a filter.



LET ME TRY IT

Removing a Filter

If you have added a filter and you change your mind, you can remove it by following these steps:

1. Select the photo.
2. Click the Format Picture tab on the ribbon.
3. Click the Filters button and click None.

Removing the Background of a Photograph

Another new photo-editing feature in Office 2011 is the Remove Background feature. This feature makes the background in a bitmapped image transparent. It

doesn't work for vector images, and you won't be able to use it effectively even on some bitmapped photos, but it does a fantastic job on photos that have a pronounced difference in foreground and background colors. Figure 4.15 shows the before and after effect of using this feature.

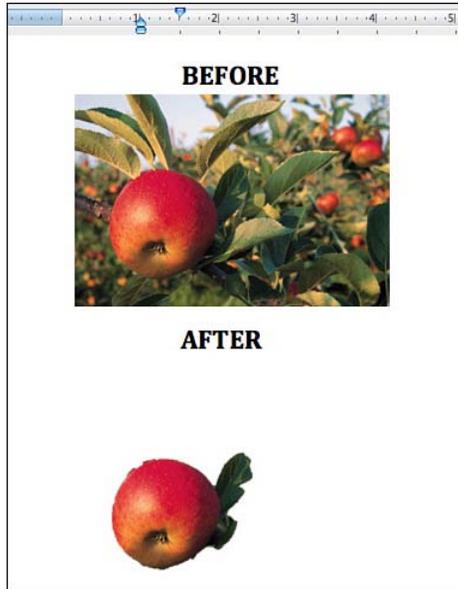


Figure 4.15 Removing the background of the photo allows the background of the page to show.



SHOW ME Media 4.5—Removing the Background of a Photo

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Removing the Background of a Photo

To remove the background of a photo, follow these steps:

1. Select the photo. (The photo in Figure 4.15 can be found in the Media Browser's Clip Art.)
2. Click the Format Picture tab on the ribbon.

3. Click the Remove Background button. Word draws a rectangle around the part of the photo that it perceives to be the foreground, the part of the image it will keep. Any part of the photo that is dark pink will be eliminated.
4. Drag any of the sizing handles to increase or decrease the rectangle to include or exclude part of the photo.
5. To fine-tune the selection, increase the zoom by dragging the slider on the right side of the window's status bar. Click in the background or foreground area to add or eliminate areas. When you click in the foreground area, a minus in a circle appears. When you click in the background area, a plus in a circle appears. Additionally, you can drag the pointer across an area that you want to include or eliminate.
6. When finished, click anywhere outside the photo.
7. If the results are not quite what you want, select the photo again and click the Remove Background button again. Continue clicking or dragging in the foreground or background to achieve better results.

Adding Effects to Photos

If you really want to go crazy with photos, you can add effects. The effects include Shadows, Reflection, Glow, Bevel, and 3-D Rotation. Figure 4.16 shows an example of each.

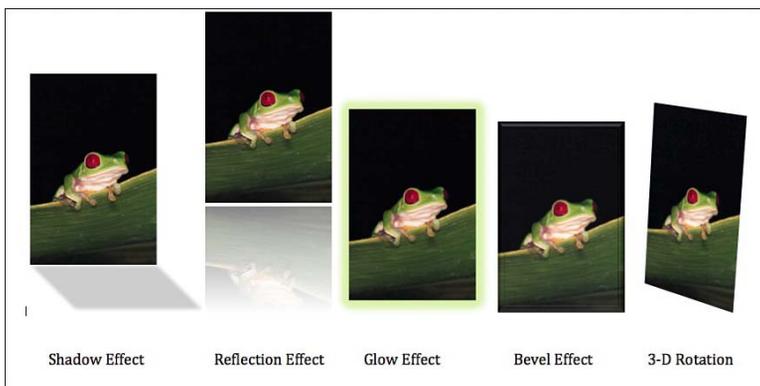


Figure 4.16 Photo effects can add some additional interest to a photo.



Adding Effects to Photos

You can add one or more effects to a photo, but be careful! If you add too many effects, I'll have to throw a penalty flag for piling on. To add one or more effects to a photo, follow these steps:

1. Select the photo.
2. Click the Format Picture tab on the ribbon.
3. Click the Effects button and point to an effect. The options for an effect display as graphics (see Figure 4.17).
4. Click the option you want to apply.

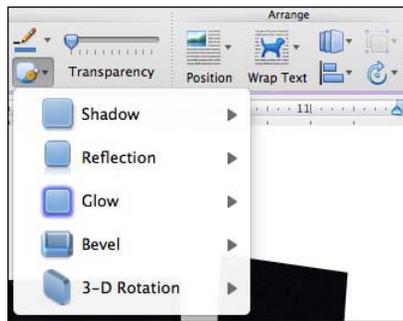


Figure 4.17 Each effect has several options.

Resetting a Photograph

If at any point in the process of formatting or adjusting a photo you have gone way too far and you just need to start over, you can click the Reset button on the Format Picture tab on the ribbon. The original photo reappears, or, if you have compressed the photo, the last compressed version of the photo appears.

Working with Layers

Word 2011 has a fantastic new feature that enables you to see the layers of a document in three dimensions. This is a feature that Office 2010 (for PCs) doesn't even have!

A document automatically has layers if you add photos, text boxes, or graphic shapes. Each object occupies its own layer. If object layers overlap each other, selecting the object that is behind another object can be difficult.

 To learn more about text boxes and graphic shapes, see Chapter 6, "Creating Documents for Publication."

Figure 4.18 shows a document that has several layers. I've inserted two photos from the Media Browser's Clip Art collection, created a text box, drawn a shape, and typed text in a placeholder. This document has a total of five layers.

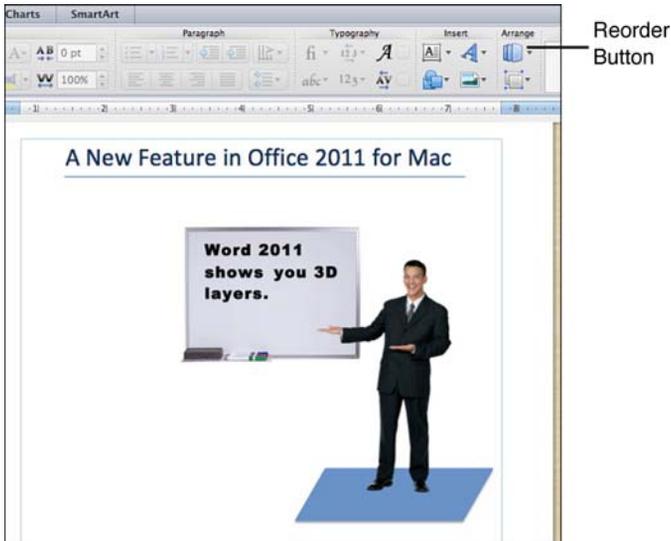


Figure 4.18 You can create interesting graphics by layering photos and other graphic objects.

When I created this document, I was careful to build the document from the bottom layer up. I inserted the photo of the dry erase board first; then I created the text box on top of the photo; and finally I inserted the photo of the man on top of both of these layers. I decided that the man looked as though he was floating in air, so he needed something to stand on. Using the parallelogram shape, I drew a platform, but because it was the top layer, it covered the man's feet. I had to rearrange the order of the levels, and that's when things really got cool (see Figure 4.19).



LET ME TRY IT

Changing the Order of Layers

To change the order of layers, follow these steps:

1. In print layout view, click an object that is layered and click the Format Picture tab.
2. Click the Reorder button. The screen changes to a 3D view of all the layers in the document, as shown in Figure 4.19.

In the Publishing Layout View, the Reorder button is located on the Home tab of the Ribbon.

3. Drag the layer to a new position and click OK.

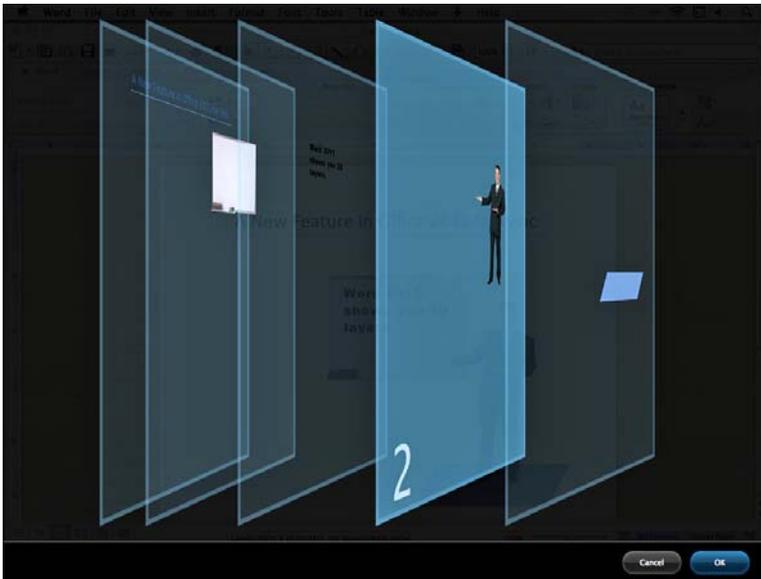


Figure 4.19 *The Layers feature is found only in the Mac version of Office.*

In this chapter, you learn about creating electronic notebooks that organize your information in written and audio formats.

Using the Notebook

Chapter 1 introduced the notebook view and notebook template. This chapter explains the notebook feature in depth. It covers how to create and customize a notebook; set up the tabs in the notebook; enter and format data; use the scribble tools; record, play, and export audio; and finally flag, sort, and search for data.

Creating and Customizing a Notebook

With the advent of PDAs and then smart phones, as well as applications such as Outlook, the old day planner notebook that you could carry around with you (and accidentally leave on the table at Starbucks) became outdated for the tech set. Why would you write everything by hand and keep it in an unsearchable, un-sortable medium? Unthinkable!

And yet ... the notebook format still has an organizational value that is unmatched by the new technology. The day planner paradigm is still one of the best ways to organize information in one place, and Microsoft has brought the paradigm into the electronic environment in a very user-friendly way.



LET ME TRY IT

Creating a Notebook

You can create a notebook from scratch or convert an existing document to a notebook. It's really better to start with a blank notebook and copy the information from the existing document into the new notebook because you can lose some types of data by converting (style definitions and the placement of graphics, for example). To create a new notebook, follow these steps:

1. Click File on the menu bar and then click New from Template. The Word Document Gallery opens.

2. Click Notebook Layout in the Templates sidebar on the left and click a style in the middle pane. The styles are all very similar. The main difference is the appearance of the tabs.
3. Click Choose. Your screen should look similar to Figure 5.1.

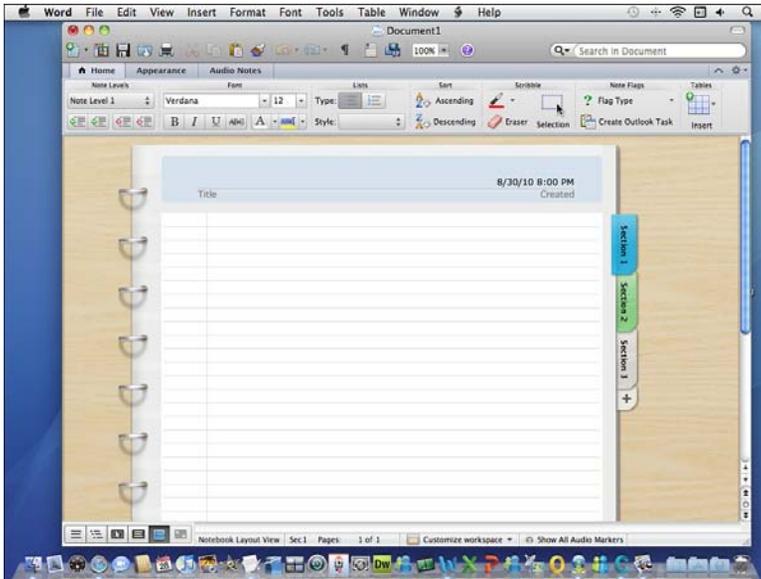


Figure 5.1 *This notebook uses the Simple Contemporary template.*

Another way to create a notebook is to open a new blank document and then switch to notebook view before you enter any text.

If you care about the way the notebook looks on the screen, you can change the background or even switch to a different template. Additionally, you can adjust the height of the lines on the page or hide them.



LET ME TRY IT

Changing the Appearance of the Notebook

To customize the appearance of the notebook, follow these steps:

1. Click the Appearance tab on the ribbon.

2. To change the notebook template, click the Type button and select a different type. Notice that each type has two forms: with or without rings. (The rings are purely visual. They don't print.)
3. To change the background, click the Background button and click the option you want, or click the Customize Workspace button in the status bar and select the option from the pop-up list.
4. To increase or decrease the line height, click the up or down arrow for Distance.
5. To hide the lines, click the Style pop-up button and click None. (Note that lines do not print even if they are not hidden.)

Setting Up the Notebook

When you create a new notebook, Word provides you with three tabbed sections named Section 1, Section 2, and Section 3. These tabs correspond to the section number displayed in the status bar. If Section 1 is the current section, the status bar displays *Sec1 Pages: 1 of 1*. Word is a little slow about updating this information in the status bar, so even if you've switched to another tab, it might still show the status of the previous tab you selected for a little while.

Renaming Tabs

Your first task after creating a notebook should probably be to rename the tabs. You really are not limited to a certain number of characters for the name. If the name you want to use has more characters than "Section 1," Word increases the size of the tab to accommodate the name.

Here's a tip for naming the tabs. If you rename Section 1 to something like *Atlanta*, the status bar still displays *Sec1* when the Atlanta tab is the current tab. To keep confusion to a minimum, name the tab something like *1-Atlanta*.



LET ME TRY IT

Renaming a Tab

To give a tab a name that is more meaningful than the default name, follow these steps:

1. Click the tab to select the page. The tab you select comes to the top.
2. Click the Appearance tab on the ribbon and click the Rename button. The name on the tab is selected.
3. Type the new name and press Return.

You also can double-click the tab, type the new name, and press Return.

Adding Tabs

Depending on your needs, you may have to add tabs. When you add a new tab, it automatically becomes the last tab. If you want the new tab to go before another tab, you have to move it to the new location.



LET ME TRY IT

Adding and Positioning a Tab

To add and position a tab, follow these steps:

1. Click the plus button below the last tab.
2. Drag the new tab to the new location. An arrow points to the new location to help you see where to drop the tab.

When you add more tabs than Word can display, Word adds scroll arrows so you can scroll the tabs up or down. Don't think you're going to display more tabs by giving the tabs shorter names. Tabs have a minimum size, and they do not get smaller just because you don't use all the space for the name.

Deleting Tabs

If you no longer need a tab, you can delete it. Deleting a tab deletes all the content in the section, not just the page where the tab is located, so before deleting a tab, make sure you don't need any data in the section.



Deleting a Tab

To delete a tab and all the information in the section, follow these steps:

1. Click the tab you want to delete.
2. Click the Appearance tab on the ribbon and click the Delete button. Word renames the sections after the deleted section if you have kept the default names Section 1, Section 2, and so on. So if you delete Section 2, the old Section 3 becomes Section 2, Section 4 becomes Section 3, and so on down the line.

Specifying Colors for Tabs

In some cases, you might want to change the colors of the tabs. For example, if your notebook has three adjacent tabs that relate to each other, you can group them by making the three tabs the same color, as shown in Figure 5.2.

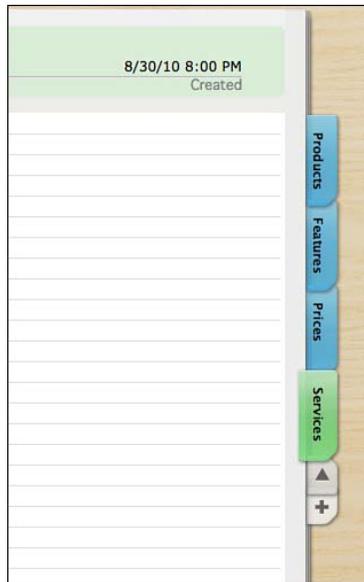


Figure 5.2 Making related tabs the same color helps to show the division between major topics.



LET ME TRY IT

Changing the Color of a Tab

To change the color of a tab, follow these steps:

1. Click the tab you want to change.
2. Click the Appearance tab on the ribbon and click the Color button.
3. Click the color you want.

Using Page Numbers

One last setting you might want to make is the addition of page numbers. These numbers don't really show up on the screen, but they do show in the print preview and they also print. You can number all pages consecutively, or you can number each section separately.



LET ME TRY IT

Adding Page Numbers to a Notebook

Page numbers automatically go in the footer at the bottom of the page. To add page numbers, follow these steps:

1. Click the Appearance tab on the ribbon.
2. Click the Include pop-up button under Footer and click Page (Number).
3. Click Restart Number per Section if you don't want to number consecutively throughout the notebook.

Storing Information

A notebook can hold various types of information from various sources. You can type information directly on the page; paste information from another source; insert information from your Contact list in Outlook; record information in an audio file using your computer's microphone; scribble notes with the electronic pencil; and insert media from the media browser, including photos, audio, movies, clip art, symbols, and shapes.

To start, each section has only one page, but when you fill up a page with information, Word automatically creates the next page for you, just as it does in a regular document. The page break, however, is not visible in the notebook view, but you can tell how many pages are in a section by looking at the status bar.

All the proofing and reference tools are also at your disposal in the notebook view. For example, you can check your spelling, look up a word in the dictionary, or find a synonym in the thesaurus.

Typing and Organizing Information

By default, a notebook is in what I call the "note-taking mode." It assumes that you are going to be typing your notes in an outline format. The first text you type is automatically styled as Note Level 1. When you press Return to go to the next line, Word applies Note Level 1 again. If you press the Tab key one time, Word indents the text, automatically changes the style to Note Level 2, and adds a bullet. You can continue in this mode specifying the correct level by pressing Tab to go to the next lower level (the lowest level is Note Level 9) or by pressing Shift-Tab to go to the next higher level. Additionally, you can use the buttons on the Home tab on the ribbon to promote or demote text (see Figure 5.3).

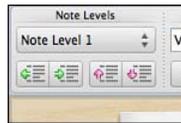


Figure 5.3 The button with the green arrow that points to the left promotes, and the button with the green arrow that points to the right demotes.

If you prefer the notes to be numbered rather than bulleted, click the Numbered List button (on the Home tab on the ribbon) before you begin typing. The default numbered list uses the scheme 1.a.i., but you can change the style at any level by clicking the Style button (on the Home tab on the ribbon) and clicking the style you want.



SHOW ME Media 5.1—Numbering Text in a Notebook

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Dragging Text

As you type, a bubble appears to the left of the text. This bubble has rather mysterious behavior. It appears and disappears, and I could explain it to you, but it would really be to no purpose. Here's what you need to know: If you point to a line and see the bubble on the left, you can then drag that bubble to move the line to a new location. If you point to a line that has subheadings, a blue triangle appears on the left instead of a bubble. Clicking the blue triangle hides or reveals

the subheads. If you want to drag a line and its subheadings to a different location, you drag the blue triangle.

Formatting Text

Text formatting tools are available on the Home tab on the ribbon in the Font section. You can select a different font, size, or color; apply bold, italic, underline, or strikethrough; and use the highlighter pen feature.

Additionally, you can display the Styles tab of the Toolbox and apply styles to text. The styles you apply to text in a notebook are retained if you switch to another view. The reverse is not true. If you apply styles to text in another view and convert to a notebook, all the styles are changed to Note Level 1.

Inserting Tables

To insert a table on a notebook page, click the Insert button under Tables on the Home tab on the ribbon. The pop-up menu shown in Figure 5.4 displays. Highlight the number of columns and rows you want to insert. Format the table and type the text as you would if you were working in a regular document.

 To learn more about working with tables, see "Working with Tables" in Chapter 3.

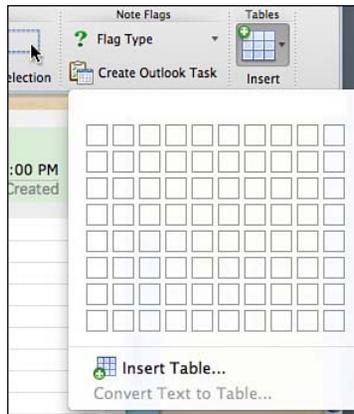


Figure 5.4 If you want to specify other characteristics of a table, click the *Insert Table* option instead of highlighting the columns and rows.

Inserting Outlook Information

In general, you can copy information from an Outlook item, such as a message, an appointment, a note, and so on, and then paste the information in your notebook. If you want to copy a complete calendar page into the notebook, you can save the page as a PDF file and then insert it as a graphic. To insert contact information into a notebook, Word has a special command that saves you the trouble of opening Contacts or your Apple Address Book.



LET ME TRY IT

Inserting Contact Information

To insert a contact in a notebook, follow these steps:

1. Click on the tab where you want to insert the contact information.
2. Click Tools on the menu bar and then click Contacts. The Contacts dialog box opens, as shown in Figure 5.5, and all contacts display by default. This includes contacts in the Apple Address Book, as well as Outlook.
3. Click, Cmd-click, or Shift-click to select contacts you want to insert, and click the Insert button.

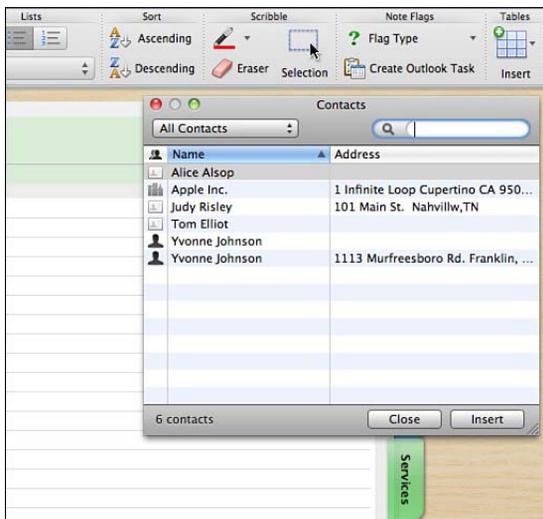


Figure 5.5 Use the search field to find a contact if you have too many to scroll through.

Duplicate contacts appear in the list in the Contacts dialog box if you have the same contact in both the Apple Address Book and Outlook.

4. When finished, click the Close button.

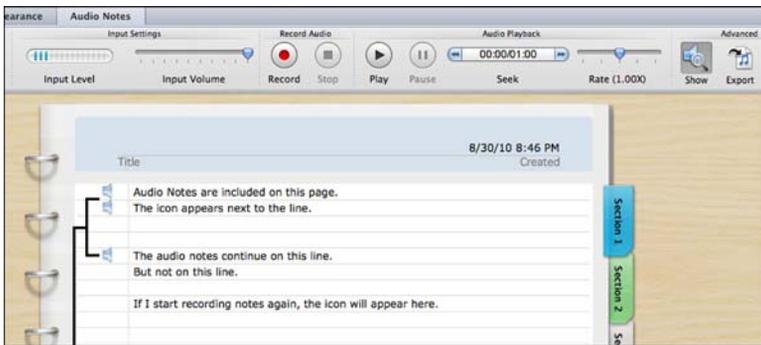
Recording Audio

Instead of typing your notes, you can use your computer's microphone to record notes. If you are typing while you record the audio, Word associates the line you are typing on with the part of the audio that you speak while you are on that line. If you point to a line of text that has audio associated with it, a speaker icon displays in the left margin. If you want to see where all audio notes are, you can click the Show button on the Audio Notes tab on the ribbon. Figure 5.6 shows an example of a notebook with several audio notes.



SHOW ME Media 5.2—Recording Audio Notes in a Notebook

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Audio Notes

Figure 5.6 The Show button (under Advanced) toggles on and off the display of the speaker icons.



LET ME TRY IT

Recording Audio Notes in a Notebook

If you find that you use the audio recording features quite frequently, you might want to invest in a microphone and headset. The microphone on an iMac doesn't pick up the sound as well as a microphone you can speak into directly. To record a note, follow these steps:

1. Click the Audio Note tab on the ribbon.
2. Click the Record button and begin speaking.
3. Type notes while you are speaking if you want to associate text with the audio note.
4. When finished, click Stop. You can start and stop as many times as you want. Word appends any new audio to the end of the audio file.

To play the audio file, click the Play button on the Audio Note tab on the ribbon. The audio starts playing from the beginning, but if you click a speaker icon beside a line of text, the audio jumps to the segment that was recorded when you typed that line of text.



TELL ME MORE Media 5.3—Setting Audio Preferences

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If you want to separate the audio file from the notebook so you can play it in iTunes or with some other player, you can export the file by clicking the Export button in the Audio Note tab.

Scribbling

In the Scribble section on the ribbon's Home tab, Word gives you tools to write, erase, and select. I can't imagine that you would try to doodle electronically in the notebook, but you might want to circle something in your notes, cross out something, or sketch a simple diagram. With the scribble tools, you can do all these things, as shown in Figure 5.7.

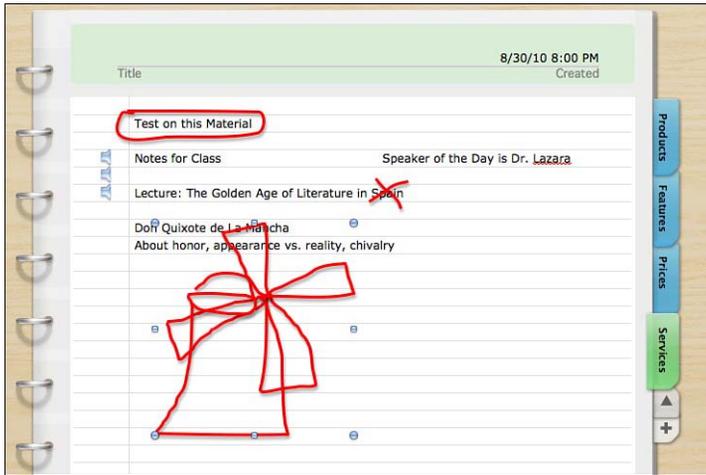


Figure 5.7 Using the scribble pen, you can mark out and circle text, as well as draw a rough diagram.



SHOW ME Media 5.4—Using the Scribble Tools

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LET ME TRY IT

Using the Scribble Tools

To use the scribble tools, follow these steps:

1. Click the Home tab on the ribbon.
2. Click the pop-up button on the button with the pen on it (under the Scribble section) and point to an option, as shown in Figure 5.8.
3. Click the color you want to use and drag the pointer to begin scribbling.
4. To erase a scribble, click the Eraser on the ribbon and click any part of the scribble. (Make sure the plus on the Eraser touches the line of the scribble.)

Note that you cannot use the Eraser to erase only part of a scribble.

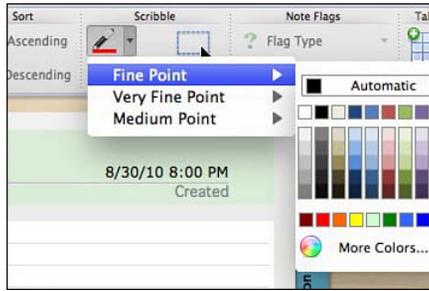


Figure 5.8 You can select the weight of the line and then the color you want to use with the pen.

5. To select multiple scribbles on the same page, click the Selection tool on the ribbon and draw a marquee around all the scribbles. Then you can work with them as a group (to delete them, copy them, drag them, and so on).

Inserting Media from the Media Browser

You can insert any item in the Media Browser in a notebook. This includes photos, audio recordings, video recordings, clip art, and shapes. To display the Media Browser, click View on the menu bar and click Media Browser, or just click the Media Browser button in the toolbar. To insert an item, click the appropriate tab and drag the item to the notebook page.

 To learn more about the Media Browser, see "Inserting Media from the Media Browser" in Chapter 6.

Managing Your Information

After you put the information in your notebook, you might need to manage it in different ways. For example, you might want to add a marginal note, sort a list, search for something specific, or even create a to-do item.

Of course, you know that you can do all these things in a notebook, or I wouldn't have brought up this issue, right?

Flagging Text

Have you ever put a question mark in the margin beside some of your notes or drawn a star beside something that's important? You can do basically the same thing in the Word Notebook by using Note Flags.



LET ME TRY IT

Inserting a Note Flag

To call attention to text in various ways, follow these steps to insert a Note Flag:

1. Click anywhere on the line that contains the text you want to flag.
2. Click the Flag Type button on the Note Flags section on the ribbon's Home tab. The pop-up menu shown in Figure 5.9 opens.

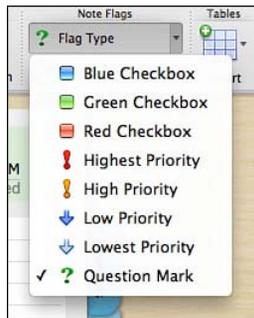


Figure 5.9 Use the priority flags to show the importance of information.

3. Click the flag you want to insert. The flag appears in the left margin (see Figure 5.10).

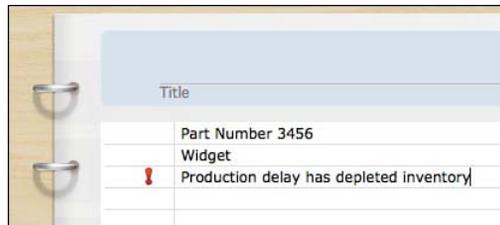


Figure 5.10 Word always inserts the flag in the left margin.

Sorting Text

If your notebook contains a list, you can sort it automatically in ascending or descending order. To sort a list, select it and click the Ascending or Descending button in the Sort group on the ribbon's Home tab. To return the items to their original order, click the Undo button in the toolbar immediately after sorting.

Creating an Outlook Task

You can create an Outlook task with a reminder that will alert you at a specified date and time using any text in your notebook as the title of the task. This feature is helpful if you need to be reminded to meet a deadline, such as studying for a test or finishing a report for your boss.



LET ME TRY IT

Adding a Task to the Outlook Task List

To create a task in Outlook, follow these steps:

1. Select the text in the notebook.
2. Click the Create Outlook Task button in the Note Flags group on the ribbon's Home tab. The dialog box shown in Figure 5.11 opens.
3. Specify a date and time and click OK.

 To learn more about working with Tasks, **see** Chapter 10, "Using Tasks and Notes."

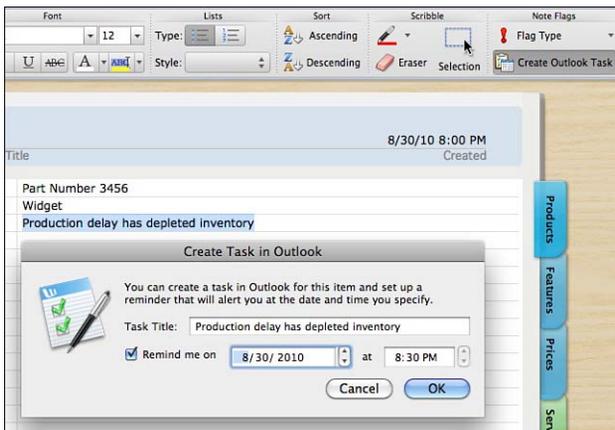


Figure 5.11 The text you selected is the name of the task.

Searching for Text

To search for text in a notebook, you use the Spotlight search field on the far right side of the toolbar. Just type the search text in the field and press Return. Word removes the colors from all tabs that do not have the search text and applies a blue highlight to the tabs of the sections that *do* have the search text. When you click a tab that is highlighted, you see the search text on the page highlighted in blue, as shown in Figure 5.12.

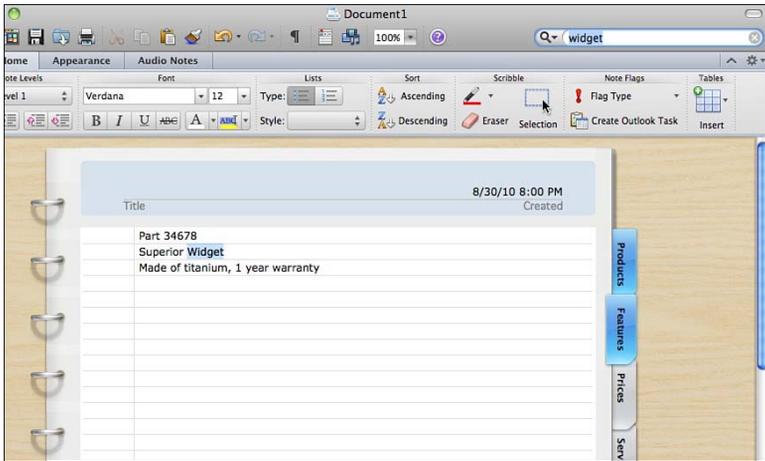


Figure 5.12 Text found in a search is highlighted in blue.

This chapter deals with using graphic design features in the publishing layout view to create a professional-looking publication.

Creating Documents for Publication

Once upon a time, the term *publishing* referred to printed media only. Now the term refers to printed media as well as electronic media that are published on the Web or for electronic book readers, such as the Kindle or the iPad.

This chapter tells you how to use the graphic and publication tools in Word to create documents that are suitable for publishing. It begins by explaining the graphic features of the publishing layout view and how to set the layout options in a new publication. After a quick tour of the publication templates, the chapter gives you step-by-step instructions on how to use text boxes, shapes, and SmartArt. It finishes with instructions for selecting, resizing, aligning, distributing, rotating, and grouping objects.

Throughout this chapter, unless otherwise noted, you can assume that the publishing layout view is the view in use.

Examining the Publishing Layout View

The publishing layout view is unlike any other view in Word. It is a graphic design environment, not a text environment. It's not a full-blown design application—nothing close to Adobe Illustrator or Photoshop—but for a design application that's tucked into a word processing program, it's pretty darned good. Graphic designers in the "real" graphic design world wouldn't be caught dead using it, but for nonprofessionals, it serves a great purpose. It's much easier to learn and use than the professional design applications, and it can produce some very professional-looking results.

Because the publishing layout view is not a text environment, you cannot click the pointer on the page and start typing. Everything in a publication is an object that must be placed in some manner. If you want to type text, you place a text box object on the page and type in the text box. When you place objects on a page, Word automatically creates layers for the objects.

Creating a New Publication

You can use one of two methods to create a publication. If you are already in a Word document, you can switch to the publishing layout view and click the Create New button to open a new publication that uses the blank template. The other method is to select a template from the Document Gallery.

Using a Blank Template

If you are reading this chapter sequentially, I suggest you use the first method to create a blank publication so you can use it to experiment with as you go through the following sections of this chapter. By starting with a blank template, you won't be confused by template elements that may not be present in all templates.

Using a Designed Template

When you are ready to create a *real* publication, if you have no experience in designing anything, I highly recommend you use one of the templates included in Word. They have been professionally designed, they look really good, there are plenty of them, and there are lots more you can download from the Web. (The term *word publishing templates* resulted in 3,740,000 hits in Google, so I think you can find a template that fits your needs.)



SHOW ME Media 6.1—Using a Template to Create a Publication

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LET ME TRY IT

Using a Template to Create a Publication

To create a publication from a template, follow these steps:

1. Click the New from Template button in the Standard toolbar.
2. Scroll down to the Publishing Layout section in the left sidebar if necessary.

3. Click a category such as Newsletters or Brochures. The templates for the category display in the middle pane.
4. To see all the pages of a template, move the pointer across the thumbnail in the middle pane.
5. In the middle pane, click the template you want to use. The template you select displays in the right pane.
6. To get a better look at the individual pages of the template, click the scroll buttons in the right pane (shown in Figure 6.1).

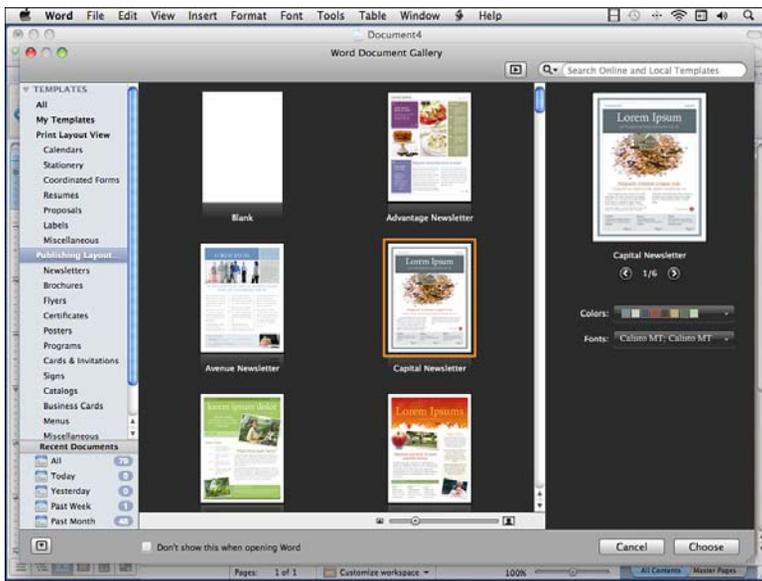


Figure 6.1 The template you select in the middle pane displays in the right pane, and you can scroll through its pages.

7. Select a different set of colors from the Colors pop-up menu and scroll the thumbnail again to see the difference.
8. Select a different set of fonts from the Fonts pop-up menu and scroll the thumbnail to see the difference.
9. Click Choose when finished. Word creates the publication using the color scheme you selected, and it has placeholders for text and photos. The text placeholders contain Latin, often referred to as *Lorem Ipsum* text, and the photo placeholders contain stock photos.

10. Replace the content of the placeholders with your own text and photos. To replace the text in a text placeholder, select the text box and then double-click it to clear the text. To replace a photo, simply drag a new photo to the placeholder.



TELL ME MORE Media 6.2—Exploring *Lorem Ipsum* Text

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Saving a Publication

There is nothing different about saving a publication. You can save it as a DOCX file just as you would any Word document. As with any file you save in Word 2011, there also might be compatibility issues with other versions of Word. If you want to publish the file to the Web and make it downloadable, you can save the file in PDF format.

Setting Up the Graphic Environment

Much of the graphic environment is already set up for you. The ribbon has all the tools you need, and the Standard toolbar even has special tools just for graphics. Some features, however, are not turned on by default, and you need to know what these features are and why you need them.

Setting Options for Nonprinting Guides

The graphic environment requires precision and exact measurements so objects can be created and placed correctly and consistently throughout the publication. To assist you with placing objects, Word provides you with nonprinting guidelines, which include gridlines, ruler guides, and object outlines.

You can use gridlines to help you place objects manually, and you can turn on their magnetic power so that objects *snap* to them automatically. By default, Word has horizontal and vertical gridlines set up at 0.13 inch (a little over 1/8 inch), but it doesn't display them. You have to turn them on. (When you turn on the display of gridlines, they are also visible in the Print Layout view. After you turn on the display of gridlines, all documents display them, not just the document you are in.)

 To learn more about the magnet power of gridlines, see "Aligning Objects," later in this chapter.



LET ME TRY IT

Turning On the Display of Gridlines

To make gridlines visible, follow these steps:

1. Click the Layout tab on the ribbon.
2. Click Options under Grid to open the dialog box shown in Figure 6.2.
3. Check Display Gridlines on Screen and click OK.

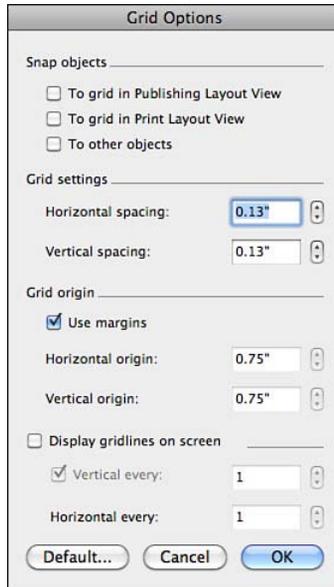


Figure 6.2 *Displaying gridlines helps you place objects more precisely on a page.*

A ruler guide is a nonprinting horizontal or vertical line that you drag from the ruler to use as a guide for aligning objects. The display of ruler guides is on by default to assist you in the design process. These guides can be distracting, so sometimes you might want to turn them off to view the page without them.



LET ME TRY IT

Turning on the Display of Guidelines and Outlines

To turn on guidelines, follow these steps:

1. Click the Layout tab on the ribbon.
2. Click Show Under Guides to show the pop-up menu.
3. Check Static Guides if it is not checked already.

To place a ruler guide on a page, point to the vertical ruler and drag to the right, or point to the horizontal ruler and drag down. As you are dragging the guide, its position shows on the opposite ruler. When the guide is lined up with the desired measurement on the opposite ruler, drop it.

The outline of an object is the rectangular border that defines the space around the object. Even if you draw a circle, the circle occupies a rectangular space. The display of outlines is off by default, but you can turn on the display if you need help placing shapes at exact locations. To show or hide object outlines, click the Show button on the Layout tab on the ribbon and check or uncheck Outlines.

Getting Acquainted with the Publishing Tools

Seven special tools appear on the Standard toolbar in the publishing layout view. These tools are invaluable, so be sure you have the Standard toolbar turned on. Figure 6.3 shows the section of the toolbar that contains the following tools:

- **Selection Tool**—The Selection tool is active by default. It actually is the pointer for the mouse. You use it to select objects in the publication.
- **Text Box**—Use this tool to create a text box. The Home tab on the ribbon also has a text box tool, but the one in the toolbar is always available.
- **Vertical Text Box**—This tool creates a text box in which the text direction is vertical instead of horizontal.
- **Draw Shape**—This tool has 15 of the most commonly used shapes. Because it is always accessible, it is more convenient to use than the Shape button on the Home tab. Of course, if you want to draw a shape that is not on this tool, you have to resort to the button on the Home tab or the Shapes tab of the Media Browser.
- **Draw Line**—This tool has a straight line and two types of arrows, but it also has some freehand drawing options that are pretty cool. You can draw the following:
 - A zigzagged line that the tool converts to a smooth curve

- A closed polygon (with any number of sides)
- A freehand line
- **Hand Tool**—Use this tool when the zoom is so large that only a portion of the page is visible on the screen. You can use the hand tool to drag another portion of the page into view.
- **Zoom Loupe**—This zoom tool works differently from simply zooming in or zooming out using the Zoom slider in the status bar. It zooms in or out on the location that you point to with the tool. To zoom in, you drag the tool to the right or down. To zoom out, you drag the tool to the left or up.



Figure 6.3 *These special tools appear only on the Standard toolbar in the Publishing Layout view.*

Laying Out a Publication

Just as you specify layout options for a regular document (paper size, margins, and orientation), you must also specify these options for a publication. The options are the same, so you shouldn't have any trouble setting them. You can click Format on the menu bar and then click Document to open the Document dialog box (discussed in detail in Chapter 3, "Formatting Documents"), or you can set individual layout options using the Layout tab on the ribbon.

Creating Master Pages

A master page serves as a template for new pages that you add to your publication. It usually contains ruler guides and standard objects that you want to repeat on every page. For example, a master page might have a text box across the bottom that contains a copyright notice.

Although you can pull guides onto a content page, it is better to put the guides on the master page. The guides show up on the content page, but you cannot accidentally move them because they are not physically on the content page.

Every publication has at least one master page, even if it's blank. You can add content to a blank master page and create additional master pages to use as templates for other pages in the publications. For example, you might have a master page for left-hand pages and a master page for right-hand pages.

To add content to an existing master page, click the Master Pages tab in the lower-right corner of the window. Use the techniques outlined in this chapter to add objects to the page. To create a new master page, click the Layout tab on the ribbon, click the Add button under Pages, and click New Master.

Creating Content Pages

If you have only one master page, you create additional, new content pages by clicking the Add button on the Layout tab on the ribbon. The new page appears on the screen, and the previous page scrolls up out of sight.

Because the publishing layout view is not a text environment, Word never generates automatic page breaks for you because you have "filled up the page." Technically, you can stack more layers on a page than you would ever possibly need, so a page never fills up.

If you have more than one master page, you must select the master on which you want to base the new page before adding the page. To select the master, click View on the menu bar, point to Sidebar, and click Thumbnail Pane. Click the thumbnail of the master you want to use and then click the Add button on the Layout tab.

Inserting and Working with Text Boxes

In many published documents, you have text that must flow continuously from one place to another, such as an article in a newspaper or magazine. To accomplish this text flow in Word, you use linked text boxes. In Word, the text that flows through the text boxes is called a *story*.

Before you start creating a set of linked text boxes, make sure Outlines are visible (as described earlier in this chapter) so you can see the text boxes even if they have no text in them. Because you can have more than one set of linked text boxes in a document, each set of linked text boxes uses a different color for the outlines.

Turning on Outlines also makes outlines visible around shapes. If this is too distracting, you might want to turn off the Outlines after you are finished working with the linked text boxes.



SHOW ME Media 6.3—Creating Linked Text Boxes and Filling Them with a Story

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



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Creating Linked Text Boxes

You can link as many as 32 text boxes in one document. To link text boxes, follow these steps:

1. Click the Text Box button in the toolbar.
2. Drag the pointer to create the first text box.
3. Point to the square handle on the right side of the text box just above the bottom corner handle (see Figure 6.4). Click the plus sign in the handle and draw another text box at the location (on any page) where the story should continue. Word numbers the text boxes in the upper-left corner.
4. Repeat step 3 for each successive text box that you want to link to a new text box.

To add a text box at the beginning (before the first box), click the plus box in the upper-left border of Box 1.

Adding the Story to the Linked Text Boxes

When you are ready to start adding text to your blank text boxes, you can type the text or paste it. The text is referred to as a *story*. It's only logical to start in Box 1, but if you start typing text or you paste text in Box 2 or higher, Word still puts the text in Box 1. When the first text box fills up, the text flows into the next linked text box and continues to flow to the other linked text boxes. If you have

too many text boxes, you can delete the ones you don't need on the end. If the opposite is true—you don't have enough text boxes—you can add more text boxes or increase the size of the existing text boxes to accommodate more text.

To navigate between linked text boxes, select a text box and then click the arrow on the right side of the text box border to go to the next text box in the story or click the arrow on the left side of the border to go to the previous text box in the story.

Breaking a Story into Two Stories

If you want a story to stop flowing between text boxes for some reason, you can break the link. The text boxes that remain before and after the break are still linked to each other but text can no longer flow across the broken link.



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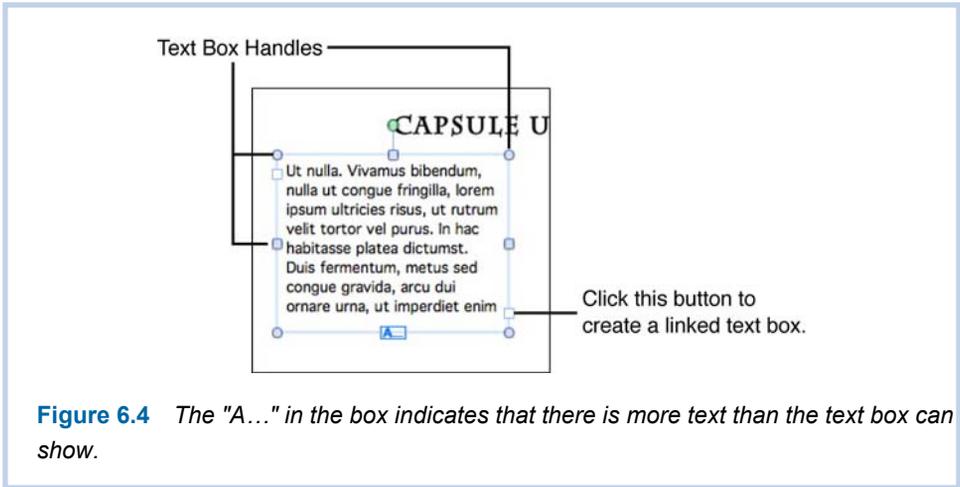
Breaking a Link Between Text Boxes

A text box has only one backward link and one forward link. If you break the link between text boxes, you create two stories. To break a link between text boxes, follow these steps:

1. In Publishing Layout view, click the text box you want to be the last text box in the story.
2. Click the Format tab on the ribbon.
3. Click the Break Link button under Text Box.

Deleting a Text Box in a Linked Set

Now say you have a story that uses three linked text boxes. One text box is on page one, the second text box is on page three, and the third text box is on page five. You just sold a \$1,000 full-page advertisement, and you want to put it on page three. You need to delete the text box on that page, but you don't want to break the flow of the story. No problem; you can delete the text box itself without breaking the link. The text in the first text box will flow to the text box on page five, but the text box on page five will not be able to hold all the new text at its current size. When a text box has text that is not visible, the bottom outline of the box has a text symbol on it, as shown in Figure 6.4.



LET ME TRY IT

Deleting a Text Box in a Linked Series

To delete a text box without breaking the link, follow these steps:

1. Select the text box you want to delete.
2. Point to the border until the pointer turns to a four-headed arrow.
3. Click the border and press the Delete key. Text that was in the deleted text box flows to the next text box in the series.

Formatting Text Boxes

You can set various formats for text boxes, including text alignment, text direction, margins, fills, borders, shadows, and so on. If you want to call attention to some short text in a publication by giving it a border and filling in the background with a light color, a formatted text box is just the trick.



LET ME TRY IT

Formatting a Text Box

To apply various formatting to a text box, follow these steps:

1. Right-click the text box and click Format Shape. The dialog box in Figure 6.5 opens.

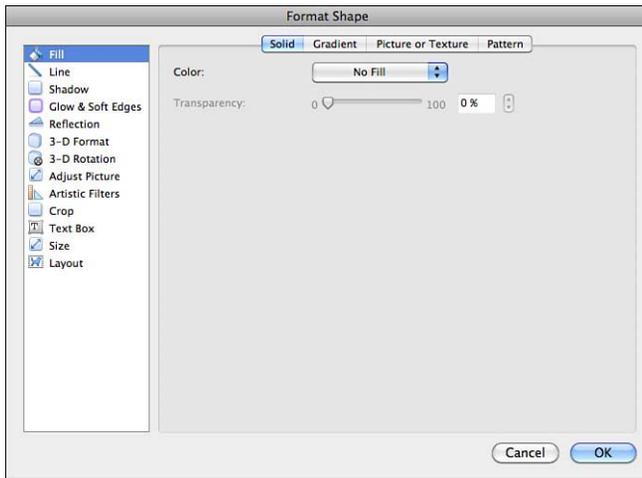


Figure 6.5 *The Text Box option on the left is not the only option that applies to text boxes.*

2. Click Text Box to set the alignment, text direction, internal margins, and so on.
3. Click Fill to add a background color.
4. Click Line to add a border.
5. Click Shadow to add a shadow.
6. Continue adding as much formatting as you like, and then click OK.

If you want to use the same formatting for all text boxes, after you have set the formats, right-click the text box and click Set as Default Textbox.

Inserting and Working with Shapes

Publications often use shapes as backgrounds for text. For example, if you are creating a flyer to sell a product, you might want to put the price of the product in a starburst.

You can add shapes to a publication via the ribbon or the Media Browser, which is discussed in detail later in this chapter. I prefer the ribbon for inserting shapes because you can size the shape as you insert it. If you drag a shape to the

publication from the Media Browser, it comes in at a standard size and you have to resize it after it appears on the page.



LET ME TRY IT

Inserting a Shape from the Ribbon

To insert a shape in a publication, follow these steps:

1. On the Home tab on the ribbon, click the Shape button (under Insert).
2. Point to a shape category to reveal your choices, as shown in Figure 6.6.



Figure 6.6 The pop-up menu shows all the shapes available in the Stars and Banners category.

3. Click the shape you want, point to location where you want to place the shape, and drag the pointer to create the size you want. (Hold down the Shift key as you drag if you want the shape to maintain its proportion.)
4. While the shape is still selected, you can type or paste text in it unless the shape is some form of a line.

Changing the Style of a Shape

When you insert a shape, Word uses a fill color (mandated by the theme of the template) and a default appearance. For example, the blank template uses blue fill for shapes, and it makes shapes one-dimensional. You can easily change the appearance of a shape by changing the style of the shape.



LET ME TRY IT

Changing the Appearance of a Shape

To change the appearance of a shape, follow these steps:

1. Select the shape and click the Format tab on the ribbon.
2. Click Quick Styles under Shape Styles.
3. Click the new style you want to use.
4. Use the buttons in the Quick Styles area to change the border color, the fill, effects, and so on.

Changing to a Different Shape

After you insert a shape, you can easily change it to a different shape if your design calls for it. You don't need to delete the shape and insert a different one. Any text that you might have added and formatted inside the shape remains when you change to a new shape.



LET ME TRY IT

Changing a Shape

To change a shape to a different shape, follow these steps:

1. Select the shape.
2. Click the SmartArt tab on the ribbon.
3. Click the Shape button under Edit SmartArt.
4. Point to the category that has the shape you want, and then click the new shape you want to use.

Changing the Fill and Outline

Every shape has a fill and an outline that you can change to coordinate with your design. In the Office theme, the default fill is a solid color blue, and the outline is a 3/4-point line that is the same color as the fill, so you really can't see the outline. For a shape's fill, you can choose a solid color or gradient, a photo or texture, or a pattern. For an outline, you can choose the color, weight, and dash pattern.



LET ME TRY IT

Changing the Fill of a Shape

You can change the fill color using a button on the ribbon, or you can open a dialog box that gives you access to additional fill options. To change the fill, follow these steps:

1. Select the shape.
2. Click the Format tab on the ribbon.
3. Click the Fill pop-up button (under Shape Styles) and click the color you want, or click Fill Effects to open the dialog box shown in Figure 6.7. Click the tab you want, make the selections you want, and click OK.

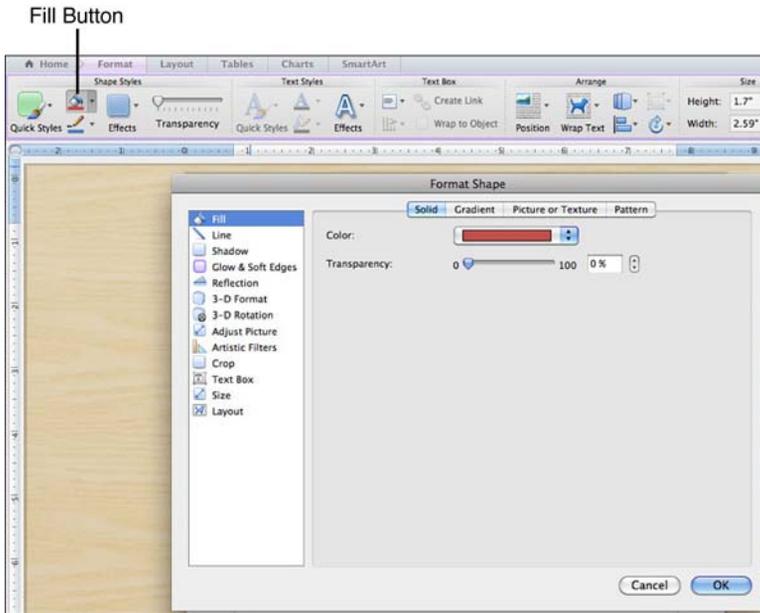


Figure 6.7 A shape can have a solid color, gradient, picture, texture, or pattern as a fill.



Changing the Outline of a Shape

You can change one outline property at a time using a button on the ribbon, or you can open a dialog box that gives you access to all the properties at once. To change the outline of a shape, follow these steps:

1. Select the shape.
2. Click the Format tab on the ribbon.
3. Click the Line pop-up button (under Shape Styles) and do one of the following:
 - Select a different color.
 - Point to Weights and select a different line weight.
 - Point to Dashed and select a solid or dashed pattern.
 - Point to Arrows and select an arrow type.

Alternatively, you can click the Line pop-up button and click Line Effects to open the dialog box shown in Figure 6.8. Make all your selections in the three different tabs of the dialog box and click OK.

If you change the color of the fill or line, the corresponding buttons on the Ribbon reflect the new color. You can then apply the new color to any shape by selecting the shape and clicking the button (not the pop-up arrow on the button).

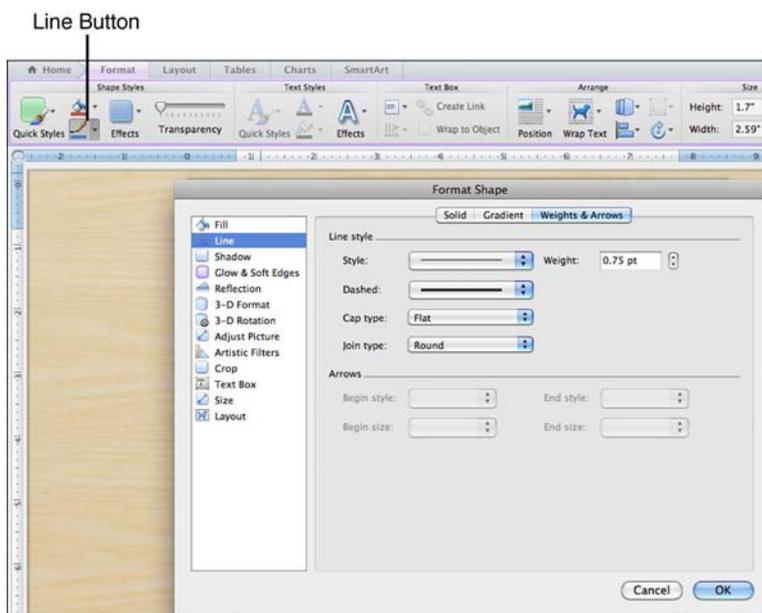


Figure 6.8 Change the color of the outline on the Solid or Gradient tabs and all other properties on the Weights & Arrow tab.

Inserting and Working with SmartArt

The SmartArt graphics are actually multiple shapes, which, in combination, provide a visual representation of a concept such as a process, cycle, hierarchy, or relationship. They have their own tab on the ribbon, and you'll find them in Word, Excel, and PowerPoint. They work exactly the same way in all Office applications.



SHOW ME Media 6.4—Inserting a SmartArt Graphic

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



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Inserting a SmartArt Graphic

To insert a SmartArt shape, follow these steps:

1. Click the SmartArt tab on the ribbon.
2. Click the pop-up button for the type of graphic you want to insert. Figure 6.9 shows the graphics available for a process. (Take the time to look at all the SmartArt graphics so you know what's available to you.)

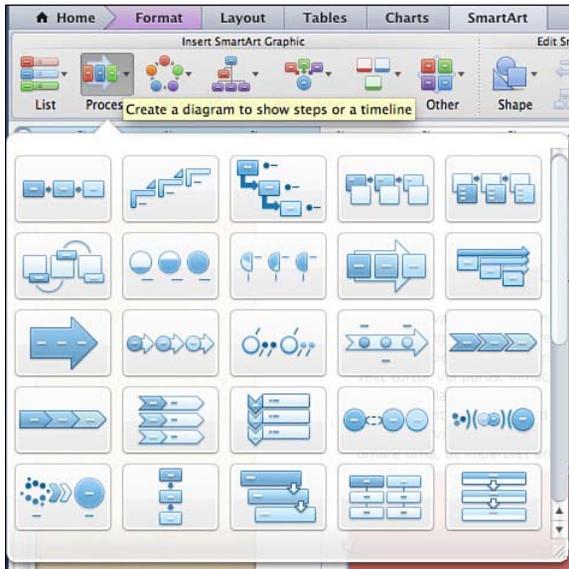


Figure 6.9 *The graphics for a process all use a linear pattern.*

3. Click the SmartArt graphic you want to insert.
4. Click a text placeholder ([Text]) and type the text you want in the placeholder. Alternatively, you can type all the text in the Text Pane. If necessary, click the Text Pane icon to open the pane shown in Figure 6.10. SmartArt automatically adjusts the size of the font to fit the drawing.

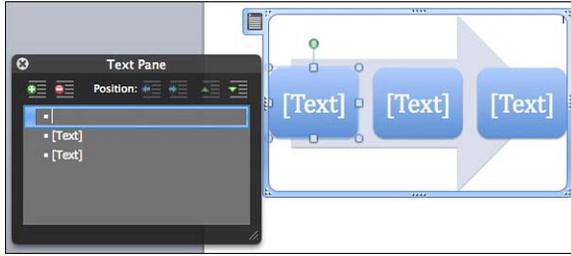


Figure 6.10 *In the Text Pane, you can add more placeholders by pressing Return.*

Modifying a SmartArt Graphic

To make modifications to the number, position, and hierarchy of the shapes that make up the SmartArt graphic, you use the Text Pane of the graphic. Remember that you can display the Text Pane by clicking the Text Pane icon in the upper-left corner of the SmartArt object. Table 6.1 lists the modifications and how to make them. To make the SmartArt modifications, click anywhere in the line of text in the Text Pane, and then click the appropriate button.

Table 6.1 SmartArt Modifications

| Action | Button |
|----------------------------|---------------------------------|
| Add a shape | Green plus |
| Delete a shape | Red minus |
| Move a shape up | Green triangle that points up |
| Move a shape down | Green triangle that points down |
| Lower the level of a shape | Blue arrow that points right |
| Raise the level of a shape | Blue arrow that points left |

Changing the Style of a SmartArt Graphic

After you insert a SmartArt graphic, if you don't like the style, you can easily change its appearance by selecting a different style. For example, Figure 6.11 shows the default graphic at the top and a different style for the graphic below it.

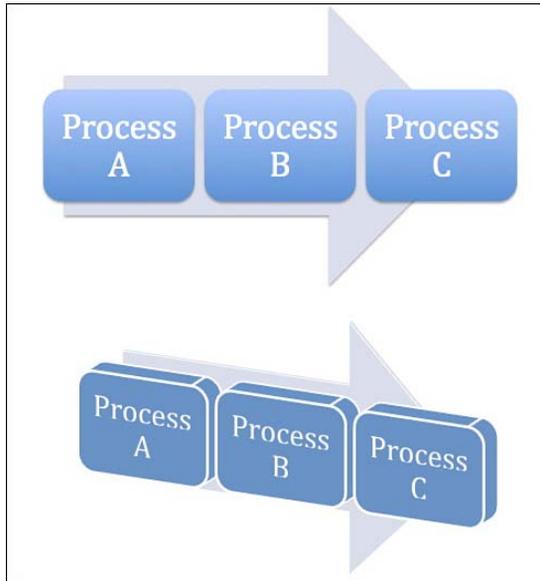


Figure 6.11 *Applying a different style to a graphic keeps the same overall design but adds different textures, dimensions, or perspectives.*



LET ME TRY IT

Changing the Appearance of a SmartArt Graphic

To change the appearance of the shapes in a SmartArt graphic, follow these steps:

1. Click the SmartArt object to select it.
2. Click the SmartArt tab on the ribbon.
3. Under SmartArt Graphic Styles, scroll the styles until you find the one you want and click it. (If you want to see all styles at once, point to the scrolling area and click the arrow at the bottom.)

Changing the Color of a SmartArt Graphic

By default, SmartArt graphics use the color scheme mandated by the theme of the template. You can override these colors by selecting a different color scheme.



Applying a Different Color Scheme to a SmartArt Graphic

To apply a different color scheme to a SmartArt graphic, follow these steps:

1. Click the SmartArt object to select it.
2. Click the SmartArt tab on the ribbon.
3. Under SmartArt Graphic Styles, click the Color button and select the color scheme you want.

Resetting a SmartArt Graphic

After making changes to colors and styles, you can reset a SmartArt graphic to its original appearance by clicking the Reset Graphic button on the SmartArt tab on the ribbon. The Reset Graphic button does not reset modifications that you have made to the graphic to add or delete shapes, move them up or down, or promote or demote them.

Inserting Media from the Media Browser

The Media Browser, a feature that works the same in Word, Excel, and Power-Point, is a palette with six tabs: Photos, Audio, Movies, Clip Art, Symbols, and Shapes. It's very simple to use. Each tab contains items that you can select and then drag into a file.

To use the Media Browser, first display it by using one of these three methods:

- Click the Media Browser button in the Standard toolbar.
- Click View on the menu bar and click Media Browser.
- Press the shortcut keys Ctrl-Command-M.

When you drag an item into a document, the item is a fixed size. No matter how small or large the thumbnails in the browser are, the items are always the same size when you drag them into the document.

Getting Acquainted with the Photos Tab

The Photos tab gives you access to the files stored in iPhoto and Photo Booth. You cannot use the Media Browser to insert a photo from any other locations. For this, you have to use the Insert, Photo, Picture from File command.

Figure 6.12 shows the Photos tab. The viewing area of the tab shows thumbnails of the graphic files, and you can show larger or smaller thumbnails (and, therefore, fewer or more) by moving the slider at the bottom of the tab to the right or left. Notice that the total number of items displays in the lower-right corner just above the slider. Because most people have scads of photos, Microsoft wisely provides a Spotlight search box in this tab so you can search for the photo or movie you want by name.

Because iPhoto and Photo Booth can contain movies, you actually can insert a movie from the Photo tab. Before inserting it, you can even play the movie to be sure it's the one you want by selecting the file in the viewing area and clicking the Play button (located to the left of the Spotlight search box).



Figure 6.12 The Photos tab of the Media Browser contains a Spotlight search box to help you locate the photo you want .

Getting Acquainted with the Audio Tab

The Audio tab gives you access to audio files stored in the default folders for GarageBand and iTunes. Additionally, it directly accesses all the playlists that you have in iTunes. Figure 6.13 shows the possibilities in the pop-up menu. If you have audio files stored in other locations, you have to insert them with the Insert, Audio, Audio from File command.

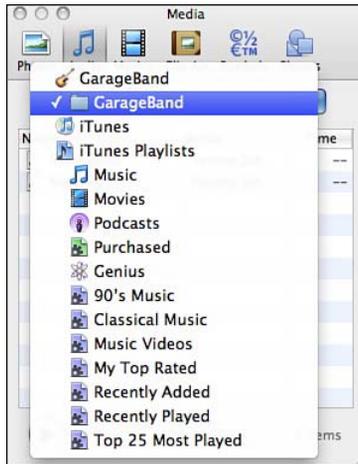


Figure 6.13 Select an option from the pop-up menu to show only the items in the selected location.

This tab uses a list to display items instead of thumbnails; therefore, it has no slider to change the size of the items in the viewing area. It has a Play button, a Spotlight search box, and it displays the total number of items in the folder.

Getting Acquainted with the Movies Tab

The pop-up menu at the top of the Movies tab gives you access to movies stored in the Movies folder, in iPhoto, Photo Booth, and iTunes. To insert a movie from any other location, you must use the Insert, Movie, Movie from File command.

The Movies tab uses thumbnails to display movies in the viewing area, and you can use the slider at the bottom of the tab to increase or decrease the size of the thumbnails. You also can play a selected movie before you drag it to a file to be sure it's the one you want. The Movies tab also has a Spotlight search box and displays the total number of items in the folder.

Getting Acquainted with the Clip Art Tab

The Clip Art tab gives you access to some of the clip art that comes with Office 2011. Using the pop-up menu, you can display thumbnails for all the clip art or individual categories, such as Animals, Business, Food & Dining, and so on. This tab has a slider to adjust the size of the thumbnails, and it displays the total number of items available.

Even better than the Clip Art tab of the Media Browser is the Clip Art Gallery. To open it, click Insert in the menu bar, click Clip Art, and click Clip Art Gallery. You can import additional files to the Clip Art Gallery.

Getting Acquainted with the Symbols Tab

The pop-up menu in the Symbols tab enables you to view all the symbols or specific categories of symbols, such as Currency, Fractions, Math, and so on. The tab has a slider to adjust the size of the symbols, and it displays the total number of items. When you drag a symbol to a Word document, Word uses the Lucinda Grande font, so if you want the symbol to match the font of the text, you will have to change the font for the symbol.

Getting Acquainted with the Shapes Tab

The Shapes tab has 160 different shapes that you can use. You can display all the shapes or select a category from the pop-up menu. Categories include Rectangles, Basic Shapes, Lines and Connectors, Block Arrows, Equation Shapes, Flowchart, Stars and Banners, and Callouts.

The Shapes tab has a slider to adjust the size of the shapes that display in the viewing area, and it displays the total number of items. It also has a Spotlight search box. For example, you might type a search phrase in the search box such as *circular*, *quad*, or *diagonal*.

Manipulating the Objects in a Publication

All professional design applications, such as Adobe Illustrator, have commands and techniques that help you manipulate objects. Office 2011 offers many of the same tools, including tools for resizing, aligning, distributing, rotating, grouping, and stacking objects.

Changing the Stacking Order of Objects

The first step in any technique that manipulates an object is to select the object. If objects are stacked, selecting an object that is behind another object may be difficult. If this is the case, you might need to change the stacking order temporarily so you can select the object you need to manipulate.

Chapter 4, "Exploring Other Features," discusses the process of changing the stacking order in reference to photographs, and it is the same process for graphic objects, but this chapter includes the steps again for your convenience.



LET ME TRY IT

Changing the Stacking Order

To change the stacking order of objects, follow these steps:

1. On the Home tab on the ribbon, click the Reorder button.
2. Drag the layer to a new position and click OK.

Resizing Objects

You probably know that you can resize an object by selecting it and dragging a sizing handle. To keep the same proportion, you hold down the Shift key as you drag a corner-sizing handle. This sort of seat-of-the-pants resizing is fine in some cases, but many times in a publication, you need to resize identical objects that must be exactly the same size. To have precise control over the size of an object, you can use the Size tool on the ribbon.



LET ME TRY IT

Changing the Size of an Object with Precise Measurements

To change the size of an object or photograph, follow these steps:

1. Select the object or photograph.
2. Click the Format tab on the ribbon for an object or click the Format Photo tab on the ribbon for a photo.
3. Under Size, enter the exact Height and Width. (Click the check box that joins the two text boxes if you want to lock the aspect ratio. By checking this box, you can enter one measurement, and Word computes the other measurement automatically to resize the object proportionally.)

Aligning Objects

If you have multiple objects on a page, such as photos or text boxes, you often need to make sure they are aligned. One way of aligning objects is to display the grid and turn on the snap to grid option. The snap to grid feature makes the

gridlines magnetic so that when you place an object, the outline of the object automatically snaps to the nearest grid.



LET ME TRY IT

Turning on the Snap to Grid Feature

To set the Snap Objects options in the Grid Options dialog box, follow these steps:

1. Select an object.
2. Click the Format tab on the ribbon and click the Align button (under Arrange).
3. Click Grid Options to open the dialog box. (Refer to Figure 6.2.)
4. Under Snap Objects, click the check box for To Grid in Publishing Layout View.
5. Click OK.

Another way to align objects is to drag ruler guides onto the page and manually align objects to the guides, but the most precise way to align objects is to use the Align command. This command provides the following choices: Align Left, Align Center, Align Right, Align Top, Align Middle, and Align Bottom. Each alignment option has a visual representation to help you select the correct alignment for the objects you are trying to align.



LET ME TRY IT

Aligning Objects with the Align Command

To align multiple objects in the most precise way, follow these steps:

1. Select all the objects.
2. Click the Format tab on the ribbon.
3. Click the Align button (under Arrange) and make sure that the Align Selected Objects option is checked. (If it isn't, check it and click the Align button again.) Then select the alignment that you want.

Distributing Objects

Distributing objects puts equal amounts of space between the objects. Let's say that you want to put three equally sized photographs on a page side by side. You

drag the first one so its left side is on the left margin, you drag the second one so its right side is on the right margin, and you drag the third one so it is in the middle, but you want the space on either side of the middle photo to be exactly the same. You can eye-ball it, but to be precise, you can use the Distribute command.



LET ME TRY IT

Distributing Objects

To distribute three or more objects equally, either horizontally or vertically, follow these steps:

1. Select at least three objects.
2. Click the Format tab on the ribbon.
3. Click the Align button (under Arrange).
4. Click Distribute Horizontally or click Distribute Vertically.

Rotating and Flipping Objects

Each object has a green rotation handle you can drag to rotate the object. The handle shows up when you select the object. As you drag the handle, the object turns in a circular motion, and a pop-up box tells you the number of degrees you have rotated the object. Additionally, you can flip an object vertically or horizontally.



LET ME TRY IT

Flipping an Object

To flip an object vertically or horizontally, follow these steps:

1. Select the object.
2. Click the Format tab on the ribbon.
3. Click the Rotate button and select Flip Vertical or Flip Horizontal.

Grouping Objects

Sometimes you might need to group several objects so they function as one object. For example, if you create a graphic of a target using layers of concentric circles, you could group all the layers so they function as one graphic. This

prevents you from accidentally moving or altering an individual object in the graphic. It also enables you to resize all the objects in the graphic at the same time and in the same proportion.



LET ME TRY IT

Grouping Objects

To group objects, follow these steps:

1. Select all the objects.
2. Click the Format tab on the ribbon.
3. Under Arrange, click the Group button and click Group.

If you need to manipulate one object in a group, you can ungroup the objects, make your change, and then group the objects again. To ungroup objects, select the group, click the Format tab, click the Group button, and click Ungroup.

This chapter looks at the Outlook Mail window. It tells you how to set up an e-mail account and send, receive, and organize your e-mail.

Using E-mail

The focus of this chapter is the e-mail component of Outlook. It covers the e-mail interface, plus how to set up an e-mail user account, view and read e-mail messages and attachments, send replies and attachments, organize messages in folders, find messages, and filter spam.

Exploring the Mail Interface

To open Mail, first open Outlook. Then, if necessary, click Mail (see Figure 7.1).

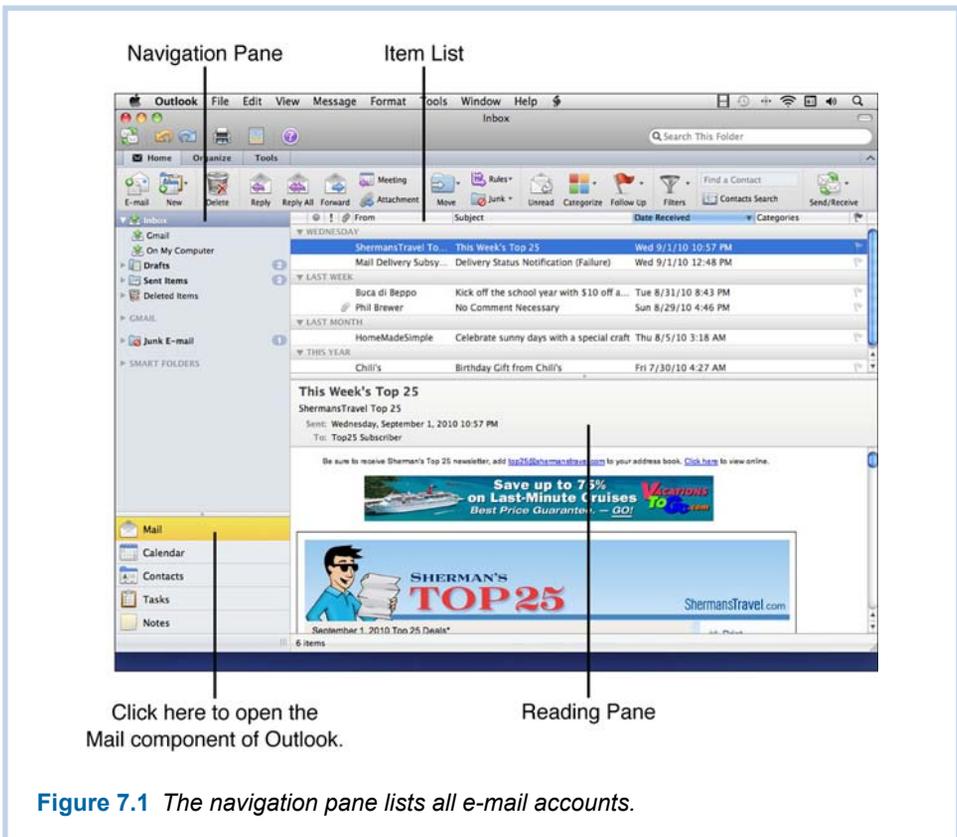


Figure 7.1 The navigation pane lists all e-mail accounts.

The Mail window has the following standard features: a title bar, a toolbar, the ribbon, and a status bar.

 To learn more about how the ribbon works, see "Getting Familiar with the Ribbon" in Chapter 1, "Getting Started with Word."

The pane on the left is called the *navigation pane*. It contains the Mail folders called Inbox, Drafts, Sent Items, Deleted Items, and Junk E-mail and the virtual folders called Smart Folders (covered in detail later in this chapter). Additional folders appear in the navigation pane if you set up certain types of user accounts. For example, if you have a Gmail account, a Gmail folder appears in the list, as shown in Figure 7.1.

The screen area to the right of the navigation pane contains the item list and the reading pane. The *item list* displays your e-mail messages, and the *reading pane* shows the content of the message that is currently selected in the item list. The reading pane can be hidden or displayed either to the right of or under the item list. Figure 7.1 shows the reading pane on the bottom (my preference because I like a wide view of the item list), and Figure 7.2 shows the reading pane on the right. (To select the view you want to use, click the Organize tab on the ribbon, click the Reading Pane button, and click Right, Below, or Hidden.)

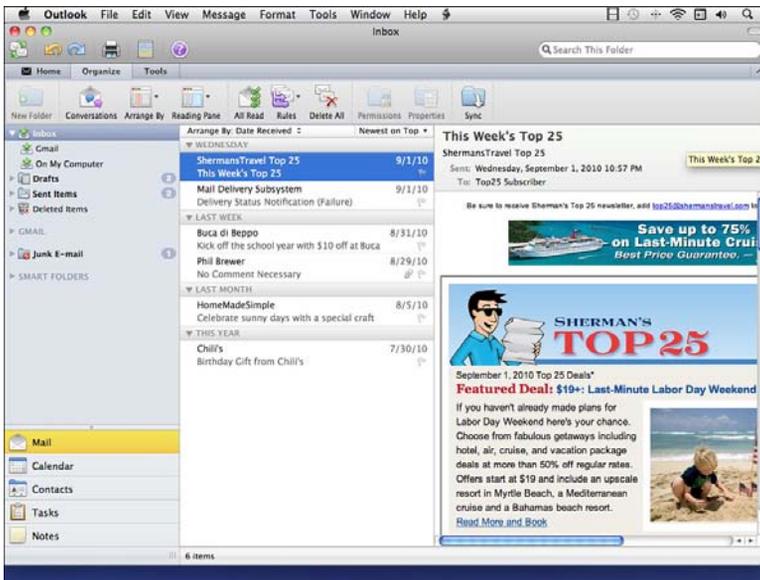


Figure 7.2 When the reading pane is on the right, you can't see as much information in the item list.

Understanding the Client/Server Relationship

E-mail is practically universal now, and it has become one of those things, like electricity, that people use without understanding how it works. For e-mail to work, two programs are required: a server application and a client application. The client application manages e-mail and is active only when a user runs it. The server application runs all the time, provides all e-mail services such as sending and receiving messages, and fills requests from client applications.

If the preceding paragraph sounds too technical and you're ready to bolt, stay with me for just a little longer. I'm making a point that will be important to you when you set up an e-mail account in Outlook.

The Microsoft client/server applications are Outlook (the client) and Microsoft Exchange Server (the server). Outlook does not actually send and receive e-mail messages in and of itself. It can only make requests to a server. A typical Outlook request of the server would be (in layman's terms) "download all new e-mail messages to me."

Although Outlook is made specifically to work with Exchange Server, it also works well with numerous other server applications. If you work at a company or organization that uses Microsoft Exchange Server, it's likely that someone has already set up your Exchange user account in Outlook for you. Otherwise, you're probably on your own. This means you'll have to set up a user account in Outlook to connect Outlook with the server application that processes your e-mail address. This might be a server application from Google, Hotmail, or a web-hosting service such as Go Daddy.



LET ME TRY IT

Setting Up an E-mail Account with Automatic Configuration

If you have an e-mail account with a major provider, such as AOL, Google, Mac, Hotmail, and so on, you can supply Outlook with your e-mail address and password, and it can usually set up your e-mail account without additional information. It knows the settings to use for these common e-mail accounts. To set up a user account for a common e-mail account, follow these steps:

1. Click Tools on the menu bar and click Accounts. The Accounts window opens. If no account has been set up yet, the window looks like the one shown in Figure 7.3.
2. Click the E-mail Account button.

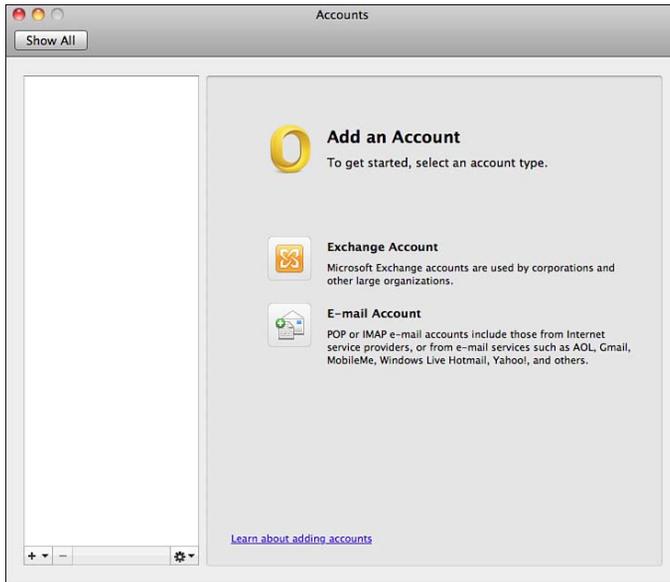


Figure 7.3 *The Accounts window lists all the e-mail accounts that you have set up in Outlook.*

3. Type your e-mail address and password and click Add Account. Outlook fills in the incoming and outgoing server names and port numbers for you, and the new account name appears in the Accounts sidebar as well as in the Outlook Mail navigation pane. Close the Accounts window.

You can set up multiple user accounts in Outlook so that e-mail from all your e-mail addresses can come to one location. To set up another account, click the plus button in the bottom-left corner, click E-mail, enter your e-mail address and password, and click Add Account.

If Outlook cannot set up the e-mail account for you automatically, you have to supply the account information yourself. You need to know which protocol your e-mail server uses (POP3 or IMAP), the names of the incoming and outgoing servers, the port numbers, and so on. This information is usually available in the Help files at the provider's website. For example, if you have your own domain hosted by 1and1.com, you can find all this information in the Support area of the 1and1 website.

Setting Up an Exchange Account

Generally, you do not have to set up an Exchange Account yourself. If you are part of an organization that uses the Exchange Server, an Exchange administrator usually sets up all the e-mail accounts. However, Outlook can configure an Exchange account automatically if you are connected to the server and can supply a minimal amount of information. To learn more about this process, listen to the audio recording I've made for you.



TELL ME MORE Media 7.1—Setting Up an Exchange Account

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

Viewing and Reading E-mail

After people know you have an e-mail address, it won't be long before you have lots of e-mail to read. Most people leave Outlook running all the time so they can check e-mail continually. If you leave Outlook open, it alerts you when you have new mail even if you aren't in the Outlook window. It plays a sound and displays a pop-up alert that tells you the name of the sender and the subject. The notification appears for only a very short time, so if you're not sitting at your computer, you'll miss it. It appears just long enough that you can click the Delete button in the notification if you know without even opening the message that you want to get rid of it.

If you'd like to modify the delivery notification, you can find the settings under Notifications and Sounds in the Outlook Preferences.

Outlook checks for new messages on a regular basis and stores your e-mail messages in the Inbox. If you want to send or receive e-mail immediately, click the Send/Receive button in the toolbar or on the Home tab on the ribbon.

The item list, where messages are listed, has the following columns of information for each message: Message Status, Priority, Attachment, From, Subject, Date Received, Categories, and Flag Status. You can change the order of the columns by dragging the column headings to different locations, and you can make a column wider or narrower by dragging the right separator of the column heading. To add or delete columns in the item list, right-click any column heading to display the list of all possible columns. Click an option to display the column and click a checked option to hide the column.

If you have the reading pane open, you can see the content of an e-mail just by selecting the message in the item list and viewing the content in the reading pane. You might have to scroll the reading pane to see all of the content though. Most of the time, I just double-click the message in the item list. The e-mail opens in a new window, as shown in Figure 7.4. Many times, you can see the entire message without scrolling this way. It's also good to use this method if you need to view the information in two different e-mail messages at the same time.

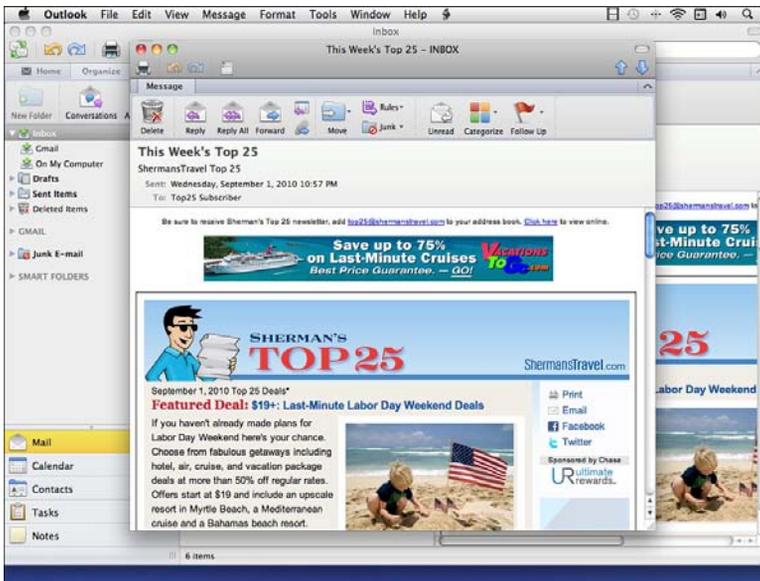


Figure 7.4 When you open an e-mail in its own window, you can move it, resize it, minimize it, and so on.

Opening and Saving Attachments

An e-mail attachment is a separate file that the sender has attached to the message. You can tell if an e-mail message has an attachment even before you open it if you are using the wide view of the item list. The Attachment column displays a paper clip if the message has an attachment. When you open an e-mail message with an attachment, you see the name of the attachment in the header, as shown in Figure 7.5. Opening the e-mail does not open the attachment. You have to open it separately by double-clicking the name of the attachment. Instead of actually opening the attachment, you can view a preview in the Mac

Previewer application. Click the Preview button beside the attachment. (The button changes to *Preview All* if the list shows more than one attachment.)

A sender can send any type of file in an e-mail message. To open the attachment and be able to read the file, you must have an application on your computer that can read the file. For example, if you receive a Photoshop file with the .psd extension, and you don't have Photoshop installed on your Mac, you cannot open the file. As I already said, a sender can send any type of file. This includes viruses, Trojan horses, and other malicious programs. Use caution when opening any type of attachment.

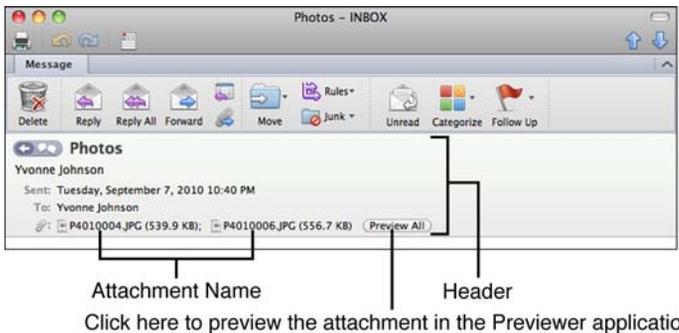


Figure 7.5 The Preview button is called *Preview All* if more than one attachment is listed in the header.



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Saving an Attachment

As long as you keep a message, you can go back to it and open its attachment. If you don't need the message any more but would like to keep the attachment, you can save the attachment and then delete the message. To save an attachment, follow these steps:

1. Right-click the attachment name and click Save As.
2. Type a new name for the attachment if desired.
3. Navigate to the location where you want to save the attachment. If you are not able to navigate, expand the dialog box by clicking the down arrow to the right of the Save As text box.
4. Click Save.

Sending Messages: The Basics

This section examines the bare bones of sending a message: creating the message, typing the message, and sending the message. The section that follows this one, "Sending Messages with Bells and Whistles," goes into more detail.

You can send an e-mail message from within Outlook in several basic ways: You can compose a new message, send a reply to a message you have received, or forward a message you have received. In all cases, Outlook saves a copy of the message that you send in the Sent Items folder, which leaves a great "paper trail" if you ever need to check on something.

At any time, when you are composing a new message, reply, or forward, you can click the Save button in the toolbar to save the message in the Drafts folder. Then you can close the message and come back to it later. To complete the message, open it in the Drafts folder and proceed as usual.

Composing a New Message

To compose a new message, click the E-mail button (the first button on the Home tab on the ribbon). A new message window opens, as shown in Figure 7.6. Fill in the header information at the top (see Table 7.1), type the message in the body area, and click the Send button. If you are connected to the Internet, Outlook sends the message to the Outbox and then sends out the message immediately. If the message is a large one that takes a while to send, you see a progress bar in the Outbox in the navigation pane. If the message is very short, you might not even see the Outbox open.

If you are not connected to the Internet when you send a message, the message goes into the Outbox, where it stays until the next time you connect. As soon as you connect to the Internet, Outlook sends the messages that are in the Outbox.

Refer to Table 7.1 for instructions on how to fill out the fields at the top of the e-mail message.

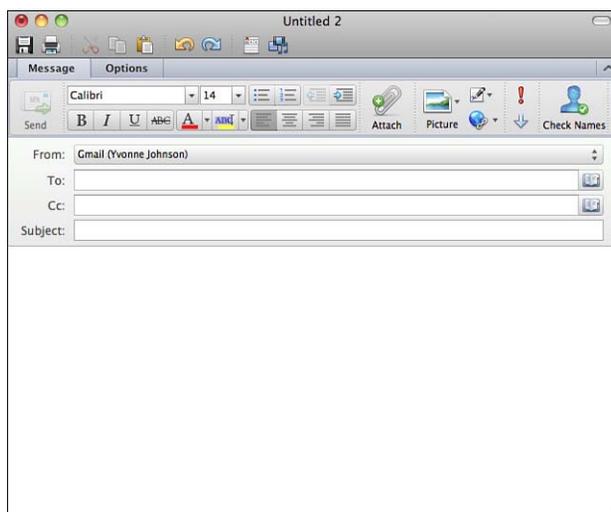


Figure 7.6 *A new message is absolutely blank (unless you have a default signature).*

Table 7.1 Filling Out Header Information

| Header Field | Instructions |
|-------------------------------|--|
| From | If you have multiple e-mail accounts in Outlook, you can select the e-mail address from which the e-mail should be sent by clicking the From pop-up button and clicking the account. |
| To, Cc (Carbon Copy), and Bcc | <p>You can type the e-mail address(es) for the recipient(s) in these fields if you know the address(es) by heart. Even if you don't quite know the complete address, if you can type the first few characters, Outlook supplies a list of addresses that start with those characters for you to select. The list comes from your Outlook contacts, the Apple Address Book (if you choose to sync it with Outlook), and from recently used addresses.</p> <p>Instead of typing, you can access your Contact list by clicking the button at the end of any address field. When the Contacts Search window opens, enter the search text. All contacts display that match the search. Select all the contacts you want to include in an address field and click the appropriate button (To, Cc, or Bcc). Continue selecting contacts and clicking the appropriate buttons. When finished, close the Contacts Search window. Note that if you click Bcc for a Contact, Outlook adds the Bcc field automatically when necessary.</p> |
| Subject | Type text in this field to give the recipient an idea of what the e-mail is about. If you don't enter a subject, when you click the Send button, Outlook confirms that you want to send the message without a subject. |

Sending Replies to Messages

When you receive a message that warrants a response, it is better to reply to the message than to create a new message. You can send the reply back to the sender only, or if the original message was sent to other recipients besides yourself, you can include those recipients in your reply.



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Sending a Reply

To send a reply to a message, follow these steps:

1. Select the message you want to respond to in the item list or open the message.
2. To send the reply only to the sender, click the Reply button on the Home tab on the ribbon. To send the reply to the sender and all other recipients, click the Reply All button in the Home tab. Outlook populates the To address field for you based on whether you clicked Reply or Reply All. Outlook also populates the Subject field with the original subject preceded by "Re" meaning "in reference to."

You can add or delete addresses in the To and Cc fields as needed.

3. Type the text of your reply at the top. The original message displays below.

If you want to quote only a portion of the original message in your reply, select that content in the original message before clicking the Reply (or Reply All) button.

4. Click the Send button when finished.

Forwarding a Message

When you forward a message, you send it to someone who did not receive the message when it went out originally.



Forwarding a Message

To forward a message, follow these steps:

1. Select the message you want to forward in the item list or open the message.
2. Click the Forward button on the Home tab on the ribbon. Outlook populates the Subject field with the original subject preceded by "FW" for "forward."
3. Specify the recipients in the To and Cc fields.
4. Type any text that you want to add in the space above the original message.
5. Click the Send button when finished.

Changing Your Mind

If you are in the middle of composing a new message, reply, or forward, and you decide you don't want to create the message after all, just click the red Close button in the upper-left corner; then click Discard Changes.

Sending Messages with Bells and Whistles

There's quite a bit more to creating an e-mail message than just typing the message. You can format the text, assign a priority level, attach files and pictures, insert your signature, and insert hyperlinks.

Like Word, Outlook checks your spelling and grammar as you type. If you want to perform an interactive spell check before you send a message, click the Spelling button on the Options tab. The Spell Checker in Outlook works very much like Word's Spell Checker.

Attaching Files and Inserting Pictures

To attach a file to an e-mail message that you are composing, click the Attach button on the Message tab on the ribbon. (It's the one that has a paper clip on it.) Navigate to the file location and double-click the filename. Using this method,

you can attach any type of file—data, photograph, video, and so on. Outlook lists the name of the attachment(s) in the header on a new line under the Subject line.

To insert a graphic file in the actual body of the message, you can open the Media Browser (View, Media Browser) and drag a photo from iPhoto or Photo Booth into the body of the message. If the photo you want to insert is not available through the Media Browser, click in the body of the message, click the Picture button on the Message tab on the ribbon, and click Picture from File. Navigate to the graphic file and double-click it.

Selecting the Message's Format

The underlying format of a message can be HTML or Plain. If you use HTML format, you can then format the text of the message, adding bold, color, and so on. If you use the Plain format, the text of the message can have no formatting.

Some e-mail servers do not accept e-mail messages in HTML format because of their potential danger.



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Selecting a Format

To select either the HTML or Plain format for a message, follow these steps:

1. Create a new message, reply, or forward.
2. In the message window, click the Options tab on the ribbon. The Format button is the first button on the ribbon, as shown in Figure 7.7.
3. Click the gray box to change the formatting. If the current formatting is set on HTML, when you click the gray box to change to Plain, Outlook warns you that you will lose any formatting that you have already applied and the action cannot be undone.

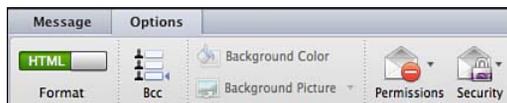


Figure 7.7 The Format button operates like a switch. When you click the gray box, it slides over.

Formatting the Text

The text formatting tools appear on the Message tab on the ribbon, as shown in Figure 7.8. Use these tools to change the character and paragraph formatting just as you would in Word.

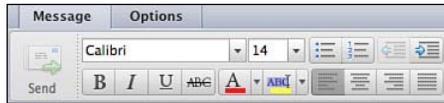


Figure 7.8 To format text, select it, and then click the button for the format you want to apply.

 To learn more about formatting techniques, see Chapter 3, "Formatting Documents."

The formatting tools are not available if you have selected Plain as the message format.

Using a Background Color

To add some color and interest to a message, you can select a color for the background of the message text (if you are using the HTML format). If you select a dark color for the background, you might want to change the font color to white or another light color that will contrast with the background color and make it easier to read.



SHOW ME Media 7.2—Applying a Background Color

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Applying a Background Color to a Message

To apply a background color to a message, follow these steps:

1. In the message window, click the Options tab on the ribbon.

2. Click anywhere in the body and click the Background Color button. The Colors window opens, as shown in Figure 7.9.

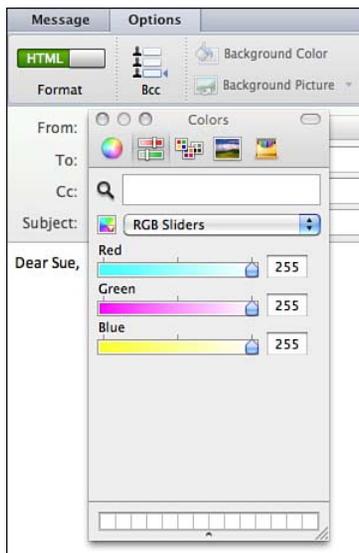


Figure 7.9 Each tab in the Colors window represents a different color model.

3. Click one of the tabs at the top of the window to provide the color model you want to use. From left to right, the tabs are Color Wheel, Color Sliders, Color Palettes, Image Palettes, and Crayons. Figure 7.9 shows the Color Slider tab.
4. Make appropriate selections for the model you selected. For example, if you select the Color Sliders, select RGB Sliders and then slide the Red, Green, and Blue sliders to mix the color that you want.
5. Close the Colors window when finished.

To ditch a background color quickly, click the Background Color button, click the Crayons tab, and click the white crayon.

Using a Background Photo or Picture

Instead of applying a color to the background of the text message, you can use a photo or picture. Again, this change is possible only when you're using the HTML format, and you might want to consider using a different color for the font.



Applying a Background Graphic

To apply a photo or picture to the message background, follow these steps:

1. In the message window, click the Options tab on the ribbon.
2. Click anywhere in the body and click the Background Picture button.
3. Navigate to the picture you want and click the Open button.

To remove a picture background, click anywhere in the body, click the Background Picture pop-up button on the Options tab of the ribbon, and click Remove.

Assigning a Priority

Assigning a priority to a message places a visual cue in the recipient's Inbox that identifies the importance level of the message. You can assign a high priority or low priority. If you assign no priority, the priority defaults to normal, and no visual cue displays. To assign a priority to an e-mail before you send it, click the appropriate button on the Message tab on the ribbon, as shown in Figure 7.10. The buttons are toggles, so if you change your mind about setting a priority, just click the same button again.

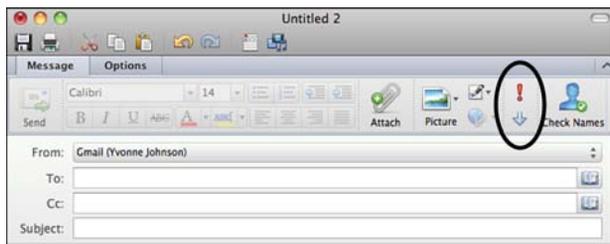


Figure 7.10 The button with the red exclamation point sets a high priority. The button with the down arrow sets a low priority.

Using Signatures

If you need to include lots of information in your e-mail signature in addition to your name, such as your office phone number, fax number, cell phone number,

and website address, you might want to create a *signature* so Outlook can insert the information for you automatically. Additionally, you can create multiple signatures to choose from in different circumstances. For example, you can have a formal signature with your full name and title and an informal signature with just your first name or nickname.



SHOW ME Media 7.3—Creating Signatures

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



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Creating Signatures

In addition to creating multiple signatures to choose from, you can create different signatures and assign them to specific e-mail accounts. To create a signature, follow these steps:

1. Click Outlook on the menu bar and click Preferences.
2. Click Signatures. The Signatures window opens.
3. Click the Plus button to add a signature. Outlook gives the signature the name *Untitled*. Click the name to select it, type a more descriptive name, and press Return.
4. Type the text that you want for your signature in the right pane.

To format the signature, select the text in the right pane, right-click it, and click Font. From there, you can select Show Fonts, Bold, Italic, Underline, Styles, and Show Colors.

5. Repeat steps 3 and 4 to add as many signatures as you need. Outlook lists each signature that you create as an option in the Signatures menu. (To access these signatures when you are composing a message, click Draft in the menu bar, click Signatures, and click the one you want to use.)
6. To set a signature as a default for an e-mail account, click the Default Signatures button, select an account, and click the pop-up button to select the signature you want to use as the default.
7. Close the Signatures window when finished.

Inserting Signatures

If you set a default signature, Outlook automatically includes the default signature each time you create a new e-mail message. If you do not specify a default signature, you can add a signature at the bottom of your message (if you choose to) by selecting the signature you want. First, position the insertion point where the signature should be, and then click Draft in the menu bar, point to Signatures, and click the one you want to use.

Thinking outside the box, you also can create "signatures" that are really boilerplate text that you want to insert in an e-mail.

Finding Messages

Before you start looking for a particular message, the most common type of message you will look for is an unread message. Outlook helps you find messages that you have not read by displaying them in bold type. Beyond that, you may think that because all your e-mail messages are contained in one place—the Inbox—it will be difficult to find anything. On the contrary, if you need to find a particular message, you can use several methods to find it. Later in this chapter, I also show you how to organize the Inbox with folders (if having everything in one place is just too much for you).

Sorting Messages

One way to find a message is to sort the Inbox. By default, the item list sorts messages by the Date Received. In this way, the latest e-mail messages that you have received appear at the top of the list. If you click the Arrange By button on the Organize tab on the ribbon and click Show in Groups, Outlook adds a header row above messages for certain time periods. Outlook lists today's messages at the top; then there is a heading row titled *Yesterday* with yesterday's messages listed under it. Additional groups have titles for the last three days of the week, Last Week, 2 Weeks Ago, 3 Weeks Ago, Last Month, and so on. You can expand or collapse each group with the reveal button on the left side of the heading row.

If you want to find messages from a particular sender, you can sort on the From column and then scan the e-mails for the sender. To sort on any column, just click the column heading. Click the column heading again to change the order of the sort (ascending to descending or vice versa). To sort by a column that does

not display in the item list, click the Arrange By button on the Organize tab on the ribbon and click the column you want to sort on. This sorts the messages but does not display the column.

Grouping Messages in Conversations

Grouping messages in conversations is a new feature in Office 2011. You might have seen this feature in Gmail or other Internet mail programs. It groups all the messages that pertain to an original e-mail message. So if you send a message to three people, and all three people send you a reply, all these messages make a conversation. As you continue to send messages back and forth on the subject, Outlook adds the messages to the conversation. When you get a new e-mail in reference to the subject, Outlook moves the entire conversation to the top of the message list.

To group by conversation, click Arrange By on the Organize tab and click Conversation. Additionally, you can click the Conversation button in the header of a message that is part of a conversation, and all the related messages are grouped with that message; however, this does not group *all* messages in the Inbox by conversation. (The Conversation button is just to the left of the Subject in the header.)

Filtering

Another way to find a message is to use a filter. When you use a filter, only messages that fit the filter specifications display in the item list. Figure 7.11 shows the filter options you can use.

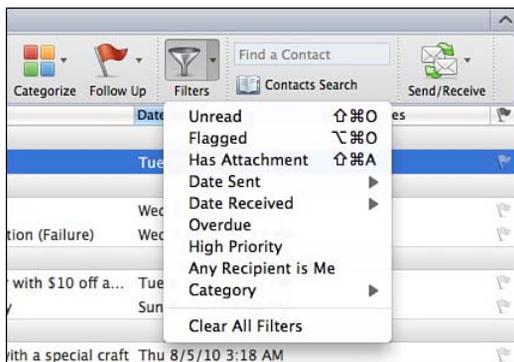


Figure 7.11 Select the Unread filter to quickly see your e-mail backlog.

Notice that one of the filters is Flagged. If you select this filter, only messages you have flagged display in the item list. You flag a message by selecting it in the item list and clicking the Follow Up button on the Home tab on the ribbon. You can select a follow-up day (Today or Tomorrow) or a follow-up time period (This Week or Next Week); select no due date; specify a custom date; add a reminder; or mark a message as complete. When a message is flagged, the gray flag in the Flag column in the item list turns to orange. Additionally, when you open or view the message, a Flag with a description displays under the header of the message, as shown in Figure 7.12.

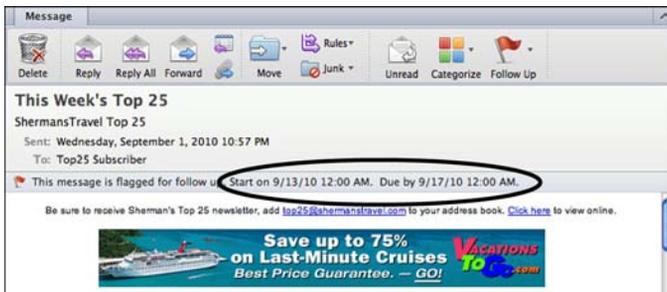


Figure 7.12 The follow-up flag that was selected for this message was Next Week. Outlook automatically filled in the correct dates.

Another filter you can use is Category. This filter displays all messages that have been categorized for the category you select. Some messages are automatically categorized if the sender of the message is in your Contact list and you have assigned a category to the contact. After you receive a message, you can categorize it yourself by clicking the Category button on the Home tab on the ribbon, and clicking the Category you want. (You can categorize any Outlook item, not just e-mail, and you can create your own categories.)

 To learn more about creating your own categories, see "Editing Categories" in Chapter 8, "Using Contacts."

After filtering messages, click the Filter button and click Clear All Filters to see all the messages in the item list again.

Searching for Messages with the Spotlight

One of the most powerful search tools you can use to find a message is the Spotlight search. To find a message, type the search text in the Spotlight search box and press Return. The search text can be any text that might appear any-

where in the message: the subject, sender, body of the message, and so on. Outlook displays all messages that contain the search text in the item list and displays the Search tab on the ribbon. When finished, click the X in the Spotlight field or click the Close button in the Search tab.

If you frequently search for messages using the same criteria, you might want to save your search criteria so you can use it repeatedly. When you save search criteria, you create a Smart Folder, a dynamic, virtual folder that is listed in the navigation pane. Any time you click the Smart Folder in the navigation pane, a new search is performed and the messages that currently meet the criteria display in the item list.

Note that Outlook provides a few Smart Folders for you by default. These are called Flagged Mail, Free Stuff, High Priority Mail, and Overdue Mail. To see the Smart Folders, you might have to click the Smart Folder reveal button in the navigation pane.



LET ME TRY IT

Creating a Smart Folder

To create a Smart Folder, follow these steps:

1. Type search text in the Spotlight search box and press Return or click one of the options that displays.
2. Click the Search tab on the ribbon. On this tab, you can click buttons to define the scope of the search (Folder, Subfolders, All Mail, All Items) and click buttons to add more search criteria. For example, click the Unread button on the ribbon to add the criteria "Read Status Is Unread." The search criteria display at the top, as shown in Figure 7.13, and messages that meet the criteria display in the item list immediately.

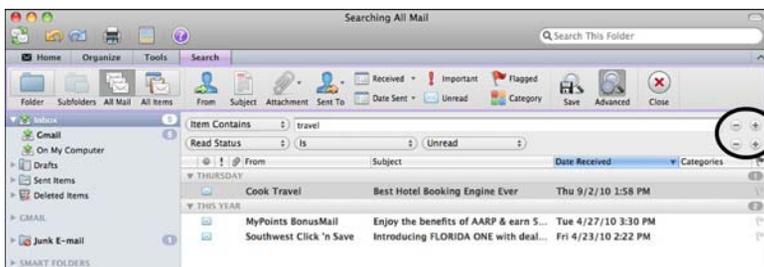


Figure 7.13 Use the plus or minus button to the right of the criteria to delete a specific criterion or add another criterion.

3. To delete a criterion, click the minus button to the right of it. To add another criterion, click the plus button and then define the specifics by clicking the pop-up buttons and selecting appropriate options. For example, to build the criterion "Cc Recipient Is Me," click Item Contains and select Cc Recipient; click Contains and select Is Me.
4. Click the Save button on the Search tab on the ribbon. The Smart Folder appears in the navigation pane with the name *Untitled*.
5. Type a name for the Smart Folder and press Return.

To delete a Smart Folder, right-click the folder in the navigation pane and click Delete; then click the Delete button in the confirmation message.

Deleting Messages

To make the Inbox more manageable, you should regularly delete unnecessary messages. Deleting a message is a two-step process. When you delete a message from the Inbox, it goes into the Deleted Items folder, from which you can retrieve the message if you change your mind. When you delete a message from Deleted Items, the message is truly deleted.



SHOW ME Media 7.4—Deleting E-mail Messages

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



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Deleting E-mail Messages

To delete one or more messages, follow these steps:

1. To select a single message, click the message you want to delete in the item list, or to select adjacent messages, click the first or last message in the block and then Shift-click the message at the opposite end of the block. To select nonadjacent messages, Cmd-click each message.

Here's where sorting can come in handy. To delete all the messages you have received from pest@spam-r-us.com, sort on the From column so all the e-mail messages from this sender appear in the item list together. Then you can easily select all of them as a block.

2. Click the Delete button on the Home tab on the Ribbon or press the Delete key. The message moves to Deleted Items.
3. To permanently delete *all* the messages in the Deleted Items folder, right-click the folder and choose Empty Folder. A confirmation dialog box opens. Click Delete. If you want to keep some messages in the Deleted Items folder for a while, you can select only the messages in the Deleted Items folder you want to permanently delete, and click the Delete button on the ribbon. Then click Delete in the confirmation message that appears.

Handling Junk Mail

Outlook has junk mail filters built in. These filters define various characteristics that junk messages generally have. When a message fits the junk e-mail profile, Outlook stores the message in the Junk E-mail folder and assigns the Junk category to the message. This keeps your Inbox much tidier. Outlook periodically tells you whether it has stored e-mail in the Junk E-mail folder and reminds you to check it—even providing a button for you to click to quickly open the folder and cycle through the e-mails to confirm them as junk.

Even when the Junk protection level is set very low, messages that *you* would not consider junk still get placed in the Junk E-mail folder if they meet the junk filter criteria. You should check this folder periodically to see whether any valid messages have made their way there. If you find a valid message, you can restore it to the Inbox easily. Select the message, click the Junk button on the Home tab on the ribbon, and click Mark as Not Junk. If too many valid messages go into the Junk E-mail folder, you might want to visit the Junk E-mail Protection options to see whether you need to make an adjustment.



LET ME TRY IT

Setting Junk E-mail Protection Options

To set your level of junk e-mail protection and specify safe and blocked domains, follow these steps:

1. Click the Junk button on the Home tab on the ribbon and click Junk E-mail Protection to open the dialog box shown in Figure 7.14.

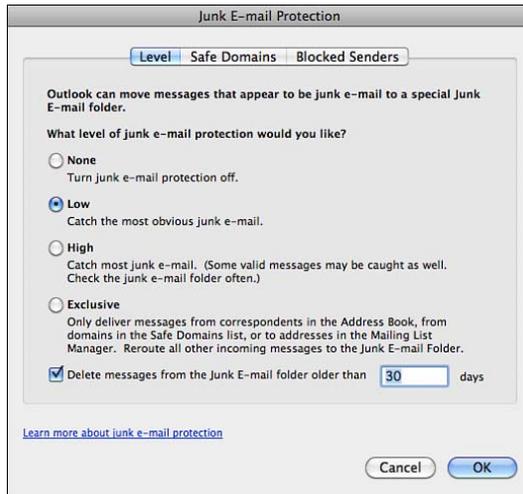


Figure 7.14 *The level of junk e-mail protection that you select determines the number of messages that will be filed in the Junk E-mail folder; it doesn't prevent you from getting the junk e-mail.*

2. Select the level of protection that you want.
3. Specify the number of days in which junk mail will be deleted, or clear the check mark for this option if you want to delete junk mail manually.
4. Click the Safe Domains tab.
5. Type the domain names from which you want to receive e-mails without treating the messages as junk. Separate each with a comma, as shown in Figure 7.15.
6. Click the Block Senders tab.
7. Type the domain names from which all e-mails should be treated as junk. Separate each with a comma.

Note that e-mail messages are not truly blocked; that is, they still come into Mail. Outlook just stores them in the Junk E-mail folder.

8. When you are finished making all settings, click OK.



Figure 7.15 *The domain names must be separated by commas.*

Working with Folders

Another way to organize e-mail messages is to create folders for them. This gives you the same type of organization you have in the Finder. You can create folders under Inbox, Sent Items, Deleted Items, and Junk E-mail. After you create folders, you can drag messages to them. Additionally, you can create rules that process your messages and send them to different folders. Creating a rule is outside the scope of this book, but if you want to try it, click Tools in the menu bar and click Rules.



LET ME TRY IT

Creating Folders in the Inbox

To create a folder, follow these steps:

1. Select the folder that will be the root of the new folder. For example, if you want to create folders for the Inbox, select one of the account folders under Inbox, such as Gmail.
2. Click the New button on the Home tab on the ribbon and click Folder, or right-click the parent folder and click New Folder.
3. Expand the account folder, if necessary, and right-click the new untitled folder. Click Rename, type the name, and press Return.

In this chapter, you learn how to create, import, sort, find, edit, delete, and categorize contacts, as well as create contact groups for mass e-mailing.

8

Using Contacts

This chapter focuses on the Contacts component of Outlook, which holds the names, addresses, phone/ fax numbers, e-mail addresses, and miscellaneous personal information for your contacts. The chapter covers adding contacts to your Address Book in many different ways; finding contacts; deleting contacts and editing contact information; editing the contact form; creating a group contact for mass e-mailing; and categorizing contacts.

Exploring the Contacts Interface

To open Contacts, first open Outlook and then, if necessary, click Contacts. The Outlook Contacts window opens, as shown in Figure 8.1. Your Address Book in Outlook is a valuable tool in and of itself, but it also works with other applications in Outlook and the Office suite to supply information when needed.

Starting at the top of the window, you find the following elements: the title bar, toolbar area, and ribbon. At the bottom of the window, you see the status bar.

 *To learn more about how the ribbon works, see "Getting Familiar with the Ribbon" in Chapter 1, "Getting Started with Word."*

Under the ribbon, on the left is the navigation pane. By default, it contains the Address Book and Smart Folders. In Figure 8.1, the Address Book is expanded to show Categories, and all the Categories are checked, which guarantees that all contacts display onscreen.

The area to the right of the navigation pane can be split either vertically, as shown in Figure 8.1 (with the item list in the middle and the reading pane on the right), or horizontally, as shown in Figure 8.2. I like the horizontal split that lists the contacts at the top and shows the selected contact in the reading pane at the bottom. Additionally, you can hide the reading pane so you can see more contacts in the item list. If you hide the reading pane, you might want to customize the headings in the item list so you can see all the information you need for each contact.

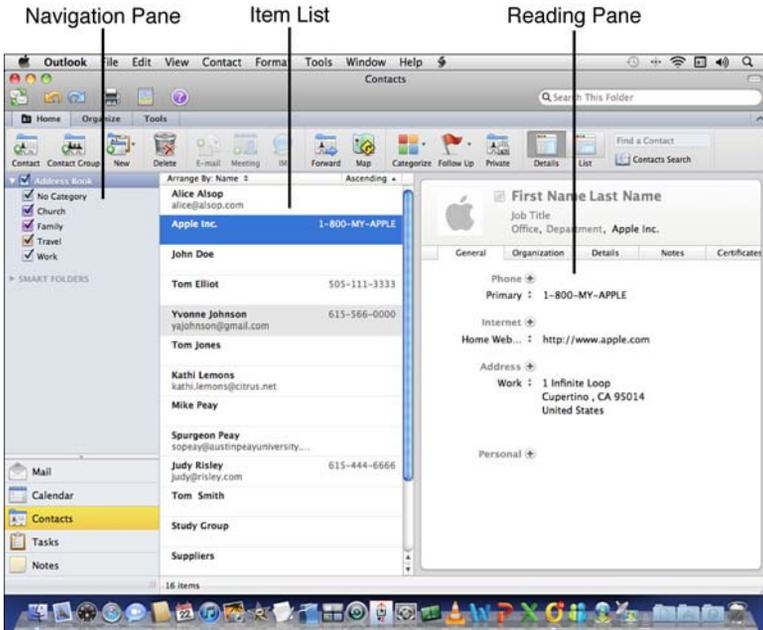


Figure 8.1 The vertical split places the reading pane on the far right.

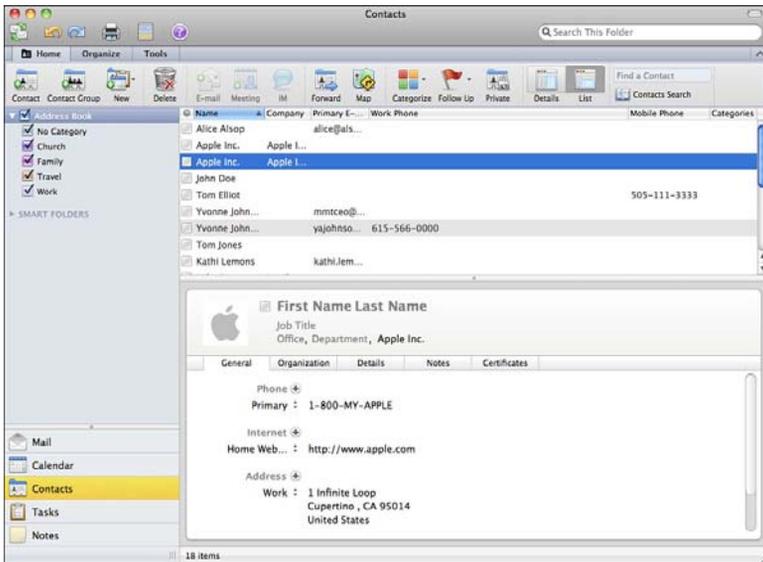


Figure 8.2 The horizontal split places the reading pane at the bottom.

To use the vertically split view, click the Details button on the Home tab on the ribbon. To use the horizontally split view, click the List button right beside the Details button. To hide the reading pane, click the Organize tab on the ribbon, click the Reading Pane button, and click Hidden.

To customize the columns that display in the item list, do any of the following:

- To display different columns, right-click any column heading and then select or deselect the headings you want to display or hide.
- To change the order of the columns, drag the column heading to the desired location.
- To change the width of the columns, drag the right border of the heading to the left or right.

Adding Contacts to the Address Book

You can add contacts to your Address Book in many different ways:

- You can use the old-fashioned method and type the contacts yourself.
- When you get an e-mail message from a sender not in your Contacts, you can easily add the sender to your list from the return e-mail address.
- You can save a vCard e-mail attachment as a Contact.
- If you use the Mac Address Book, you'll be blown away by how easy it is to get all your addresses from that application into Outlook's Contact list.
- If you are upgrading from Entourage to Outlook, you can import a file that you have exported from Entourage.
- If you are making the switch from Outlook for the PC to Outlook for the Mac, you'll be glad to know that you can import your complete Outlook Contact list via a .pst or .olm file.
- Outlook for Mac also can import contacts from other e-mail applications if the other applications can export their data as a delimited text file or an MBOX file. (You learn more about this later in this section.)



LET ME TRY IT

Adding a Contact by Typing the Information

Typing a contact's information is undoubtedly the slowest way to enter information, but many times, it's the only way. This set of instructions addresses using

only the default fields in the contact form. Later in the chapter, under "Adding and Deleting Fields on a Contact Form," you learn how to modify the fields on the contact form. To add a new contact by typing it yourself, follow these steps:

1. Click Contacts in the navigation pane if necessary.
2. On the Home tab on the ribbon, click the Contacts button or press Cmd-N. A form opens for you to fill out, as shown in Figure 8.3.

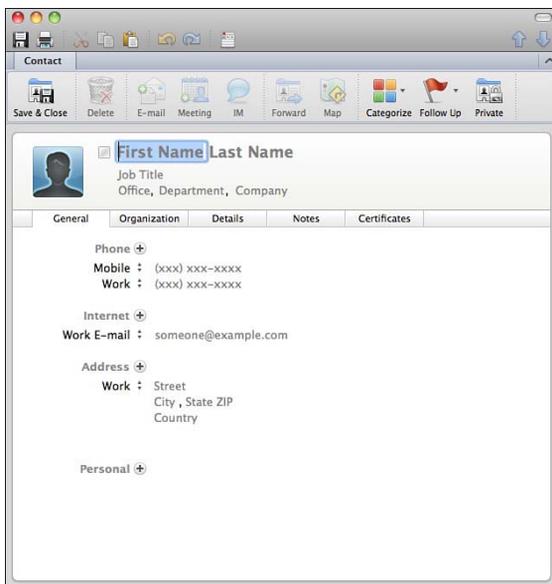


Figure 8.3 The blank contact form opens to the General tab.

3. Fill out the information by typing the text and pressing Tab to move to the next field. (You can leave any field blank.)
4. To add a photo to the contact, double-click the photo placeholder and click Choose. Navigate to the photo and double-click it; then click Set.

You also can drag a photo to the placeholder.

5. If the label for a field has a pop-up button, you can select a different label from the pop-up menu. For example, by default, Outlook displays labels for work-related information, such as Work E-mail. If the e-mail address you

want to enter is a personal one, click the label pop-up and select Home E-mail.

Changing a field label for a contact does not change the contact form for any other contacts.

6. Click the Notes tab and type any information that you want.
7. Click the Save & Close button when finished.



LET ME TRY IT

Adding a Contact from an E-mail Sender

In Outlook, if you get an e-mail message from someone you know you will continue to correspond with, it's a good idea to add that sender's name and e-mail address to your Contacts list. To add a contact directly from an e-mail message, follow these steps:

1. Right-click the e-mail message in the Mail items list, select Sender, and click Add to Contacts. The contact form opens with the name and e-mail address filled in for you.

If the message is open in its own window, point to the sender. A pop-up opens. Click the Open Contact button, which looks like a Rolodex card.

2. Enter additional information if you want and click the Save & Close button.



LET ME TRY IT

Saving a vCard as a Contact

A *vCard* is an electronic business card that can be sent via e-mail. Later in this chapter, you learn how you can send a vCard to someone else, but if *you* receive one, you can save it as a contact by following these steps:

1. Open the message that contains the vCard attachment and double-click the attachment. It opens in a contact form.

2. Enter additional information if you want and click the Save & Close button.



LET ME TRY IT

Importing Contacts from Mac Address Book

The method for importing contacts from the Mac Address Book is pure Mac; you'll love it. To import contacts from the Mac Address Book, follow these steps:

1. Select the contacts in your Mac Address Book and drag them to the Desktop. This creates a vCard file with a .vcf extension.
2. Open Contacts in Outlook.
3. Drag the file on the Desktop to the item list. The new contacts appear in the list. This is why you own a Mac!

If you want to merge all the contacts in your Mac Address Book into your Outlook list instead of selecting specific contacts, click Outlook, Preferences and open the Sync Services preference.



LET ME TRY IT

Importing Contacts from Outlook for Windows

To transfer your Outlook for Windows contacts to Outlook for Mac, you must first export the contacts on your PC. Depending on your version, Outlook for Windows exports items in a file with the extension .pst or .olm. After you create the .pst or .olm file, you must make the file accessible to your Mac so you can import the data in the file. To import from a .pst or .olm file, follow these steps:

1. In Contacts, click File on the menu bar and then click Import. A wizard opens, as shown in Figure 8.4.
2. Outlook Data File (.pst or .olm) is selected by default, so click the right arrow button at the bottom-right corner to go to the next step in the wizard.
3. Select the format that you want to import and click the right arrow button.
4. Navigate to the .pst or .olm file and click Import.
5. Click Done to close the wizard.

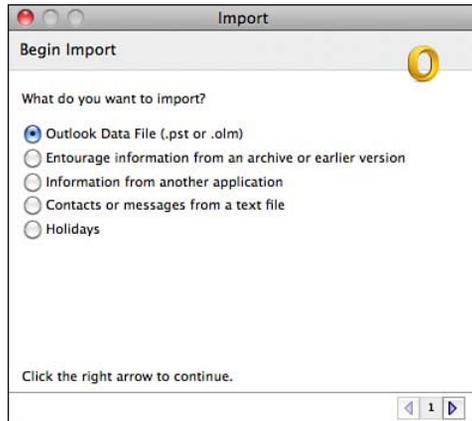


Figure 8.4 *The Import Wizard guides you through the importing process.*



LET ME TRY IT

Importing Contacts from Entourage

To transfer your Entourage contacts to Outlook, you must first export the Entourage contacts to a file. Entourage refers to exported files as identities and uses the extension `.rge`. After you create the export file, follow these steps to import the contacts into Outlook:

1. In Contacts, click File on the menu bar and then click Import to open the wizard that guides you through the process.
2. Select the Entourage option and click the right arrow button at the bottom-right corner to go to the next step in the wizard.
3. Select the correct version of Entourage and click the right arrow button.
4. Deselect the items you do not want to import and click the right arrow. (For purposes of this discussion, you might deselect all items except Contacts.)
5. Click Browse and double-click the Entourage exported file.
6. Click Done to close the wizard.



Importing Contacts from Text Files

You can import contacts from other programs, such as Gmail or Eudora, if the application is able to export its data as a delimited text file or as an MBOX file. A delimited text file has one contact per line, and each field is separated with a tab or comma. The first line in the file usually gives the field names. This is the information Outlook uses to try to map its contact fields to the incoming data. An MBOX file uses a format that was first developed for Unix systems, and it's used by Eudora. To import contacts from a text or MBOX file, follow these steps:

1. In Contacts, click File on the menu bar and then click Import to open the wizard that guides you through the process.
2. Select Contacts or Messages from a Text File and click the right arrow button in the bottom-right corner to go to the next step in the wizard.
3. Select the type of text file and click the right arrow at the bottom of the wizard.
4. Browse to the file and double-click it. The Import Contacts dialog box opens, as shown in Figure 8.5.



Figure 8.5 To map the fields, drag fields in the left pane so they line up with the fields in the right pane.

5. Outlook lists the fields that it can map to Address Book fields in the pane on the left. Make sure that the incoming fields are mapped correctly. You can drag the incoming fields up and down in the left pane to match them up

with their correct fields. When finished mapping the data, click the Import button in the dialog box. Outlook imports the data.

6. Click Finish to close the wizard.

Finding Contacts

Contacts are not too difficult to find if you don't have a lot of them. You can just scroll through them until you see the one you want. If your contact list is too large for this method, Outlook provides several methods for finding contacts.

Sorting Contacts

If you still prefer scrolling through your list, you can make things easier for yourself by sorting the list in the List view. By default, Outlook sorts on the Name column, using the last name of the contact or the company name if there is no last name. To sort on a different column, click the column heading for that field. For example, if you can't remember the name of the contact you're looking for, but you remember the company, click the Company heading to sort the contacts by company. Click the heading again to reverse the order of the sort. To sort by a field that is not represented in the item list, click the Organize tab on the ribbon and click the Arrange By button. Select a field to sort by from the list of all the fields available.

Using a Spotlight Search

Another method of finding a contact is to use a Spotlight search. To find a particular contact, type the search text in the Spotlight search box on the right side of the toolbar and press Return. (You can search for text that appears in any part of the contact.) Outlook displays all contacts that contain the search text and switches to the Search tab on the ribbon.

If you perform an advanced Spotlight search, you can specify additional criteria and even save the search as a Smart Folder to be used repeatedly. To hear more about advanced searches, listen to the following audio recording.



TELL ME MORE Media 8.1—Performing Advanced Searches

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

Using Contacts Search

The Contacts Search is similar to a Spotlight search, but this method searches for data in only the first name, last name, title, department, company, or e-mail address fields. So if you don't know any information in any of these fields, and you enter the work address as the search string, this search will come up empty.



LET ME TRY IT

Finding a Contact with Contacts Search

To use Contacts Search, follow these steps:

1. Click the Contacts Search button on the Home tab on the ribbon. The Contacts Search window opens.
2. Begin typing the name, title, department, company, or e-mail address. Outlook displays the contacts that contain the search text in one of these fields.
3. You can limit your search further by clicking the pop-up buttons under the search box, as shown in Figure 8.6. The default for the first criterion is All Fields, but this refers only to the first and last name, title, department, company, or e-mail address. Changing this criterion to Search Names Only limits the search to the first and last name fields. The second criterion defaults to All Folders, and this includes the Global Address List (GAL) if you have a Microsoft Exchange account. If you have created other folders for Contacts, you can select the folder from this pop-up list.
4. When contacts that contain the search text display, you can open the one you want by double-clicking it. Additionally, if the contact has an e-mail address, two buttons appear under the contact information in the search results. You can use these buttons to send an e-mail or a meeting request to the contact.
5. Click the Close button in the Contacts Search window when finished.

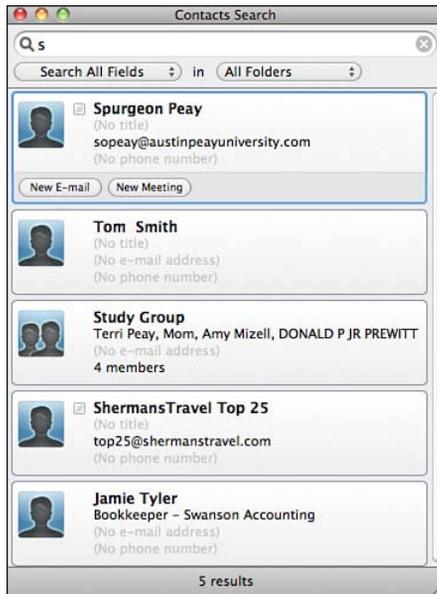


Figure 8.6 *The two buttons under the Spotlight search box add additional criteria to the search.*

Communicating with Contacts

The Contacts application is not just the repository for your contacts; it is also an application that can reach out and touch contacts in many different ways. Using the Contact menu or the buttons on the Home tab on the ribbon, you can communicate with a contact via e-mail, a meeting invitation, or instant message.

If you hide the reading pane or display it under the item list, you have access to the Online Status column in the item list. When you click the box in this column, you see the pop-up shown in Figure 8.7. The buttons along the bottom of the pop-up enable you to send an e-mail, send an instant message, make an audio call to the contact, make a video call to the contact, send a meeting invitation, or open the contact.

To send an instant message, make an audio call to the contact, or make a video call to the contact file, you and the contact must be signed into Messenger or Communicator.

Additionally, if you have an account on an Exchange Server, a new feature in Office 2011 for Mac called *Presence* retrieves and displays information about the contact from the contact's calendar. If the contact is diligent about keeping his or her calendar up-to-date, you can see if the contact is busy and what time the contact will be free.



Figure 8.7 *If you are not using an Exchange account, this pop-up displays "Presence Unknown" for every contact.*

Editing and Deleting Contacts

When the data for a contact changes, you can edit the contact in your Address Book so it's current. If you no longer want to keep a contact in your Address Book, you can delete it.

One of the first contacts you should edit is the contact that Outlook automatically creates for you. To open this contact, click View in the menu bar and click Me Contact.



LET ME TRY IT

Editing Contact Information

To edit the information in a contact, follow these steps:

1. Open the contact by double-clicking it in the item list.
2. Use the same steps as you would to create a contact; that is, tab to a field and type the data. If a field has data in it, the new data overwrites it. If you want to edit a field that has data in it, and you don't want to tab to it, triple-click the field to select all the data and then type the new data.

3. Click the Save & Close button on the Home tab on the ribbon when finished.

Additionally, you can select a contact in the item list and make modifications directly in the reading pane.



LET ME TRY IT

Deleting a Contact

To delete a contact, follow these steps:

1. Select the contact(s) in the item list.

Use the Shift-click method to select adjacent contacts or the Cmd-click method to select nonadjacent contacts.

2. Click the Delete button on the Home tab on the ribbon. Outlook asks if you are sure you want to delete.
3. Click Delete.

Editing the Contact Form

Outlook limits your ability to make changes to the contact form itself. As previously explained, you can change some field labels, but you cannot change the location of the fields on the form, change the fonts, add informational text, and so on. You can, however, add or delete fields on a form for a particular contact.



SHOW ME Media 8.2—Adding and Deleting Fields on a Contact Form

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Adding and Deleting Fields on a Contact Form

Fields under the header are listed in categories (Phone, Internet, Address). You can add or delete fields in each category as needed. To modify the fields in a category, follow these steps:

1. Open the contact.
2. To add a field, click the plus button next to the category and select a label.
3. To delete a field in a category, point to the field and then click the minus button that appears to the left of the field.
4. When finished, click the Save & Close button.

Sending an Electronic Business Card

As mentioned earlier in this chapter, a vCard is an electronic business card. Sending a vCard is similar to handing out a printed business card, but much better because it can hold more information than a little 2-inch x 3.5-inch business card. In Outlook, you can pass out your own contact as an electronic business card, but you also can send a business card for any other contact in your list. For example, your friend says to you, "The price of ink cartridges is killing me. Do you know where I can get them cheaper?" You can send your friend a vCard for your *cheapest-ink-prices-in-the-known-universe.com* contact.

Before forwarding contact information as a vCard, you might want to review the contact to make sure there is no information included that you would not want to pass along.



LET ME TRY IT

Sending Contact Information as a vCard

To send a vCard, follow these steps:

1. Select the contact(s).
2. Click the Forward button on the Home tab on the ribbon. A new e-mail message opens with a vCard as an attachment, as shown in Figure 8.8.

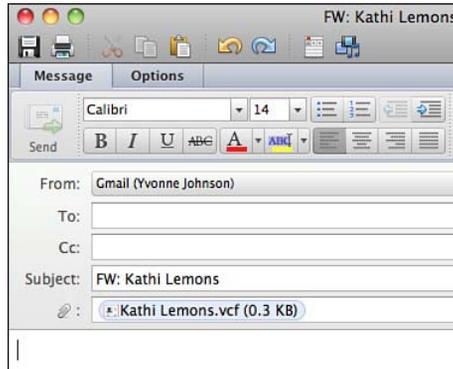


Figure 8.8 Outlook fills in the subject of the e-mail with FW (for Forward) and the name of the contact.

3. Fill out the address information for the recipients, type the message, and click the Send button.

Sending Mass E-mails

Most people find that at least occasionally they need to send an e-mail message to a large group of recipients. This is referred to as a *mass e-mail*. If you frequently send out mass e-mails to the same recipients, you can save yourself some time by creating a group that contains all the e-mail addresses. The group appears as a single entry in the Address Book.



SHOW ME Media 8.3—Creating a Contact Group

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Creating a Contact Group

Contact groups can contain members that you do not have contacts for, as well as members that come directly from your Address Book. You can create multiple contact groups, an individual contact can be in more than one contact group, and a contact group can contain a contact group as a member. To create a contact group, follow these steps:

1. Click the Contact Group button on the Home tab. The contact form opens.

2. Type a name for the group and press Return.
3. If the recipients in the group do not know each other, check the box for Use Bcc to Hide Member Information. When this option is checked, Outlook automatically places all the recipients' names in the Bcc field so each recipient cannot see the addresses of the others who also receive the message.

As far as I'm concerned, using Bcc is not optional if the members of the group do not know each other; it's required. It's a protection of privacy that you must extend to the recipients in the group.

4. Click the Add button on the ribbon or double-click the instruction that says, "Double-click to add."
5. To add a name that is in your contact list or from which you have sent or received an e-mail message, just begin typing the name. Outlook displays names and e-mail addresses that contain the text you have typed. Click the one in the list that you want to add.

To add a name from your Address Book, if the name is visible behind the group contact form, just drag it into the list.

6. To add a name and e-mail address for a contact that is not in your list and you have never corresponded with, type the full name, tab to the address field, type the e-mail address, and press Return.
7. Repeat steps 5 and 6, as needed, to continue adding names to the group. Figure 8.9 shows a group contact form in progress.
8. To delete a name in the group, click the name and then click the Remove button on the ribbon.
9. Click in the Notes field and type any text you want. This might be information that tells you what kind of message to send and how often to send it.
10. When finished, click the Save & Close button on the ribbon.

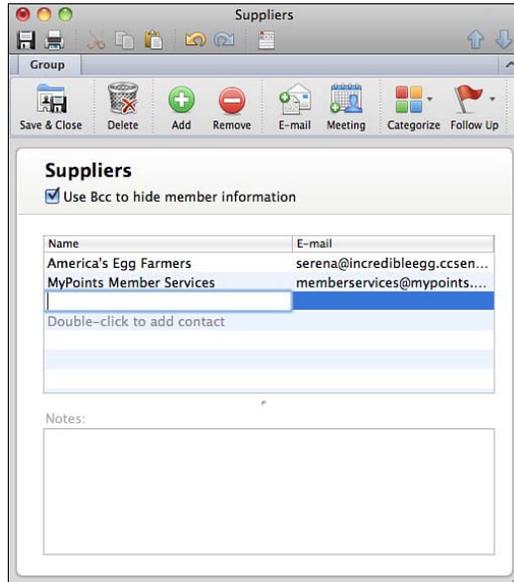


Figure 8.9 *The contact group form accepts as many e-mail addresses as you need to add.*

To use the group contact, simply select the group contact in the contact list and click the E-mail button on the Home tab on the ribbon. If you are in the Mail application, you can open a new message form and select the group contact as a To, Cc, or Bcc address just as you would any other recipient. Selecting the group contact for the To or Cc fields overrides the Bcc setting you might have set when creating the group. (See step 3 in the preceding "Let Me Try It.")

Categorizing Contacts

Outlook provides the following categories you can use to bring another level of organization to your contact list: Family, Friends, Holiday, Junk, Personal, Recreation, Travel, and Work. If you do not assign a category to a contact, Outlook automatically assigns a category called No Category to the contact. Categorizing contacts enables you to view the contacts in different ways. See "Viewing Contacts by Category" later in this chapter.

Editing Categories

If you need additional categories, you can create your own. You also can delete the categories you don't want—even most of the default categories that Outlook

supplies for you. (You cannot delete the Junk or Holiday categories, however, because they serve special purposes.)



SHOW ME Media 8.4—Adding and Deleting Categories

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Adding and Deleting Categories

To add or delete a category, follow these steps:

1. Click the Categorize button on the Home tab on the ribbon and click Edit Categories. The Categories Preferences window opens, as shown in Figure 8.10.

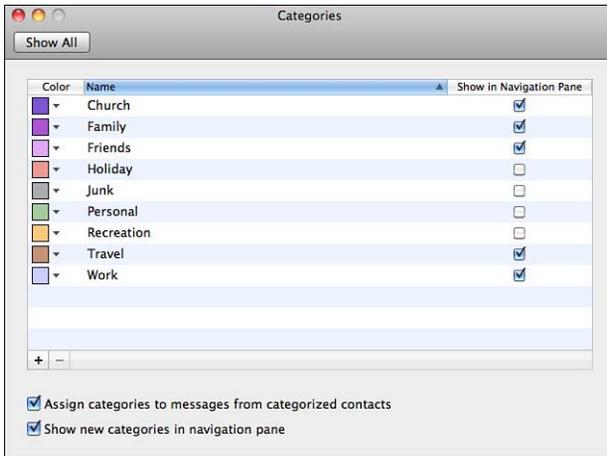


Figure 8.10 Notice that you can determine which categories show in the navigation pane.

2. To add a new category, click the plus button at the bottom of the list of categories, select a color for the category, type the name of the new category, and click OK. The new category appears in the list, and Outlook automatically checks the box for Show in Navigation Pane.
3. To delete a category, select the category in the list, click the minus button at the bottom of the list, and click Delete.

4. Close the window when finished.

Assigning and Removing Categories

When you assign a category to a contact, the contact displays in the item list in the color that is associated with the category. If you assign multiple categories to a contact, the contact displays in the color associated with the last assigned category.

When you get e-mail from a contact that you have categorized, Outlook automatically assigns the same category or categories to the e-mail messages and displays them in the appropriate colors.



LET ME TRY IT

Assigning a Category to a Contact

To assign a category to a contact, follow these steps:

1. While creating a new contact or editing an existing contact, click the Categorize button on the Home tab on the ribbon and click the category you want to assign.

You also can select multiple contacts in the item list and assign the same category to all of them at once by clicking the Categorize button and clicking a category.

2. Repeat step 1 as many times as you need to assign additional categories.

You can create a new category and assign it to a contact simultaneously. Just select the contact, click the Categorize button, click Add New, type the name, and click OK.



Removing a Category from a Contact

To remove a category from a contact, follow these steps:

1. Select the contact.
2. Click the Categorize button on the Home tab on the ribbon and clear the check for the assigned category. Repeat this step to remove other categories for the same contact.

If you have assigned more than one category to a contact, and you want to delete all of them at once, click the Categorize button and click Clear All.

Viewing Contacts by Category

You can use categories in two ways to change the view of your contacts. You can view contacts in category order or view only the contacts for particular categories.

To view all contacts in category order, click the Organize tab, click Arrange By, and click Categories. The contacts display in the item list in category order with uncategorized contacts listed at the bottom.

To view the contacts in specific categories, turn your attention to the navigation pane. Expand the Address Book item, if necessary, deselect the categories you don't want to see, and select the ones you do want to see. (*Hint:* To deselect all the categories at once, deselect Address Book.)

Printing the Address Book

If you're going to be away from your computer and have limited access to the Internet (going on a *real* vacation, in other words), you might want to take a print-out of your most important contacts with you. You can print contacts using either an address book format or a phone list format.



Printing a Contact List

To print contacts, follow these steps:

1. Select the contacts you want to print if you don't want to print your entire list.
2. Click the Print button in the toolbar or press Cmd-P. The Print dialog box opens, as shown in Figure 8.11.

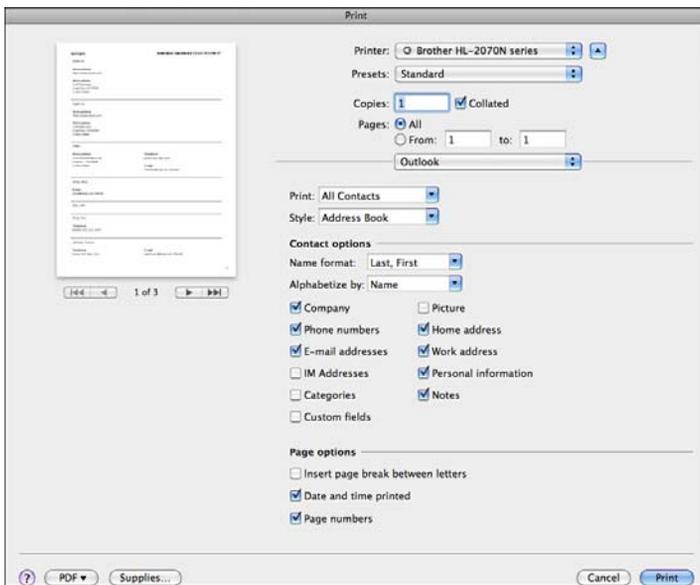


Figure 8.11 The preview pane on the left shows how the contacts will look when printed.

3. Select the printer you want to use. Then set all other printer-related options at the top of the dialog box and set all Page Options at the bottom of the dialog box.
4. Under Outlook, select Selected Contacts, All Contacts, or Flagged Contacts for Print, and select Address Book or Phone List for Style.
5. Select the desired options under Contact Options.
6. Click Print.

Using Folders

If you want to create separate contact lists, you can create folders for them and add new contacts or move or copy existing contacts from the Address Book into the new folder. When you create a folder, it appears in the navigation pane under On My Computer.



LET ME TRY IT

Creating Folders for Contacts

To create a folder, follow these steps:

1. Click File on the menu bar and click New, Folder. A new Untitled Folder appears in the navigation pane under On My Computer.
2. Type the name for the new folder and press Return.

To add a new contact to a folder, select the folder in the navigation pane, click the Contact button on the Home tab on the ribbon, and proceed as usual. To move an existing contact into a folder, drag the contact from the item list and drop it on the folder name in the navigation pane. To copy an existing contact to a folder, press the Option key as you drag the contact from the item list to the name of the folder in the navigation pane. Be advised that changes you make to one copy of a contact do not pass through to the copy of the contact that exists in a different folder.

This chapter shows you how to navigate in the calendar, create and edit appointments, and print the calendar.

Using the Calendar

The Outlook calendar is one of the primary components of Outlook. In this chapter, you can explore the different calendar views and learn to navigate the calendar; create recurring and nonrecurring appointments and events; send meeting requests; search for appointments; and edit, delete, and print appointments. Also in this chapter, you learn about the feature called My Day.

Exploring the Calendar Window

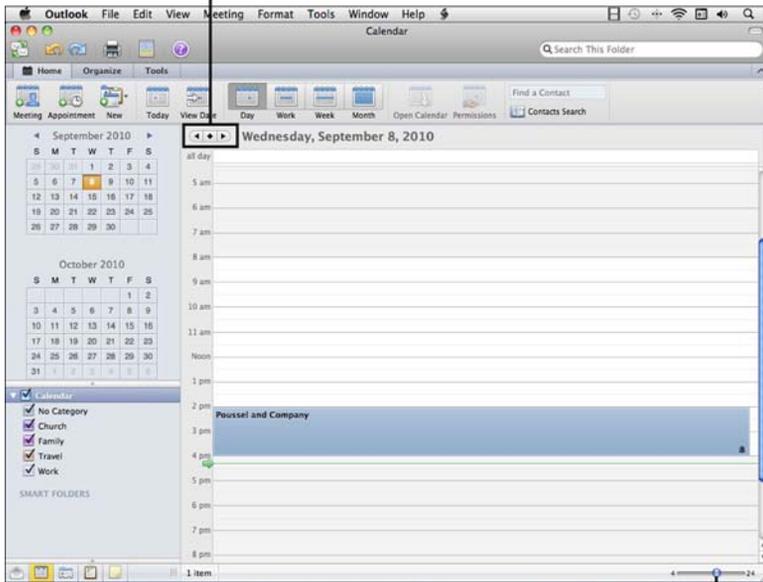
To open the Outlook calendar, first open Outlook and then, if necessary, click Calendar in the navigation pane. Figure 9.1 shows the Calendar window, and you can see that it has the menu bar at the top, then the title bar, a toolbar under the title bar, and then the ribbon. The status bar is at the bottom of the window. The calendar window uses two panes: the navigation pane on the left and a pane on the right that displays different views of the calendar.

 *To learn more about how the ribbon works, see "Getting Familiar with the Ribbon" in Chapter 1, "Getting Started with Word."*

The navigation pane has three sections that you can resize. At the top is a section for a mini calendar. In the middle is the folder list, and the buttons for the Outlook components are at the bottom. I like to drag the Outlook buttons down so they occupy only one line at the bottom of the navigation pane. This gives me more room to display two mini calendars at the top, as shown in Figure 9.1.

Unlike all other components of Outlook, the calendar does not use a reading pane. The area to the right of the navigation pane can display a grid or list. In the grid view, the calendar displays a calendar for the day, a work week, a seven-day week, or a month. In the list view, the calendar displays an item list. To choose between a grid view and list view, click the Organize tab on the ribbon and click the Grid button or List button.

Navigation Buttons



Slider That Adjusts the Timeslots
Drag here to resize the section.

Figure 9.1 In this window, the navigation pane has been customized to show two mini calendars, and the pane on the right is in the grid mode, showing the day view.

Viewing and Navigating the Calendar

The calendar has more views than any other Outlook component. The different views of the calendar show different time periods so you can view your calendar for a single day or see the big picture and view an entire month. Each view has navigation tools that can take you to specific dates.

Changing the View

If you have selected the grid view, you can then specify the time period you want to view in the right pane. To select a view, click the appropriate button on the Home tab on the ribbon: Day, Work, Week, or Month. Regardless of what view you choose, the date for "today" is always orange.

The day view, shown in Figure 9.1, shows timeslots for a single day. You can make the timeslots taller or shorter by dragging the slider in the bottom-right corner. The green arrow with the green line shows the current time of day.

By default, the work view displays only five days, Monday through Friday. It has timeslots for 24 hours, but it differentiates the work hours by shading all the timeslots before 9:00 a.m. and after 5:00 p.m., as shown in Figure 9.2. It also has a slider to adjust the size of the timeslots.

You can customize the work view so it reflects your own work schedule. At a minimum, the view displays five days, even if you work only four days. Additionally, if you work at least one day on the weekend, the view displays all seven days. The view shades all the days and hours you don't work, but these days and hours are still available for scheduling, of course.

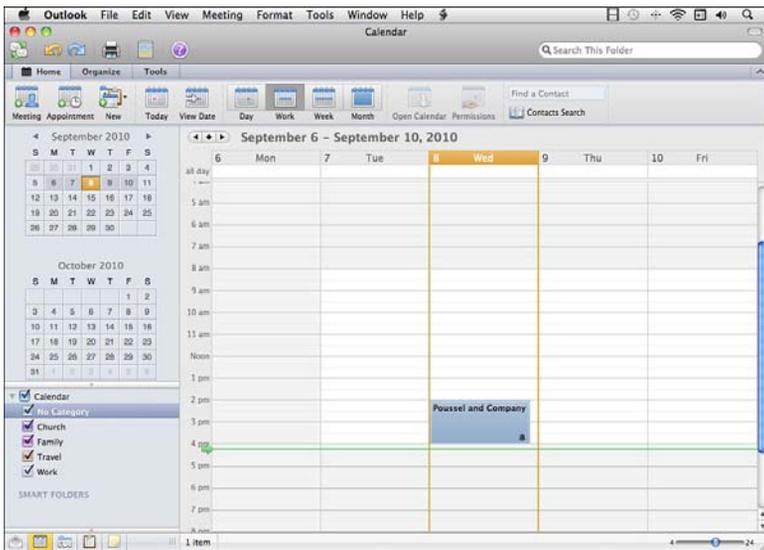


Figure 9.2 In the work view, each timeslot that represents an hour that you work uses a white background.



SHOW ME Media 9.1—Customizing the Work View

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



Customizing the Work View

To select different days for the work week, follow these steps:

1. Click Outlook on the menu bar and click Preferences.
2. Click Calendar in the bottom row. The Calendar Preferences window opens.
3. Enter the correct times for Work Day Starts and Work Day Ends.
4. Click each day you want to see in the Work Week, as shown in Figure 9.3, and close the window.

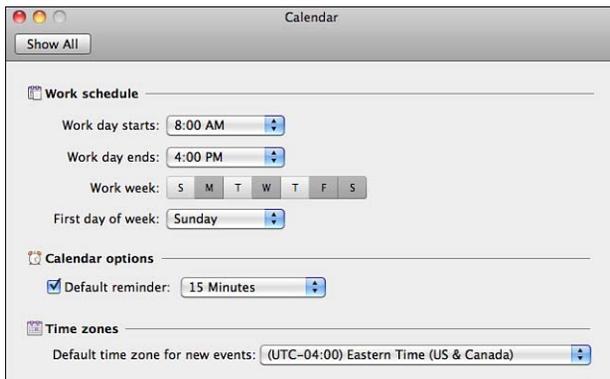


Figure 9.3 You can select the days that you want to show in the work view. Monday, Wednesday, Friday, and Saturday are chosen here.

The week view is similar to the work view, but it displays all seven days of the week. It also shades the nonwork hours based on the settings in the Calendar Preferences and has a slider to adjust the size of the timeslots.

The month view, shown in Figure 9.4, displays five weeks. The dates for the previous month and next month that happen to display in the calendar are light gray.

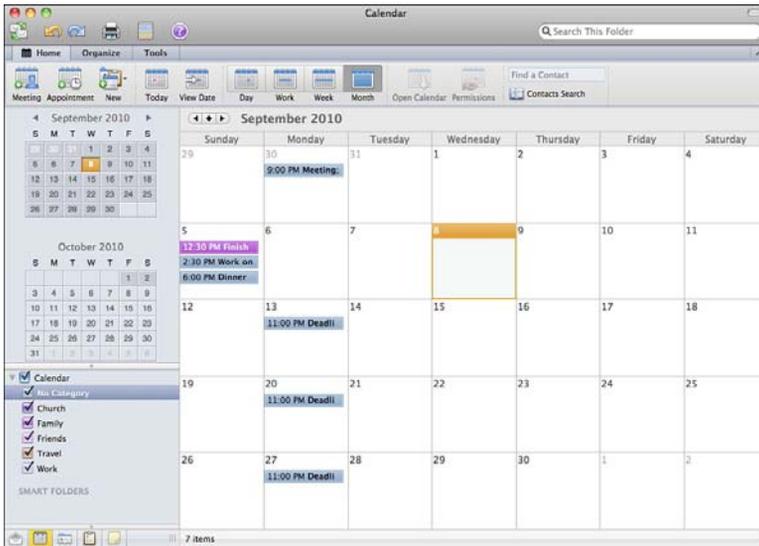


Figure 9.4 *The month view always shows 35 days, so the last days of the previous month and the first days of the next month could both display in this view.*

Navigating

Outlook provides many different navigation tools to help you move around in a calendar. Generally, each view has tools that scroll a calendar and tools that go to a specific date.

Using the Mini Calendar

The mini calendar at the top of the navigation pane is good for reference, but it is also a navigation tool that will take you to a specific date in the right pane. To go to a specific date in the right pane, click the desired date in the mini calendar. (To scroll the mini calendar to the next or previous month, click the arrow buttons to the right or left of the month name.) If you scroll through the months in the large calendar, the mini-calendar scrolls in sync.

Today's date is always orange in the mini calendar.

Going to a Specific Date

The Home tab on the ribbon provides two buttons for going to a specific date: Today and View Date. When you click the Today button, today's date becomes visible in the right pane in whatever view you are using, with the possible exception of the work view. (The work view cannot display a day that is not in its default view.) When you click the View Date button, this month's calendar displays in a pop-up window, and you can click the day you want to display or scroll the calendar and then click the day. The date becomes visible in the right pane in whatever view you are using, again with the possible exception of the work view.

Navigating in a View

Each view has its own navigation buttons in the upper-left corner (refer to Figure 9.1). The three buttons are (from left to right) Previous, Today, and Next. They function differently according to the view. For example, if you are looking at the month view, Previous and Next scroll a month at a time. If you are looking at the week view, the Previous and Next buttons scroll a week at a time.

Creating Appointments and Meetings

Your Outlook calendar is the repository for two types of events that you can schedule: appointments and meetings. The words *appointment* and *meeting* are synonymous in most people's minds, but Outlook defines a meeting as an event that involves inviting other people and reserving resources, such as a conference room or equipment. Outlook defines an appointment as an event that doesn't involve inviting other people or reserving resources.

Note that you cannot sync the Outlook calendar with iCal or Cal-DAV, so all appointments must be created within Outlook.

Creating a One-Time Appointment

Some appointments are one-shot deals, and others occur over and over again. Say you have an appointment with a body shop to get an estimate for repainting the left side of your new car after it was keyed in the parking lot. This is an example of an appointment that you hope never occurs again, so it's a nonrecurring appointment.



SHOW ME Media 9.2—Creating a Nonrecurring Appointment

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Creating a Nonrecurring Appointment

To create an appointment on your Outlook calendar for an appointment that occurs only once, follow these steps:

1. In day, work, or week view, go to the date on the calendar on which the appointment will occur and double-click the time the appointment will start. A new appointment form opens, and the Starts date and time are filled out for you, as shown in Figure 9.5.

The screenshot shows the Outlook Appointment form. The window title is "Untitled 2 - Appointment". The ribbon shows the "Appointment" tab with buttons for "Save & Close", "Delete", "Invite", "Reminder: 15 Minutes", "Recurrence", "Time Zone", "Categorize", and "Private". The "Status" is set to "Busy". The "Subject" and "Location" fields are empty. The "Starts" field is "9/24/2010 8:00 AM" and the "Ends" field is "9/24/2010 8:30 AM". There is an "All day event" checkbox and a "Duration: 30 Minutes" dropdown.

Figure 9.5 The new appointment form is blank if you just click the Appointment button on the Home tab on the ribbon instead of double-clicking a specific time on the calendar.

Instead of going to the date on the calendar, you can just press Cmd-N or click the Appointment button in the Home tab of the ribbon and specify the Start date and time yourself. I prefer to go to the date on the calendar before creating the appointment so I can see if the timeslot is open. Outlook doesn't warn you if there is a scheduling conflict.

2. Type a name for the appointment in the Subject field and press the Tab key.
3. If needed, type the address or a general description of the location, such as *The Baxter Room*.
4. Click the pop-up button for Duration and select the amount of time that the appointment will take. The Ends time updates to reflect your selection. Or you can set a specific Ends time, and the Duration reflects your selection.
5. Click the Status pop-up button and select the status that you want your calendar to show while you are at this appointment. (If you are using an Exchange e-mail account, people who are trying to set up a meeting can view this information to see whether you are available.)
6. Click the pop-up button for Reminder and select a reminder that gives you a little more notice than the default 15 minutes, or select None if you don't want a reminder.

You can change the default reminder time by clicking Outlook, Preferences, Calendar. Set the reminder time and close the window.

7. Click in the whitespace at the bottom and type additional information about the appointment.
8. If the appointment occurs in a different time zone, click the Time Zone button to add the Time Zone field to the appointment. Then click the pop-up button in the new field and select the time zone. Outlook posts an alert in the saved appointment to tell you what time the meeting starts in your home time zone.
9. Click Categorize and select a category if desired.
10. Click the Save & Close button.

Creating a Recurring Appointment

Now say you have an appointment on Friday to have dinner at one of your favorite restaurants with your sweetheart. This is the kind of appointment you might like to have every Friday. This is called a recurring appointment.



SHOW ME Media 9.3—Setting a Recurring Appointment

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LET ME TRY IT

Setting a Recurring Appointment

To set an appointment that will occur repeatedly in a definite pattern, such as the first day of every month, follow these steps:

1. Create a new appointment as instructed in the preceding set of steps, but don't save and close the appointment.
2. Click the Recurrence button and select a recurrence period, or click Custom to open the dialog box shown in Figure 9.6, define a more specific recurrence period (such as every 2 weeks), and click OK. Outlook displays the recurrence period on the last line of the appointment's header below the Ends and Duration fields. (Figure 9.5 shows the header.)

The screenshot shows a dialog box for setting a recurrence. At the top, it says "Repeats: Weekly" with a dropdown arrow. Below that, "Every: 1 week(s)" has a text input field with "1" and "week(s)". The "On:" field shows a row of seven boxes: "S", "M", "T", "W", "T", "F", "S". The "Start date:" is "9/24/2010" with a calendar icon. The "End date:" is "None" with a dropdown arrow. The "Start time:" is "8:00 AM" and the "End time:" is "8:30 AM". The "Duration:" is "30 Minutes" with a dropdown arrow. At the bottom, there are "Cancel" and "OK" buttons.

Figure 9.6 Using the custom options, you can define a recurrence as complex as the first Wednesday of every third month.

3. Click the Save & Close button. The appointment appears on the calendar with a recurrence symbol beside it.

Creating an Event

Now say that you want to create an appointment on your calendar to go to a convention for three days. This type of appointment is called an all day event.



LET ME TRY IT

Creating an All Day Event

To set an appointment for an event, follow these steps:

1. Go to the date on the calendar on which the all day event will occur and double-click any timeslot on that day.
2. Enter a Subject and Location. If you want, change the Status (which defaults to Free) and set a different Reminder interval or select None if you don't need a reminder. Type anything you want about the event in the whitespace at the bottom.
3. Click the All Day Event check box.
4. If the event lasts more than one day, enter the Ends date.
5. Click the Save & Close button.

You also can set the Recurrence feature for events.

Scheduling a Meeting

If you are on a Microsoft Exchange Server, you have very powerful tools you can use to schedule a meeting with co-workers. You can use the Scheduling Assistant to select a time for the meeting by looking at the free time on everyone's calendars, and you can specify whether a person's attendance is required or optional. When an invitee gets the meeting request, Outlook automatically places the meeting on the invitee's calendar and marks it as tentative. The invitee can respond to the meeting request and accept or decline or even suggest a different date or time. As people respond to the meeting invitation, the organizer of the meeting can send updates if changes to the meeting details must be made. Additionally, the meeting organizer can schedule resources, such as conference rooms or equipment.

If you are not on a Microsoft Exchange Server, the meeting request feature is more limited. Because the features available through the Microsoft Exchange

Server are outside the scope of this book, this chapter just looks at the meeting invitation from the standpoint of a user who doesn't have an Exchange e-mail account.



LET ME TRY IT

Creating a Meeting Invitation

If you are not on a Microsoft Exchange Server, you can use the meeting invitation for a meeting that has a definite date and time and is not dependent on whether everyone who is invited can actually attend. To create a meeting invitation, follow these steps:

1. Go to the date on the calendar on which the meeting will occur and double-click the time the appointment will start. A new appointment form opens, and the Starts date and time are filled out for you.
2. Click the Invite button on the ribbon, and the new appointment form changes to a new meeting form.

Instead of going to the date on the calendar, you can just click the Meeting button in the Home tab of the ribbon and specify the Starts date and time yourself.

3. Enter the e-mail addresses of the people who should attend the meeting.
4. Enter a name for the meeting in the Subject field.
5. Enter the address or a general description of the location in the Location field.
6. Specify the Duration and the Ends time updates to reflect your selection, or specify the Ends time and the Duration updates.
7. Set other options as you would for an appointment: the Status, a Reminder, the Time Zone, and so on.
8. Click in the whitespace at the bottom and type additional information about the meeting.
9. Click the Send button. Outlook creates a meeting on your calendar and sends an e-mail invitation to everyone you invited. If an invitee has Outlook, Outlook places the meeting on the invitee's calendar too. If the invitee

deletes the meeting on his or her calendar, Outlook opens a cancellation e-mail message that is addressed to the meeting organizer.

You also can set the Recurrence feature for a meeting.

Searching for Appointments

After you have scheduled appointments in your calendar for several months, you might find it necessary to search for one. You might have forgotten when you scheduled the appointment, or you might just need to find the appointment so you can open it and check some details.



LET ME TRY IT

Finding an Appointment

To find an appointment, follow these steps:

1. Type the search text in the Spotlight search box and press Return. Regardless of the view you are in when you perform the search, the results display in the list view, and Outlook switches to the Search tab on the ribbon.
2. Use buttons on the Search tab to limit the results further. For example, click Location to enter a location so that only appointments with the original search text and the specified location display.
3. When the results show the appointment you are looking for, handle the appointment as needed. For example, you can double-click it to open and edit it or just look at it in the list view.
4. Click the Close button on the Search tab when finished.

Another way to find an appointment is to list all your appointments in the list view (View, List). Then you can sort the entries by various fields.

Editing and Deleting Appointments

If you just need to change the date, starting time, or ending time of an appointment, you can use the dragging method. To change the date of an appointment, display a view that will show the current date and the new date simultaneously. Then drag the appointment to the new date. To change the start time, drag the appointment to the new time. To change the end time, drag the bottom border of the appointment up or down, as needed.

If you drag a recurring appointment to a new time, only that occurrence of the appointment changes. To update the time for the entire series, you must edit the details of the appointment as explained next.

If you need to edit other details of the appointment, you have to open the appointment. Sometimes, instead of editing an appointment, you need to delete it entirely. If the appointment is a recurring one, you might need to delete all the occurrences or just one of them.



LET ME TRY IT

Editing Details of the Appointment

To change certain details of an appointment, such as the reminder, location, or category, follow these steps:

1. Navigate to the appointment and double-click it to open it.
2. Make any changes that are necessary and click the Save & Close button.

or

If the appointment is a recurring one, click the Go to Series button (shown in Figure 9.7), make the necessary changes, and click the Save & Close button.

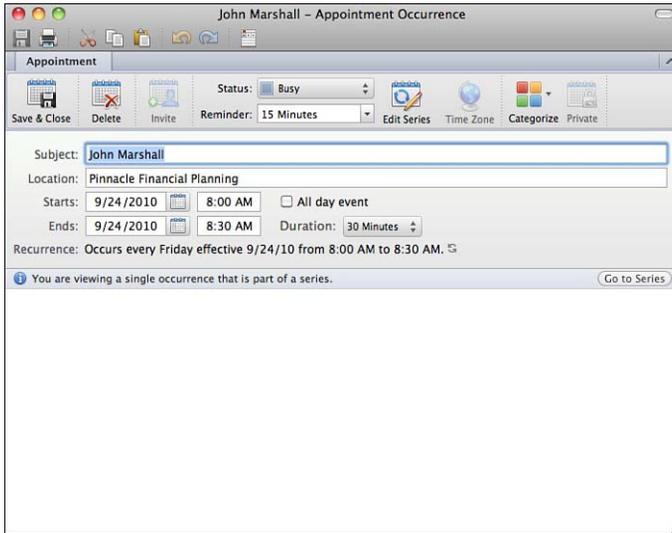


Figure 9.7 The *Go to Series* button appears only in items that have recurrence defined.



LET ME TRY IT

Deleting a Nonrecurring Appointment

To delete a nonrecurring appointment, follow these steps:

1. Navigate to the appointment and click it to select it.
2. Click the Delete button on the Appointment tab on the ribbon. A dialog box asks if you are sure want to delete the appointment.
3. Click the Delete button in the dialog box.



LET ME TRY IT

Deleting a Recurring Appointment

To delete only one occurrence of a recurring appointment or to delete all the occurrences of a recurring appointment, follow these steps:

1. Navigate to the occurrence of a recurring appointment that you want to delete, and click to select it.

2. To delete the single occurrence or the series, click the Delete button on the Appointment Occurrence tab on the ribbon and click Occurrence (for just the one occurrence) or Series (for all occurrences). Then click Delete in the dialog box that opens.

Printing the Calendar

When you want to print your calendar to carry with you, you can print it in different formats. These formats match the views that you see on the screen: Day, Work Week, Week, and Month. Additionally, you can include the task list when you print the calendar.



LET ME TRY IT

Printing the Calendar and Task List

Before going through the steps to print a calendar, you might want to set your page size and orientation. Use the Page Setup command on the File menu to set these options. Then, to print the calendar and your task list, follow these steps:

1. Make sure the calendar is selected in the navigation pane and select the categories of appointments you want to include in the printout if you don't want to print every appointment in the calendar.
2. Click File on the menu bar and click Print, or use the keyboard shortcut Cmd-P. The Print dialog box opens, as shown in Figure 9.8.
3. Select the printer from the Printer pop-up menu.
4. Specify the number of copies to print and the pages to print.
5. Select an option for Print. Here's where you can choose to print just the categories you selected in step 1.
6. Select a Style from the pop-up menu.
7. Specify the start and end dates and times.
8. Select the Task Options that you want if you want tasks to print with the calendar.
9. Select the Page Options that you want.
10. Scroll through the preview. If everything looks okay, click the Print button.

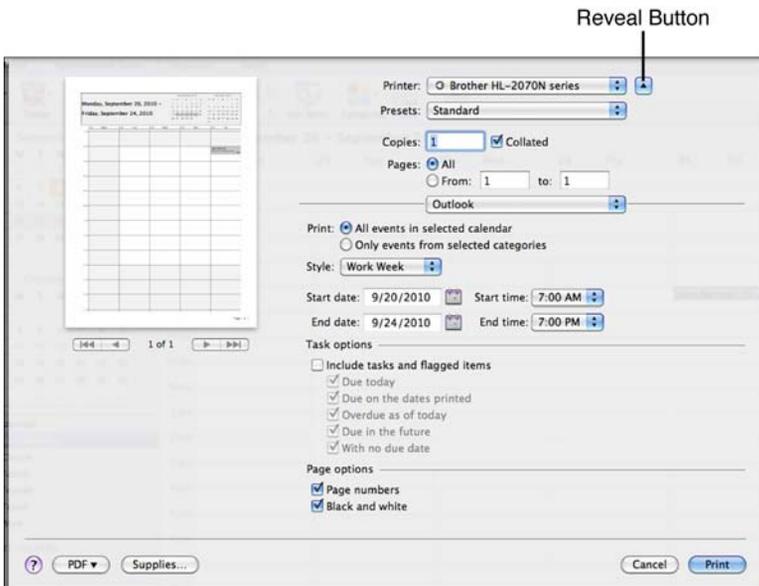


Figure 9.8 If your Print dialog box is not expanded to show all the options, click the reveal button.

Using My Day

My Day is an Outlook component that enables you to see your day at a glance. It is, however, a horse of a slightly different color. Although E-mail, Contacts, Calendar, Tasks, and Notes require Outlook to be open while they are running, My Day can be running even if Outlook is closed. What makes it even better is that it can access Outlook information when Outlook is closed. Figure 9.9 shows the different aspects of your day that My Day displays—appointments and tasks. It also can search your contact list.

To open My Day, click the My Day button on the Tools tab on the ribbon. (My Day is accessible from every component of Outlook, not just the Calendar.) To hide and display the tasks at the bottom of the My Day window, click the button with a check mark at the bottom. To display or hide the Contacts search panel, click the button that looks like a Rolodex card at the bottom. Use the navigation button in the upper right to see the previous day or the next day.

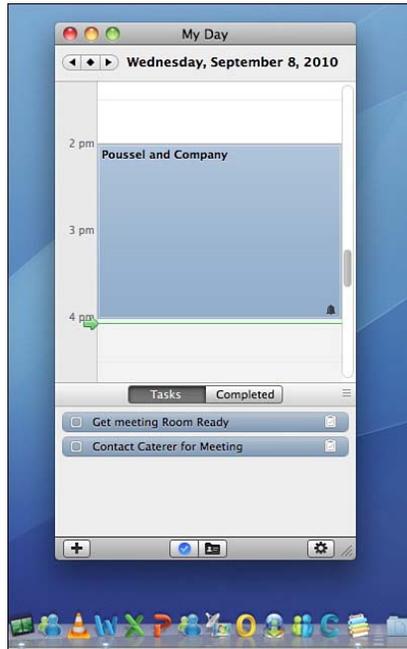


Figure 9.9 *In this figure, you can see that My Day is open but Outlook is not, as evidenced by the icon for Outlook in the Dock..*

You can customize My Day by setting preferences. To learn more about setting preferences, listen to the following audio recording.



TELL ME MORE Media 9.4—Setting Preferences for My Day

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

Using Tasks and Notes

Tasks and notes are two components that round out the Outlook application. They are not as robust as the other three components (e-mail, calendar, and contacts), but they both serve their purposes well. In this chapter, you explore the Tasks and Notes windows; learn how to create, edit, and delete tasks and notes; and find out how to change the view of tasks and notes. Additionally, this chapter shows you how to create a recurring task, mark a task as completed, and send a note in e-mail.

Exploring the Tasks and Notes Windows

The Tasks and Notes windows are so much alike that this section discusses them together. To see the Tasks window, first open Outlook and then click the Tasks button in the navigation pane. To see the Notes window, click the Notes button in the navigation pane.

Each window has a navigation pane on the left, of course, and the area on the right displays the item list and reading pane. As you probably know by now, the reading pane can display to the right of the item list, under it, or not at all. Figure 10.1 shows the reading pane under the item list for tasks, and Figure 10.2 shows the reading pane to the right of the item list for notes. As you might remember from other chapters, I recommend displaying the reading pane below because it enables you to have more columns displayed in the item list. To configure the reading pane, click the Organize tab, click the Reading Pane button, and click Right, Below, or Hidden.

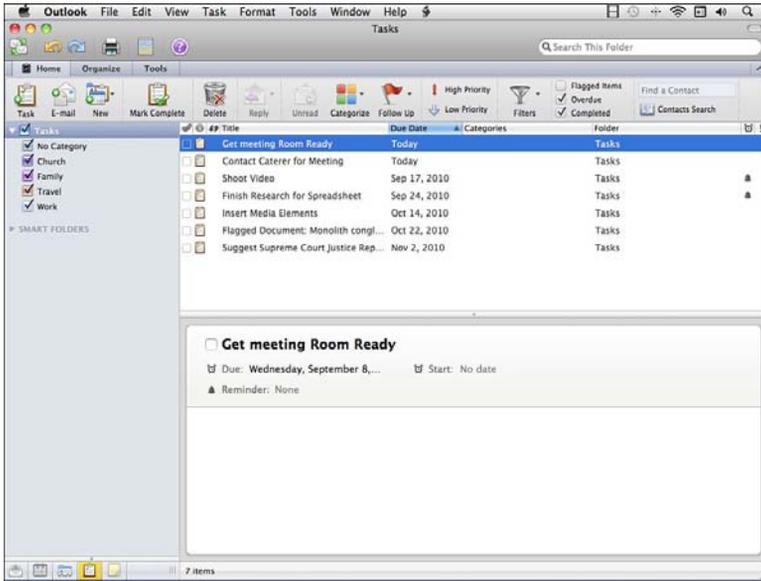


Figure 10.1 When you position the reading pane under the Task item list, you can see more columns in the item list.

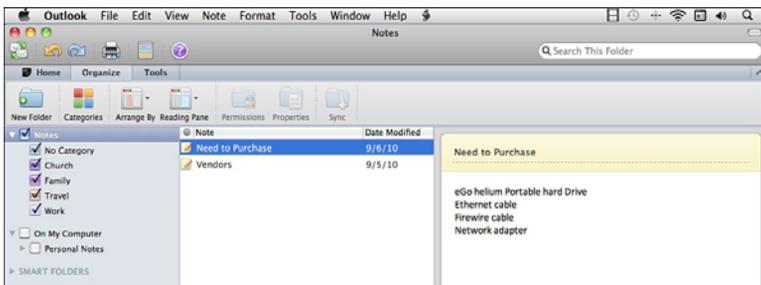


Figure 10.2 In this view, the reading pane is positioned to the right of the Notes item list.

Using Tasks

I suppose to-do lists are universal. I know I live by them. In Outlook, you create to-do lists in tasks. Using tasks, you can keep track of individual tasks that you create, as well as items you have flagged for follow-up, such as e-mail messages, contacts, or documents.

Creating Tasks

Like appointments, tasks can be one-time items or recurring. You can create a task with or without a due date, and you can set a date for Outlook to remind you about the task. (Overdue tasks appear in the task list in red type.) To help you organize your tasks, you can assign priorities and categorize them.



SHOW ME Media 10.1—Creating a Task

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LET ME TRY IT

Creating a Task

To create a task, follow these steps:

1. Click Tasks in the navigation pane if necessary.
2. Click the Task button on the Home tab on the ribbon or press Cmd-N. An Untitled Task window opens, as shown in Figure 10.3.

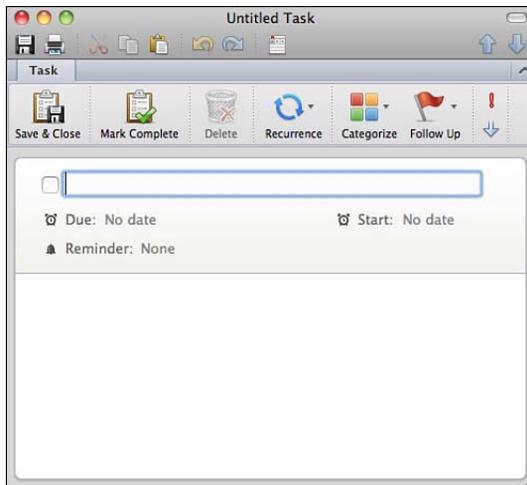


Figure 10.3 The name *Untitled Task* changes to whatever you type as the name of the task after you click the *Save & Close* button.

3. Enter a name for the task.

4. To set a Due date, click No Date and click a date on the calendar. (Scroll the calendar if necessary.)
5. To set a date and time for a reminder, click None. Click a date on the calendar. Then type the time you want.
6. To set a Start date, click No Date and click a date on the calendar for the date on which the task should start.
7. Click in the whitespace at the bottom of the window to type additional details that pertain to the task.
8. Click the Categorize button on the ribbon, if desired, and select a category.
9. Click the appropriate button on the ribbon to set a high or low priority. (Click the same button again to remove a priority.)
10. When finished, click the Save & Close button.



SHOW ME Media 10.2—Creating a Recurring Task

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LET ME TRY IT

Creating a Recurring Task

To create a recurring task, follow these steps:

1. Create a new task as instructed in the preceding set of steps, but don't save and close the task.
2. Click the Recurrence button on the ribbon and select a recurrence period, or click Custom, define a more specific recurrence period (such as every two weeks), and click OK. Figure 10.4 shows the dialog box that you use to define a custom recurrence.
3. Click the Save & Close button. The task appears in the list with a recurrence symbol beside it.

It's important to note that you cannot add a task to the task list by synchronizing with iCal, Google, your iPhone, and so on.

Repeats: Weekly

Every: 1 week(s)

On: S M T W T F S

Start date: 9/ 8/2010

End date: None

Cancel OK

Figure 10.4 Using the custom options, you can define more complex recurrences, such as the last Monday of every month.

Editing and Deleting Tasks

Of course, it is inevitable that you will need to revise a task. For example, I can't stand the pressure of having an overdue task blaring at me in bright red type, so I just edit the task and change the due date. Problem solved (...sort of)!



SHOW ME Media 10.3—Making Changes to a Task

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Making Changes to a Task

To edit a task, follow these steps:

1. Double-click the task in the item list to open it. The title of the task is selected for you automatically. If you want to change the name of the task, just type the new name and it replaces the selected name. To change just a few characters in the name, click in the name and make the revision.
2. Click in any of the date fields to select a different date.
3. To delete a date, click in the field and then click the X button that appears beside the field.
4. Make any other changes that you need to make, such as changing categories, priority, or recurrence.
5. Click the Save & Close button when finished.

Additionally, you can select a task in the item list and edit fields directly in the reading pane.



LET ME TRY IT

Deleting a Task

To delete a task, follow these steps:

1. Select the task and click the Delete button on the Home tab on the ribbon. A confirmation dialog box opens.
2. Click Delete in the dialog box.

Viewing Tasks

You can control the way items display in the task item list in various ways:

- You can check the boxes in the Home tab for the items you want to display in the list, such as Flagged Items, Overdue, and Completed.
- In the item list, you can sort tasks on any column by clicking the column heading. Click the column heading again to reverse the sort order. Additionally, you can right-click a column heading and select or deselect the columns you want to show or hide. And finally, you can size the columns by dragging the right border on the column heading to the left or right.
- Another way to sort tasks is to use the Arrange By button on the Organize tab. Click the button and select the order in which the items should be sorted, such as by due date, start date, or category. The advantage to sorting by the Arrange By button is that you can sort on a field that isn't even displayed in the item list.
- On the Home tab, you can click the Filters button and select an option that displays only certain tasks such as Overdue, Completed, or High Priority. (If you filter the list, be sure to click the Filters button again and select Clear All Filters when you are finished.)
- In the navigation pane, you can check the categories that you want to see and uncheck the categories you want to hide. Only tasks that have been categorized with checked categories display in the list.



TELL ME MORE Media 10.4—Creating Separate To-Do Lists with Categories

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Marking a Task as Complete

When a task is complete, you can check it off your list by clicking the check box next to the task in the list or by selecting the task in the list and clicking the Mark Complete button on the Home tab on the ribbon. When a task is completed, it either disappears from the list or has a check mark beside it in the list, depending on whether you are showing completed items. In Figure 10.5, the completed tasks are visible, but notice that in the item list, the task is checked off, and in the reading pane, the task has a line through the title. If you don't want to see completed items on the list, be sure Completed is not checked on the Home tab on the ribbon.

If you mark a task as complete, and you change your mind (or your "better half" points out that you didn't do it right, so you have to do it over), you can remove the check mark by clicking the check box for the task.

Completed tasks show in the list because this option is checked.

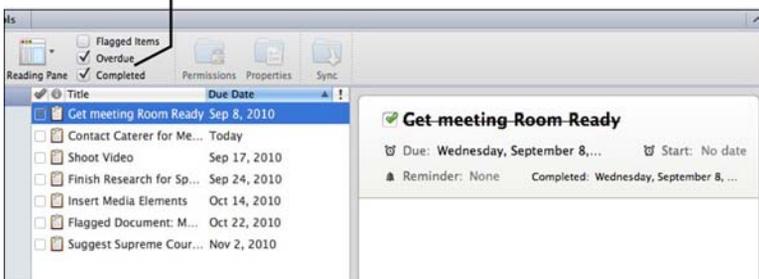


Figure 10.5 A completed task has a line drawn through its title in the reading pane.

Using Notes

The Notes component of Outlook gives you a place to "jot down" something you want to keep or remember. You also can use notes to park text that you want to use somewhere in the future.



SHOW ME Media 10.5—Creating Notes

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LET ME TRY IT

Creating Notes

To create a note, follow these steps:

1. Click Notes in the navigation pane if necessary.
2. Click the Notes button on the Home tab on the ribbon or press Cmd-N. A new note opens.
3. Type a title for the note.
4. Press Tab and type the text of the note.
5. Use the commands on the Format menu on the menu bar to format text if desired.
6. Assign a category to the note, if applicable.
7. To insert a picture in the note, click the Picture button on the Home tab on the ribbon, and click Photo Browser or Picture from File. Drag the photo or clip art from the Media Browser, or navigate to the file and double-click it.
8. Click the Close button in the upper-left corner, and then click Save.

As is the case with tasks, you cannot add notes from other sources, such as iCal, your iPhone, and so on.

Editing and Deleting Notes

To edit a note, double-click it to open it. Make the changes, click the Close button, and click Save. To delete a note, select the note in the item list. Then click

the Delete button on the Home tab on the ribbon. When the confirmation dialog box opens, click Delete.

Viewing Notes

When viewing notes in the item list, you can sort notes on any column by clicking the column heading and then reverse the sort order by clicking the heading again. To show or hide specific columns, right-click a column heading and select or deselect the columns you want to show or hide. To make columns wider or narrower, drag the right border of the column heading to the right or left. Additionally, you can sort notes by clicking the Arrange By button on the Organize tab. If you have assigned categories to notes, you can filter the notes by category by checking the categories in the navigation pane that you want to see and unchecking the categories you want to hide.

E-mailing Notes

If you want to e-mail a note to someone, you have two options. You can send the note as the text of a message, or you can send the note as an HTML attachment. To send the note as the actual text of the message, select the note and click the E-mail button on the Home tab on the ribbon. Outlook makes the name of the note the subject of the message and inserts the text of the note in the body of the message. All you have to do is supply the recipients and send the message. To send the note as an HTML attachment, click the Forward button on the Home tab on the ribbon. Then it's up to you to supply the recipients and a subject before you send the message.

This chapter shows you how to create and present a basic slide presentation.

11

Getting Started with PowerPoint

PowerPoint is the Office application that creates slide presentations. Using slide presentations, you can present ideas and information one image at a time. As the presenter, you have the ability to pace the presentation and take the time to explain, discuss, or answer answers on each topic. PowerPoint presentations can be simple or quite stylish and elaborate. This chapter introduces you to the application and shows you how to create and present a simple presentation.

 To learn about creating more elaborate presentations, see Chapter 12, "Creating Sophisticated Presentations."

Using Themes and Templates

When you start PowerPoint, the PowerPoint Presentation Gallery opens by default, as shown in Figure 11.1, unless you have turned off the PowerPoint Presentation Gallery by clicking the Don't Show This When Opening PowerPoint check box. This window enables you to select a theme or a template for the presentation you want to create. If it doesn't open when you start PowerPoint, click the New from Template button, shown later in Figure 11.2, to open it.

In the navigation pane, you have a choice of three categories: Themes, Templates, and Online Templates. PowerPoint has more than 50 themes, 15 built-in templates, and innumerable online templates for you to use.

A *theme* is a collection of slides that use specific fonts, colors, and graphic elements to help you create a presentation that has a consistent design. Each theme provides various layouts that you use to create a new slide. The layouts have placeholders for text, graphics, videos, and so on, and you must add your own content to these placeholders. If you want to build your own presentation from scratch, choose a theme instead of a template.

The same themes are available in Word and Excel, so you can create a consistent look across documents.

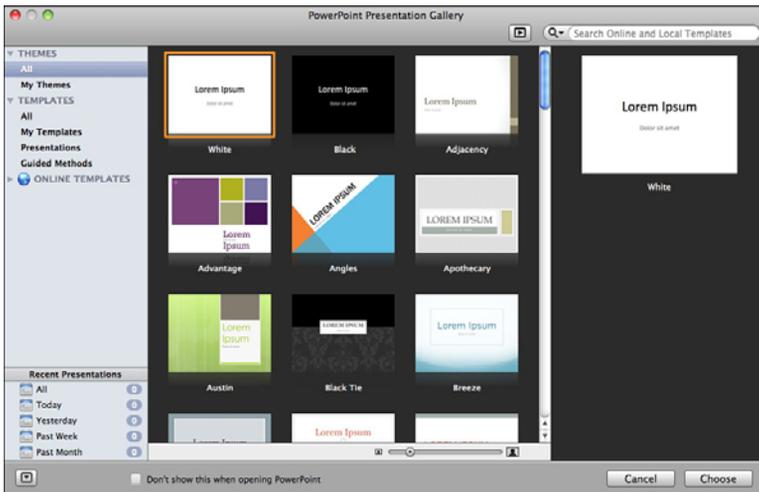


Figure 11.1 The PowerPoint Presentation Gallery gives you access to all the styles and templates on your computer as well as those located online.

If you want to build a presentation quickly, choose an appropriate template instead of a theme. PowerPoint provides several photo album templates as well as subject-specific templates. A *template* is an actual *finished* presentation. By "finished," I mean that the presentation contains slides that present a complete idea from start to finish. The placeholders contain text and photos that you might very well be able to use with only slight additions or modifications. This depends on the template, of course. Some presentation templates, such as *Charting a Course by Wes Moss*, even guide you through the process of developing your own material to place in the presentation.



LET ME TRY IT

Selecting a Theme

To select a theme from the complete set of themes that PowerPoint provides, follow these steps:

1. Click the New from Template button in the toolbar to open the Gallery.
2. In the left pane, click the reveal button for Themes if necessary and click All.

3. In the middle pane, click the thumbnail for the theme that you want to use. The theme displays in the right pane. Except for the White theme, all other themes have three options that you can set if you want to.

To get an idea of what slides are available in each theme, move the mouse pointer across the thumbnail in the middle pane.

4. If you want to change the color scheme, font, or size of the slide, make your selections for each from the appropriate pop-up menus. The slides represented in the right pane update to reflect your new selections. You can click the navigation buttons under the slide to see all the samples.
5. Click Choose. PowerPoint creates a new slide presentation that it calls Presentation1 or Presentation2, and so on. You can give the file a more appropriate name when you save it.



LET ME TRY IT

Selecting a Template

To select a template from the complete set of templates that PowerPoint provides, follow these steps:

1. Click the New from Template button in the toolbar to open the Gallery.
2. In the left pane, click the reveal button for Templates if necessary and click All. Additionally, you can click the reveal button for Online Templates if necessary, and click Presentations.
3. In the middle pane, click the thumbnail for the template that you want to use. The template displays in the right pane with three options that you can set if you want to.

Before selecting a template from the collection that is installed on your hard drive, you can move the mouse pointer over the thumbnail to see the various slides the template contains. This feature is not available for online templates.

4. If you want to change the color scheme, font, or size of the slide, make your selections for each from the appropriate pop-up menus. The slides

represented in the right pane update to reflect your new selections. You can click the navigation buttons under the slide to see all the samples.

5. Click Choose. PowerPoint creates a new slide presentation that it calls Presentation1 or Presentation2 and so on. You can give the file a more appropriate name when you save it.

The template called *Introducing PowerPoint 2011* is a tour of new features, and it's well worth a look.

Exploring the PowerPoint Window

The PowerPoint window, shown in Figure 11.2, has the standard window elements: a title bar at the top, a toolbar under the title bar, and then the ribbon. The status bar is at the bottom of the window.

 To learn more about how the ribbon works, see *"Getting Familiar with the Ribbon,"* in Chapter 1, *"Getting Started with Word."*

Notice in Figure 11.2 that the Layout and Section buttons do not have labels. This is because the screen resolution is set at 1024 by 768 (the resolution required for this book). At higher resolutions, PowerPoint shows a label for these buttons.

You can view the PowerPoint window with three different views: normal, slide sorter, and slide show. Use the normal view to create or edit an individual slide. Use the slide sorter view to get an overview of your presentation or rearrange slides. Switch to the slide show view to see how a particular slide will look when played or to play the entire presentation. Press Esc to exit the slide show view.

Figure 11.2 shows the normal view, which divides the window into three panes. The pane on the left is the navigation pane. It toggles between two views: Slides (thumbnails of the slides you create) and Outline (the text on all the slides in an outline format). The largest pane on the right contains the currently selected slide. The pane under the largest pane is the Notes pane. Use it to make notes for yourself, or use it to make notes that you will later print and hand out to the audience.

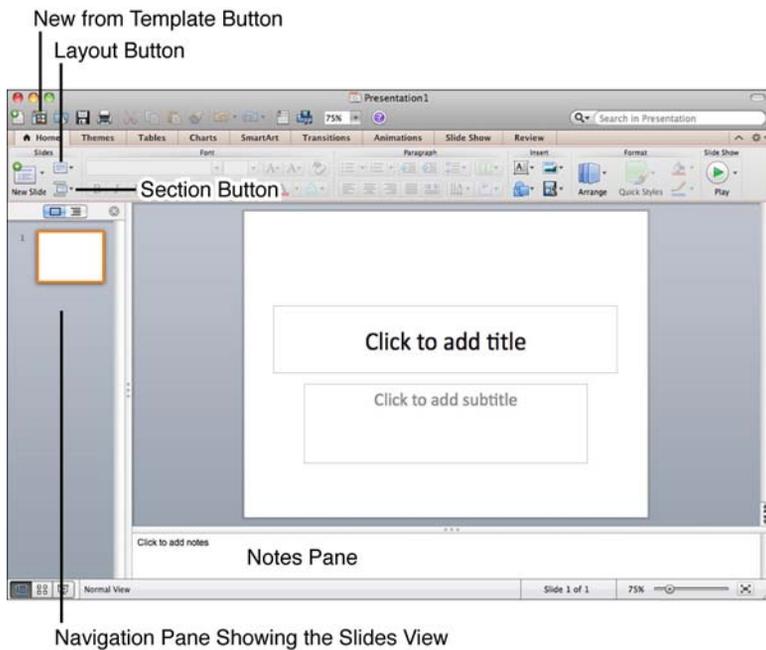


Figure 11.2 *The PowerPoint window opens by default to the normal view.*

In Figure 11.3, you can see that the slide sorter view shows thumbnails of all the slides. If you double-click a thumbnail in the slide sorter view, the slide opens in the normal view, where you can edit it.

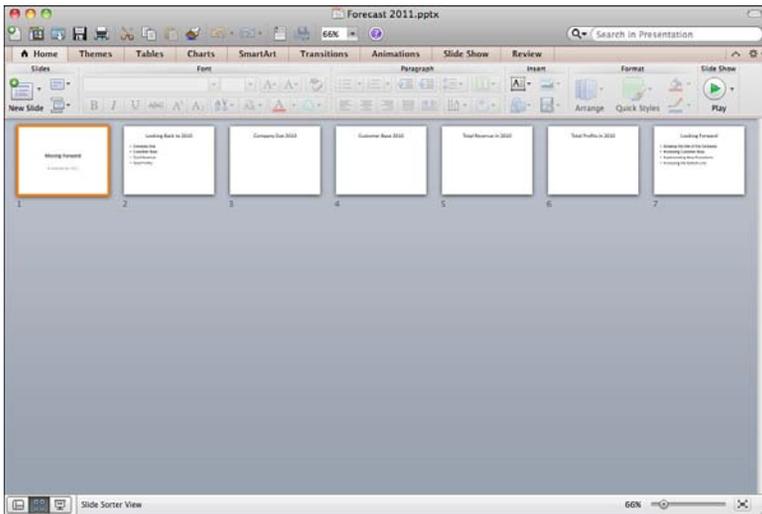


Figure 11.3 *The slide sorter view shows thumbnails of all the slides in the presentation.*

Building the Presentation

When using a theme for a presentation, you should know that PowerPoint provides two distinct methods for building a presentation: You can build a presentation by creating one slide at a time, or you can type or import an outline that automatically creates all the slides based on the heading levels in the outline. Additionally, you can combine both methods to get the best of both worlds. This chapter covers all three methods.

From this point on, I use a specific theme to illustrate the steps for basic procedures. If you want to follow along with the steps in the next few procedures and make sure your screen looks like my figures, create a new presentation using the Adjacency theme and choose Breeze for the color scheme. If you're just looking up how to do something in this chapter, don't worry; the steps are the same no matter what theme you use.

Creating a Presentation One Slide at a Time

Using this method, you select the layout for the slide, add the slide, and then add the content to the placeholders. With this method, you can see the design of the presentation developing. When you create a new presentation using a theme, PowerPoint creates the first slide for you using the Title Slide layout. As you add

slides to the presentation, you have the opportunity to select the layout you want a slide to use.



SHOW ME Media 11.1—Adding a Slide

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LET ME TRY IT

Adding a Slide

To add a slide, click the Slides button in the navigation pane and follow these steps:

1. In the navigation pane, click the slide that the new slide should follow.
2. Click the pop-up button on the New Slide button (located on the Home tab on the ribbon) to display your layout choices, as shown in Figure 11.4. All themes have the same layout options, but templates can have different layouts. The reason is that the layouts are created specifically for each template.

If you simply click the New Slide button, PowerPoint adds a slide that has the same layout as the previous slide. However, if the previous slide is a Title Slide, PowerPoint is smart enough to know that you don't usually have two title slides together, so it adds a slide that uses the Title and Content layout.

3. Click the layout you want the new slide to use. The new slide opens in the large pane, and the new slide also appears in the navigation pane.
4. If you find that you want to change to a different layout, click the Change the Layout of the Selected Slide button (refer to Figure 11.2).

Each slide layout comes from a master slide. The default master slide contains placeholders, but you can edit the master slides and add or delete slide elements. See "Editing a Slide" later in the chapter for more information.

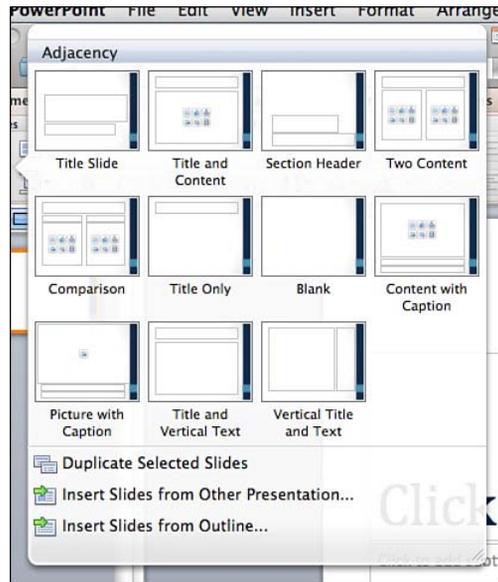


Figure 11.4 All themes offer the same basic layouts.

After you create a slide, you can add the content to the placeholders. Some placeholders can hold only text, whereas other placeholders can hold tables, charts, photos, and other media. This chapter focuses on text, photos, and clip art. Chapter 12, "Creating Sophisticated Presentations," covers the topics of inserting tables, charts, audio, and video.

The default text in a placeholder, "Click to add", displays only in the normal view. A placeholder is invisible in a presentation if you have not added content to it.



SHOW ME Media 11.2—Adding Text to a Placeholder

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LET ME TRY IT

Adding Text to a Placeholder

To add text to a text placeholder, follow these steps:

1. Click in the placeholder and type the text. The text is formatted with the font size that is mandated by the theme.

It is possible to type more text than the placeholder can hold. If your text is just a little too much for the default size of the placeholder, edit the text so it fits or increase the width of the placeholder. (See instructions later in this chapter.)

Another alternative is to change the font size, but then you are messing with the design and creating an inconsistent and (probably) unprofessional look. I don't recommend this approach even though PowerPoint provides a button for you to use to automatically fit text to the placeholder. You shouldn't try to say everything on the slide anyway. The slide presentation is just a visual aid for your verbal presentation. It should hit the high points, and you should fill in the details.

2. To add emphasis or color to a portion of the text, select the text and use the Font buttons (Bold, Italic, Underline, Font Color, Font Effects, and so on) on the Home tab on the ribbon. To format paragraphs, select the text and use the Paragraph buttons (Bulleted List, Numbered List, Line Spacing, and so on) on the Home tab.

If you want to place text on a slide that is not in a placeholder, insert a text box by clicking the Text Box button on the Home tab.



LET ME TRY IT

Adding Clip Art to a Placeholder

To add clip art to a placeholder, follow these steps:

1. Click the Clip Art Browser button in the placeholder (see Figure 11.5). The Media Browser opens to the Clip Art tab if it is not already open (or if the Media Browser is open but displaying a different tab, it switches to the Clip Art tab).

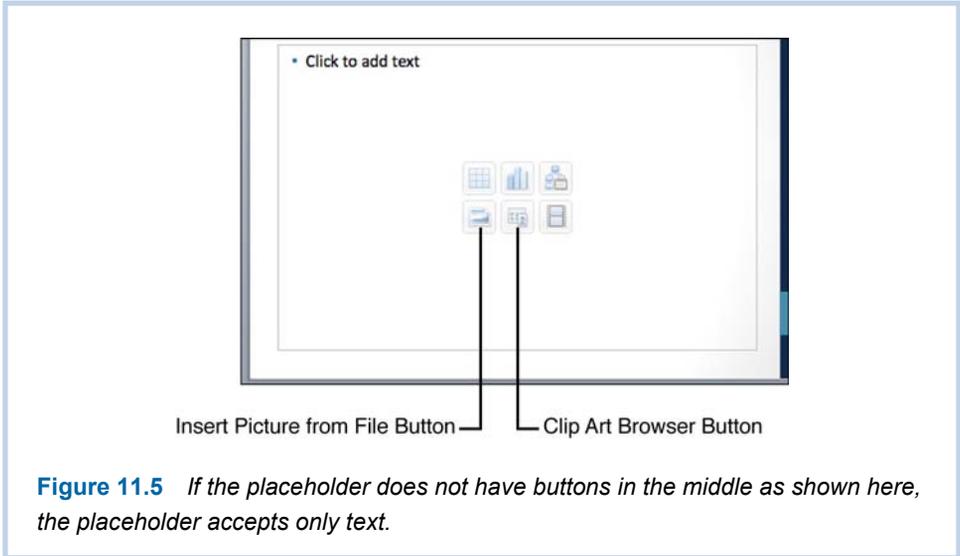


Figure 11.5 *If the placeholder does not have buttons in the middle as shown here, the placeholder accepts only text.*

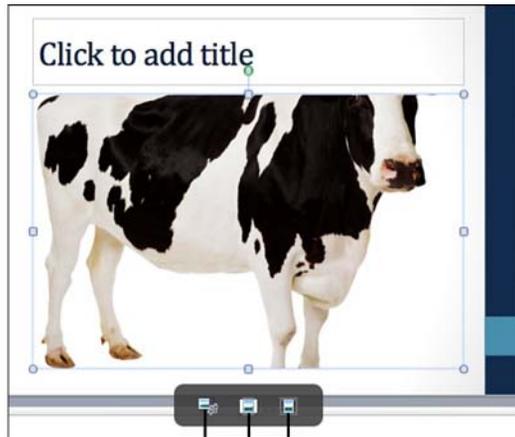
2. Drag the clip art that you want into the placeholder. The clip art displays at a default size, which might be too large or too small for your purposes. Figure 11.6 shows clip art that is too large for the placeholder.
3. Resize the clip art if necessary by using the buttons shown in Figure 11.6.
4. When finished, click outside the placeholder.

Alternatively, you can open the Clip Art Gallery to insert the clip art instead of using the Media Browser. To open the Clip Art Gallery, click Insert in the menu bar and click Clip Art, Clip Art Gallery.



SHOW ME Media 11.3—Adding a Photo to a Placeholder

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Click to manually crop and resize.

Click to automatically crop so
the art fills the placeholder.

Click to see the uncropped clip art at
a size that fits in the placeholder but
doesn't necessarily fill it.

Figure 11.6 When clip art is too large for a placeholder, only a portion of the clip art displays unless you resize the clip art or the placeholder.



LET ME TRY IT

Adding a Photo to a Placeholder

To add a photo to a placeholder, follow these steps:

1. Click the Insert Picture from File button in the placeholder. (Refer to Figure 11.5.) The Choose a Picture dialog box opens.
2. Navigate to the file you want and select it, as shown in Figure 11.7.
3. Click Insert. Photos automatically resize to fill the placeholder, as shown in Figure 11.8.
4. Resize the photo if necessary by using the buttons shown in Figure 11.8.
5. Use any of the photo formatting techniques on the Format tab that you want to apply to the photo, such as Corrections, Filters, Removing Background, and so on.

 To learn more about photo formatting techniques, see "Working with Photos" in Chapter 4, "Exploring Other Features."

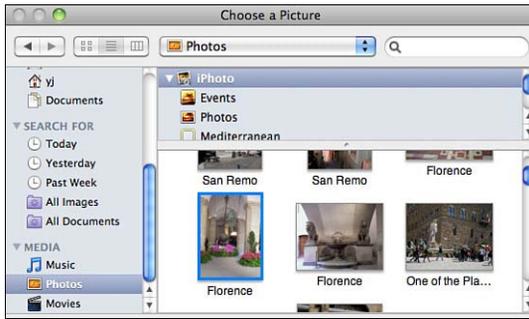
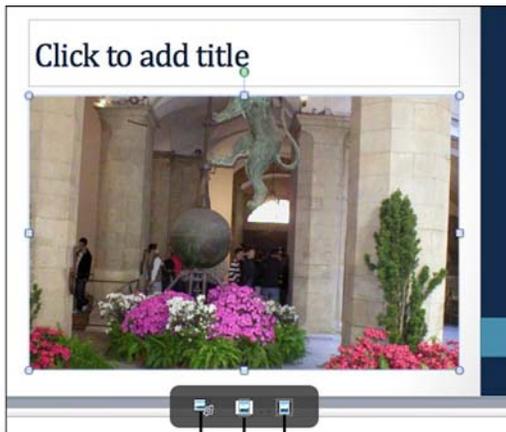


Figure 11.7 *The selected photo has a portrait composition, but it will be going into a placeholder that is landscape.*



Click to manually crop and resize. Click to see the original, uncropped photo.
 Click to fill the placeholder.

Figure 11.8 *PowerPoint automatically cropped the photo and resized it to fill the placeholder. Refer to Figure 11.7 to see the original, uncropped photo.*

6. When finished, click outside the placeholder.

If the photo you want to insert in the placeholder is in iPhoto or Photo Booth, you can drag the photo from the Media Browser to the placeholder. To open the Media Browser, click the Show or Hide Media Browser button on the toolbar or press Cmd-Opt-M.

Using the Media Browser

Because I've mentioned the Media Browser, I feel I must give you a heads-up about using it. Don't think that just because you can drag an object from any tab in the Media Browser and drop it on a placeholder that the object actually goes into the placeholder. A placeholder may not even be able to hold the object you drop on it. For example, a placeholder can't hold a shape. This doesn't mean, however, that you can't put a shape on a slide. You can. The shape is just free-floating.

 To learn more about the Media Browser, see "Inserting Media from the Media Browser" in Chapter 6, "Creating Documents for Publication."

Try this little experiment to demonstrate my point. Add a slide using the Title and Content layout. Drag a photo from the Media Browser to the placeholder under the title. Now drag the green handle at the top of the placeholder to rotate the placeholder. The photo rotates with the placeholder because it is indeed inside the placeholder. Now delete the photo. The placeholder rights itself automatically. This time drag a rectangular shape from the Media Browser to the placeholder and rotate the placeholder again. The rectangle does not rotate because it's not really in the placeholder. The rectangle is on its own layer on the slide. To learn more about working with layers on slides, watch the following video. It demonstrates the new three-dimensional reorder feature.



SHOW ME Media 11.4—Working with Layers

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

By following all the instructions in this section, you will create one slide. Then you can start all over again and create the next slide, and the next slide, until you have created all the slides in the presentation.

Creating a Presentation from an Outline

The second method for creating a presentation is to type the text of all the slides in the Outline pane of the navigation pane. As you type, PowerPoint creates each slide for you.

If you already have the outline created in Word, you can save the file in Rich Text Format (.rtf) and use it instead of typing the text. Note that the outline must have levels applied to the headings using the Promote and Demote button in the Outline view.



SHOW ME Media 11.5—Typing the Outline for a Presentation

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Typing the Outline for a Presentation

To use the outline method, first click the Outline button in the navigation pane of the normal view. To type the text for all the slides in the presentation, follow these steps:

1. Click the insertion point to the right of the icon for the first slide (see Figure 11.9) in the navigation pane and type the title that should appear on the slide. By default, this slide uses the Title layout, which has a placeholder for a title and subtitle. As you type the title in the navigation pane, the text shows in the title placeholder in the large window.
2. Press Return. PowerPoint generates a new slide that uses the Title and Content layout, giving you no chance to type a subtitle on the first slide! Press Tab to take back control! PowerPoint deletes the new slide, indents the line that you are on in the navigation pane, and redisplayes the first slide in the large pane. Type a subtitle.
3. Press Return. Now you can type a second line for the subtitle, but assume that you have only a one-line subtitle.
4. Press Shift-Tab. PowerPoint creates the second slide for you, again using the Title and Content Layout.
5. Type the title for the slide and press Return. Again, PowerPoint roars right past the placeholder for the content of the slide.
6. Press Tab to return to the slide. Type the text for the content. PowerPoint automatically formats the text as a bulleted list. Each time you press Return, PowerPoint creates another bullet point. (If you press Tab, Power-

Point creates a sublevel bullet.) When finished with the last bulleted item, press Return, and then press Shift-Tab.

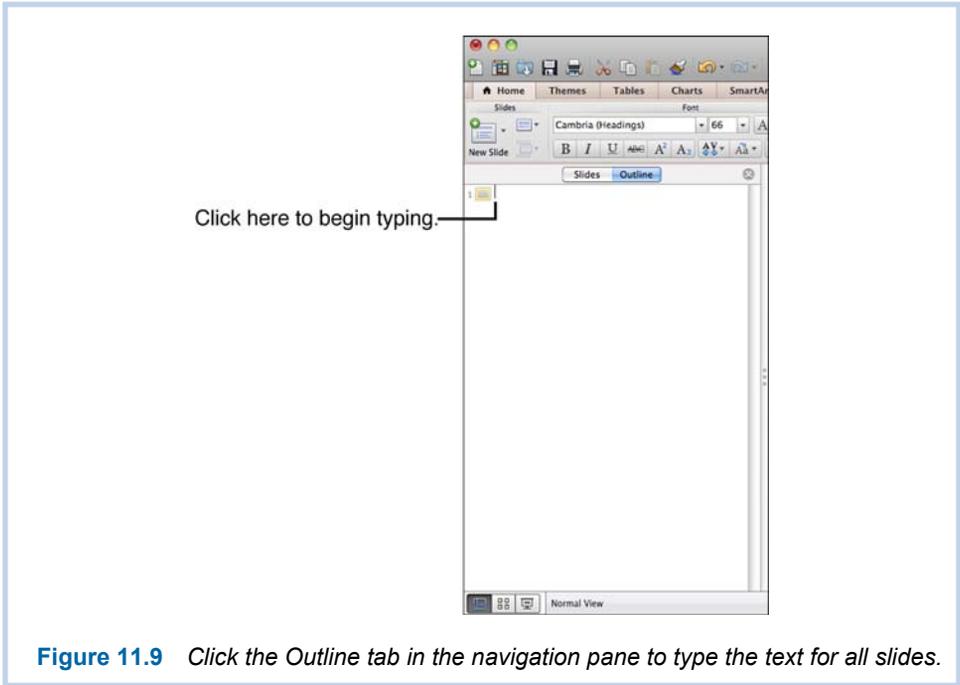


Figure 11.9 Click the Outline tab in the navigation pane to type the text for all slides.

If the content you want to put on a slide does not fit the bulleted list format, or you don't like the layout of the slide, you can reformat the text or select a different layout. I don't usually worry about this issue until after I finish typing the complete outline.

7. Repeat steps 5 and 6 for each slide in the presentation. When you are on the last slide, don't press Return at the end of the last line.

Creating a Presentation with Both Methods

Using a combination of both methods may be the most efficient way to create a presentation. You can start out by typing the outline, but when a new slide doesn't use the layout that you want, you can click the Change the Layout of the Selected Slide button on the Home tab on the ribbon and select the layout you want to use. After selecting the layout, you can return to the navigation pane and continue typing the text.



SHOW ME Media 11.6—Creating a Presentation with Both Methods

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

Saving a Presentation

When you're saving a PowerPoint presentation, think about how you will use the file. If you are going to play the slide show on your computer, it should be fine to save the presentation in PowerPoint's default XML file format, which has the extension .pptx. Additionally, you could save it in the PowerPoint Show format with the .ppsx extension. Double-clicking a .ppsx file in the Finder automatically opens the file in slide show view. If you might give the file to a user with an older version of PowerPoint that doesn't read the XML-based format, use the .ppt file format. If you might give the file to someone who doesn't have PowerPoint at all, you could save the file as a QuickTime movie so it still runs like a presentation, or you could save it in PDF format, which has a page for each slide.



LET ME TRY IT

Saving a Presentation in Different Formats

To save a presentation in different formats, follow these steps:

1. Click File on the menu bar and then click Save (if the file has never been saved before) or click Save As.
2. Enter a name for the file if it has never been saved before or you want to change the name.
3. Select a location where you want to save the file.
4. Click the pop-up button for Format. Your choices are shown in Figure 11.10.
5. Select the format and click Save.

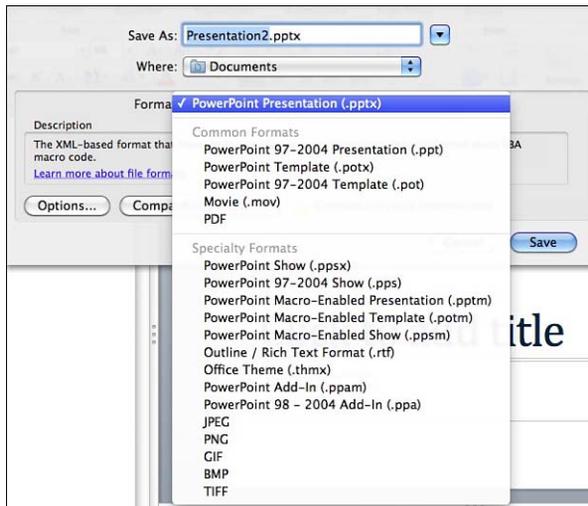


Figure 11.10 *Select the correct format for the presentation when you save it.*

Modifying the Presentation

Making modifications to a presentation is not an isolated event. While you are creating a new presentation, you are also modifying it. Of course, after a presentation is created and saved, you might need to open it and modify it some more. This section covers some of the most common types of modifications.

Editing a Slide

Editing a slide covers a lot of territory. You can revise, add, or delete text and graphic content on a slide; tweak the layout by adding, moving, or resizing placeholders; change the slide to a different layout; and modify the master slide layout.

To edit a slide, you first have to display the slide in normal view. You can select the slide in the slide sorter view and then switch to normal view, double-click the slide in slide sorter view, or select the slide in the navigation pane in normal view. Then make any of the following edits:

- **To edit text in a placeholder**, click anywhere in the placeholder and use text editing or formatting techniques. These techniques are the same as those you would use in Word. For example, you can select text and press

Delete. The formatting buttons for fonts and paragraphs are located on the Home tab on the ribbon.

- **To modify a photo or clip art in a placeholder**, click the graphic to select it and use the same techniques to resize or crop as explained earlier in this chapter in the "Creating a Presentation One Slide at a Time" section.
- **To delete a photo or clip art in a placeholder**, select the graphic and press Delete.
- **To change the size or location of a placeholder**, click the placeholder and drag a handle to resize it or drag the outline to a new location to move the placeholder. Although you also can delete a placeholder, there's really no point. Just delete the content of the placeholder and leave the placeholder there in case you need it later.
- **To change the layout the slide uses**, select the slide (or multiple slides) and click the Change the Layout of the Selected Slide button. Click the layout you want to use.
- **To change a master slide layout**, click View on the menu bar and select Master, Slide Master. In the navigation pane, click the layout you want to modify. Make the changes that you want to make, such as moving the placeholders, adding graphics, changing the fonts, and so on. The changes that you make to the layout are reflected in all slides that have been or will be created using the layout.



TELL ME MORE Media 11.7—Editing the Master Slide Layouts

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Deleting a Slide

You can delete slides in the slide sorter view or in the navigation pane in normal view. I like to use the slide sorter view to delete slides because it enables you to see more than one slide, and you can verify that you have selected the correct slide for deletion by zooming in so you can read the slide.

To delete a slide in the slide sorter view, click it to select it and then press Delete. To delete several slides that are adjacent to each other, select all the slides by clicking a slide at one end and Shift-clicking the slide at the other end. To select multiple slides that are not adjacent, Cmd-click each slide. In the normal view, you use the same steps. Select the slide(s) in the navigation pane (in either the Slides pane or Outline pane) and press Delete.

Duplicating a Slide

To duplicate a slide, select the slide you want to duplicate either in the slide sorter view or in the navigation pane in the normal view. Then click Edit on the menu bar and click Duplicate. The keyboard shortcut for this command is Cmd-D.

Changing the Slide Order

You can rearrange the order of slides in the normal view or the slide sorter view, but you can see more slides in the slide sorter view. In either view, you simply drag a slide to a new location. In the normal view, you drag the slide in the navigation pane in either the Slides pane or the Outline pane.

Hiding a Slide

To make a slide presentation more versatile, you might want to include slides for one audience that you do not include for a different audience. When you don't want a slide to show in a presentation, you can hide it before running the slide show. To hide a slide, right-click the slide (either in the slide sorter view or in the navigation pane in the normal view) and click Hide Slide. PowerPoint dims the thumbnail for the slide in the navigation pane and in the slide sorter view. To make the slide visible again, right-click the slide again and click Hide Slide to remove the check mark.

Adding Notes to a Slide

You might recall that the normal view has a pane on the right for adding notes. It's under the large pane, and it says, "Click to add notes." Use this pane to type any notes to yourself, or use it to add additional information that you intend to print to give to the audience. To print the notes, click the Print What pop-up box in the Print dialog box and select Notes. PowerPoint prints one slide per page with the slide at the top and the notes under it.

Changing the Theme

If you have created a presentation using a theme, you can modify the theme by selecting different colors, fonts, or backgrounds, or you can switch to a different theme. Although it is possible to switch to a different theme if the presentation is based on a template, doing so is not advisable. The result is usually a mess.

To change anything about the theme of a presentation, click the Themes tab on the ribbon. You can change the colors, fonts, or background by clicking the

corresponding buttons in the Theme Options section. You can change to a different theme by clicking a new theme in the Themes section. After I have created several slides using different layouts, I like to experiment with different themes in the slide sorter view. This view gives a great overview of what the presentation will look like because it shows all the different layouts I have used with the new theme.

Presenting the Show

To play the slide show, open the file and then click the Play pop-up button on the Home tab on the ribbon. Click Play from Start or click Play from Current Slide. By default, the slide show plays in full screen, and you must advance the slides manually.

To change these defaults, click the Set Up Show button on the Slide Show tab on the ribbon.

To advance to the next slide manually, click the right arrow in the control that displays at the bottom-left side of the screen or press the right arrow key. To go back to the previous slide, click the left arrow in the control or press the left arrow key. When the presentation is finished, press Esc.

 *To learn more about presenting slide shows, see "Polishing Your Presentation Skills," in Chapter 12.*

Inevitably, someone in the audience wants a printed copy of the slide show. You can prepare for this by printing handouts ahead of time. In the Print dialog box, click the Print What pop-up button and select an option for the number of slides you want to print per handout page (two, three, four, six, or nine). The Quick Preview shows you what the handout will look like, as shown in Figure 11.11.

Handouts do not include any notes you have included in the presentation.

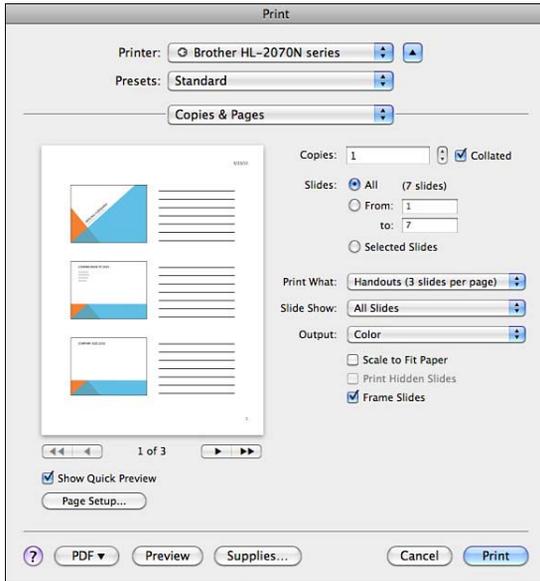


Figure 11.11 *If you select three slides per page, PowerPoint adds lines beside the slides for taking notes.*

This chapter shows you how to add transitions, animations, and narration and how to save a presentation as a QuickTime movie.

Creating Sophisticated Presentations

PowerPoint slide presentations can be very elaborate and stylish. Using the special tools that PowerPoint provides, you can create a very interesting, entertaining, and commanding presentation. You also can become so enamored with the features that you overpower the point of your presentation with fancy bells and whistles. This chapter shows you how to use some of these special features and gives you a little advice along the way to keep you from getting carried away.

This chapter covers organizing a slide show in sections, creating custom slide shows within the same file, and adding actions to perform tasks for you. To enhance the slide show, the chapter shows you how to add tables, charts, and SmartArt; animate individual slide elements; include music, narration, and video; and add transition effects between slides. To improve your final presentation, you see how to rehearse, create handouts, set up the show, and present the slide show using the Presenter View.

Grouping Slides in Sections

Grouping slides in sections is a new feature in Office for Mac 2011. You can create sections in any slide show, but the feature is particularly suited to working with slide shows that have multiple contributors or a large number of slides. For example, you can create sections for each contributor, or you can create sections for slides in various stages of development, such as Incomplete Data, Needs Photo, Check for Accuracy, Delete If Necessary, Finished, and so on. Additionally, you can create sections to group similar topics together to help you organize your slide show and move slides as a group.



Creating a Section

To create a section, follow these steps:

1. Select the slide that should be the first slide in the section.

If you add your first section anywhere *after* the first slide, PowerPoint automatically creates a section called *Default Section* at the beginning of the presentation.

2. Click the Section button (see Figure 12.1).
3. Click Add Section. The Rename Section dialog box opens.
4. Type the name for the section and click Rename.

When you create a section, PowerPoint creates a bar with the name of the section. This bar displays in the navigation pane of the normal view and in the slide sorter view. The section title has a reveal triangle that you can click to collapse or expand the section, as shown in Figure 12.1.

Notice in Figure 12.1 that the Section button does not have a label. This is because the screen resolution is set at 1024×768 (the resolution required for this book). At higher resolutions, PowerPoint shows a label for this button.

If you don't like the name you gave a section or the purpose of the section changes, you can change the name by right-clicking the title bar and selecting Rename. Type the new name and click Rename.

The slides that you put in each section do not have to be in the order in which they will be presented, and, in fact, many times they are not, as the case would be for sections called Incomplete Slides and Finished Slides. Additionally, sections do not have to be in any particular order. You can move slides and sections in the slide sorter view (my favorite) or in the navigation pane in normal view. To move a section in the navigation pane, drag the title bar up or down. To move a slide to a different section, drag the slide to the new location in the new section.

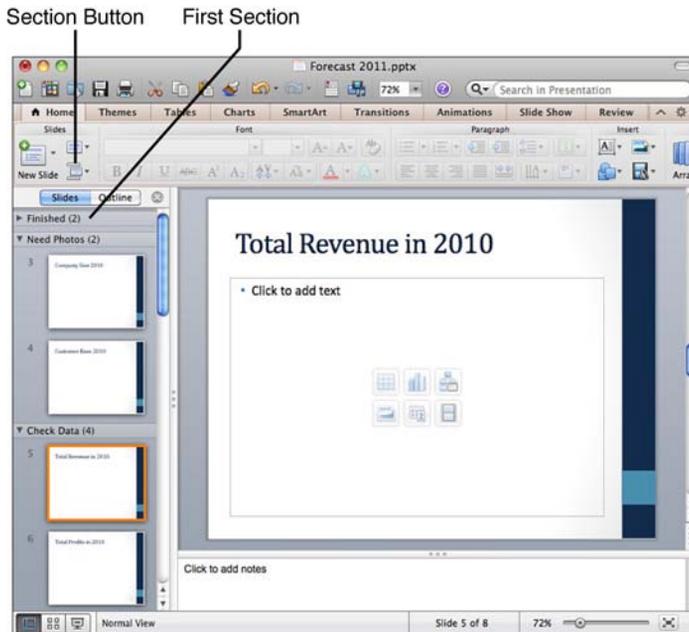


Figure 12.1 *The first section in the slide sorter view is collapsed.*

Because PowerPoint numbers slides sequentially, regardless of the sections, and rennumbers them when you move them around, I recommend that you put a temporary number in a text box on each slide with the number of its true position in the slide show. Then, when you are finished with sections, you can put the slides back in the correct order and delete the text boxes with numbers in them.

While you are working on a presentation, if a section of slides is no longer needed, you can delete the section and all the slides in the section. For example, if you have a section called Delete If Necessary, where you put all the slides that you want to delete if the presentation gets too long, you can delete them all in one fell swoop.

I usually just hide slides instead of deleting them. You never know when you might need them!

When a section heading is no longer useful—you have completed all the slides in the section, for example—you can delete the section heading. When *all* section headings are no longer useful, you can delete all of them at once, leaving the slides intact. Then you can drag the slides into the correct order, if necessary.



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Deleting Sections

To delete sections, follow these steps:

1. Right-click a section or click the section title bar in the navigation pane or in the slide sorter view to select it and click the Section button.

It is not possible to select more than one section title at a time.

2. To delete all sections, click Remove All Sections.

To delete only the selected section title, click Remove Section.

To delete the selected section title and all slides, click Remove Section and Slides.

Adding Tables, Charts, and SmartArt

As explained in Chapter 11, "Getting Started with PowerPoint," placeholders that can hold tables, charts, photos, and other media have a set of buttons in them, as shown in Figure 12.2. The first button inserts a table, the second button inserts a chart, and the third button inserts SmartArt. This section looks at each one of these elements.

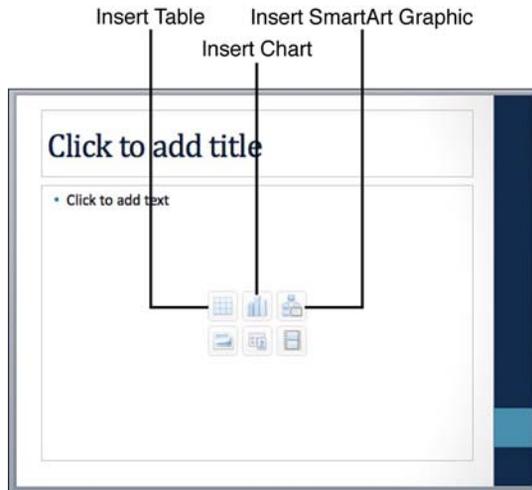


Figure 12.2 Click the button to insert the corresponding element.

Inserting a Table

To present information on a slide in a tabular format, insert a table by clicking the Insert Table button in the placeholder. Specify the number of columns and rows and click OK. PowerPoint inserts a table that has a header row, banded rows, and uses colors consistent with the theme (see Figure 12.3). Use the Options button on the Tables tab to change the header row and banded rows or to add a total row.

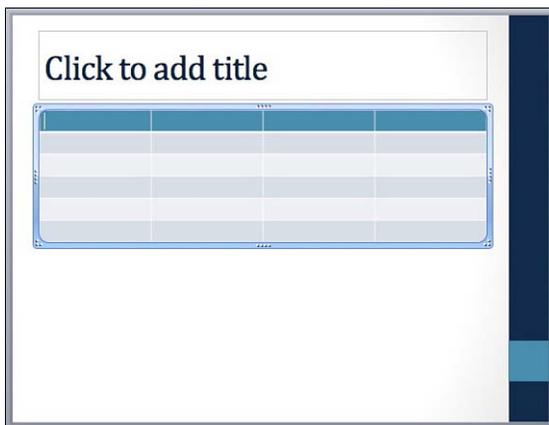


Figure 12.3 PowerPoint inserts a table that is consistent with the theme colors.

On the ribbon, use the Home tab to format text in the table, use the Tables tab to format the table colors and borders, and use the Table Layout tab to modify the structure of the table. To delete a table, click it and press Delete. Other aspects of working with tables in PowerPoint are the same as those for working with tables in Word. For example, if the insertion point is in the last cell in the table and you press Tab, PowerPoint creates a new table row.

 To learn more about creating, navigating, and modifying tables, see "Working with Tables" in Chapter 3, "Formatting Documents."

Inserting a Chart

Charts are quite common in slide presentations. I think it's actually against the law to give a presentation that doesn't contain one. They present information in a graphic way that is easier to understand and interpret than looking at the raw data.

When you insert a chart on a slide, PowerPoint opens an "internal" Excel sheet with sample data, and you must replace the data with the real data. When you save the PowerPoint presentation, PowerPoint saves the Excel sheet within the PowerPoint file. If you have already created a chart in an existing Excel file, you can open the workbook, copy the data range, paste it into the internal PowerPoint sheet, and then create the chart. Another alternative for using a chart from an existing Excel file is to create the chart in Excel, copy the chart from the Excel file, and paste it directly on a slide in the PowerPoint file.



LET ME TRY IT

Inserting a Chart

To insert a chart on a PowerPoint slide, follow these steps:

1. Click the Insert Chart button in the placeholder. The Chart tab on the ribbon opens.
2. Click the button for the type of chart you want to insert and then select the style of the chart. PowerPoint opens an Excel spreadsheet with sample data in it.
3. Replace the sample data with the data you want to graph and switch to PowerPoint to see the chart. Close the internal Excel worksheet if you are satisfied with the chart. If you need to edit the data after closing the worksheet, click the Edit button on the Charts tab on the ribbon.

 To learn more about creating charts, see "Working with Charts" in Chapter 14, "Enhancing Worksheets."

Inserting SmartArt

The SmartArt graphics provide a visual representation of a concept such as a process, cycle, hierarchy, or relationship. Like charts, they present information in a way that is easier to understand and interpret than reading straight text.



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Inserting a SmartArt Graphic

To insert a SmartArt shape, follow these steps:

1. Click the SmartArt button in the placeholder. The SmartArt tab on the ribbon opens.
2. Click the pop-up button for the type of graphic you want to insert, and then click the style you want.
3. Click each [Text] placeholder in the graphic and type the text you want. SmartArt automatically adjusts the size of the font to fit the drawing.
4. Click anywhere outside the SmartArt graphic when finished.

 To learn more about working with SmartArt, see "Inserting and Working with SmartArt" in Chapter 6, "Creating Documents for Publication."

Using Actions

Imagine that you are a software designer, and you are giving a PowerPoint presentation on the benefits of using your software. At one point in the presentation, you want to launch the actual software so you can demonstrate it. You can do this without ever leaving the slide presentation by assigning an *action* to launch the application to an element on the slide, such as a button. When you click or mouse over the element, PowerPoint performs the action you have assigned.

In addition to launching an application (as in this example), an action can hyperlink to another presentation, file, web page, slide in the current presentation, and so on; run a macro; perform an object action (if the action is attached to an embedded object such as a video); or play a sound. The great thing about actions is, when you present the slide show, you don't have to perform them at all. It's entirely up to you. They are just there if you need them.



SHOW ME Media 12.1—Assigning an Action

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Assigning an Action

You can assign an action to a placeholder, graphic, text box, and so on. To assign an action to an element on a slide, follow these steps:

1. Select the element and click the Slide Show tab on the ribbon.
2. Click the Action Settings button to open the dialog box shown in Figure 12.4. The Mouse Click tab is the default tab.

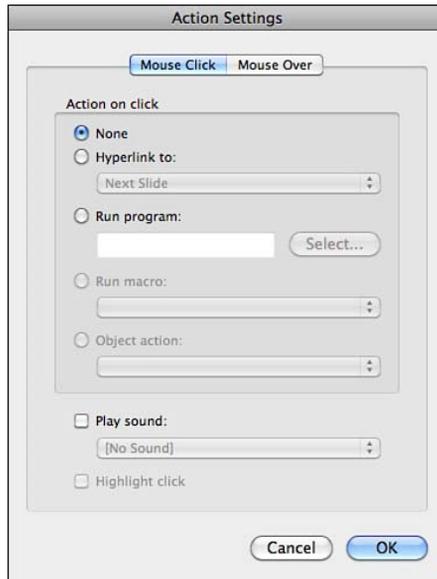


Figure 12.4 Actions that are dimmed are not available for the object you have selected.

3. Click the Mouse Over tab if you prefer to activate the action with a mouse over instead of a mouse click.
4. Select an action from the Action on Click or the Action on Mouse Over box:

- To hyperlink, select Hyperlink To and then select a hyperlink target, as shown in Figure 12.5.



Figure 12.5 *Hyperlinks can jump to other slides in the same show or go outside the presentation to web pages or other files.*

- To launch an application, click Run Program and then click Select. Navigate to the application file and double-click it. (Most applications are in the Applications folder and have the extension .app.)
 - To run a macro, click Run Macro and then select the macro from the pop-up list. (This option is not available if no macros are saved in the PowerPoint presentation.)
 - If you have selected an embedded object, click Object Action and click an option in the pop-up menu.
5. To play a sound, click Play Sound and then select a sound such as Drum Roll from the pop-up menu or add your own canned laughter by selecting Crowd Laughing.
 6. Select Highlight Click if you want to see a border display around the element briefly when you click it.
 7. Click OK.

PowerPoint also has Action buttons you can add to presentations. Many of these buttons are preprogrammed to perform specific actions when you click them. For example, the Home button is hyperlinked to the first slide. To insert an Action button, click the Slide Show option in the menu bar and point to Action Buttons. Click the button you want, and then click the slide. Complete the Action Settings dialog box if necessary and click OK.

Adding Animation and Transitions

Slide presentations have been around in one form or another for a long time. An apparatus called the Magic Lantern, invented in the 1840s, was the forerunner of the slide projector that used 2×2 slides in the 1950s. So people have been yawning at slide presentations for more than a century. One way to cut down on the yawning is to add animation and slide transitions to your presentation.

Adding Animation to Presentations

Animations can focus a viewer's attention on a slide as well as make a point. For example, if the title of a slide is "Costs Are Spinning Out of Control," you could apply an animation to the title that makes the title spin.

You can apply animation to any element on a slide, and you can animate the entrance or the exit of the element as well as emphasize the element while it's on-screen. The animation can play automatically or when you click the mouse.



SHOW ME Media 12.2—Animating Slide Elements

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LET ME TRY IT

Animating Slide Elements

To add animation to multiple elements on a slide, follow these steps:

1. Select the element (or multiple elements) on the slide that should perform the animation. It could be a text placeholder, photo, table, SmartArt element, and so on.

2. Click the Animation tab on the ribbon and click the effect you want to use under Entrance Effect, Emphasis Effects, Exit Effects, or Motion. PowerPoint plays the effect for you and places a number in a box on the left side of the slide, as shown in Figure 12.6.

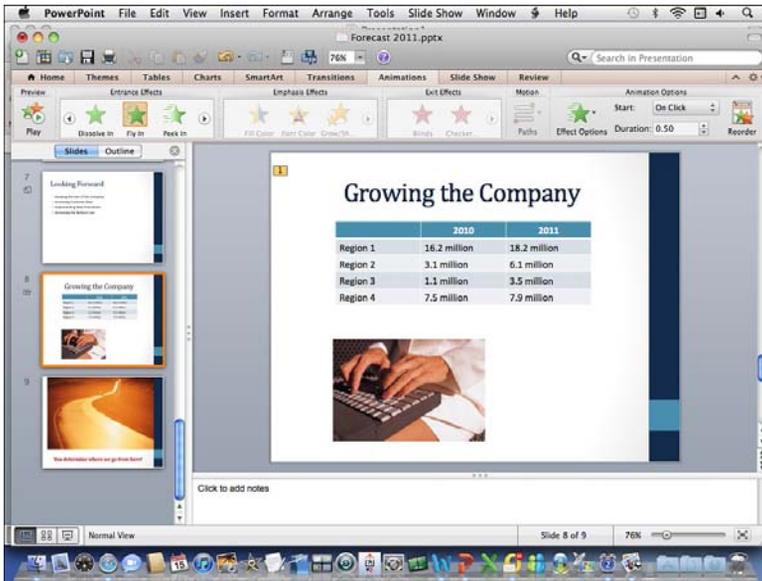


Figure 12.6 The animation number displays beside its element on the slide.

3. Click the Start pop-up button in the Animation tab and select On Click, With Previous, or After Previous.
4. Click the Duration pop-up button and specify the number of seconds the animation should take.
5. To see all the effects you have applied to an element, click the Play button under Preview in the Animations tab.
6. Repeat steps 1 through 4 for each element you want to animate. As you animate each element on the slide, PowerPoint applies a sequential number to the animation.

Changing the Animation Order

It might take a little tweaking to get just the right sequence of actions when you apply more than one animation to a slide. For example, if you apply an exit effect to the title of a slide as the first animation, the slide will show the title and then

the title will exit. Generally, that's not what you want to happen. You want the title to display for the entire duration the slide displays. Usually, exit effects are the last animations you want to occur. In very elaborate animations, however, you might have objects exiting the slide so they can be replaced by other objects. For example, using entrance and exit animation, you could display a different photo as each new bullet point on a slide displays.

Animations perform in the order of their numbers. If you get the order of animations wrong, you can correct them by clicking the Reorder button on the Animations tab. This button displays the Custom Animation tab in the Toolbox, as shown in Figure 12.7. You can move animations up and down to change the order and fine-tune other effects as well.



Figure 12.7 You can reorder animations or set effect options and timings on this tab.

Deleting an Animation

To delete an animation in the Custom Animation tab of the Toolbox, select the animation and click the button with the X. In the normal view, click the animation's number (displayed on the left side of the screen, as shown in Figure 12.6) and press Delete. Before deleting the animation in the normal view, be sure it is the correct animation by checking the ribbon. PowerPoint selects the animation on the ribbon when you select the number.

Adding Transitions Between Slides

A transition is an animated way to move from one slide to the next. The transition you select applies to the viewer's last look at the previous slide and the first look at the slide to which you applied the transition. For example, if you apply the Dissolve transition to the second slide, when you move from slide one to slide two, slide one appears to dissolve as slide two appears to fill in.

Applying a Transition

You can apply a different transition to each slide or the same transition to all the slides at once. I don't recommend using a different transition on each slide because it's too distracting and detracts from the information you are presenting on the slide. For slide shows with fewer than a dozen or so slides, I recommend you use the same transition throughout. For longer slide shows, I sometimes use different transitions for different groups of related slides. Additionally, on long slide shows, I like to give the audience a rest and use *no* transitions on slides that do not present a chain of information.

You can apply a transition to one or more slides at the same time, or you can apply a transition that you have already applied to a slide to *all* the other slides in the presentation.



SHOW ME Media 12.3—Applying a Transition

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Applying a Transition

You can apply only one transition to a slide. If you apply a transition and then apply another one, you have just replaced the first one with the second one. To apply a transition to selected slides, follow these steps:

1. Select the slide or select multiple slides and click the Transitions tab on the ribbon.
2. Click the icon on the ribbon for the transition you want to apply (under Transition to This Slide). For example, click Push.
3. Click the Effect Options button to apply different effects to the transition, as shown in Figure 12.8. (If the transition has no effects, this button is dim.)

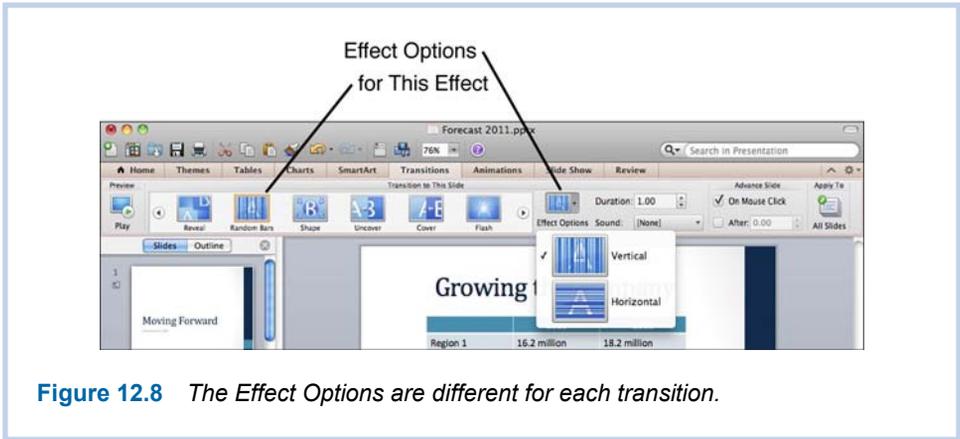


Figure 12.8 *The Effect Options are different for each transition.*

4. Click the up or down arrows on the duration control on the ribbon to increase or decrease the time it takes for the transition.



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Adding the Same Transition to All Slides

PowerPoint makes it easy for you to apply the same transition to all the slides in a presentation. Be careful if you use this technique, though, because it overrides any transition setting you have set previously for individual slides. To add the same transition to all slides, follow these steps:

1. Apply the transition you want to use to at least one slide and select it or select a slide that already has the transition you want to use.
2. Click the All Slides button (under Apply To) on the Transitions tab on the ribbon.

Use the All Slides button to your benefit. Apply the same transition to all slides, and then go back and change the transitions for individual slides.

Deleting Transitions

To delete a transition, select the slide (or slides) and click the None button on the Transitions tab under Transition to This Slide. Now imagine that you have to delete all the transitions that have been added to 100 slides in your presentation.

Ouch! It would be a pain to delete each one individually. To delete all slide transitions at once, select a slide that has no transition applied to it and click the All Slides button (under Apply To) on the Transitions tab on the ribbon. Bada bing, bada boom! You're done!

Adding Audio and Video

As mentioned earlier, yawning can be a big problem for a slide show audience. How about adding a little music to wake up people and keep them interested? Video is also a good addition to a slide show because people are much more attentive to video than they are to "flat graphics."

Adding Audio to a Presentation

You can add an audio file that plays when you click it and stops playing when you move to the next slide. This could be a short music clip or a recorded narration. You can insert audio from the Media Browser or from a file. To insert audio, click Insert on the menu bar and then click Audio, Audio from Browser, or Audio from File. If you select Audio from Browser, drag the audio file to the slide. If you select Audio from File, navigate to the file and double-click it. PowerPoint places a speaker icon on the slide. This is the graphic that you click to play the audio when you present the slide show.

If you create the presentation on one computer and then present it using a different computer, you could have a problem if you have downloaded music from iTunes to use in your presentation. If the presenting computer isn't authorized, you can't play the music.

To record narration and add it to a slide, select the slide and then click Insert on the menu bar. Click Audio, Record Audio. Enter the name for the recording and specify the input device and source. Click the Record button, speak into the microphone, and click Stop when finished. Click Save, and PowerPoint inserts the speaker icon on the slide.

Adding Video to a Presentation

When you insert a video, PowerPoint automatically sets the action for a movie to play when you click the mouse. (See "Using Actions," earlier in this chapter.) When you play the slide show, you can point to the video to display controls if you want to pause, restart, replay, or adjust the sound for the video.

Note that PowerPoint 2011 cannot play YouTube or Flash files.



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Inserting a Video

To insert a video, follow these steps:

1. Add or select a slide that has a placeholder with the six buttons in the middle. Refer to Figure 12.2.

You can display the Media Browser and drag a video to a slide regardless of whether you drag it to a placeholder. The advantage of using a placeholder is that PowerPoint inserts the video at a size that fits nicely on the slide.

2. Click the Insert Video button, navigate to the movie file, and double-click it, or you can open the Media Browser to the Movies tab and drag a movie to the placeholder.

Creating and Presenting Custom Slide Shows

Now imagine that you need to present the same slide show to three completely different audiences, but you need a few different slides to address the concerns of each audience. To make life easier, you can create the basic slide show and add all the slides that you will need for each audience. Then, you can create three custom slide shows using the "core" slides, plus the slides for each specific audience in each custom show. PowerPoint saves all the custom shows in the same file.



LET ME TRY IT

Creating a Custom Slide Show

To create a custom slide show, first create a slide show and include all the slides you want to use in the different custom shows. Then follow these steps:

1. Open the PowerPoint file that contains the slide show and click Slide Show on the menu bar.
2. Point to Custom Shows and click Edit Custom Shows. The Custom Shows dialog box opens. Click New, and the Define Custom Show dialog box opens, as shown in Figure 12.9.

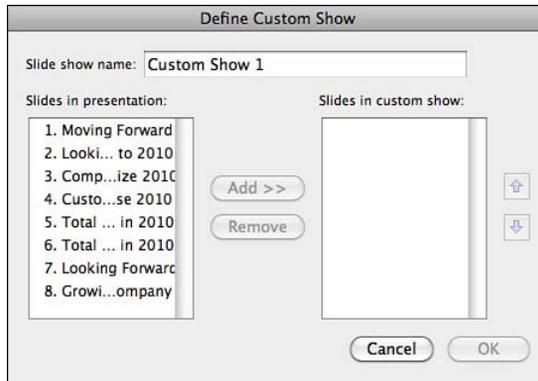


Figure 12.9 A custom slide show can use any number of slides that are present in the file.

3. Enter a name for the custom show.
4. Select the slides in the Slides in Presentation box that you want to include in the custom show and click Add. The Slides in Custom Show box displays the slides you added.
5. To change the order of the slides in the Slides in Custom Show box, select a slide and click the up or down arrow to move the slide.
6. To delete a slide from the custom show, select the slide in the box on the right and click Remove.
7. When all slides are included and in the correct order, click OK and then click Close. PowerPoint adds the name of the new custom show to the Custom Shows menu.

Playing a custom show is simply a matter of selecting the show from the Custom Shows menu. (Click Slide Show on the menu bar and click Custom Shows.)

Polishing Your Presentation Skills

Using PowerPoint's presentation tools, you can become the star of the show. You can rehearse your show and time how long it takes you to give the presentation, or you can record yourself as you make the oral part of the presentation so you can listen and critique yourself. Additionally, you can make notes for each slide as you practice, and PowerPoint will append them to any existing notes.



LET ME TRY IT

Rehearsing or Recording the Presentation

To rehearse or record your presentation, follow these steps:

1. Click the Slide Show tab on the ribbon. Click the Rehearse button to rehearse or click the Record Slide Show button to record your oral presentation.
2. Give your oral presentation while you advance the slides. A progress bar at the top shows how much of the presentation you have given. The timer resets after each slide so you can see how much time each slide takes.
3. Click the Pause button if you want to stop for a while—to add some notes, for example.
4. When you advance the last slide, PowerPoint asks if you want to save the slide timings. If you click Yes, PowerPoint saves the timings, opens the slide sorter view, and displays the timing for each slide under the slide icons. If you click No, PowerPoint exits the rehearsal mode.

If your presentation takes longer than the time you have allotted, be sure to save the timings so you can see which slides are taking the longest to present.

Presenting with Presenter View

When you give your presentation, if you can attach two monitors to your Mac, you can use the Presenter View on one monitor while your audience sees the presentation in full screen on the other monitor. The Presenter View puts you in full control by showing you the current slide, the next slide, your elapsed time, and your notes, as shown in Figure 12.10. Additionally, you can take more notes

in the Notes pane as you give the presentation. To use the Presenter View, simply click the Presenter View button on the Slide Show tab on the ribbon before issuing the command to play the show.

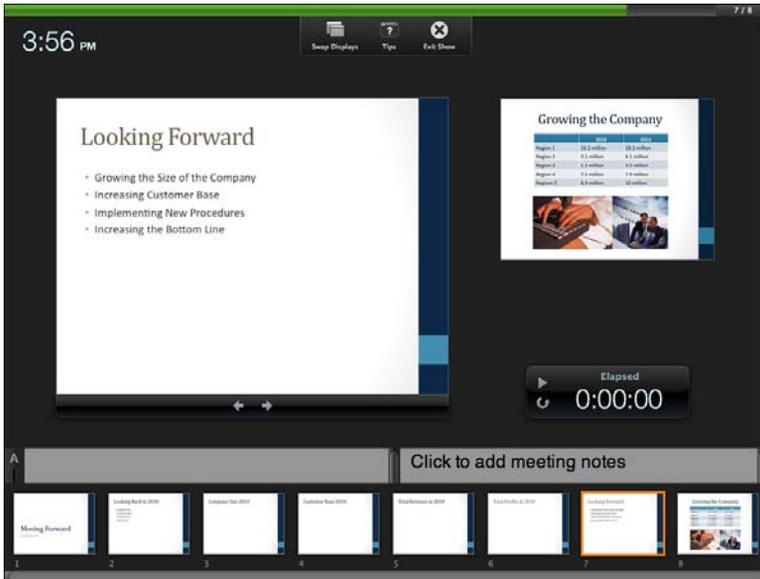


Figure 12.10 *The Presenter View gives the presenter lots of information about the presentation as it is being given.*

While you are presenting the show, you can use the Annotation tool to call attention to certain points on your slides. To learn more about annotating slides during a presentation, listen to the following audio recording.



TELL ME MORE Media 12.4—Annotating Slides

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

My Top Five Tips

I want to end this chapter with five of my favorite tips for making PowerPoint presentations:

- **Tip 1**—I usually make the first slide of a presentation a welcome slide instead of the title of the slide presentation. Then, I start the show before the crowd gets there so they can't see me start PowerPoint and load up the file.

As people walk in, they see the welcome slide, and I leave it on the screen while I make my introductory remarks. When I'm ready to start the presentation, I advance to the next slide, which is the title slide for the presentation.

- **Tip 2**—I make the last slide in the show blank and leave it onscreen instead of pressing Esc and showing the PowerPoint program. I usually make the background of this slide black or the darkest color in the theme I'm using. It gives the presentation a "fade to black" feel at the end. It also keeps the slide show running so I can go back to a previous slide if someone has a question.
- **Tip 3**—For effect, I like to rotate placeholders that hold photographs. You can do this by dragging the green handle at the top of the placeholder. Sometimes I even rotate title placeholders.
- **Tip 4**—If the presentation says it all (in other words, there is no oral presentation that goes with it), I like to add background music to the presentation. Here's how to do it: First, make sure you have a music file that is long enough to play through the entire slide presentation. Select the slide where the music should start—generally the title slide. Click Slide Show on the menu bar and then click Action Button. Click Sound and drag a button on the slide. The Action Settings dialog box opens. Click the Play Sound pop-up button. Scroll down to the last option and select Other Sound. The file navigation dialog box opens. (If necessary, select All Files for Enable in this dialog box.) Navigate to the music file and double-click it. PowerPoint exports a movie file. When the export is finished, click OK in the dialog box.

When you play the slide show, click the sound button you created on the slide where the music should start. The music plays until it reaches the end of the song or until you stop the slide presentation, whichever comes first. You cannot stop the background music during the presentation. You also can create a "voice over" by adding narration to any slide. When you click the narration object during the presentation, it plays over the background music.

- **Tip 5**—I like to repurpose all the hard work and artistic design I put into making a slide show by saving each slide as a .jpg file that I can use in other supporting documents. This is so easy to do. You just choose Save As and select the JPEG format. PowerPoint automatically saves each slide as a separate file. It names the files Slide01.jpg, Slide02.jpg, and so on. This works for all the graphic formats the Save As command provides (PNG, GIF, BMP, and TIFF).

This chapter introduces the Excel window and covers entering and editing data, formulas, built-in functions, and printing.

13

Getting Started with Excel

This chapter lays the foundation for working with Excel workbooks by defining worksheet terms, explaining the types of data you can enter, and discussing formulas and functions. It covers how to enter data, move around, select cells, copy and cut cells, and use relative and absolute cell addresses in formulas. It concludes with information about how to set up a worksheet for printing.

Exploring the Window

When you start Excel, the Excel Workbook Gallery, shown in Figure 13.1, opens by default. (You can turn off this feature by clicking Don't Show This When Opening Excel.) In this window, you can select a template for the type of workbook you want to create. Excel has templates in the following categories: Time Management, Business Essentials, Personal Finance, Business Finance, and Graph Paper. Most of the templates have sample data in them that you can replace with your own data. Additionally, templates are available online.

To select a template, click the category in the left pane, select the template in the middle pane, and click Choose. The template called Excel Workbook is a basic, blank workbook. Figure 13.2 shows what it looks like. In the figure, you can see that the Excel window has the menu bar at the top, then the title bar, a toolbar under the title bar, and then the ribbon. This is standard for most Office applications.

 *To learn more about how the ribbon works, see "Getting Familiar with the Ribbon" in Chapter 1, "Getting Started with Word."*

Unique to Excel is the formula bar, which is located under the ribbon. Under the formula bar is the heading row for the columns. Each column (there are 16,384 of them) is named with letters. Along the left side of the window is a column of numbers that identifies each row, all 1,048,576 of them. On the right side of the window is the vertical scrollbar. The large area that looks like a grid contains the cells where you enter your data.

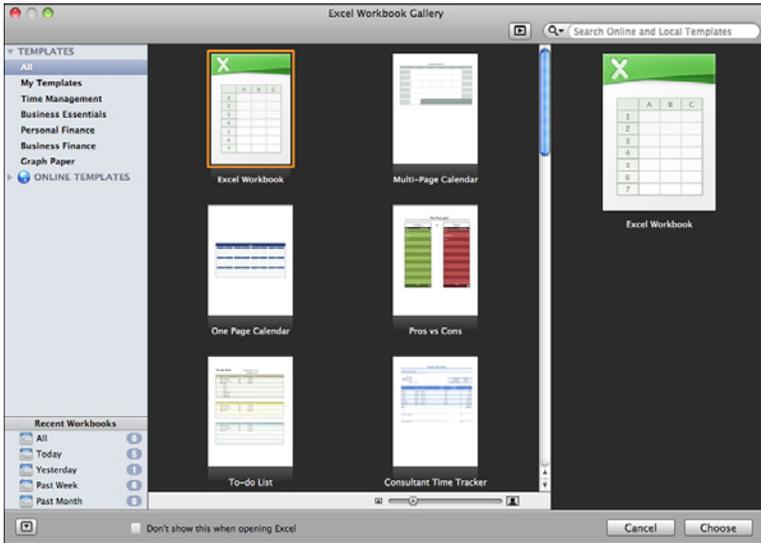


Figure 13.1 Use the Excel Workbook Gallery to select a template that meets your needs.

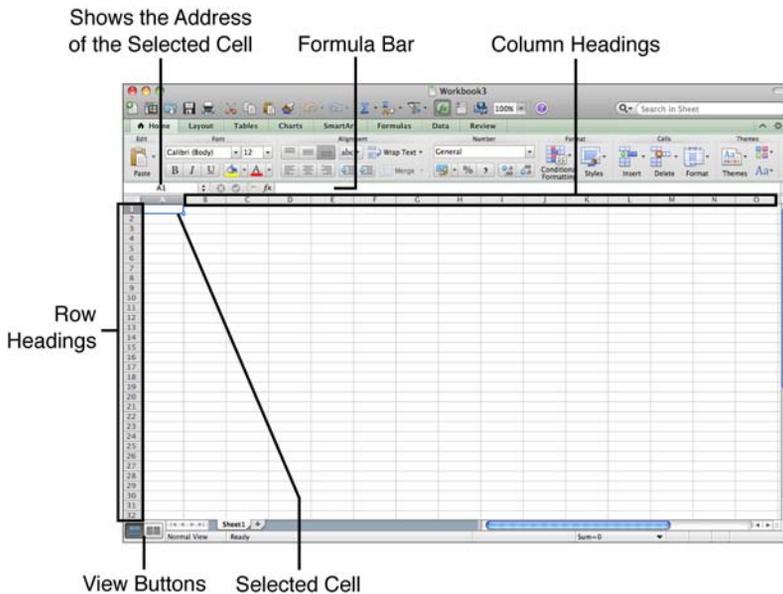


Figure 13.2 This blank worksheet template enables you to start using Excel quickly.

The two buttons under the row numbers on the left side of the screen toggle the view from normal view to page layout view. To the right of the view buttons, above the status bar, you can see controls for navigating through multiple sheets (these controls are dimmed in the figure because the workbook has only one sheet). Next to the sheet navigation controls is the tab for the sheet. The default number of sheets in a new workbook is one, but you can have as many sheets as your Mac's memory will allow. Next to the sheet tab is the Insert Sheet button (used for adding more sheets), and beside that is the horizontal scrollbar. The status bar at the bottom currently displays the view (Normal View), the mode (Ready), and the sum of all selected cells. (Only cell A1 is selected, and because it has no content, the sum equals zero.)

Because there is so much going on in the Excel window, I've recorded a video tour for you that points out the features of the window.



SHOW ME Media 13.1—Taking a Tour of the Excel Window

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

Entering and Editing Data in Cells

A *cell* is the intersection of a row and column. The *address* of a cell is its column letter(s) followed by the row number. For example, A1 is the cell address of the first cell in the sheet. If you have the time to scroll all the way to the right and all the way down (which takes a considerable amount of time), you'll find that the address of the cell in the lower-right corner of the sheet is XFD1048576.

To enter data in a sheet like the one shown in Figure 13.2, you must select a cell. You can click in a cell to select it or move to the cell using the keystrokes listed in Table 13.1. If you want to click in a cell you cannot see on the screen, use the vertical or horizontal scrollbars to scroll the worksheet until the cell is in view.

Note that not all keyboards have the Home, End, Pg Up, or Pg Dn keys, but Other keyboard combinations, usually involving the Fn key, perform the same functions.

Table 13.1 Navigation Keystrokes

| To Go To | Press |
|---|--------------------------|
| The next cell to the right | Right arrow or Tab |
| The next cell to the left | Left arrow or Shift-Tab |
| The cell directly below | Down arrow or Return |
| The cell directly above | Up arrow or Shift-Return |
| The cell in the upper-left corner | Cmd-Home |
| The cell in the lower-right corner* of the active worksheet | Cmd-End |
| Down one screen | PgDn |
| Up one screen | PgUp |
| Right one screen | Alt-PgDn |
| Left one screen | Alt-PgUp |

* The intersection of the last column and the last row used in the worksheet is the lower-right corner of the worksheet.

To enter data in multiple rows very easily, type data in the first cell in the row and press Tab to go to the next cell. Repeat until you reach the last cell in the row you want to use. Press Return to go to the cell in the next row that is directly under the first cell in which you entered data on the row above.

When you click in a cell to select it, Excel puts a dark blue border around it. After you select a cell, you can start typing the data. The data appears in the formula bar as you type. When you finish typing, press Return to enter the data and move down a cell. Alternatively, instead of pressing Return, you can press Tab to enter the data and move to the cell to the right or press the up, left, or right arrow to enter the data and move in the corresponding direction. If you make a mistake while typing data, press Backspace to erase the character to the left and retype the text before you press a key that enters the data. If you change your mind completely, press Esc before pressing a key that enters the data.

If the data you enter is too wide to fit in a cell, one of several things can happen, depending on what type of data you enter:

- **If the data is text**, Excel lets the text use the space of the cells to the right. Note, however, that Excel does not actually put the spillover text into the adjoining cells. If you enter text in the adjoining cell (or if the adjoining cell already has text in it), Excel truncates the text in the cell to the left.

- **If the data is a date or time**, Excel fills the cell with pound signs (#).
- **If the data is a number**, Excel widens the column slightly if the number is not too long. If the number *is* too long, it fills the cell with pound signs (#) or converts it to scientific notation, depending on the number format in use.

Scientific notation is a number format used for very large or very small numbers such as a trillion or a trillionth. The scientific notation for one trillion is 1.0E+12, which means one times 10 to the 12th power.

If a cell is not wide enough to display the data, you can fix the problem in several different ways. You can widen the column or reduce the font size. If the data is text, you can wrap it or start a new line in the cell.

 *To learn more about number formats and the methods for fixing data that doesn't fit in a cell, see Chapter 14, "Enhancing Worksheets."*

Editing Data

To edit the data in a cell, select the cell and then click within the text in the formula bar to delete or insert more text. Double-clicking in a cell enables you to edit the data directly in the cell.

Deleting Data

If you have entered data, and you want to erase it, select the cells containing the data and press Delete (see Table 13.2). Note that the Delete key deletes the data in the cells, not the cells themselves.

Table 13.2 Methods for Selecting Cells

| Cells to Select | Method |
|--|---|
| Single cell | Click the cell. |
| Block of cells (also known as a range) | Drag through the block or click one corner of the block and Shift-click the opposite corner of the block. |
| Noncontiguous group of cells | Cmd-click each individual cell and Cmd-drag through blocks you want to add to the selected cells. |
| A row of cells | Click the row heading. |
| Adjacent rows | Drag through the row headings. |

| | |
|-----------------------|---|
| A column of cells | Click the column heading. |
| Adjacent columns | Drag through column headings. |
| Noncontiguous rows | Cmd-click each row heading and Cmd-drag through adjacent row headings to add to the selected rows. |
| Noncontiguous columns | Cmd-click each column heading and Cmd-drag through adjacent column headings to add to the selected columns. |

Copying, Cutting, and Pasting Cells

Often it is a convenience to copy cells and paste them in another location. For example, if you have typed the names of 12 cities, and you want to create another area that contains the same city names, you can copy the names to the new area.

To copy, select the cells (refer to Table 13.2) and press Cmd-C. To paste the cells in the new location, click the cell in the upper-left corner of the new location and press Cmd-V. If the new location already has data in it, Excel overwrites the data with no warning, so be careful.

Using practically the same method, you can cut and paste cells. Instead of pressing Cmd-C for copy, press Cmd-X for cut. When you cut cells, the data is cut, not the cells themselves. Pasting cut cells also overwrites existing data, if any, in the new location.

If the cells you are copying and pasting contain formulas, things can get dicey. The results you get when you paste the formulas in the new locations might be incorrect. See "Copying Formulas" later in this chapter to find out why.

Enlisting Excel's Help Entering Data

If you type *Monthly Income* in a cell, the next time you start typing *Mon...* in the same column, Excel shows "Monthly Income" in a pop-up. If that is the text you intend to type, you can just quit typing and press Return. This is Excel's way of helping you with its feature called AutoComplete. If your intent is to type *Monthly Outgo*, you can just ignore the pop-up and keep typing. The next time you type *Monthly* in the same column, Excel lists both choices in the pop-up. You can use the arrow keys to select one and press Return.

Excel does not give you AutoComplete choices when you are typing the same data across a row.

Another way Excel can help you enter data is to complete a series for you. If you enter a recognizable series in a row or column, such as *20, 30, 40* or *Jan, Feb, Mar* or *Week 1, Week 2, Week 3*, and so on, Excel can complete the series for you. Enter enough data for Excel to recognize the pattern (usually two cells is enough). Select the cells and point to the *fill handle* on the lower-right corner of the last cell in the selection. When the pointer changes to a black plus, drag the handle down (for a column) or to the right (for a row) to fill the number of cells you need. I love this feature! What a time-saver!

If you select only one cell and drag the fill handle, Excel copies the data in the cell instead of filling in a series, but you can click the AutoFill Options pop-up button and select Fill Series. Excel then creates a series with an increment of one.

Entering Comments

In addition to the text you enter in cells, you also can enter comments. Comments are attached to a cell; they do not appear *in* a cell. If a cell has a comment, it has a red triangle in the upper-right corner. Mousing over a cell with a comment displays the comment. To insert a comment, click the New button on the Review tab on the ribbon and type your comment. Click anywhere outside the comment to close it. To delete a comment, select the cell with the comment and click the Delete button on the Review tab.

 To learn more about reviewing comments, see "Reviewing Worksheet Comments" in Chapter 16, "Using Review Features."

Working with Formulas

The primary purpose of a worksheet is to perform calculations for you. Of course, you have to enter the numbers and the correct formulas. If you change the numbers that are referenced by a formula, Excel recalculates the formula for you.

A formula is a mathematical statement that requires a calculation to produce a result. For example, when the teacher asks the first grader, "What is two plus

three?" the question itself is a formula. When the first grader says, "Five," the student has performed a calculation that produces the answer. If the teacher writes the formula on the board, she writes "2 + 3." She uses numbers and an *arithmetic operator*. The operator describes the type of calculation that must be performed on the numbers—addition, in this example. Other arithmetic operators include – (subtraction), * (multiplication), / (division), % (percent), and ^ (exponentiation).

Exponentiation multiplies a number by itself as many times as the number of the exponent. Two raised to the fourth power (2^4) is two times two times two times two, which results in 16.

Constructing a Formula

When you enter a formula in a cell, you enter it much the same way you would write the formula on the board, but you must begin with the equal sign. This tells Excel the data is going to be a formula. When you enter the formula, Excel doesn't display the formula in the cell like text; it always displays the answer to the formula. So, continuing the preceding example, you can enter =2+3, and Excel will display the number 5 in the cell, as shown in Figure 13.3. (Notice the formula does not have spaces in it.)

It's really a waste of effort to enter the formula as =2+3 because you might have to change one or both of the numbers in cells B1 and B2. If you have to change the numbers in the cells to 4 and 5, for example, your formula will not give the answer you are looking for. It will still add 2 and 3. To remedy this situation, you should enter the formula using the cell addresses of the numbers. Now, the formula would look like this: =B1+B2. If the numbers in the cells change, the formula automatically recalculates to give the correct answer.

You don't have to capitalize the cell addresses, but Excel always displays them with capital letters.

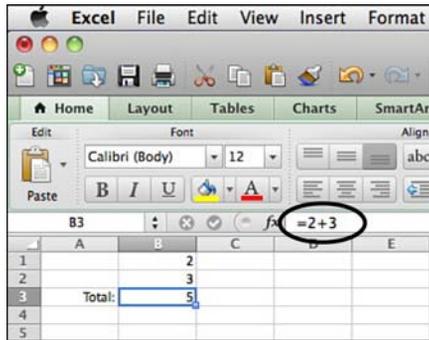


Figure 13.3 The formula shows in the formula bar but the answer shows in the cell.

Understanding the Order of Precedence

Are you smarter than a fifth grader? Examine a formula that uses more than one operator and find out. So far, you've been looking at a formula that uses only the plus operator (+) to add numbers. What if the teacher asks, "What is 5 + 2, times 3?" You can tell by the teacher's intonation, the slight pause after she says 5 + 2, that she wants you to add 5 and 2 and then multiply that result by 3. You know the answer is 21! Congratulations! That's right, but you still don't know if you are smarter than a fifth grader. Look at the numbers in Figure 13.4.

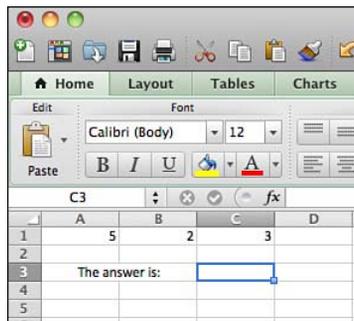


Figure 13.4 What formula will you enter in cell C3 to add A1 and B1 and multiply the result by C1?

Think about the formula you would enter in cell C3 to get the answer to the teacher's question. If you enter `=A1+B1*C1`, Excel calculates the answer, and

the answer is ... 30! What happened? Because Excel never makes a mistake, the problem must be that the formula is incorrect.

Here's the problem. You calculated the formula correctly in your head because you interpreted the intonation of the teacher. When you entered the formula, you failed to communicate that intonation to Excel. To communicate the fact that you want Excel to add the first two numbers before it multiplies by 3, you enter the formula using parentheses, like this: $=(A1+B1)*C1$.

If you do not use parentheses in this formula, Excel is forced to calculate the formula based on an immutable law of mathematics called *the order of precedence*. The order of precedence mandates that certain operations must be performed before others. Here's the order for arithmetic operations: Parentheses (working from the inside out if there are parentheses within parentheses), exponentiation, multiplication or division (proceeding from left to right if both are present), and finally addition or subtraction (proceeding from left to right if both are present). A mnemonic for the order of precedence is "**Please excuse my dear Aunt Sally.**"

To understand order of precedence better, study the following example showing how a formula with several operations in it is calculated.

| Order of Precedence | Explanation |
|---------------------------------|---|
| $(10 - (2 + 3 * 2)/2)^2 + 10^3$ | The formula to calculate. |
| $(10 - (2+6)/2)^2 + 10^3$ | The inside parentheses are calculated first, but multiplication takes precedence over addition, so 3 is multiplied by 2. |
| $(10 - 8/2)^2 + 10^3$ | The single operation in the inside parentheses is calculated, resulting in 8. |
| $(10 - 4)^2 + 10^3$ | One set of parentheses is left, and it must be calculated next, but it has two operations in it. Division takes precedence over subtraction, so 8 is divided by 2 with the result of 4. |
| $6^2 + 10^3$ | The operation in the parentheses is calculated and results in 6. |
| $36 + 1,000$ | Exponentiation has a higher precedence than addition, so the formula multiplies 6 times 6 and multiplies 10 times 10 times 10 for a result of 1,000. |
| 1,036 | The final answer. |

Using a Function

Now go back for a moment to the first grade teacher who might ask, "What is $1 + 2 + 3 + 4$?" In Excel, you could enter the formula as `=A1+A2+A3+A4`. What if the formula had to add a hundred numbers? Yikes! This is where *functions* come in. In this example, you would use the SUM function.

A function is a built-in formula—one Excel includes in the application—that performs a more complex calculation based on the arguments you supply. A function does not use spaces, and it follows this format:

```
=FUNCTION_NAME(argument,argument,argument...)
```

The format for the SUM function is

```
=SUM(number1,number2,number3...)
```

If a function uses the arguments *number1*, *number2*, *number3*, you don't have to list each number. You have some options. One option is to specify a *range* as the argument. A range is a rectangular block of cells. Figure 13.5 shows how Excel denotes a range in the function `=SUM(A1:A18)`. It lists the first cell in the range followed by a colon and then the last cell in the range. (It could also be the last cell, a colon, and the first cell.)

Another option is to specify an entire column or an entire row as the argument, as shown in Figure 13.6. Excel is smart enough to ignore blank cells and to disregard all data in the column or row that is not a number. The function is `=SUM(3:3)`.

Another option is to use a combination of arguments, as shown in Figure 13.7. This function adds the numbers in the range A1:A3 to the number in cell C1 and then adds a constant.

A good way to learn about the built-in functions is to open the Formula Builder. Click the `Fx` in the formula bar, or click `View` on the menu bar and click `Formula Builder`. The Formula Builder lists all the built-in functions by category and describes each one.

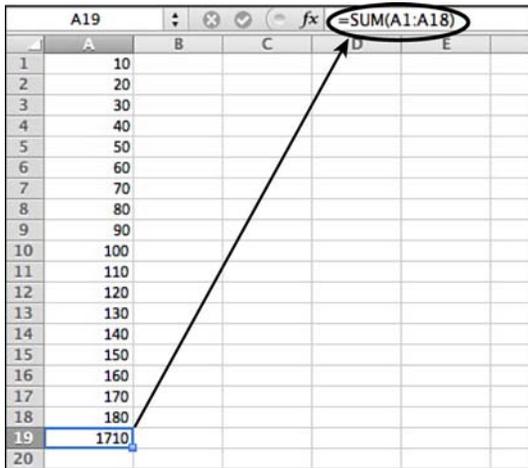


Figure 13.5 The function shows the range of cells from A1 to A18 as A1:A18.

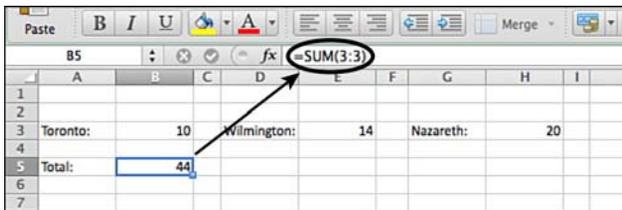


Figure 13.6 The function adds all the numbers in row 3 and ignores the blank cells and cells that contain text.

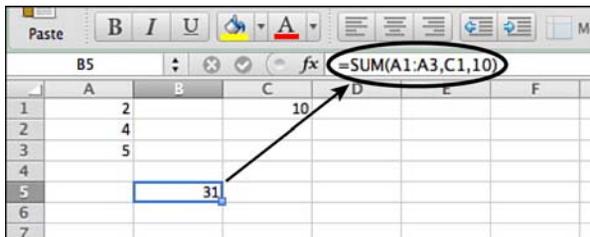


Figure 13.7 This function use a range, cell address, and a constant as arguments.

Entering a Formula or Function

Excel provides several ways to enter formulas and functions in a cell:

- **Typing**—If you type a formula or function directly into a cell, you have to know all the cell addresses and type them correctly. This is the easiest way to make mistakes, and I don't recommend it.
- **Pointing**—With this method, you point to the cell addresses and ranges and type everything else, such as the name of the function or the operation signs. This is the method I recommend.
- **Using the Formula Builder**—If you double-click a function name in the Formula Builder, it helps you build the function. It lists the arguments you need and enables you to supply the arguments by typing or clicking a cell or range of cells. As you build the function, it displays the result below the list of arguments. After you have supplied all the arguments and the result looks correct, you can press Return to enter the function in the cell. If you already know how to use the function you are entering, this method just takes longer.



SHOW ME Media 13.2—Entering a Formula with the Pointing Method

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Entering a Formula with the Pointing Method

To understand the steps to enter a formula or a function by pointing, think about entering the formula `=A1*B1+SUM(C1:C10)`, and follow these steps:

1. Click in the cell where the result of the formula should display and type an equal sign.
2. Click cell A1. Excel goes into the Point mode (see the indicator in Figure 13.8) and inserts the address in the formula.
3. Type an asterisk. Now you are back to Enter mode.
4. Click cell B1 and type `+sum(`.
5. Drag through the range from C1 to C10.

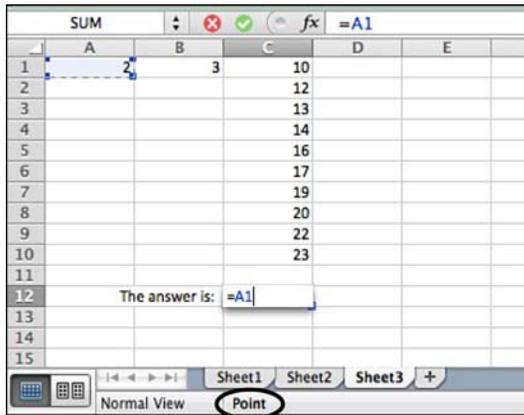


Figure 13.8 The mode indicator in the status bar displays "Point."

6. Type) and press Return.

My guess is that the =SUM function is one of the functions used most often. Why else would Microsoft give this function its very own button on the toolbar and in the Formulas tab? It's the button that looks like a capital E. To use the AutoSum button, click in the cell where you would normally enter the SUM function (at the bottom of a column of numbers, for example) and then click the AutoSum button. Excel creates the function complete with range, and all you have to do is press Return.

Copying Formulas

Earlier in the chapter, I warned you that copying cells with formulas could result in incorrect formulas in the new locations. The reason is that when you copy and paste a formula, Excel rewrites the formula if it contains *relative cell references*. All the formulas and functions discussed so far have used relative cell references.

A relative cell reference is a cell address Excel evaluates in terms of its location relative to the location of the formula that references it. Consider the formula =A1+A2 entered in cell A3. The position of A1 relative to A3 is that A1 is in the same column as A3, and it is two rows above A3. The relationship of A2 to A3 is that A2 is in the same column and one row above A3. So for this example, the

true meaning of the formula $=A1+A2$ is NOT "add the value in A1 to the value in A2," but "add the value in the cell two rows above the formula to the value in the cell one row above the formula." If you copy the formula in A3 to B3, Excel changes the formula to $=B1+B2$ because B1 and B2 are the cells in the same column as the formula and they are located two rows above and one row above the formula. If you copy the formula in A3 to P6, Excel changes the formula to $=P4+P5$.

In most cases, the change Excel makes when you copy a formula is just what you want. For example, if you have 12 columns with 15 numbers in each column, and you want to total each column, you can enter the SUM function under the first column and copy it to the other 11 columns. Excel copies the formula and changes the cell addresses for each column because it realizes that the true meaning of the function in the first column is "total the 15 cells directly above me."



SHOW ME Media 13.3—Copying Formulas with Relative Cell References

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In some cases, however, you want the formula always to refer to a specific cell if it is copied. For this you must use an *absolute cell reference*. An absolute reference for a cell is written with dollar signs, as in $\$A\1 . Figure 13.9 shows an example of a formula in cell C2 that multiplies a relative cell address by an absolute cell address ($=B2*\$E\2). The true meaning of the formula is "multiply the value in the cell one column to the left times the value in cell E2." If you copy the formula down the column, it will yield the correct results.



TELL ME MORE Media 13.4—Using Absolute Cell References

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

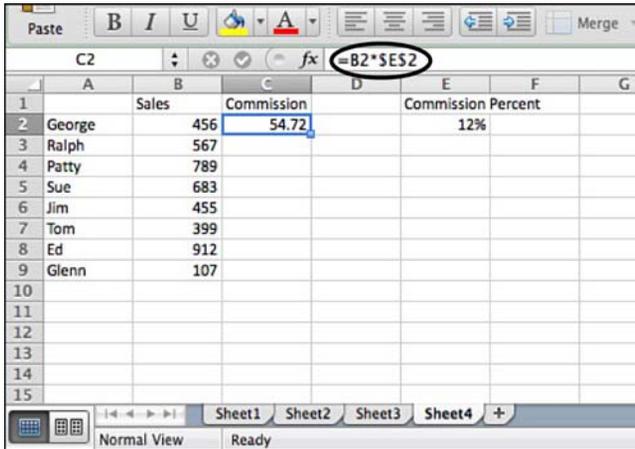


Figure 13.9 The absolute address ensures that the formula will always multiply by the value in cell E2 no matter where it is copied.

Correcting Formula Errors

Excel has several ways to inform you when you have or *might have* made an error in a formula. If you enter something Excel does not understand or accept in a formula, you might see #NAME? or #VALUE! or #DIV/0! in the cell. Additionally, you can look for errors by running the Error Checking tool (Tools, Error Checking).

If you see the name error, it means the formula contains unrecognized text. You may have typed the function name incorrectly or typed a cell address as 1 instead of A1.

If you see the value error, it means one of the cells referenced in the formula contains text instead of a value. Functions generally do not result in the value error because they can evaluate a cell and ignore it if it contains text. Value errors generally come from formulas that use the arithmetic operators (+, -, *, /).

The #DIV/0! error means the formula is dividing by zero—a mathematical impossibility! This error often occurs when you have copied a formula containing a division by a cell with a relative reference. After the formula is copied to the new location, the rewritten cell address results in a division by an empty cell or a cell with text in it, both of which evaluate to zero.

To check for errors, click the Check for Errors button on the Formulas tab on the ribbon. This tool not only points out errors, but also tells you if it finds a formula

that is inconsistent with the other formulas in its area. For example, if all the formulas in the row compute the sum of the 20 cells above, but one of the formulas computes the sum of only 19 cells above, Excel brings this formula to your attention as being inconsistent.

Printing a Worksheet

Some worksheets are never meant to be printed. If yours *is*, I suggest you set up the page options (orientation, size, margins, and so on) before you start entering the data. Additionally, you might want to work in page layout view so you can see exactly what will print on the page.

Setting the Page Layout and Print Options

To set up the page, you can click the Layout tab on the ribbon and then click each of the first three buttons under Page Setup (Orientation, Size, and Margins) to set the options you want. Then you can use the buttons and controls under Print (in the same tab) to set their options.

One quick way to set all the options at once is to open the Page Setup dialog box by clicking File on the menu bar and clicking Page Setup. The dialog box, shown in Figure 13.10, has all the options that appear on the Layout tab on the ribbon and then some. This section looks at setting the options on each tab of the dialog box.

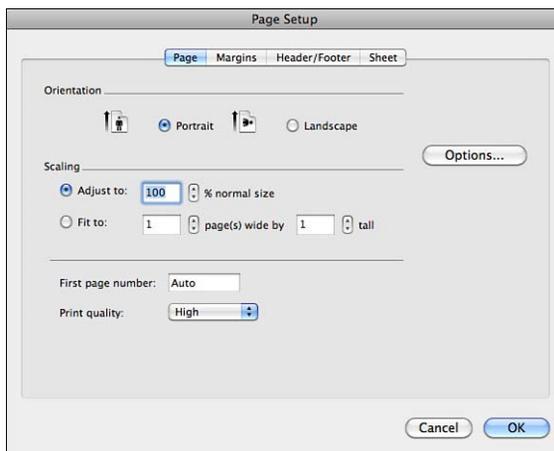


Figure 13.10 The Page Setup dialog box has four tabs that contain all the options needed for setting up and printing a worksheet.



LET ME TRY IT

Setting Page Options in the Page Setup Dialog Box

To set the Page options, open the Page Setup dialog box (File, Page Setup), click the Page tab if necessary, and follow these steps:

1. Select Portrait or Landscape for the Orientation.
2. Click Options, specify the paper size, and click OK.
3. Select a different scaling percentage if you want the data to print larger or smaller than its normal size (100%). Decreasing the percent allows Excel to print more columns and rows per page. Increasing the percent causes Excel to print fewer columns and rows per page.
4. If you want the data to fit on fewer pages, select the Fit To option and specify the number of pages wide by the number of pages tall. For example, if you select Fit to 1 Page Wide by 1 Tall, Excel reduces the scaling percent to whatever is necessary to fit the print range on the page.
5. If you have multiple pages and you want the first page to start with a number other than one, enter the number for First Page Number. Note that you must physically insert the page number in the header or footer to print. (See the "Setting Header/Footer Options in the Page Setup Dialog Box" section later in this chapter.)
6. Select a print quality and click OK.



LET ME TRY IT

Setting Margins Options in the Page Setup Dialog Box

To set the Margins options, open the Page Setup dialog box (File, Page Setup), click the Margins tab if necessary, and then follow these steps:

1. Specify the values for Top, Left, Right, and Bottom.
2. Specify the values for the Header and the Footer.
3. Click Horizontally or Vertically or both to center the data on the page. (This is a bonus option you don't get on the ribbon.)



Setting Header/Footer Options in the Page Setup Dialog Box

To set the Header/Footer options, open the Page Setup dialog box (File, Page Setup) and click the Header/Footer tab if necessary. Click the pop-up buttons under Header and Footer, select one of the default text offerings, and click OK. If none of the default selections suits your needs, follow these steps:

1. Click Customize Header. The Header dialog box shown in Figure 13.11 opens.

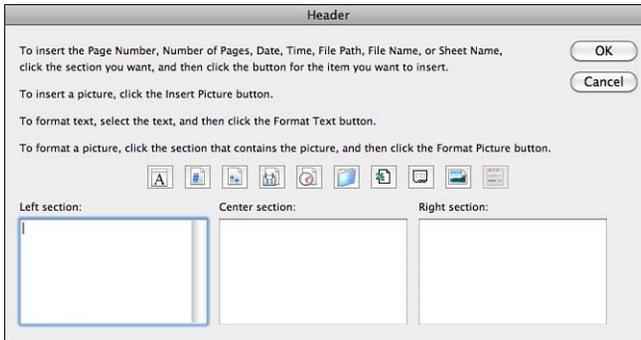


Figure 13.11 *The Header dialog box has its own toolbar you can use to insert various elements in a header.*

2. Click in the section where you want to enter text and type the text, or use the buttons in the dialog box to insert various items. You can insert the page number, the number of pages, the date, the time, a picture, and so on.
3. To format the text, select it and click the Format Text button in the dialog box. The Font dialog box opens. Select the options you want and click OK.
4. Click Customize Footer. The Footer dialog box opens; it is identical to the Header dialog box. Follow the instructions in steps 2 and 3 to complete the Footer.
5. Click OK.



Setting Sheet Options in the Page Setup Dialog Box

To set the Sheet options, open the Page Setup dialog box (File, Page Setup), click the Sheet tab if necessary, and then follow these steps:

1. To print the same rows at the top on every page that prints, click the button at the right end of the Rows to Repeat at Top text box. Select the cells that contain the rows you want to print and click the button at the end of the box.
2. To print the same columns on the left side on every page that prints, click the button at the right end of the Columns to Repeat text box. Select the cells that contain the columns you want to print and click the button at the end of the box.
3. Click the button at the right end of the Print Area box. Select the cells you want to print and click the button at the end of the box.
4. In the Print area, click the other elements you want to print, such as Grid-lines or Row and Column Headings (the numbers and letters that identify the rows and columns).
5. If you want to print in black and white only, click Black and White.
6. If you want to print in draft quality, click Draft Quality.
7. If you have comments in the spreadsheet, click the Comments pop-up button and select a location where you want them to print.
8. In Print Order, select either Down, Then Over or Over, Then Down.
9. Click OK.

You also can quickly set a print area by using a menu command. Select the cells you want to print, and click File in the menu bar. Then click Print Area, Set Print Area.

Previewing the Sheet Before Printing

If you have set all the Page Setup options, you are ready to send the data to print. Before doing so, you might want to get a quick preview by clicking the Preview button under Print on the Layout tab on the ribbon. The Mac Preview

application opens and displays the sheet as a .pdf file. You can use the Next and Previous button to go from page to page and use the Zoom buttons to zoom in or out on the data. When you are finished previewing the document, click the Close button in Preview.

The only problem you might have now is where the pages break. If you are working in page layout view, you can see where the pages will break ahead of time and adjust them accordingly. If you haven't done that, you should adjust them now, before you send the data to print. To insert a page break, click anywhere on the row that should start the next page and click the Breaks button on the Layout tab. Click Insert Page Break.

Sending the Sheet to Print

Finally, you are ready to actually print! Click File on the menu bar and click Print. The standard Print dialog box opens. Select your printer, the pages you want to print, the number of copies, and so on. When you're ready for liftoff, click Print!

Enhancing Worksheets

After explaining just the bare basics in Chapter 13, "Getting Started with Excel," this chapter covers numerous features and operations that enhance the structure, format, and usefulness of a worksheet. It shows you how to change the column widths and row heights; insert, delete, hide, and unhide cells, columns, and rows; format text and numbers; edit and create Excel styles; work efficiently in very large spreadsheets by freezing and splitting panes; and create charts, sparklines, and SmartArt.

Configuring the Worksheet for Your Data

In a new, blank worksheet, all the columns are the same width, and all the rows are the same height. This is generally not the best configuration for your data. When you're entering data in a worksheet, it is quite common to

- Change column width
- Change row height
- Merge cells
- Insert and delete columns and rows
- Insert and delete cells
- Hide columns and rows

Changing the Column Width

Notice that column C in Figure 14.1 is much wider than the default width of a column. If you know you will need a wider column, you can type the text in the column first and then adjust the width, or you can take an educated guess and widen the column before you start entering the data. If you guess wrong, it's a simple matter to adjust the width again.

The screenshot shows the Microsoft Excel interface. The ribbon at the top includes Home, Layout, Tables, Charts, SmartArt, Formulas, Data, and Review. The Font group is active, showing Calibri (Body) font, size 12, and various text formatting options like Bold, Italic, Underline, and text color. The Alignment group shows options for text alignment and wrapping. The worksheet grid shows columns A through L and rows 1 through 30. The data table starts at row 2, column A, and contains employee information.

| | A | B | C | Start Date | | | G | I | J |
|----|-----------|-------------|------------|------------|-------|-----|-----------------|------------------|----------------|
| | | | | Year | Month | Day | | | |
| 2 | First | Last | Department | | | | Yrs. of Service | Last Review Date | Proposed Bonus |
| 3 | Wilma | Stevenson | Sales | 2002 | 11 | 13 | 8 | 11/31/09 | \$800 |
| 4 | Alice | Steinbeck | Sales | 2001 | 5 | 6 | 9 | 2/15/10 | \$900 |
| 5 | Michael | Smith | Sales | 2001 | 12 | 14 | 9 | 11/15/09 | \$700 |
| 6 | John | Shelley | Research | 2008 | 9 | 5 | 2 | 1/15/10 | \$300 |
| 7 | Susan | Patton | Operations | 2009 | 4 | 16 | 1 | 12/1/09 | \$700 |
| 8 | Marcus | Hildebrandt | Support | 2000 | 4 | 10 | 10 | 7/1/10 | \$300 |
| 9 | Judith | Hildebrandt | Support | 2000 | 4 | 10 | 10 | 3/15/10 | \$400 |
| 10 | Matthew | Graham | Support | 2003 | 2 | 21 | 8 | 12/1/09 | \$400 |
| 11 | Luke | Dennis | Operations | 2001 | 6 | 15 | 9 | 7/1/10 | \$600 |
| 12 | James | Byron | Marketing | 2000 | 1 | 20 | 11 | 1/1/10 | \$500 |
| 13 | Frederick | Beck | Operations | 2007 | 3 | 28 | 3 | 9/1/10 | \$400 |
| 14 | Betty | Stevia | Sales | 2002 | 11 | 13 | 8 | 11/31/09 | \$800 |
| 15 | George | Sloane | Sales | 2001 | 5 | 6 | 9 | 2/15/10 | \$900 |
| 16 | Kathy | Smith | Sales | 2001 | 12 | 14 | 9 | 11/15/09 | \$700 |
| 17 | Nelda | Shelton | Research | 2008 | 9 | 5 | 2 | 1/15/10 | \$300 |
| 18 | Stan | Perry | Operations | 2009 | 4 | 16 | 1 | 12/1/09 | \$700 |
| 19 | Judy | Hughes | Support | 2000 | 4 | 10 | 10 | 7/1/10 | \$500 |
| 20 | Jack | Hughes | Support | 2000 | 4 | 10 | 10 | 3/15/10 | \$400 |
| 21 | Richard | Goode | Support | 2003 | 2 | 21 | 8 | 12/1/09 | \$400 |
| 22 | Kirk | Dreyfus | Operations | 2001 | 6 | 15 | 9 | 7/1/10 | \$600 |
| 23 | Todd | Bick | Marketing | 2000 | 1 | 20 | 11 | 1/1/10 | \$500 |
| 24 | Logan | Boyle | Operations | 2007 | 3 | 28 | 3 | 9/1/10 | \$400 |
| 25 | Lilly | Taylor | Sales | 2002 | 11 | 13 | 8 | 11/31/09 | \$800 |
| 26 | Cooper | Ruegerio | Sales | 2001 | 5 | 6 | 9 | 2/15/10 | \$900 |
| 27 | William | Alvarez | Sales | 2001 | 12 | 14 | 9 | 11/15/09 | \$700 |
| 28 | Rachel | Patel | Research | 2008 | 9 | 5 | 2 | 1/15/10 | \$300 |
| 29 | Rebecca | Sanchez | Operations | 2009 | 4 | 16 | 1 | 12/1/09 | \$700 |
| 30 | Josie | Carrera | Support | 2000 | 4 | 10 | 10 | 7/1/10 | \$300 |

Figure 14.1 This worksheet has a typical configuration.

To widen a column, point to the separator on the right side of the column heading (where it says A, B, C, and so on). When the pointer changes to a double-headed arrow, drag the separator to the right. Similarly, you can make a column narrower by dragging the separator to the left. To change the width of several columns at the same time, select the columns first and then drag the right-side separator of any column.

 To learn more about how to select columns, see Table 13.2, "Methods for Selecting Cells," in Chapter 13, "Getting Started with Excel."

Another way to adjust the column width is to use AutoFit, a tool that adjusts the width to accommodate the length of the longest text in the column. To use AutoFit, select the column or columns, and double-click the right heading separator. (The menu command for this feature is Format, Column, AutoFit Selection.)

It's important to know that all cells in a column (all the way down to the last row in the worksheet) are the same width. You cannot change the width of selected cells in a column.

Changing the Row Height

In Figure 14.1, you can see that the second row is taller than the other rows. This creates some space under the title in row 1.

To increase the height of a row, select the row (or rows) and point to the bottom separator in the row headings (1, 2, 3, and so on) on the far left. When the pointer turns to a double-headed arrow, drag the separator down. Of course, you can make a row shorter by dragging the separator up.

Unlike columns, rows have a kind of built-in AutoFit. They automatically adjust to fit the height of the tallest data in the row. Nevertheless, Excel also has an actual AutoFit command for rows. You might use the AutoFit command in this situation: Say you increase the row height and then decide you want it to be the normal height again. You can return the row height to the original by double-clicking the bottom separator for the row heading. (The menu command for this is Format, Row, AutoFit.)

The default minimum height of a row accommodates a font size of 12 points. The built-in AutoFit does not automatically adjust to sizes smaller than 12 points.

Merging and Centering Cells

Notice in the sample worksheet in Figure 14.1 that the title "Start Date" is in a cell that spans the width of three columns. Notice also that the text in this cell is centered. To achieve this effect, select the cells in a row; then click the Merge button on the Home tab on the ribbon. If you want to merge the cells but keep the text aligned on the left, you can click the Merge pop-up button and click Merge Across. To undo the merge, click the Merge button again.

You also can merge blocks of cells.

If you merge cells that already have data in them, Excel keeps only the data in the upper leftmost cell, but it warns you about this so you can cancel the operation if necessary. Then before merging, you can copy or enter the data you want in the upper leftmost cell. If you make the mistake of merging cells and losing data, click the Undo button in the toolbar twice.

Inserting and Deleting Columns and Rows

Often it is necessary to insert additional columns or rows between existing data. To insert a column, click the column heading for the column that should be to the right of the new column. Click the Insert button under Cells on the Home tab on the ribbon. To insert more than one column at a time, select the same number of columns that you want to insert, again selecting the columns to the right of the place where the new columns will be inserted, and click the Insert button on the Home tab.

Inserting rows follows the same procedure, but you select the row or rows that should be under the new row(s) and then click the Insert button on the Home tab. The Insert button knows what to insert, either columns or rows, based on what you have selected.

To delete columns or rows, select the columns or rows and click the Delete button under Cells on the Home tab on the ribbon. Note that this button deletes the actual cells and the data in the cells, not *just* the data in the cells.

Also note that when you insert or delete a row or column, an entire row and entire column are inserted or deleted. This change has ramifications if you have a large worksheet with other areas of data you can't see on the screen. Inserting or deleting a column or row could adversely affect these areas as well as formulas that might reference deleted data.

Inserting and Deleting Cells

If inserting or deleting a column or row causes a problem with data in other areas of the worksheet, your best bet is to insert or delete just the cells you need in the one area.



SHOW ME Media 14.1—Inserting Cells

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Inserting Cells

To insert cells, follow these steps:

1. Select the cells that occupy the area where you want to insert blank cells.

2. Click the Insert pop-up button under Cells on the Home tab on the ribbon and click Insert Cells to open the dialog box shown in Figure 14.2.

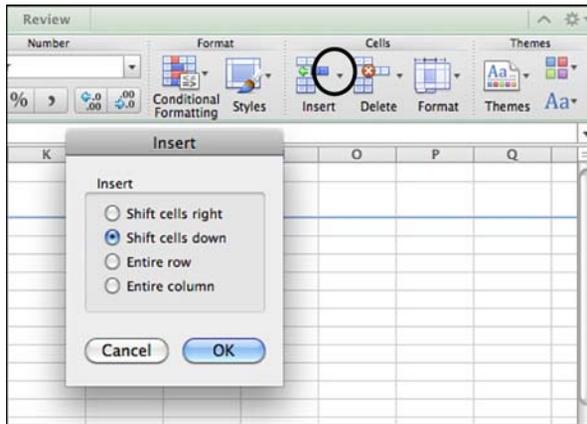


Figure 14.2 When you insert cells, existing cells must shift to make room for them.

Note that at lower screen resolutions, the Insert, Delete, and Format buttons are combined into one button called Actions.

3. Select an option for where Excel should move the adjacent cells and click OK.

You also can use the Insert pop-up button to insert cells that you have copied or cut from some other location. As you know, if you paste to cells that already contain data, Excel overwrites the data in the cells.



LET ME TRY IT

Deleting Cells

To delete cells, follow these steps:

1. Select the cells you want to delete.

2. Click the Delete pop-up button under Cells on the Home tab on the ribbon and click Delete Cells.
3. Select a shift direction and click OK.

Hiding and Unhiding Columns and Rows

Sometimes you have columns or rows of data that are necessary, but they do not need to display at a particular time. For example, you might have a column in the worksheet with constant values in it that you use in certain formulas. When presenting the worksheet onscreen or printing the worksheet, you don't want this "behind the scenes" data to show, so you hide it. Notice that column H is hidden in Figure 14.1. Excel changes the column headings on either side of a hidden column to bright blue to alert you that a column is hidden.

To hide a column or multiple columns, select the columns, right-click the header, and click Hide. To unhide a column, select the two columns on either side of the hidden column, right-click the columns, and click Unhide.

Formatting

By default, a new blank worksheet uses the font called Calibri at a font size of 12 points. The alignment is left justified in the cell for text and right justified for numbers. Data of any type aligns vertically to the bottom of the cell and uses landscape orientation. To override these default settings, you can apply different formatting options.

By default, when you copy a cell that has formatting, Excel also copies the formatting and applies it to the cell where you paste it. If you want Excel to do something different, you can choose Paste Special from the Edit menu. Additionally, when you insert a row, the cells in the new row take on the formats of the cells above them.

Formatting the Font

To format the font data uses, select the cells and use the buttons under Font on the Home tab on the ribbon, as shown in Figure 14.3. You can change the font style or size; apply bold, italic, or underline; change the font color; and so on.

To specify the font used in the entire worksheet, select all the cells in the worksheet by clicking the button above the row numbers (to the left of the column headings).

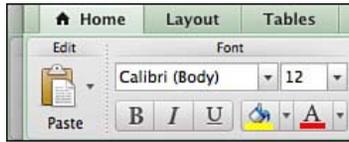


Figure 14.3 Use the Font button on the ribbon to apply formatting to data.

Changing the Alignment

To change the alignment of data, use one of the six alignment buttons under Alignment on the Home tab on the ribbon, as shown in Figure 14.4. The three buttons on the top row align the text vertically in the cell, and the three buttons on the second row align the text horizontally.

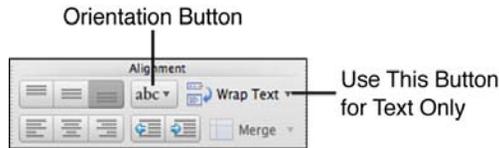


Figure 14.4 Some buttons in the Alignment section apply only to cells that contain text.

Changing the Orientation

The Orientation button under Alignment (refer to Figure 14.4) enables you to assign the different orientations shown in Figure 14.5. You might want to use a different orientation for the text in the cells of a title row.

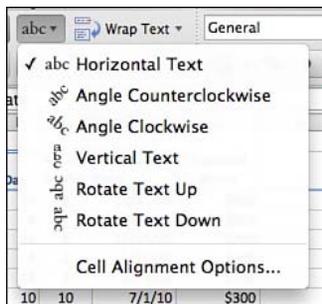


Figure 14.5 Applying orientation options to a cell causes the size of the row where the cell is located to change.

Wrapping Text in a Cell

As you know, you can type text that is too long for a cell, and Excel allows it to "hang over" into the adjacent cell(s). If the adjacent cells have data in them, Excel truncates the text. Excel doesn't delete the excess text; it merely displays only the text that will fit in the true width of the cell. To display all the text in a cell, you can apply the text wrapping format to the cell by clicking the Wrap Text button on the Home tab on the ribbon.

Instead of allowing text to wrap automatically, you can break the text manually. As you are entering the data, press Control-Opt-Return at the point where you want the text to break.

Alternatively, you can shrink text to fit in a cell by clicking the Wrap Text button and clicking Shrink Text to Fit. Of course, you can make the text so small that it's difficult to read using this method.

Using Number Formats

When you enter a number in a cell, Excel uses an internal algorithm to automatically apply a format to a cell. Study the examples given in Table 14.1 to better understand the number formats that Excel automatically applies to the data you enter.

Table 14.1 Default Number Formats

| <u>If You Enter</u> | <u>Excel Automatically Applies This Format</u> | <u>And Displays the Number in the Cell Like This</u> |
|---------------------|--|--|
| 1 | General | 1 |
| 1.1 | General | 1.1 |
| .0015 | General | .0015 |
| .00000000000000015 | General | 1.5E-16 |
| 12000 | General | 12000 |
| 12,000 | Number | 12,000 |
| 1/2 | Date | 2-Jan |
| 0 1/2 | Fraction | 1/2 |
| 12% | Number | .12 |

| | | |
|------------|----------|------------|
| \$100 | Currency | \$100 |
| \$1,200.00 | Currency | \$1,200.00 |
| 1/2/11 | Date | 1/2/11 |
| 1-2-11 | Date | 1/2/11 |
| January 2 | Date | 2-Jan |
| Jan 2 | Date | 2-Jan |
| 1:11 | Time | 1:11 |
| 1:11:11 | Time | 1:11:11 |

In addition to the six formats Excel applies by default, four other formats are available for your use: Accounting, Percentage, Scientific Notation, and Special (for things such as ZIP Codes and Social Security numbers). And, if that's not enough, you can create your own custom format.



LET ME TRY IT

Changing the Number Format

If Excel applies a number format you do not want to use, you can change the format by following these steps:

1. Select the cell(s).
2. Click Format on the menu bar and click Cells. The Format Cells dialog box opens, as shown in Figure 14.6. Click the Number tab if necessary.
3. Select the format you want to use from the Category list and then set the options for the format. All categories have options except General. See Table 14.2 for details about each format category.
4. Click OK.



Figure 14.6 You can set all formats for a cell using the *Format Cells* dialog box.

Table 14.2 Format Options

| Category | Options | Comments |
|----------|---|--|
| General | No options | Numbers appear exactly as entered except for very large or very small numbers, which display in scientific notation. |
| Number | Decimal places (specify the number of places you want to use) 1000 Separator (,) Negative numbers (with a minus, in red, or in parentheses) | |
| Currency | Decimal places (specify the number of places you want to use) Currency symbol (choice of None or multiple international symbols) Negative numbers (with a minus, in red, or in parentheses) | |

| | | |
|------------|--|---|
| Accounting | <p>Decimal places (specify the number of places you want to use)</p> <p>Currency symbol (choice of None or multiple international symbols)</p> | This format lines up the currency symbols and the decimal points in the column. Negative values display in parentheses. |
| Date | <p>Type (3/14/01; Wednesday, March 14, 2001; 3/14; 3/14/01, and so on)</p> <p>Location (Language)</p> <p>Calendar Type</p> | Excel can display dates in other languages and use different calendars if a location has multiple types of calendars. The types vary by language. |
| Time | <p>Type (1:30:55 PM, 13:30, 1:30 PM, 1:30:55, 1:30:55 PM, 3/14/01 1:30 PM, and so on)</p> <p>Location (Language)</p> | Excel can display times in different languages. The types vary by language. |
| Percentage | Decimal places (specify the number of places you want to use) | |
| Fraction | Type [Up to one digit (1/4); Up to two digits (21/25); Up to three digits (312/943); As halves (1/2); and so on] | |
| Scientific | Decimal places (specify the number of places you want to use) | |
| Text | No options | When applied to a number, Excel displays the number exactly as entered but treats the number as text, which means the cell has numeric value of zero. |
| Special | <p>Type (ZIP Code, ZIP Code + 4, Phone Number, Social Security Number, and so on)</p> <p>Location (Language)</p> | The types vary by language. |
| Custom | Create your own format | Use the format codes provided to create your own number format. |

Using Styles

In a fashion similar to Word, Excel has built-in styles you can apply to cells. To apply a built-in style, select the cells you want to format and click the Styles

button on the Home tab on the ribbon. Figure 14.7 shows the pop-up menu with the built-in styles. Click the one you want to apply.

📌 To learn more about the benefit of using styles, see "Using Styles" in Chapter 3, "Formatting Documents."

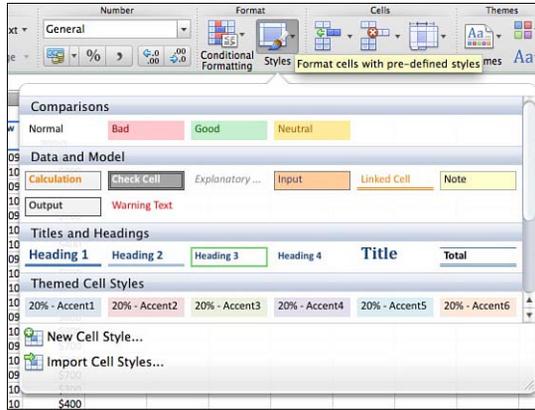


Figure 14.7 Excel provides styles for formatting cell content.

If a built-in style is not exactly what you want, you can edit the style. If no built-in style is even close to what you need, you can create your own style.



LET ME TRY IT

Editing an Excel Style

To edit one of the styles Excel provides for you, follow these steps:

1. Apply the style you want to edit to a cell. Then with the cell selected, click **Format** on the menu bar and click **Style**. The **Modify Cell Style** dialog box opens, as shown in Figure 14.8.
2. Click **Format**. The **Format Cells** dialog box opens. (Refer to Figure 14.6.)
3. Click each tab and set the options you want to include in the style.
4. When finished, click **OK**.

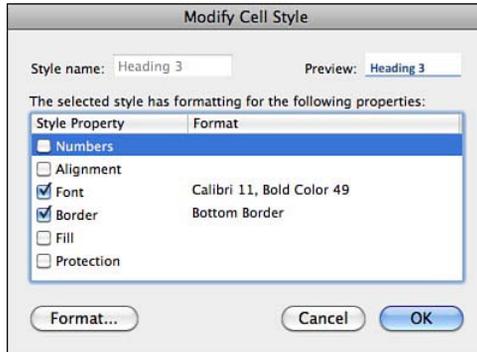


Figure 14.8 Style properties that are set for a style are designated by a check mark in the Modify Cell Style dialog box.



SHOW ME Media 14.2—Creating an Excel Style

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Creating an Excel Style

To create a new style of your own, follow these steps:

1. Click the Styles pop-up button on the Home tab on the ribbon.
2. Click New Cell Style. The New Cell Style dialog box opens. It's essentially the same as the Modify Cell Style dialog box shown in Figure 14.8.
3. Type a name for your style in the Style Name box.
4. Click Format. The Format Cells dialog box opens. (Refer to Figure 14.6.)
5. Click each tab and set the options you want to include in the style.
6. When finished, click OK.

Using Conditional Formatting

Conditional formatting is a feature that highlights cells using a background fill color or creates visual effects for the data with data bars, color scales, or icon sets. These formats make it easier to read and interpret data. To learn more about conditional formats, listen to the following audio recording.



TELL ME MORE Media 14.3—Using Conditional Formatting

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

Working with Large Worksheets

When a worksheet gets wider or longer than what you can see on the screen, it becomes difficult to work with. You find yourself scrolling back and forth or up and down to look at your column or row labels to make sure you are entering the data in the correct cell. Another difficulty is being able to see two distant extremes of the worksheet at the same time. Of course, Excel has features for overcoming these obstacles.

Freezing and Unfreezing Panes

For the problem of scrolling back and forth or up and down to look at your column or row labels, you can freeze the pane. When you freeze parts of the pane, you freeze rows at the top of the sheet, columns on the left of the sheet, or both at once. Frozen columns or rows do not scroll off the screen, and you cannot click in any cell in the frozen area.

You cannot freeze a column or row that is in the middle of unfrozen columns or rows. Excel freezes all columns to the left of the column you want to freeze and all rows above the row you want to freeze.

To freeze parts of the pane, first click in an appropriate cell (as explained next), and then click Window on the menu bar and click Freeze Panes.

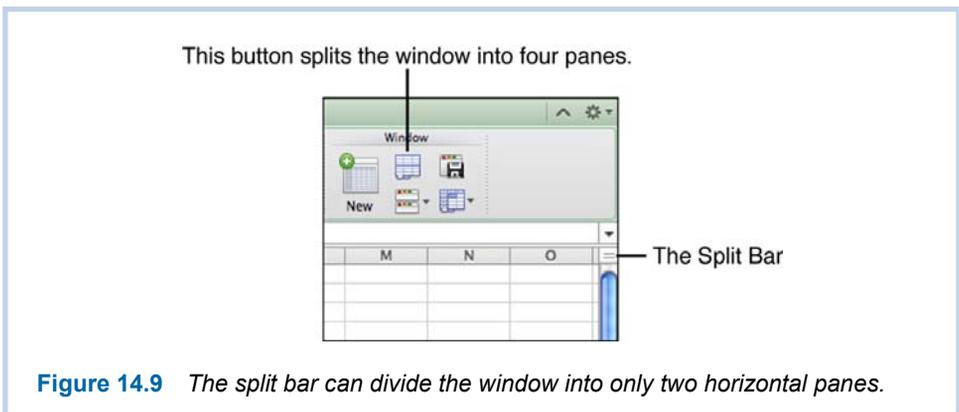
- To freeze rows, click in any cell in the row below the rows you want to freeze.
- To freeze columns, click in any cell in a column to the right of the columns you want to freeze.
- To freeze both columns and rows, click in the cell that is just below the intersection of the columns and rows (the upper-left corner of the data, in other words).

To unfreeze the columns or rows, click Window on the menu bar and click Unfreeze Panes.

Splitting the Pane

Using two different methods, you can split the worksheet into two (horizontal) or four panes that scroll independently. If you split the window into two horizontal panes, each pane scrolls independently on the vertical axis. So if you have a worksheet with 1,000 rows in it, you could see rows 1 through 20 in the top pane and rows 990 through 1000 in the bottom pane. If you split the window into four panes, the two panes on the left scroll together horizontally, and the two panes on the right scroll together horizontally. On the vertical axis, the two panes at the top scroll together, and the two panes at the bottom scroll together.

To split the pane into two horizontal panes, drag the split bar in the vertical scrollbar (see Figure 14.9). Double-click the split bar to remove the split. To split the worksheet vertically and horizontally into four panes, click the button shown in Figure 14.9 (under Window on the Layout tab on the ribbon). Drag the split to change the size of the panes or drag the split all the way to the top row to create two vertical panes. To clear the split, click the button on the Layout tab again.



Working with Charts and Graphic Elements

Nothing makes data more understandable than a chart. You can see trends, spot the high and low points, see plateaus, and so on. Excel's charting function has always been excellent, and the ribbon puts all the charting features right at your fingertips.

Unfortunately, I don't have the space in this book to devote an entire chapter to charts. So, to give you as much information as possible, I show you how to create some basic charts, then tell you how I tweaked them, and finally, include a video that shows you how to make more modifications and enhancements to a chart.

Working with Charts

Figure 14.10 shows a 3-D, exploded pie chart positioned beside the data in the worksheet that it represents. The data range for the chart is A1:B6. Each piece of the pie represents a part of the total sales. The chart has a title at the top and a legend on the right. To create this chart, I selected the range A1:B6, clicked the Chart tab on the ribbon, clicked the Pie button, and clicked 3-D Exploded Pie. What could be easier? Excel intuitively knew the title was in cell B1 and the legend was in the range A2:A6.

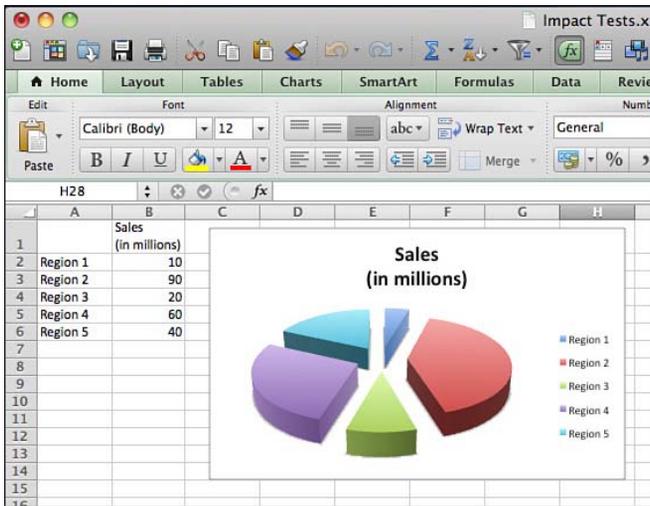


Figure 14.10 Excel calculates the size of each piece as a percentage of the total.

Figure 14.11 shows a simple line chart positioned below the data in the worksheet that it represents. The data range for the chart is A2:H6. Each line on the chart represents a data set; the data sets are in rows 3, 4, 5, and 6 of the worksheet. The chart has a title at the top and titles for the x- and y-axes. On the right is a legend that tells what color represents each data set. To create this chart, I selected the range A2:H6, clicked the Chart tab on the ribbon, clicked the Line button, and clicked the Line chart. Then I made a few enhancements.

Here are the tweaks I made:

- To add a title to the chart, I clicked the Chart Title button and clicked Title Above Chart. I selected the default text in the title and typed my own title.

- To add a title on the y-axis (the vertical axis), I clicked the Axis Titles button on the Chart Layout tab and clicked Vertical Axis Title, Rotated Title. I selected the default text in the title and typed my own.
- To add a title on the x-axis, I clicked the Axis Titles button and clicked Horizontal Axis Title, Title Below Axis. I selected the default text in the title and typed my own.

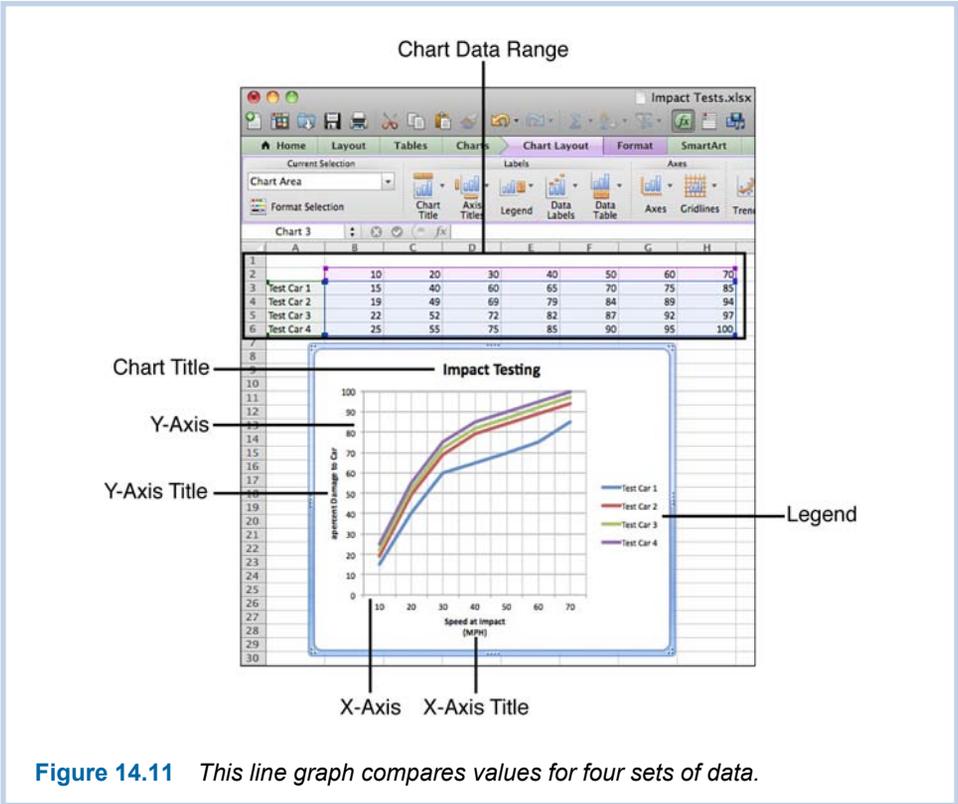


Figure 14.11 This line graph compares values for four sets of data.

- To show vertical gridlines, I clicked the Gridlines button on the Chart Layout tab and clicked Vertical Gridlines, Minor Gridlines.
- To make the scale on the y-axis stop at 100, instead of 120, which was the default, I clicked the Axes button on the Chart Layout tab and clicked Vertical Axis, Axis Options. I clicked Scale, changed Maximum to 100, and clicked OK.



SHOW ME Media 14.4—Modifying and Enhancing Charts

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

To delete a chart, select it and press Delete.

Inserting and Deleting Sparklines

Sparklines, new to Excel 2011 for Mac, are charts that fit in a single cell. The data for sparkline charts can be in a row or column.

Figure 14.12 shows a worksheet that uses all three kinds of sparkline graphs: lines in column F, bars in row 8, and win/loss in row 23. To make the sparklines larger for the line graphs, I increased the row heights and made column F wider. I also widened columns H, I, and J so the sparkline graphs in those columns would be wider.

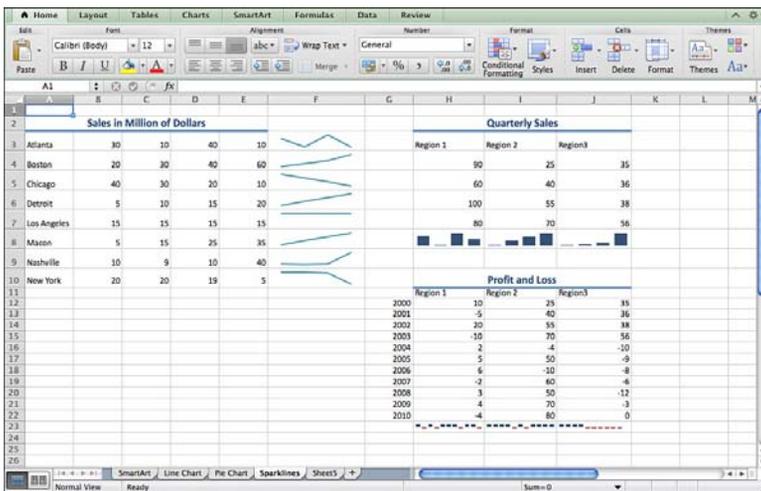


Figure 14.12 Sparklines can show patterns that are difficult to see in raw data.



LET ME TRY IT

Inserting a Sparkline

To create a sparkline, follow these steps:

1. Click the Chart tab on the ribbon and click the Line, Column, or Win/Loss button under Insert Sparklines. The Insert Sparklines dialog box shown in Figure 14.13 opens.

2. Type the data range for the sparkline in the first text box, or click the button at the end of the box and select the data range. Then, click the button to return to the dialog box.

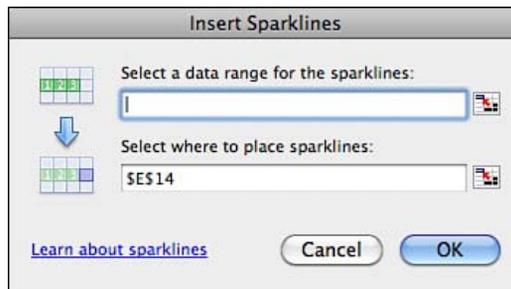


Figure 14.13 Clicking the buttons at the end of the text boxes takes you back into the worksheet where you can select a cell or range.

3. Type the range where you want to place the sparkline graphs, or click the button at the end of the box and select the data range.
4. Click OK.

To delete sparklines, select the cells that contain them and click the Clear button on the Sparklines tab on the ribbon.

Inserting and Deleting SmartArt

Although the Excel ribbon has a tab for SmartArt, a SmartArt graphic is not something you will insert in a workbook very often. SmartArt is a graphic depiction of a list, a process, a cycle—not a depiction of numeric data. It's not like creating a chart that actually takes its shape from the data in your worksheet.

You might use a SmartArt graphic in a worksheet like the one shown in Figure 14.14. This worksheet shows the results of impact tests of various cars at various speeds. The SmartArt simply gives a graphic depiction of the testing process.

To insert SmartArt, click the SmartArt tab on the ribbon, click one of the buttons for the different types of SmartArt such as List or Process, and click the SmartArt style you want to insert. To delete SmartArt, select it and press Delete.

 To learn more about working with SmartArt, see "Inserting and Working with SmartArt" in Chapter 6, "Creating Documents for Publication."

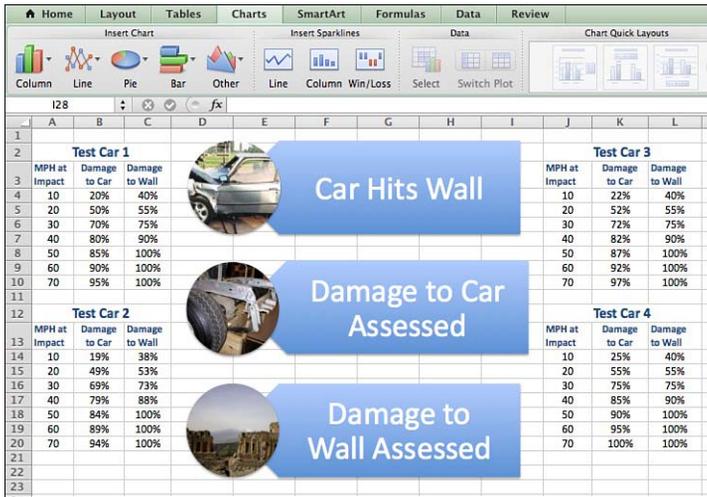


Figure 14.14 An example of how SmartArt might be used in a worksheet.

Adding Media

Using the Media Browser, you *can* add photographs, audio, video clip art, symbols, or shapes to a worksheet, but you probably won't do it very much. Except for symbols, all items you drag from the Media Browser to the worksheet are free floating. When you drag a symbol to the worksheet, Excel inserts it in a cell.

 To learn more about working with the Media Browser, **see** "Inserting Media from the Media Browser" in Chapter 6.

This chapter shows you how to work with databases and multiple sheets in a workbook. It also covers 3D formulas.

Working with Databases and Multiple Worksheets

In this chapter, you learn about sorting and filtering databases; adding, renaming, deleting, copying, moving, hiding, and unhiding worksheets; grouping worksheets; and entering 3D formulas in workbooks that have multiple worksheets.

Creating a Database

A database is really nothing more than a list, and studies have shown that making lists is one of the main things for which people use an Excel worksheet. A database can be a single column, but normally it has several columns, such as the one shown in Figure 15.1.

| Employees for ABC Company, Inc. | | | | | | | | | |
|---------------------------------|------------|------------------------|------|-------|-----|----------|-------|-------------|-------|
| | | Start Date | | | | | | | |
| First | Last | Department | Year | Month | Day | Yrs. Emp | Grade | Last Review | Bonus |
| Wilma | Stevenson | Sales | 2002 | 11 | 13 | 8 | C | 11/30/09 | \$800 |
| Alice | Steinbeck | Sales | 2001 | 5 | 6 | 9 | D | 2/15/10 | \$900 |
| Michael | Smith | Sales | 2001 | 12 | 14 | 9 | C | 11/15/09 | \$700 |
| John | Shelley | Research & Development | 2008 | 9 | 5 | 2 | B | 1/15/10 | \$300 |
| Susan | Patton | Operations | 2009 | 4 | 16 | 1 | A | 12/1/09 | \$700 |
| Marcus | Hildebrant | Information Services | 2000 | 4 | 10 | 10 | A | 7/1/10 | \$300 |
| Judith | Hildebrant | Information Services | 2000 | 4 | 10 | 10 | A | 3/15/10 | \$400 |
| Matthew | Graham | Information Services | 2003 | 2 | 21 | 8 | A | 12/1/09 | \$400 |
| Luke | Dennis | Operations | 2001 | 6 | 15 | 9 | B | 7/1/10 | \$600 |
| James | Byron | Marketing | 2000 | 1 | 20 | 11 | A | 1/1/10 | \$500 |
| Frederick | Beck | Operations | 2007 | 3 | 28 | 3 | A | 9/1/10 | \$400 |
| Betty | Stevia | Sales | 2002 | 11 | 13 | 8 | C | 11/30/09 | \$800 |
| George | Sloane | Sales | 2001 | 5 | 6 | 9 | D | 2/15/10 | \$900 |
| Kathy | Smith | Sales | 2001 | 12 | 14 | 9 | C | 11/15/09 | \$700 |
| Nelda | Shelton | Research & Development | 2008 | 9 | 5 | 2 | B | 1/15/10 | \$300 |
| Stan | Perry | Operations | 2009 | 4 | 16 | 1 | A | 12/1/09 | \$700 |
| Judy | Hughes | Information Services | 2000 | 4 | 10 | 10 | A | 7/1/10 | \$300 |
| Jack | Hughes | Information Services | 2000 | 4 | 10 | 10 | A | 3/15/10 | \$400 |
| Richard | Goode | Information Services | 2003 | 2 | 21 | 8 | A | 12/1/09 | \$400 |
| Kirk | Dreyfus | Operations | 2001 | 6 | 15 | 9 | B | 7/1/10 | \$600 |
| Todd | Blick | Marketing | 2000 | 1 | 20 | 11 | A | 1/1/10 | \$500 |
| Logan | Boyle | Operations | 2007 | 3 | 28 | 3 | A | 9/1/10 | \$400 |
| Lilly | Taylor | Sales | 2002 | 11 | 13 | 8 | C | 11/30/09 | \$800 |
| Cooper | Ruggerio | Sales | 2001 | 5 | 6 | 9 | D | 2/15/10 | \$900 |
| William | Alvarez | Sales | 2001 | 12 | 14 | 9 | C | 11/15/09 | \$700 |
| Rachel | Patel | Research & Development | 2008 | 9 | 5 | 2 | B | 1/15/10 | \$300 |

Figure 15.1 The database shown here has 10 fields and more records than you can see on the screen.

Each column in the database is a *field*, and each row is a *record*. A field is one specific piece of data, such as last name or part number, and a record is a set of all the fields that pertain to one item, such as a person's name, address, phone number, email address, and Social Security number. The field names appear above the columns of data. Excel refers to these labels as *headers*.

If the data you want to use in Excel exists in a database application, such as FileMaker Pro, you might be able to import it. Before typing it all yourself, find out whether the source can export the data in a form that you can import, such as comma-separated. FileMaker Pro is one of the applications that produces data Excel can import.

Sorting Data

Sorting data puts the data in a certain order, depending on the type of sort you perform. Essentially, all sorts are either ascending or descending. You can sort text from A to Z or from Z to A; numbers from highest to lowest or lowest to highest; and dates and times from oldest to newest or newest to oldest.



LET ME TRY IT

Sorting a Database on One Field

To sort data on a particular column, such as by the Last Name column, follow these steps:

1. Click any cell in the column of data that you want to sort by.

If your data is arranged in a way that might cause the sort to include data that it shouldn't, select the complete range of data that you want to sort instead of clicking in a single cell and use a custom sort. (See "Sorting a Database on Multiple Fields" later in this chapter.)

2. Click the Sort pop-up button on the Standard toolbar, or press Cmd-Shift-R.
3. Select the sort option you want to use. Excel sorts the records.

If there is anything significant about the order in which you input the records in the list, you might want to include a field for numbering each record consecutively. Then if you sort the database, you can return the data to its original entry order by sorting on the record number field.



SHOW ME Media 15.1—Sorting a Database on Multiple Fields

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Sorting a Database on Multiple Fields

Sometimes you need to sort data on multiple fields. In the example in Figure 15.1, you might want to sort by Last Name, the first level, and then First Name, the second level. To sort on more than one field, follow these steps:

1. Select the range of cells you want to include in the sort.
2. On the Standard toolbar, click the Sort pop-up button and click Custom Sort. The Custom Sort dialog box opens, as shown in Figure 15.2.
3. The last sort you performed (if any) appears at the top of the box. Click the Remove Level button (the button with the minus) if necessary and then click the Add Level button (the button with the plus).
4. Click the pop-up button under Column and select a field. Click the pop-up button under Order and select the order if necessary. Repeat this step for each level you add to the sort.
5. Click OK.

In addition to sorting on data values, Excel can sort on the cell color, font color, or cell icon. These are conditional formats you might have applied to create visual effects for your data.



TELL ME MORE Media 15.2—Sorting on Conditional Formatting

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.

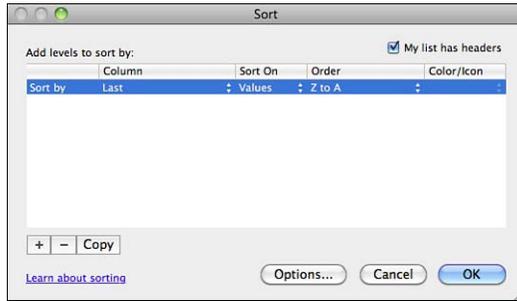


Figure 15.2 The option *My List Has Headers* is selected by default.

Filtering a Database

Filtering your data is a method of specifying criteria so that only the records that meet the criteria display in the sheet. When you filter data, Excel hides the records that don't meet the criteria and redisplay them when you remove the filter. After you filter data, you can sort it, copy it to another location, print it, and so on.

In the database shown in Figure 15.1, you could filter the data to meet these specifications: Employees in the Sales department since 2002. To do this, you would have to filter on the Department and Year fields.



SHOW ME Media 15.3—Filtering Data

Access this video file through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Filtering Data

To filter data in a database, follow these steps:

1. Select the range of cells in the database, including the header row.

If your database is set up in such a way that the header row is in row 1 or there is at least one blank row above the header, you do not have to select the database range. You can click in any cell in the database.

2. Click the Filter button on the Standard toolbar or press Cmd-Shift-R. Excel adds pop-up buttons to all the headings.
3. Click the pop-up button for the field on which you want to filter. The window shown in Figure 15.3 opens.

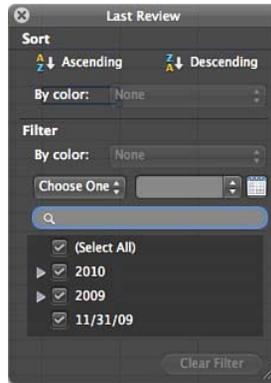


Figure 15.3 The name of the field, *Last Review*, appears at the top of the window.

4. Click the Choose One pop-up button and click an operator (Equals, Does Not Equal, Begins With, Contains, Before, After, and so on).
5. Depending on the type of field and the operator you select, either fill in the blank field next to Choose One or select a value from the list. Again, depending on the operator you selected, you might be able to specify an And or Or option (see Figure 15.4). Excel filters the list immediately and adds a filter icon to the field's pop-up arrow button.

If the field is a date field, the list groups values under the year and month. To see the values, click the reveal button by the year or month.

6. To filter the data further, repeat steps 3, 4, and 5 for as many additional fields as needed.
7. When finished specifying filters, click the Close button to close the filter window.

To remove filtering, click in any cell in the database and click the Filter button on the Standard toolbar.

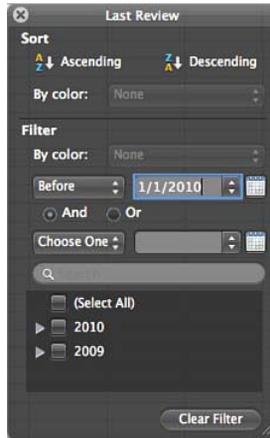


Figure 15.4 The *Before* operator selected in this filter allows for additional *And* or *Or* criteria.

Working with Additional Sheets

By default, a new, blank workbook has only one sheet. You can add more sheets as you need them. I like to use different worksheets to organize data. I might have a sheet to track my time, separate sheets to track each project I'm working on, and a sheet to summarize everything. I can go quickly to the appropriate data by clicking the tab for the sheet.

Adding and Renaming Sheets

To add a worksheet, click the Insert Sheet button, located to the right of the last sheet tab. (It has a plus sign on it.) You might have to scroll to see the Insert Sheet button if you already have quite a few sheets. A new worksheet opens, and Excel positions it to the right of the last sheet. The generic name of a new worksheet is *Sheet n* , where n equals the total number of worksheets in the workbook.

When you have several sheets in the workbook already, you can add a number of new sheets at once by selecting multiple existing sheets before you click the Insert Sheet button. Excel adds new sheets equal to the number of sheets you selected.

Generic sheet names are not very helpful, but you can rename sheets with more significant names. To rename a sheet, right-click the sheet tab, and click **Rename** or simply double-click the sheet tab. Then type the new name and press **Return**. You can name sheets with very short names or with complete sentences if you want. I recommend you keep the names as short as possible so the tabs take up a minimum amount of space. When the tabs fill up the space allotted to them, you have to use the scrolling buttons on the far left of the tabs to navigate.

To make room for the display of more sheet tabs, drag the horizontal scrollbar to the right to make it smaller.

Deleting a Sheet

To delete a sheet, right-click the sheet and click **Delete**. Excel warns you that the data in the sheet will be permanently deleted. (This means that clicking the **Undo** button will not retrieve the deleted sheet and its data.) Click **OK** to delete or click **Cancel** if you need to reconsider.

Copying a Sheet

If you have a sheet that you want to use as a template for another sheet, to run some different what-if scenarios, for example, you can copy a sheet. To copy a sheet, right-click the sheet and click **Move or Copy**. Click the **Create a Copy** check box, and click **OK**. The new sheet uses the name of the original sheet with a "2" appended. You can rename the sheet (as explained earlier) and move it to a different location (as explained next).

Moving a Sheet

To move a sheet, drag the sheet tab to the left or right. A black line with an arrow at the top marks the location of the sheet as you drag it. Drop it in the desired location.

Hiding and Unhiding a Sheet

If you have so many sheets that you are constantly having to scroll left and right to select the sheet you want, you might want to hide some of the sheets you aren't using all the time. Another reason you might want to hide a sheet is simply to hide it from a viewer. For example, if you are giving a presentation with the

workbook, and you don't want the audience to know about some of the other sheets in the workbook, you can hide them for the presentation.

To hide a sheet, right-click the sheet tab and click Hide. To unhide a sheet, right-click any sheet tab and click Unhide. A dialog box displays with a list of all hidden sheets. Select the one you want to unhide and click OK. (Unfortunately, you cannot select more than one sheet at a time to unhide.)

Working with Grouped Sheets

In Figure 15.5, you see a sheet that lists the quarterly sales by city for the year 2011. Notice there is a sheet for 2010 and 2009. All the sheets are identical in layout. To save yourself lots of time, you can create the layout for all sheets at the same time by grouping the sheets before you start entering the titles, column and row headings, and formulas.

This method of creating multiple sheets with the same layout has an advantage over simply creating one as a template and copying it. Invariably, once you have copied the template, you need to tweak it. Then you have to delete the first copies and copy the original again. When sheets are grouped, you can tweak all of them at once.

Grouping Sheets

When you group sheets, any changes you make to one sheet are made in every sheet in the group. These changes include entering and formatting text; inserting or deleting columns or rows; changing column widths, row heights, alignment; and so on. For this reason, Excel displays an indicator to the right of the file name in the title bar to remind you that you are in the Group mode, as shown in Figure 15.5.

To set up the example like the one in Figure 15.5, first insert all the sheets you need in the workbook. In the example, I needed two more sheets. Rename each sheet with an appropriate name. In this case, I named each tab with the corresponding year. Group the sheets by clicking the sheet tab for the first sheet in the range and then Shift-clicking the last sheet. (You also can do this from the opposite end, clicking the last sheet in the range and Shift-clicking the first sheet.) The sheet you click first when selecting the sheets for the group will be the sheet that

is on top. You can enter data on that sheet or click any sheet tab in the group and enter data on that sheet.

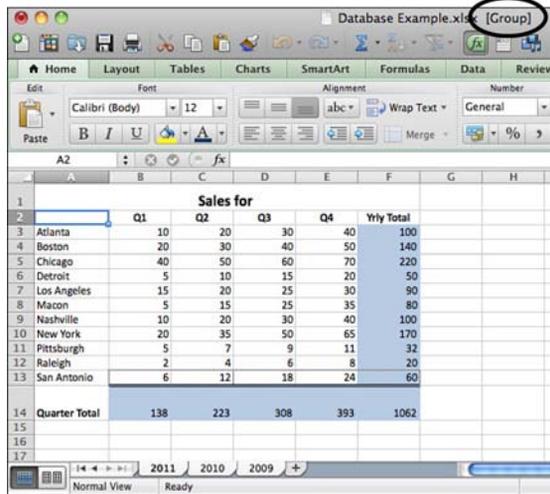


Figure 15.5 All three sheets are grouped, and sheet 2011 is on top.

Ungrouping Sheets

If you need to make a change to just one sheet, you should ungroup the sheets, make the change, and then group your sheets again to continue making changes to all sheets at once. In the example in Figure 15.5, the title on each sheet is "Sales for." To add the appropriate year in each title, you would ungroup the sheets, add the year to the title on each sheet, and then group the sheets again. To ungroup the sheets, right-click any sheet tab in the group and click Ungroup Sheets, or click any visible tab of a sheet not included in the group.

You must pay close attention while you are working in groups. You can easily get distracted and do a little something on a sheet that is not in the group and then return to the task at hand thinking you are still working in Group mode. When you click a sheet that is not in the group, you automatically ungroup.

Using 3D Formulas

Workbooks that have a purpose similar to the example in Figure 15.5 often have a summary sheet that calculates all the data in the individual sheets. When sheets have data in identical cells or ranges of cells, you can use 3D formulas to perform calculations on all the data. A 3D formula is one that references the same cell or range on multiple spreadsheets.

Using the Proper Syntax for 3D Formulas

A 3D formula references the cells in multiple sheets by listing the range of sheets (using their names) followed by the cell address or range address. It uses a colon to denote a range of sheets and cell addresses, and it uses an exclamation point to separate the sheet range from the cell addresses. Notice the syntax for a typical SUM formula:

```
=SUM(Sheet1:Sheet3!A2:B5).
```

This formula adds the values in the cell range from A2 to B5 on Sheet1, Sheet2, and Sheet3.

For the workbook shown previously in Figure 15.5, you could add a sheet to calculate all the totals for each city for the three-year period. In Figure 15.6, you see the summary sheet that totals or summarizes the sales for all three years. The SUM formula in cell B3 looks like this:

```
=SUM(2011:2009!B3).
```

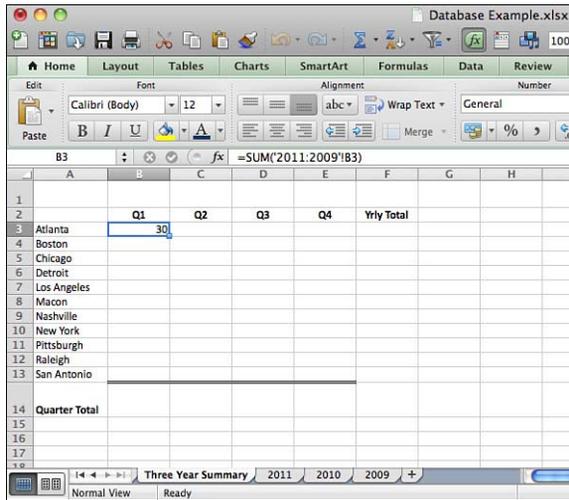


Figure 15.6 The SUM formula adds Atlanta's first quarter values for 2011 through 2009.

Entering 3D Formulas by Pointing

In the "Entering a Formula or Function" section in Chapter 13, "Getting Started with Excel," you saw how to use the pointing method to enter one-dimensional formulas and functions. You also can use the pointing method to enter 3D formulas.



SHOW ME Media 15.4—Using the Pointing Method for 3D Formulas

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LET ME TRY IT

Using the Pointing Method for 3D Formulas

You generally enter a 3D function on a sheet that summarizes all the other sheets. Because you might have been grouping the sheets before working on just the summary sheet, be sure you are not in the Group mode before you start. To enter a 3D function by pointing, follow these steps:

1. Click in the cell on the summary sheet where the function should be entered and type the beginning of the function, as in `=sum(`.

2. Click the tab of the first sheet in the range.
3. Shift-click the tab of the last sheet in the range.
4. Click the cell or select a range.
5. Type the close parenthesis and press Return.

This chapter covers the collaborative editing and reviewing tools in Word, Excel, and PowerPoint.

Using Review Features

The two chapters in this section relate to working with others on the same files. This chapter covers the techniques of editing files (Word documents, Excel workbooks, and PowerPoint presentations) so that everyone who is working on a file can see the edits that have been made and so that the edits can ultimately be discarded or incorporated in the final version.

Examining the Editorial Process

Whether you're writing a legal contract, creating a worksheet for the company's new budget, or building a slide presentation to present your new idea to the Executive Leadership Team, it's always better to have a second set of eyes look at your work before you submit the final version. This is the underlying principle of the editorial process, which in its simplest form involves the following steps:

1. An author creates a file and sends it to an editor (or multiple editors) to edit.
2. The editor edits the file and sends it back to the author for approval.
3. The author reviews the edits and makes the final decision about what changes to keep or discard in the final version.

To facilitate the editorial process, Office provides Review tools. These tools include Comments, which allow editors to make comments without entering text directly in the body of the file; Track Changes, which call attention to edits using different colors; and Accept, Accept All, Reject, and Reject All buttons, which incorporate edits or delete edits automatically (with absolutely no additional work on the author's part). Office also attaches information to each edit that lists the edit, the editor's name, and the date and time of the edit.

The editor's name is retrieved from the computer owner's contact in the Outlook Address Book.

The Review tools that Office supplies for the editorial process come in slightly different flavors in each of the three main file-producing applications: Word, Excel,

and PowerPoint. The next three sections take a close look at how to use Review tools in each application. As you might expect, the Review tools reside on the Review tab on the ribbon. This chapter focuses on this tab exclusively.

Reviewing Word Documents

The Review tools are the most robust in Word, which is what you would expect, because the majority of files that go through an editorial process are Word files. Figure 16.1 shows part of the Review tab in Word.



Figure 16.1 Use Word's Review tab to assist in tracking and reviewing edits.

If you are using a low screen resolution, some of the button labels do not display on the ribbon. Refer to Figure 16.1 for the button names used in the following sets of steps if you need help finding a button.

To explain the reviewing features in Word, I follow the processes that both the author and the editor go through. Each heading in this section is preceded by the words *Author* or *Editor* to distinguish who does what, and I select you to play the starring role of the author.

Author: Getting a Document Ready for an Editor

Before you send your completed document to an editor, you can turn on Track Changes so that Word will mark any changes the editor makes to the document. This step is not absolutely necessary because the editor can turn on Track Changes before making edits, but if you give this control to the editor, the editor can turn them off just as easily! If *you* turn on Track Changes, you also can protect the document so that the editor cannot turn off Track Changes. This protects your original text so that nothing is accidentally changed without being marked as a change.



Turning On and Protecting Track Changes in Word

To turn on Track Changes and then protect the document so Track Changes cannot be turned off, follow these steps:

1. Open the document you want to send to the editor and make any last changes you want to make before turning on Track Changes.
2. Click the Review tab on the ribbon and click the Track Changes button. The button changes to On.
3. Click the Document button under Protection. The Protect Document dialog box opens, as shown in Figure 16.2.



Figure 16.2 *Tracked Changes is selected by default.*

4. Type a password to ensure that no one can turn off Track Changes without the password and click OK.
5. Retype the password and click OK. The Track Changes On/Off switch becomes inaccessible on the ribbon.

If you are not worried about protecting track changes, you can simply click OK in step 4 instead of typing a password, and the dialog box closes.

Editor: Making Changes to the Document

If the author has *not* turned on Track Changes, that is the first step the editor should take. If this feature is already turned on, all the editor has to do is start inserting text, deleting text, moving text around, and so on. If the editor needs to tell the author something or ask a question, the editor can insert a comment instead of typing directly in the document.

Word emphasizes each change the editor makes in some way. For example, depending on the preferences you have set and the markup view you select, Word might show inserted text in a different color type and underline it or show it in a balloon in the right margin space; it might show deleted text in place with strike-through or in a balloon in the right margin space. (See Figure 6.3 for a picture of balloons.)

To set preferences for Track Changes, click Word on the menu bar and click Preferences, and then click Track Changes. Set the preferences and click OK.



LET ME TRY IT

Inserting a Comment in Word

To insert a comment, follow these steps:

1. Click in the document in an appropriate place. For example, if the comment refers to a particular paragraph, click at the beginning or end of the paragraph.
2. Click the New button under Comments on the Review tab on the ribbon. (Refer to Figure 16.1.)
3. Type the text of the comment in the comment balloon and then click back in the document.

Author: Reviewing the Edits

When you get the document back from the editor, you can give the document a quick read-through to get an idea of what the editor changed. First, you should make sure that all markups are showing so you get a complete overview. Click the Show Markup button and make sure that all options are checked. (Of course,

if you just want to concentrate on one type of edit or just on comments, you can uncheck the markups that you don't want to see.)

Next, click the button above the Show Markup button and select the view. You can view the document in four different ways, as described in Table 16.1.

Table 16.1 Markup Views

| View | Description |
|-------------------------|---|
| Final Showing Markup | Shows inserted text in place and deleted text in a balloon in the margin |
| Final | Shows what the final version will look like if you accept all the editor's changes |
| Original Showing Markup | Shows inserted text in a balloon in the margin and deleted text in place with strikethrough |
| Original | Shows the document with no edits |

When you start scanning the document for edits, look for the vertical bars in the left margin. Word inserts these bars beside areas that have edits. Figure 16.3 shows a document that has been marked up with Track Changes turned on.

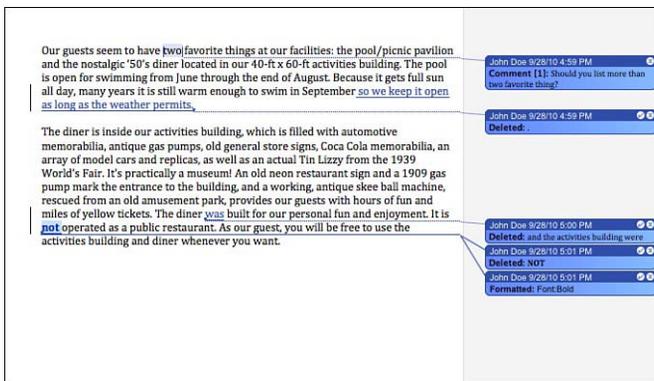


Figure 16.3 Word refers to the boxes in the right margin as "balloons."

After you get a sense of how you will proceed, you can begin accepting and rejecting changes and comments. If the edits are few and you like all of them, or you don't like any of them, you can accept or reject all changes at once:

- **To accept all changes**, click the Accept pop-up button, and click Accept All Changes in Document.

- **To reject all changes**, click the Reject pop-up button, and click Reject All Changes in Document.

Note that using this all-or-nothing method does not accept or reject comments. If you have comments that you want to review, use the Next button (in the Comments section on the ribbon) to go to each one. To delete a selected comment, click the Delete button on the ribbon or the Delete button in the Comment balloon.



SHOW ME Media 16.1—Reviewing Each Edit and Comment in Word

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LET ME TRY IT

Reviewing Each Edit and Comment in Word

If you need to make a decision to either accept or reject each edit or comment, you can go through the document one item at a time by following these steps:

1. Turn off Track Changes so you can make your own edits in the document as you go along.
2. Start at the beginning of the document and click the Next button (in the Changes section, not the Comments section). Word moves to the first edit or comment.
3. Do one of the following:
 - Click the Accept button on the ribbon or in the balloon in the margin. Word incorporates a change or leaves a comment in place and moves to the next item in the document.
 - Click the Reject button on the ribbon or in the balloon in the margin. Word returns the text to original or deletes the comment and moves to the next item in the document.
 - Click the Next button on the ribbon. Word skips the change and moves to the next item in the document.
4. Repeat step 3 until you have processed all the edits and comments. Word displays a notice when there are no more comments or tracked changes in the document.

Reviewing Excel Workbooks

Figure 16.4 shows part of the Review tab on the Excel ribbon. As you can see, it's quite a bit different from Word's Review tab. This section on Excel follows the same format of explaining the process from both the author's and editor's viewpoints. You are still the star of the show, playing the role of the workbook author.

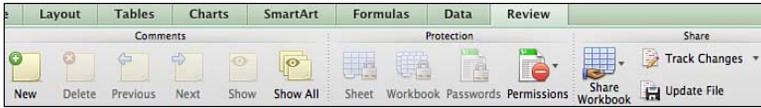


Figure 16.4 *The Review tab in Excel doesn't have all the buttons you find on Word's Review tab, but at least they all have names!*

Author: Getting a Workbook Ready for an Editor

Before you send your workbook out for review, you can turn on Track Changes. Turning on Track Changes automatically turns on workbook sharing, and Excel reminds you that the workbook is in Shared mode by displaying [Shared] beside the filename in the title bar.



LET ME TRY IT

Turning on Track Changes in a Workbook

To turn on Track Changes, follow these steps:

1. Click Track Changes on the Review tab and click Highlight Changes. The Highlight Changes dialog box opens, as shown in Figure 16.5.
2. Click Track Changes While Editing.
3. Set options for When, Who, and Where and click OK.

After you turn on Track Changes, it's also a good idea to protect the changes. Doing so makes the Track Changes command inaccessible so that you cannot turn it off without unprotecting the feature. Protecting the Track Changes feature discourages someone from turning it off and sends the message, "I prefer that you leave Track Changes on while you are handling this document."

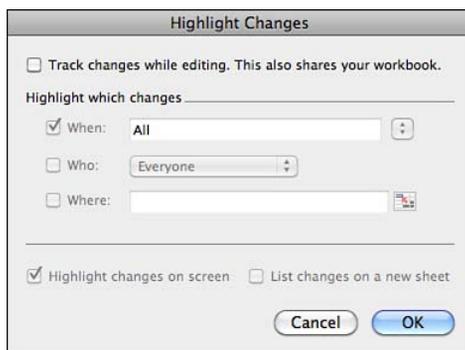


Figure 16.5 *Highlight Changes On Screen is selected by default in this dialog box.*



LET ME TRY IT

Protecting Track Changes

To make the Track Changes command inaccessible, follow these steps:

1. Click the Share Workbook button on the Review tab.
2. Click Protect Shared Workbook.
3. Click Sharing with Track Changes and click OK.

If you want to make sure that no one but you turns off Track Changes, you can password-protect the workbook. You might want to do this if several editors are editing the worksheet online simultaneously. If anyone turns off Track Changes during the editorial process, Excel removes the workbook from shared use, and users who are making edits simultaneously to the document will not be able to save their changes. You cannot rectify the situation by turning Track Changes back on again.



SHOW ME Media 16.2—Turning On and Protecting Track Changes in Excel

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Turning On and Protecting Track Changes in Excel

To password-protect and turn on Track Changes, follow these steps:

1. Open the workbook and make any last changes before turning on Track Changes.
2. Click the Review tab on the ribbon and click Share Workbook.
3. Click Protect Shared Workbook. The Protect Shared Workbook dialog box opens.
4. Click Sharing with Track Changes.
5. Enter a password and click OK.

You can add a password only when the workbook is unshared at the time of protection. So, if you want to add a password, you must not turn on Track Changes first because this automatically puts the workbook in Shared mode. Protecting a workbook automatically turns on Track Changes and makes the option to turn it off inaccessible.

6. Reenter the password and click OK. This step simultaneously turns on Track Changes, protects the document so no one can turn off Track Changes, and saves the document. At this point, you might want to set options for When, Who, and Where, as described earlier.

Excel highlights changes to a worksheet in the following ways:

- It displays a colored triangle in the upper-left corner of an edited cell.
- It changes the column and row headings to red type for an edited cell.
- It puts a colored outline around an entire column or row that has been inserted.
- It displays a thick colored line where a column or row has been deleted.
- It puts a red triangle in the upper-right corner of a cell with a comment.

Unlike Word, Excel doesn't highlight every type of change made in a worksheet. For example, Excel doesn't highlight the following changes:

- Font or alignment changes

- Number format changes
- Change to the width of a column
- Change to the height of a row

Editor: Making Changes to the Workbook

If the author has turned on Track Changes, all the editor has to do is start editing. The editor can make changes on any sheet in the workbook, and Excel keeps track of the changes. If the author has not turned on Track Changes, then, of course, the editor should.

Like Word, Excel attaches a pop-up to every edit or comment. The pop-up contains the edit, the editor's name, and the date and time of an edit. The editor should ensure that this information is correct by making sure his or her name appears correctly in Outlook Contacts and that the computer has the correct date and time.

If the editor needs to ask questions or make a suggestion, the editor can insert a comment. Excel attaches the comment to a cell, and a cell can have only one comment. Note that the Comment feature is not always used as an editing feature. You can add comments to a worksheet for other purposes.



LET ME TRY IT

Inserting a Comment in a Worksheet

To insert a comment, follow these steps:

1. Click in the cell that should be associated with the comment.
2. Click the New button under Comments on the Review tab on the ribbon.
3. Type the text of the comment in the comment box, and then click back in the worksheet. A red triangle appears in the upper-right corner of the cell.

To delete a comment, click the cell that has the comment and click the Delete button on the Review tab.

Author: Reviewing the Worksheet Edits

When you get the workbook file back from the editor, you can open the Highlight Changes dialog box (Tools, Track Changes, Highlight Changes) and set the options for the highlighting you want to see. For example, you can choose to see all edits made by everyone, or you can choose to see only the edits made by a particular editor.

For a very detailed look at the changes, you can look at the history that Excel keeps from the time Track Changes is turned on until it is turned off. You can see this history on a separate sheet.



LET ME TRY IT

Viewing the History Sheet

To view the history sheet, follow these steps:

1. Save the workbook if any changes have been made.
2. Click Track Changes on the Review tab and click Highlight Changes.
3. Uncheck When, Who, and Where.
4. Click List Change on a New Sheet and click OK. Excel creates a new, protected sheet called History, as shown in Figure 16.6.
5. To delete the sheet, open the Highlight Changes dialog box again and uncheck List Changes on a New Sheet.

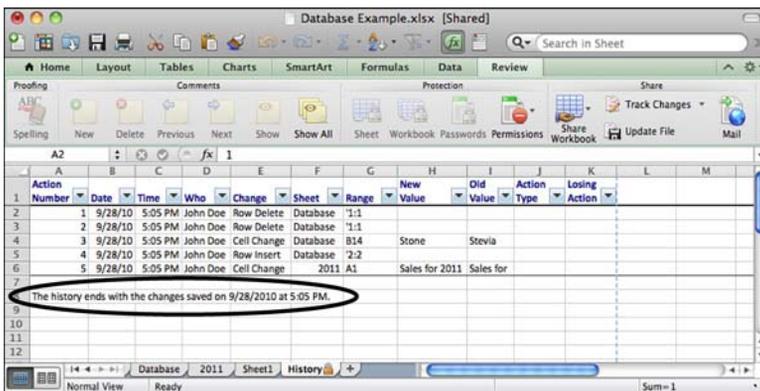


Figure 16.6 The history on the sheet is for a specific date and time, as shown in row 8.

After looking at the changes to the workbook, you can accept or reject all of them at once, or cycle through each change and accept or reject each one individually.



SHOW ME Media 16.3—Accepting and Rejecting Changes in Excel

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LET ME TRY IT

Accepting and Rejecting Changes in Excel

To accept or reject changes, follow these steps:

1. Click Track Changes on the Review tab on the ribbon.
2. Click Accept or Reject Changes. The Select Changes to Accept or Reject dialog box opens, as shown in Figure 16.7. When and Not Yet Reviewed are automatically selected.



Figure 16.7 The Who box lists names of individual editors who have edited the workbook.

3. Check the Who box, which has Everyone automatically selected, and then click OK. The first change displays in the dialog box, and the area is highlighted on the worksheet, as shown in Figure 16.8.
4. Do one of the following:

To review edits one by one, click Accept or Reject. Excel accepts the edit or reverts to the original and then goes to the next edit. (Note that Excel has no Next or Previous button that enables you to skip an edit. You must

make a decision on every edit or click Close to stop the process.) Repeat this step until finished.

Click Accept All or Reject All. (You can click either of these buttons at any time.)

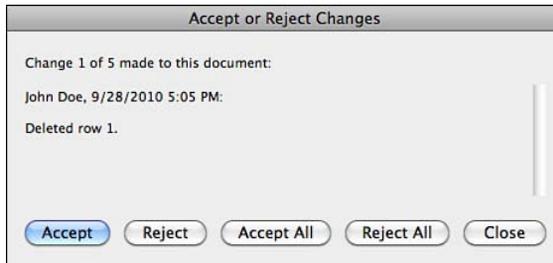


Figure 16.8 You might need to move the dialog box to see the highlighted area on the worksheet.



LET ME TRY IT

Reviewing Worksheet Comments

The process to accept or reject changes in a worksheet excludes comments. To perform a separate review for comments, follow these steps:

1. Click in cell A1 to begin searching for comments from the beginning of the worksheet.
2. Click Next (in the Comments section on the Review tab).
3. To delete the comment, click the Delete button (in the Comments section) and click the Next button to go to the next comment. To keep the comment and go to the next one, click Next.

Reviewing PowerPoint Presentations

PowerPoint cannot track changes directly in a PowerPoint presentation. If you want someone to edit your presentation so you can review the changes and accept or reject them, you have to give the editor a copy of the file. The editor makes changes in the copy, adds comments, and gives the file back to you. The changes the editor makes in the copy are not highlighted in any way, but you can view any comments the editor inserted. (They show up as numbered yellow boxes on the slides.) You can review all the comments one at a time and delete

them when appropriate, but to review the edits, you must first perform a comparison between the two files. In the comparison process, PowerPoint lists the differences in the two files, and you can go to each item and accept or reject it.



LET ME TRY IT

Inserting a Comment on a Slide

To insert a comment, follow these steps:

1. In normal view, select the slide that should contain the comment.
2. If you want to place the comment close to an element on the slide, click the element.
3. On the Review tab, click the New button. A yellow note opens.
4. Type the comment and click the Close button in the note. The note appears as a numbered yellow box. (If you selected a slide element in step 2, the note appears close to the element.)



LET ME TRY IT

Reviewing Comments in a Presentation

To review comments, follow these steps:

1. Click the Review tab, click the Next button, and read the comment.
2. At this point, instead of deleting the comment, I like to read all the comments in the file to get an overview; therefore, I recommend that you click the Next button to go to each comment. Click the Previous button to back up and reread a comment. After reading all the comments, you will have a better idea of what you want to do with each comment.
3. Return to the first slide and click the Next button. If you want to delete the comment, click the Delete button and select Delete Comment. (If you've read all the comments and know you want to delete them all, select Delete All Comments in Presentation after you click the Delete button.)
4. If you don't delete all comments at once, continue going to the next comment and deleting as necessary.



SHOW ME Media 16.4—Comparing and Reviewing Presentations

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LET ME TRY IT

Comparing and Reviewing Presentations

To compare a file and an edited copy of the original file and then accept or reject the changes, follow these steps:

1. Open the original file in PowerPoint.
2. On the Review tab on the ribbon, click Compare, navigate to the copy of the file that contains the edits, and double-click the file. PowerPoint compares the two files and opens the Compare Changes window, as shown in Figure 16.9. PowerPoint goes to the first slide in the presentation that has a change and shows the slide from the edited version at the bottom of the Compare Changes window. This window lists all the differences between the two presentations using a hierarchical list with reveal buttons that expand or collapse the changes on each slide. Each slide and each change on a slide has its own Accept and Reject buttons in the listing.

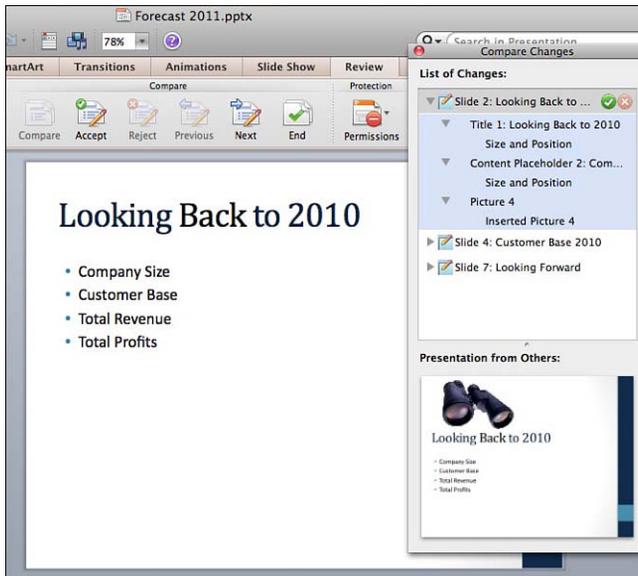


Figure 16.9 Click the reveal button beside any item in the list to expand the item.

3. Select a change listed under the slide number and click the Accept or Reject button for the selected change. Alternatively, if you want to accept or reject all the changes on one slide, click the Accept or Reject button on the slide number level. (Every item in the hierarchical listing remains in the list even after you accept or reject it.)

Sometimes it is not possible to Reject a change. For example, if the change is a deletion of a slide, PowerPoint gives you an Accept button, but the Reject button is inaccessible. In this case, you just ignore the change to reject it.

4. Click the next slide number. PowerPoint automatically expands the slide to show the changes. Repeat step 3.
5. Continue selecting slides and accepting or rejecting changes until you process all changes.
6. Click the Close button in the Compare Changes window and click End Comparison. Any changes you did not accept are discarded.

Collaborating

This chapter tells you about several methods of collaborating that Office for Mac 2011 provides. It covers Microsoft Document Connection and cloud computing, broadcasting a PowerPoint presentation on the Microsoft PowerPoint Broadcast Service, and using Remote Desktop.

Cloud computing is the Internet-based provision of shared resources, software, and information provided to users on demand. Most cloud computing infrastructures are built on servers. SharePoint and SkyDrive are the two Microsoft cloud computing servers, but SharePoint is beyond the scope of this book, so the emphasis in this chapter is on SkyDrive.

Surveying the Collaboration Landscape

In Office for Mac 2011, Microsoft offers many new and enhanced collaboration features. Following are the ones discussed in this chapter:

- **Co-authoring**—The ability for multiple users to simultaneously work on the same file from different computers. While users are working simultaneously, they can see who else is working at the same time and see the changes they make to a file because the file updates automatically with all edits. Users can protect areas they are working on from being edited by other collaborators and can resolve editing conflicts.

Note that co-authoring is supported in Word and PowerPoint within Office for Mac 2011, but co-authoring in Excel is supported only in the Excel Web Application. Conversely, the Word and PowerPoint Web Applications do not support co-authoring.

- **SharePoint and SkyDrive**—Microsoft cloud storage services where users can store, access, edit, and save changes to their files. SharePoint is a client/server application that large corporations may purchase and provide to

their users. SkyDrive is a server that Microsoft makes freely available to the public at large. SkyDrive, part of the Windows Live services, enables you to have 25GB of online storage, and you can use it for co-authoring. Microsoft Document Connection is the Office for Mac 2011 application that you use to access either of these cloud services.

- **Rich Presence Everywhere**—Valuable presence information about contacts based on a contact's calendar activity. I'm not sure if "everywhere" accurately describes this feature, but it is available in Outlook and, when you are co-authoring, in Word and PowerPoint.

Presence is the key factor in determining whether a person is available for real-time communication and collaboration. Office retrieves the information directly from the Exchange server so the information is available to a user whether or not the user has Outlook running. Office updates the information automatically as a user's status changes. Users who are not on an Exchange Server can receive some limited information about users who are collaborating if both users are logged in to Messenger or Communicator.

- **Office Web Applications**—Versions of Word, Excel, and PowerPoint that run on the Web via SharePoint (must be configured for Web Apps on SharePoint 2010) or SkyDrive.
- **Presentation Broadcasting**—Presenting a presentation on the Web to multiple users simultaneously.
- **Remote Screen Sharing**—The ability to give control of your computer to a remote user.

Using Microsoft Document Connection

The Office for Mac 2011 application that connects with SharePoint and SkyDrive is Microsoft Document Connection. Using this application, you can upload files to the cloud server, and then open, edit, and share them with other users. Each file that you upload to the server has a URL that you can send to another user as a hyperlink to open the file.

Before you can use the Document Connection application to connect to the server, you must have a valid login and password for a SharePoint server (usually supplied by the SharePoint administrator) or a Windows Live ID for SkyDrive.

If you don't have a Windows Live ID, do a web search for "windows live id" and sign up for one. It's free!



Connecting to SkyDrive

To connect to SkyDrive, follow these steps:

1. Launch the Document Connection application.
2. Click Add Location on the toolbar.
3. Click Sign in to SkyDrive.
4. Enter your Windows Live ID and password.
5. Click Connect. The location displays under SKYDRIVE in the navigation pane, and the folders you have on SkyDrive display in the right pane. By default, you start with a folder on SkyDrive called, in true Microsoft form, *My Documents*. This protected folder is not accessible by anyone but you. If you want to make files accessible to other users for reading or editing, you must create a folder on SkyDrive that has the corresponding permission rights and put the files in that folder.

Even if you have more than one Windows Live ID, you can make a connection with SkyDrive with only one account at a time.

Exploring the Document Connection Window

Figure 17.1 shows the Document Connection window. The toolbar at the top has buttons for adding, editing, and reading files. Some of the buttons on the toolbar are specific to SharePoint. They include New File, Upload, Check Out, Check In, and Discard.

Under the toolbar is the navigation pane on the left and the navigation bar on the right, just above the list pane. By default, the navigation pane lists the following categories: FILES, SHAREPOINT, and SKYDRIVE. The two folders you see under FILES—Drafts and Favorite Files—are also default folders. (The Drafts folder lists documents you have checked out on SharePoint. The folder is not accessible on SkyDrive.)

When you make a connection to SharePoint or SkyDrive, the connection name appears under the appropriate category in the navigation pane, as shown in the figure. The buttons at the bottom of the navigation pane (with a plus and minus on them) add or remove locations.

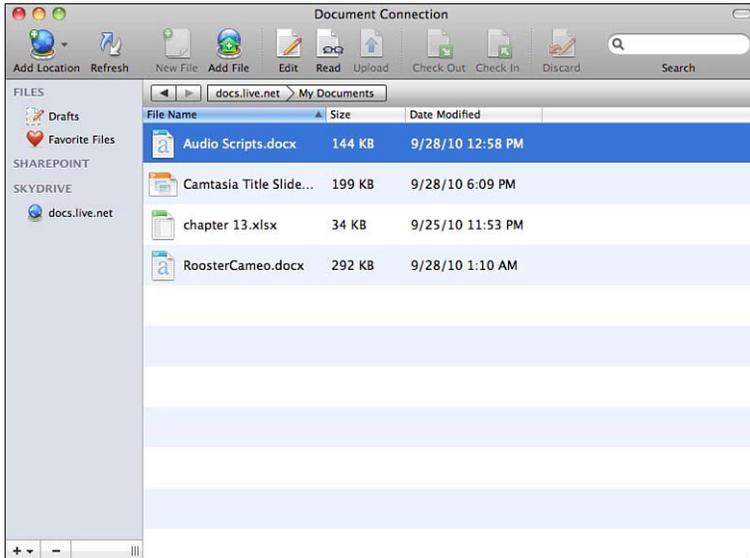


Figure 17.1 The files in the list pane are located in the My Document folder.

The list pane on the right shows the names of folders and files for the selected location. You can navigate through the folders in this pane by using the navigation bar above it.



SHOW ME Media 17.1—Touring the Document Connection Window

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Putting Files on SkyDrive

Before putting files on SkyDrive, you might want to go to Windows Live on the Web, log in, and go to SkyDrive to create some folders because you can't do this in Document Connection. When you create new folders on SkyDrive, you can create protected folders that only you can access, or you can create folders with permission levels that allow other users to access the files in various ways.

When you create a folder, you set permissions to specify who has the right to view a file and who has the right to add files, edit files, and delete files.

After you organize SkyDrive with the folders you need, you can use two different methods to upload files to those folders. You can upload files from Document Connection or save files directly to the SkyDrive from within Word, PowerPoint, or Excel.



SHOW ME Media 17.2—Uploading Files to a SkyDrive Folder

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LET ME TRY IT

Uploading Files to a SkyDrive Folder

Although you have a total of 25GB of available storage space on SkyDrive, Microsoft restricts you to uploading files no larger than 50MB each. To upload a file to a folder on SkyDrive, follow these steps:

1. Open Document Connect and connect to SkyDrive, if necessary.
2. Open the folder on SkyDrive where you want to add the file by double-clicking the folder in the list pane.
3. On the Document Connection toolbar, click the Add File button, navigate to the file you want to add to SkyDrive, select it, and click Upload.

Additionally, you can drag files from the Finder to the list pane of Document Connection.



LET ME TRY IT

Saving a File Directly to SkyDrive

Another way to add files to SkyDrive is to save a file directly to SkyDrive just as you would save a file to your hard drive. You can save a Word, Excel, or PowerPoint file to SkyDrive by following these steps:

1. When the file is open in its application, click File on the menu bar, point to Share, and click Save to SkyDrive.
2. Type your Windows Live ID and password.
3. Click Sign In.
4. Type a different name for the document in the Save As text box if desired.
5. Select the folder on SkyDrive where you want to save the file.
6. Click Save.

Working with Files in the Cloud

One big advantage to storing files in the cloud, whether you're using SharePoint or SkyDrive, is that you can work on the files from any computer anywhere if it has an Internet connection and a web browser. The computer doesn't even need to have Microsoft Office installed because you can use Microsoft Web Apps to edit the files.

The Web Apps are not as robust as the Office applications, so unless you specifically *need* to use the Web Apps, you might prefer to edit files on SharePoint or SkyDrive with the Office applications via Document Connection.

Working with documents on SharePoint is a little more sophisticated than working with documents on SkyDrive. As I mentioned earlier, SharePoint is beyond the scope of this book, but you can learn more about working with documents on SharePoint by listening to the following audio recording.



TELL ME MORE Media 17.3—Working with Documents on SharePoint

Access this audio recording through your registered Web edition at my.safaribooksonline.com/9780132174718/media.



LET ME TRY IT

Editing a File on SkyDrive via Document Connection

To open and make edits to a file that is stored on your SkyDrive, follow these steps:

1. Open Document Connection, open the folder on SkyDrive that contains the file, and select the file you want to edit.
2. Click the Edit button. The file downloads to your computer and opens in the appropriate application.
3. When finished editing, save the file. The file saves back on SkyDrive, not your computer.

You can add files that you use frequently to the Favorites folder in the navigation pane by dragging them from the SkyDrive folder to the Favorites folder.



LET ME TRY IT

Saving a SkyDrive File to Your Computer

To save a SkyDrive file to your local computer, follow these steps:

1. Open Document Connection, open the folder on SkyDrive that contains the file, and select the document.
2. Click File on the menu bar and then click Save As. The filename appears in the Save As text box. Change the filename if you want to or just use the same name.
3. Navigate to the folder on your computer where you want to save the file and click Save. The file is no longer associated with the file on SkyDrive.

Collaborating on SkyDrive Files

When you are collaborating with other users on one of your files, you are working on a file that is in a shared folder on the cloud. You have given other users permission to edit the file (using commands in SkyDrive) and have sent them the URL of the file so they can open and edit the file. (To get the URL of a file, select

the file from within Document Connection, click Edit on the menu bar, and click Copy Link.) The collaborating authors open the file in Word or PowerPoint by clicking File on the menu bar, clicking Open URL, entering the URL you have supplied to them, and clicking Open.

If you are working on a Word file at the same time as another user, you can avoid conflicts in editing by blocking other authors from working on complete sections of the document. When you're finished with the sections, you can release them. If you don't want anyone else *ever* to work on a section, you can keep it blocked until the document is final.

Text is blocked automatically at the paragraph level. No other author can simultaneously edit within the same paragraph as another author.



LET ME TRY IT

Blocking Other Authors

To block other authors from editing a section of a Word document, follow these steps:

1. Open the document on SkyDrive. (Click File, Open URL, enter the URL, and click Open.)
2. Select the section you want to block.
3. Click the Review tab and click Block Authors. An icon appears beside the section, as shown in Figure 17.2.

To unblock the sections, click the Block Authors button, and then save the file.

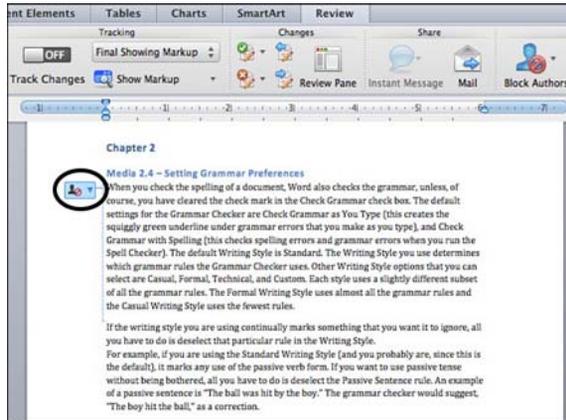


Figure 17.2 *The Block Authors icon reminds you that you have a section locked.*

Broadcasting a PowerPoint Presentation

Another way to collaborate with remote users is to broadcast a PowerPoint presentation on the Web. You upload the presentation to the web host (Microsoft PowerPoint Broadcast Service, a free service of Microsoft) and send the URL of the file to the remote users. The users click the link or type it into their browser and then follow along in their web browsers as you give the oral presentation (probably on a conference call). This is a great way to have a meeting, launch a new product, train people on a process, and so on. It's so easy for everyone in the audience—no techie stuff involved for the viewers!



SHOW ME Media 17.4—Presenting a PowerPoint Presentation on the Web

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LET ME TRY IT

Presenting a PowerPoint Presentation on the Web

To present a presentation on the Web, follow these steps:

1. Open the PowerPoint presentation you want to present.

- Click the Slide Show tab on the ribbon and click the Broadcast button under Play Slide Show. The Broadcast Slide Show dialog box opens, as shown in Figure 17.3.



Figure 17.3 PowerPoint Broadcast Service is provided free by Microsoft.

- Click Connect. The file uploads to the Microsoft PowerPoint Broadcast Service, and the link for the show displays in the dialog box, as shown in Figure 17.4.



Figure 17.4 The URL of the slide show displays in the box on the left.

- Click Send in E-mail, and an e-mail message opens in Outlook. The file name is inserted for Subject and the link to the file appears in the body of the message. Address the message to the remote users who will view the file and click Send. Alternatively, you can click Copy Link and paste the link in some other form of communication, such as an instant message.

5. When everyone has had time to receive the link and click on it (you would know this if you were on a conference call), click Play Slide Show.

You can make a presentation with two computers and use the Presenter View just as you are able to do with a live audience.

6. When you finish with the show, press Esc as you normally would.
7. Click the End Broadcast button (in the yellow bar under the ribbon) to disconnect all viewers and click End Broadcast in the warning dialog box.

Remote Desktop

The application called Remote Desktop Connection facilitates desktop sharing and viewing via the instant message application Communicator 8, which is the corporate equivalent to the personal application called Messenger. With Remote Desktop Connection, a user can initiate or accept a desktop sharing session with a remote user. During the session, either user can control the other's desktop. This is a good way to provide hardware or software support to a user.

The Remote Desktop Connection application does not work with Microsoft Messenger, but Mac users who don't have Communicator don't need to feel left out in the cold. If you have Mac OS X Snow Leopard, you can already share your desktop via iChat and even make video presentations. For more information on sharing your computer or using iChat Theater, refer to my book titled *Using Mac OS X Snow Leopard*, published by Que.

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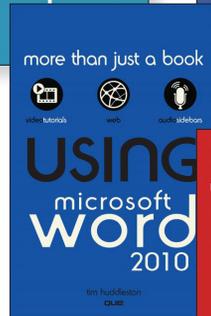
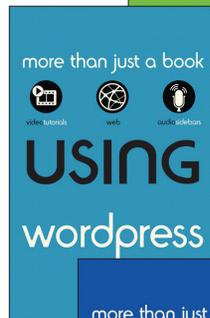
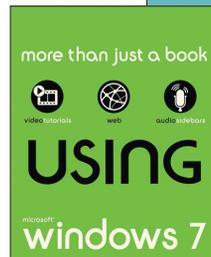
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