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Microsoft Office Inside OUT

(Office 2021 and Microsoft 365)

Joe Habraken

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(Office 2021 and Microsoft 365)

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About the Author

Joe Habraken is an educator, digital media and computer technology professional, best-selling author, and documentary filmmaker with more than 30 years of experience in the information technology and digital media production fields. He has written more than 40 books, which include numerous titles on the Microsoft Office application suite, computer networking, and Microsoft's Windows Server network platform. His titles have been translated into numerous languages and read around the world. Joe is currently an associate professor of Communication at the University of New England in Biddeford, Maine, where he teaches a variety of digital media, film, and hands-on software-related courses.

Introduction

Although I have worked with Microsoft Windows applications since 1989, it still amazes me that the Microsoft 365 application suite (formally known as Microsoft Office) continues to evolve and offer very thoughtful enhancements to these powerful software tools. The apps “get better” with each subsequent release, and this latest iteration of the apps is no different. This latest version of the suite, which includes Word, Excel, PowerPoint, Outlook, and Publisher offers new features as well as refinements of existing processes and commands.

Microsoft 365 has been the gold standard for consumer desktop applications for most of my professional life, and it continues to provide all the tools that you need for a wide variety of tasks whether you are a writer, accountant, sales representative, engineer, teacher, or pretty much anything else.

Many of the features and certainly the user interface provided by this latest version of 365 will be familiar to some of you, who have used these applications before. You will, however, also find that each interface has changed somewhat (with the introduction of Windows 11) and that each app has new tools and enhancements that make them even more effective and powerful software tools.

The challenge of writing a book like this one that covers a group of applications, rather than a single application, means that a balance must be struck in the coverage of each of the applications. I think you will find that this book not only provides a solid foundation for each of the 365 applications (Word, Excel, PowerPoint, Outlook, and Publisher) but also provides a depth of coverage that will serve any user of the Microsoft 365 suite.

Who this book is for

This book offers a well-rounded look at the features most people will use in the Microsoft 365 apps and serves as both a primer for new users of the applications as well as an excellent reference for seasoned users of Word, Excel, PowerPoint, Outlook, and Publisher. Also, this book also goes the extra mile and provides information that will be useful to advanced 365 users and the IT professionals who support them. Whatever level of 365 user you consider yourself, you will find that this book is written in an easy-to-read, conversational style that allows you to concentrate on learning and understanding. Although each of the Office applications provides multiple ways to tackle nearly every task, this book stresses best practices in using the applications of this powerful and sometimes complex software suite.

Assumptions about you

This book has been designed to get the Microsoft 365 novice up and running and to allow the experienced 365 user a chance to flex their application “muscles” to accomplish even more with the likes of Word, Excel, PowerPoint, and Outlook. Newcomers will find it an excellent hands-on tool for learning the basics of the various Office applications. Those with more experience will find it a resource that enables them to go well beyond the basic capabilities of these powerful software applications. No matter what your experience level with the 365 apps, you will find that this book is a resource for learning how to best take advantage of the capabilities of the individual Office applications and also leverage the capabilities of Office as an integrated suite of software tools.

How this book is organized

This book is divided into six parts and also includes two appendixes. Each 365 application—Word, Excel, PowerPoint, Outlook, and Publisher—is discussed in detail in its own part or section. This book also includes an introductory section (Part I) that gets you up to speed with installing the 365 apps and discusses new features in the 365 application suite.

- Part I, "Getting started with the Microsoft 365 apps," gets you oriented to the 365 application interface and geography and looks at improvements and new features in the applications. This section also discusses managing and sharing your application files and working with graphics and images in the applications. An introduction to the updated 365 Online apps is also provided.

- Part II, "Word," takes an in-depth look at the Microsoft 365 suite's powerful word processor and desktop publishing application. This section begins with an overview of the Word application environment and how to access essential Word features and tools. Subsequent chapters build your Word knowledge base, from commonly used features and commands to advanced subject matter that helps you create more complex and specialized Word documents using styles, tables, and sections. This section also provides complete coverage of advanced features, such as Word's mail merge and forms, and it details approaches for creating larger documents that require a table of contents, footnotes, and cross-references.

- Part III, "Excel," quickly orients you to this powerful spreadsheet application so that you can immediately begin to work with worksheets, text labels, values, formulas, and cell ranges. This section then focuses on worksheet management and advanced formatting and provides an in-depth discussion on Excel formulas and functions. Charts, pivot tables, and tools for sorting and filtering data are also covered in this section. This part culminates in coverage of Excel's advanced features for validating and analyzing your worksheet data.

- Part IV, "PowerPoint," provides a detailed discussion of this powerful presentation tool. This section, which begins with an overview of the PowerPoint application environment and basic presentation tools and concepts, gives you all the information you need to build complex and compelling PowerPoint presentations. Chapters in this section include information on how to build better PowerPoint slides using themes, slide transitions, and special animations. The options and best practices for presenting PowerPoint presentations are also provided, with particular insight into how printed materials such as handouts and notes can make a presentation even more effective.

- Part V, "Outlook," covers how to use this powerful information manager both at home and at work. This section provides an overview of the Outlook interface and essential features and then shifts from the general to the specific by concentrating on Outlook's diverse capabilities. This coverage looks at Outlook's different roles as an email client, contact information manager, calendar manager, and organizer of tasks, notes, and other personal information. This section concludes with information to help you secure your information in Outlook and protect your Outlook Inbox from spam, viruses, and other security threats.
- Part VI, "Publisher," discusses the 365 suite's dedicated desktop publishing application. Publisher has evolved over the last few years into a professional layout and desktop publishing tool that enables you to quickly create a variety of visually appealing and professional documents. This section orients you to the basics of creating special documents in Publisher and then builds your knowledge base in the application so that you can create more professional and complex items, including online content.

The book completes its discussion of the Office applications with Appendix A, "Microsoft 365 app integration," and Appendix B, "Microsoft 365 macros," which provide information on integrating the Office applications and Office macros, respectively. Each appendix is designed to give you additional information related to the Office applications that you can use to leverage your capabilities when using the Office suite applications.

Errata, updates & book support

We've made every effort to ensure the accuracy of this book and its companion content. You can access updates to this book—in the form of a list of submitted errata and their related corrections—at:

MicrosoftPressStore.com/Office365insideout/errata

If you discover an error that is not already listed, please submit it to us at the same page.

For additional book support and information, please visit:

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CHAPTER 3

Managing and sharing 365 files

Understanding 365 file formats 49
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Protecting a 365 file 65
Preparing a file for sharing 67

The Microsoft 365 applications provide you with all the tools you need to create documents, presentations, workbooks, and publications. After you create your various files using the 365 applications, it is up to you to manage your files and share them with colleagues and coworkers.

In this chapter, we take a look at the 365 file formats used in each of the Microsoft 365 applications. We also look at your options for managing and sharing files.

Understanding 365 file formats

The default file formats for each of the 365 applications (excluding Outlook) take advantage of the open XML (eXtensible Markup Language) file standards. The file formats benefit file compression, improved damage recovery, better detection of files containing macros, and better compatibility with other vendor software.

Although some backward-compatibility issues may be involved when you attempt to share a file using one of these file formats with a user who still works with an earlier version of a particular 365 application (think pre-2010 versions), most problems have been ironed out. Users still working with earlier versions of the applications can take advantage of various conversion utilities and software updates that enable them to convert or directly open a file using one of the new file formats.

You can also save your files in file formats that offer backward compatibility for coworkers still using older versions of the Microsoft (formerly Office) suite applications. And the applications (such as Word and Excel) provide you with compatibility-checking tools that help negate any issues with files shared with users of legacy Microsoft applications.

As already mentioned, Word, Excel, and PowerPoint use the open XML file formats by default when you save a file in these applications. And you have some other file format options in these applications if needed.

Publisher, on the other hand, saves publications by default in the .pub file type. The .pub file type is "directly" compatible with versions from Publisher 2003 through Publisher 2013. Although Publisher does not enable you to save a publication in the open XML file format (like Word and Excel), you can save Publisher files in the XPS file type, which is an XML file format for "electronic paper." Publisher also has file types available that you can use to make your publications backward compatible with collaborators who are using previous versions of Microsoft Publisher.

➤ **For more about Publisher file types, see "Creating a new publication," in Chapter 27.**

The following lists provide an overview of some of the file types used in Word, Excel, and PowerPoint, respectively.

Word:

File Extension	Description
docx	XML file type; default file type for Word 2010, 2013, 2016, and 2019 documents
docm	XML file type; macro-enabled document
dotx	XML file type; Word template
dotm	XML file type; macro-enabled Word template
doc	Binary file type; document compatibility with Word 97–2003
dot	Binary file type; template compatibility with Word 97–2003

Excel:

File Extension	Description
xlsx	XML file type; default file type for Excel 2007, 2010, 2013, 2016, and 2019 workbooks
xlsm	XML file type; macro-enabled workbook
xltx	XML file type; Excel template
xltm	XML file type; macro-enabled Excel template
xls	Binary file type; document compatibility with Excel 97–2003
xlt	Binary file type; template compatibility with Excel 97–2003

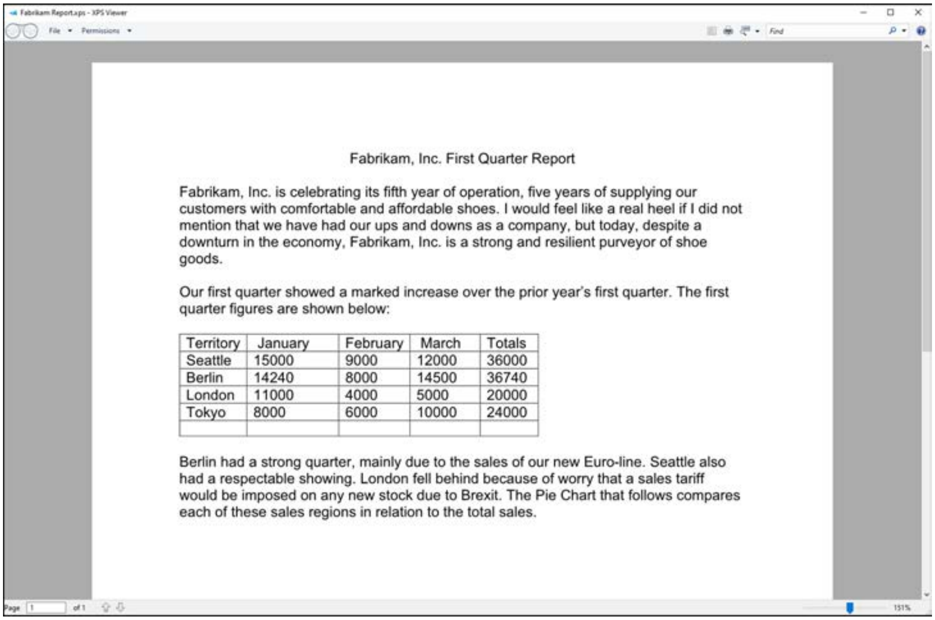
PowerPoint:

File Extension	Description
pptx	XML file type; default file type for PowerPoint 2007, 2010, 2013, 2016, and 2019 presentations
pptm	XML file type; macro-enabled presentation
potx	XML file type; PowerPoint template

potm	XML file type; macro-enabled PowerPoint template
ppsx	XML file type; PowerPoint show
ppsm	XML file type; macro-enabled PowerPoint show
ppt	Binary file type; presentation compatibility with PowerPoint 97–2003
pot	Binary file type; template compatibility with PowerPoint 97–2003

The 365 applications also provide other file formats that make it simple for you to share your documents or workbooks in a format designed for easy viewing. A good example is the PDF file format (created by Adobe Systems), which allows users who have a PDF reader, such as the free Adobe Reader software installed on their computers, to view your files. Windows 10 also provides a PDF viewer (Windows Reader) to view a PDF document. The viewer enables you to search the PDF document using the Find tool.

The XML Paper Specification (XPS) file format also makes it easy for others to view your work. Windows 10 supplies an XPS viewer that enables any Windows 10 user to open and view files in the XPS file type. Figure 3-1 shows the Windows 10 XPS viewer containing a Word document converted to an XPS document.



Fabrikam, Inc. First Quarter Report

Fabrikam, Inc. is celebrating its fifth year of operation, five years of supplying our customers with comfortable and affordable shoes. I would feel like a real heel if I did not mention that we have had our ups and downs as a company, but today, despite a downturn in the economy, Fabrikam, Inc. is a strong and resilient purveyor of shoe goods.

Our first quarter showed a marked increase over the prior year's first quarter. The first quarter figures are shown below:

Territory	January	February	March	Totals
Seattle	15000	9000	12000	36000
Berlin	14240	8000	14500	36740
London	11000	4000	5000	20000
Tokyo	8000	6000	10000	24000

Berlin had a strong quarter, mainly due to the sales of our new Euro-line. Seattle also had a respectable showing. London fell behind because of worry that a sales tariff would be imposed on any new stock due to Brexit. The Pie Chart that follows compares each of these sales regions in relation to the total sales.

Figure 3-1 A Word XPS document in the XPS viewer

Both the PDF and the XPS file formats are primarily designed to enable you to share a view of a particular file without requiring that the applications themselves be installed on the computer of the user who will view the file. Although both the PDF and XPS file types require a particular viewer type to view the file, viewers such as Acrobat Reader and some XPS viewers (including

Microsoft's XPS viewer) are available for free download on the web. Most operating systems, including Windows 10, have their own native PDF and XPS viewers.

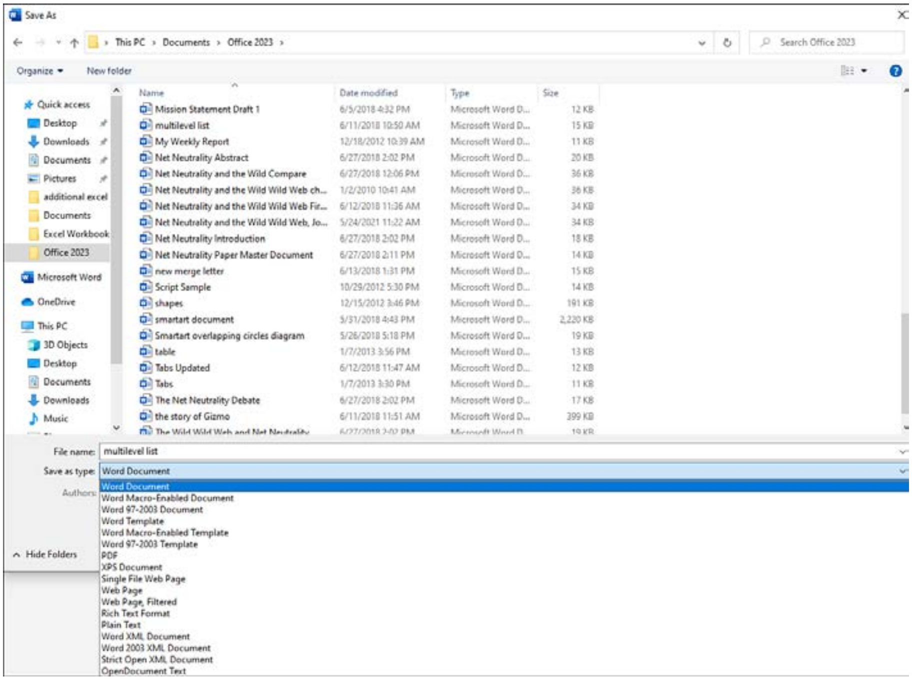
NOTE

This chapter doesn't address Outlook because of how it stores and works with different items such as emails and contacts, which is very different in how applications such as Word and Excel where you create discrete files. Part V, "Outlook," covers everything you need about this powerful email, contact, and calendar application.

Saving files as different file types

When you create a new Word document, Excel workbook, or PowerPoint presentation, you eventually need to save your work to a file. As already mentioned, each of these applications uses the open XML file format by default. So, if you save a new Word document and do not change the Save As Type setting, you get a file with the extension .docx (the open XML format for Word).

When you save a file for the first time, the Save As dialog box opens. At a minimum, you must provide a file name for the new file, and you have the option of specifying the location where the file will be saved. You also have control over the file type used when the file is saved. You can select the file type in the Save As Type drop-down menu. Figure 3-2 shows the Word Save As dialog box with the Save As Type drop-down menu selected.


Save As
This PC › Documents › Office 2023 ›
Search Office 2023
Organize
New folder
Quick access
Desktop
Downloads
Documents
Pictures
additional excel
Documents
Excel Workbook
Office 2023
Microsoft Word
OneDrive
This PC
3D Objects
Desktop
Documents
Downloads
Music
Authors:
Hide Folders
Word Document
Word Macro-Enabled Document
Word 97-2003 Document
Word Template
Word Macro-Enabled Template
Word 97-2003 Template
PDF
XPS Document
Single File Web Page
Web Page
Web Page, Filtered
Rich Text Format
Plain Text
Word XML Document
Word 2003 XML Document
Strict Open XML Document
OpenDocument Text

Name	Date modified	Type	Size
Mission Statement Draft 1	6/5/2018 4:32 PM	Microsoft Word D...	12 KB
multilevel list	6/11/2018 10:50 AM	Microsoft Word D...	15 KB
My Weekly Report	12/18/2012 10:39 AM	Microsoft Word D...	11 KB
Net Neutrality Abstract	6/27/2018 2:02 PM	Microsoft Word D...	20 KB
Net Neutrality and the Wild Compare	6/27/2018 12:06 PM	Microsoft Word D...	36 KB
Net Neutrality and the Wild Wild Web ch...	1/2/2010 10:41 AM	Microsoft Word D...	36 KB
Net Neutrality and the Wild Wild Web Fir...	6/12/2018 11:36 AM	Microsoft Word D...	34 KB
Net Neutrality and the Wild Wild Web, Jo...	5/24/2021 11:22 AM	Microsoft Word D...	34 KB
Net Neutrality Introduction	6/27/2018 2:02 PM	Microsoft Word D...	18 KB
Net Neutrality Paper Master Document	6/27/2018 2:11 PM	Microsoft Word D...	14 KB
new merge letter	6/13/2018 1:31 PM	Microsoft Word D...	15 KB
Script Sample	10/29/2012 5:30 PM	Microsoft Word D...	14 KB
shapes	12/15/2012 3:46 PM	Microsoft Word D...	191 KB
smartart document	5/31/2018 4:43 PM	Microsoft Word D...	2,220 KB
Smartart overlapping circles diagram	5/26/2018 5:18 PM	Microsoft Word D...	19 KB
table	1/7/2013 3:56 PM	Microsoft Word D...	13 KB
Tabs Updated	6/12/2018 11:47 AM	Microsoft Word D...	12 KB
Tabs	1/7/2013 3:30 PM	Microsoft Word D...	11 KB
The Net Neutrality Debate	6/27/2018 2:02 PM	Microsoft Word D...	17 KB
the story of Gizmo	6/11/2018 11:51 AM	Microsoft Word D...	399 KB
The Wild Wild Web and Net Neutrality	6/27/2018 2:02 PM	Microsoft Word D...	19 KB

File name: multilevel list

Save as type: Word Document

Figure 3-2 Selecting the file type for a Word document

After selecting the file type, click Save. When you have saved the file for the first time, use the Save button on the application's Quick Access Toolbar to save the changes that you make as you add to and edit the document.

You can also convert an existing file to another file type by using the Save As dialog box. After you save a file, the only route to the Save As dialog box is via the application's Backstage. Follow these steps to open the Save As dialog box for a previously saved file:

> TIP
>
> **You can also save 365 files such as Word documents, Excel worksheets, and PowerPoint presentations in various web page formats, making it easy to include the content on a website.**

1. Select File to access the Backstage.
2. Select Save As. The Backstage Save As page opens.
3. Select a place (location) to save the file on the left side of the Save As page. You can choose from This PC and cloud places such as your OneDrive or a network drive. You can also choose from existing Windows folders, such as Documents, Desktop, and Downloads.
4. Select Browse to choose your location and open the Save As dialog box.
5. In the Save As dialog box, use the Save As Type drop-down menu to specify the file type for the file.
6. You also have the option of changing the name and location for the newly created file.
7. Click Save. The Save As dialog box closes.

The file is saved using the new file format you selected. The file has a new name and save location if you changed these settings in the Save As dialog box.

Converting files to different file types

Save As gives you the capability to change a file's current file type to another file type. Another avenue for converting a particular file to a different file type is the Export page in the Backstage. You can access this page by selecting File and then selecting Export.

The Export page provides two possibilities: Create PDF/XPS Document and Change File Type. By default, the Create PDF/XPS Document is selected on the Export page, so to quickly create a PDF or XPS "copy" of the current file, click the Create PDF/XPS button. When the Publish As PDF Or XPS dialog box opens, it looks much like the Save As dialog box. By default, the file is saved as a PDF, but you can switch to XPS using the Save As Type drop-down menu. Specify a location file name, and then select Publish to save the PDF (or XPS) file.

The Export page also provides the Change File Type pane, which is accessed by selecting Change File Type on the left side of the Export page. The Change File Type pane makes changing the file type less confusing than just picking a file type from the Save As Type drop-down menu in the Save As dialog box. File types are visually represented in the Change File Type pane, and short descriptions of each file type are provided. Figure 3-3 shows the Excel Change File Type pane in the Backstage.

To create a copy of the current file in a new file type, select one of the alternative file types provided in the Change File Type pane. For example, you might want to save an Excel workbook that is currently in the Excel .xlsx file format (the default) to the Excel 97–2003 workbook file type (.xls) so that you can share the file with a colleague who uses an earlier version of Excel.

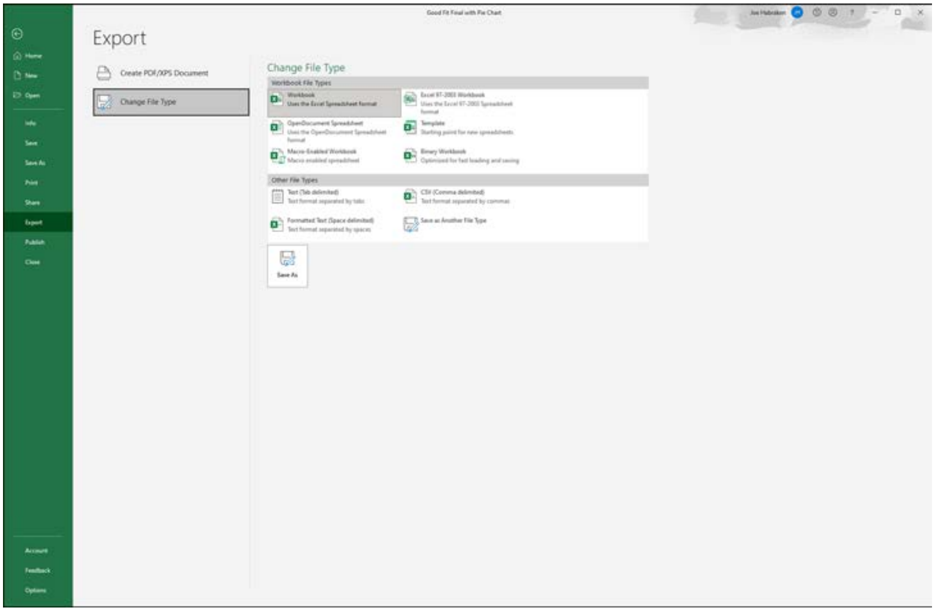

Good Fit Final with Pie Chart
Joe Habraken
Home
New
Open
Info
Save
Save As
Print
Share
Export
Publish
Close
Account
Feedback
Options
Export
Create PDF/XPS Document
Change File Type
Change File Type
Workbook File Types
Workbook
Uses the Excel Spreadsheet format
Excel 97-2003 Workbook
Uses the Excel 97-2003 Spreadsheet format
OpenDocument Spreadsheet
Uses the OpenDocument Spreadsheet format
Template
Starting point for new spreadsheets
Macro-Enabled Workbook
Macro enabled spreadsheet
Binary Workbook
Optimized for fast loading and saving
Other File Types
Text (Tab delimited)
Text format separated by tabs
CSV (Comma delimited)
Text format separated by commas
Formatted Text (Space delimited)
Text format separated by spaces
Save as Another File Type
Save As

Figure 3-3 The Export page and the Excel Change File Type pane

Select the new file type in the Change File Type pane, and the Save As dialog box opens. The file type that you chose in the Change File Type pane is selected in the Save As Type drop-down menu. You can change the file name or the file location as needed and then click Save to save a copy of the original file in the file type.

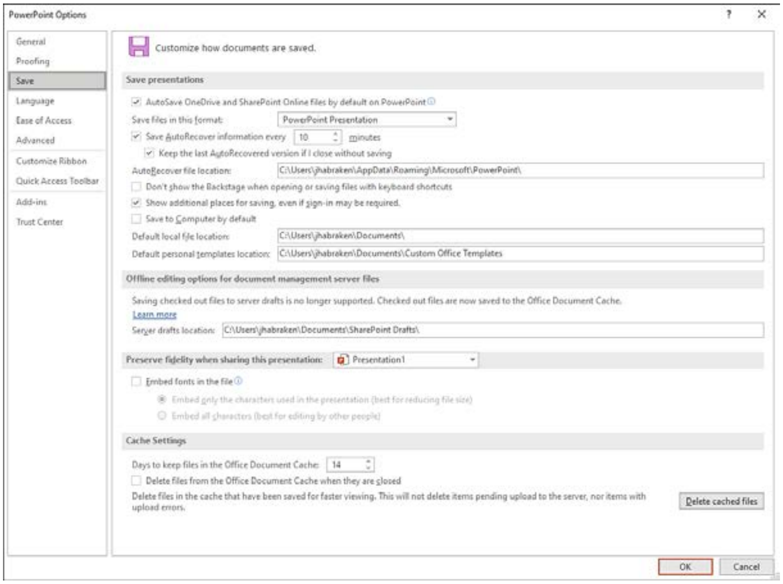
Although going directly to the Save As dialog box via the Backstage Save As command might seem to be a faster option than getting to the Save As dialog box via the Change File Type pane, the latter option does a better job of laying out the possibilities. Until you have a good feel for which file type is which on the Save As Type drop-down menu in the Save As dialog box, use the Change File Type pane as an aid to select the appropriate file type for the file. Obviously, “appropriate” depends on what you are going to do with the file in its alternative file type.

Configuring save file options

When you save a file for the first time in one of the 365 applications, you obviously will have the option to specify the location where the file will be saved. By default, the applications are configured to save your files in your Documents folder. However, when you save a new file, you are ushered to the Backstage, and if you don't provide an alternative location, the files end up in the default folder—your Documents folder.

You can actually control the save options for an application and specify both the default file format for saving files and the default location for files and templates. You can even set an option so that the Backstage won't open every time you save a new file; this option enables you to "jump" right to the Save As dialog box. Other options that you control include the default file location and the default file format used to save files in a particular 365 application. The settings for these various options are in the Save pane of an application's Options window.

To open the Options window for an application, select File to open the Backstage. Then select Options. The Options window for the application opens. Click Save to view the save settings for the application. Figure 3-4 shows the Save pane for PowerPoint. The Save options for Word and Excel are similar.



Customize how documents are saved.

Save presentations

☑ AutoSave OneDrive and SharePoint Online Files by default on PowerPoint

Save files in this format: PowerPoint Presentation

☑ Save AutoRecover information every 10 minutes

☑ Keep the last AutoRecovered version if I close without saving

AutoRecover file location: C:\Users\jhabraken\AppData\Roaming\Microsoft\PowerPoint\

☐ Don't show the Backstage when opening or saving files with keyboard shortcuts

☑ Show additional places for saving, even if sign-in may be required.

☐ Save to Computer by default

Default local file location: C:\Users\jhabraken\Documents\

Default personal templates location: C:\Users\jhabraken\Documents\Custom Office Templates

Offline editing options for document management server files

Saving checked out files to server drafts is no longer supported. Checked out files are now saved to the Office Document Cache.

Learn more

Server drafts location: C:\Users\jhabraken\Documents\SharePoint Drafts\

Preserve fidelity when sharing this presentation: Presentation1

☐ Embed fonts in the file

● Embed only the characters used in the presentation (best for reducing file size)

○ Embed all characters (best for editing by other people)

Cache Settings

Days to keep files in the Office Document Cache: 14

☐ Delete files from the Office Document Cache when they are closed

Delete files in the cache that have been saved for faster viewing. This will not delete items pending upload to the server, nor items with upload errors.

Figure 3-4 The PowerPoint Save options

To change the default file format, use the Save Files In This Format drop-down menu. Change the file format only if you have a good reason, such as the fact that you always work with people who use a legacy version of an application, and you want to match the file type that they use.

You can also edit the default file location. The default file location is used only if you also select Don’t Show The Backstage When Opening Or Saving Files With Keyboard Shortcuts. Selecting this option takes you right to the Save As dialog box when you save a new file for the first time (instead of going to the Save As Page in the Backstage).

If you do want to specify the location where your files are stored by default, you can edit the entry in the Default Local File Location box. You are required to type the path, so you may want to use the Windows File Explorer to browse for the path so that you enter it correctly in the Default Local File Location box.

Other options provided by the Save pane relate to the AutoRecover feature and offline editing options when you work in an environment that uses network servers running SharePoint Server. Leave most of these options at the defaults—particularly those related to offline editing in a server environment.

CAUTION

If you work in a networked environment other than a home or small office environment, you might drive your network administrator completely insane if you change the default Save settings for your 365 applications. Check with your administrator before you attempt to change these settings.

Creating and managing files

The Microsoft 365 applications provide you with different ways to create new files. When you open one of the applications, such as Word, Excel, or PowerPoint, you are taken to the Start screen. The Start screen enables you to create a new blank file (such as a new blank document in Word), open files from the Recent list, or take advantage of a huge library of themes and templates.

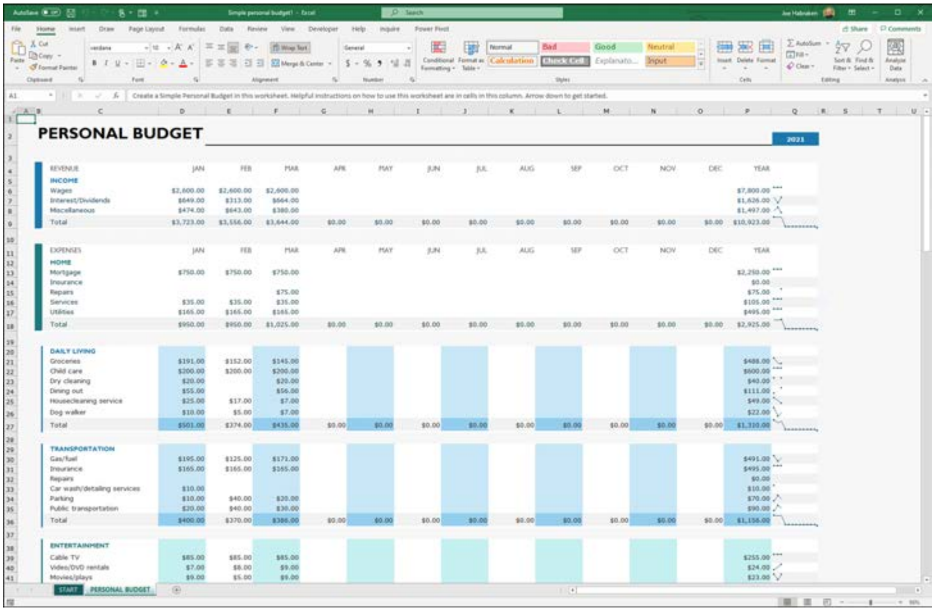
Inside OUT

Choose or create the right template for your file

Everything that you create in the 365 applications is based on a template. Each application has a default template. For example, in Word, the default template is the Normal template and is used when you create a new blank document. By design, templates are ready-made blueprints for documents, workbooks, or other application files. For example, you might want to create a monthly budget for your household. If you want some help in creating the overall layout that goes into making this budget in Excel, you can take advantage of the Simple Monthly Budget template that is provided by Office.com and easily opened via the Excel Backstage. Remember, you are not limited to the templates that are provided by the various applications such as Word and Excel. You can also create your own templates so you have greater control over a particular Word document or Excel workbook.

When you want to create a more specialized document, workbook, or presentation, the easiest route is to take advantage of one of the templates provided by the application in which you are working. Templates often provide layout attributes, text formatting, and even placeholder text. The sophistication of the file created using a particular template depends on the actual template. For example, you might use a Word Memo template that creates a simple memo containing some placeholder text (that you replace) in the To, From, and Re: areas of the memo. Or you might take advantage of the Simple Monthly Budget template mentioned a moment ago. It provides individual tables in a worksheet for items such as projected costs and projected monthly income, and it supplies ready-made charts for your monthly expenses and expenses by category. Figure 3-5 shows a new Excel worksheet started using the Simple Personal Budget template.

You can also start a new file using a theme. A theme is a collection of colors, fonts, and text effects. Most of the possibilities provided on the Start screen and the Backstage New page are actually themes (unless you do an online search for templates on the Start screen or New page). Themes provide you with an overall document look, as a template does, but using a theme negates having to work within the confines of a template's placeholder text and other document settings. However, using themes or templates is a quick way to begin the process of creating an eye-catching document, presentation, or worksheet.



Create a Simple Personal Budget in this worksheet. Helpful instructions on how to use this worksheet are in cells in this column. Arrow down to get started.

PERSONAL BUDGET

2021

REVENUE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YEAR
INCOME													
Wages	$2,600.00	$2,600.00	$2,600.00										$7,800.00
Interest/Dividends	$649.00	$313.00	$664.00										$1,626.00
Miscellaneous	$474.00	$643.00	$380.00										$1,497.00
Total	$3,723.00	$3,556.00	$3,644.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$10,923.00

EXPENSES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	YEAR
HOME													
Mortgage	$750.00	$750.00	$750.00										$2,250.00
Insurance													$0.00
Repairs			$75.00										$75.00
Services	$35.00	$35.00	$35.00										$105.00
Utilities	$165.00	$165.00	$165.00										$495.00
Total	$950.00	$950.00	$1,025.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,925.00
DAILY LIVING													
Groceries	$191.00	$152.00	$145.00										$488.00
Child care	$200.00	$200.00	$200.00										$600.00
Dry cleaning	$20.00		$20.00										$40.00
Dining out	$55.00		$56.00										$111.00
Housecleaning service	$25.00	$17.00	$7.00										$49.00
Dog walker	$10.00	$5.00	$7.00										$22.00
Total	$501.00	$374.00	$435.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,310.00
TRANSPORTATION													
Gas/fuel	$195.00	$125.00	$171.00										$491.00
Insurance	$165.00	$165.00	$165.00										$495.00
Repairs													$0.00
Car wash/detailing services	$10.00												$10.00
Parking	$10.00	$40.00	$20.00										$70.00
Public transportation	$20.00	$40.00	$30.00										$90.00
Total	$400.00	$370.00	$386.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,156.00
ENTERTAINMENT													
Cable TV	$85.00	$85.00	$85.00										$255.00
Video/DVD rentals	$7.00	$8.00	$9.00										$24.00
Movies/plays	$9.00	$5.00	$9.00										$23.00

Figure 3-5 Excel's Simple Personal Budget template

You can take advantage of themes and templates in Excel, Word, PowerPoint, and Publisher. To start a new file based on a template or theme, follow these steps:

1. Select File to open the Backstage.
2. Select New in the Backstage. The New page opens (which is similar to the Start screen). Figure 3-6 shows the Excel New page.
3. Select a template or theme in the New window to preview the template or theme. The Preview window also describes the theme or template.
4. If you want to search for an online template or theme, select one of the suggested searches at the top of the New page or enter keywords in the Search box and run the search.
5. The search results show all the templates available online that match your search criteria. On the right side of the Search results, you find a Category list. The categories listed are keyword subsets of all the templates that were found using your search terms. Each category has a number to the right showing how many of the listed templates fall into the category. You can view a subset of the search results by selecting a category.
6. If you selected a template stored locally on your computer, click Create. If the template is an Office.com template, click Download. In either case, a new file opens in the application window based on the template.

You determine whether to create your files from new blank documents, workbooks, or presentations or to take advantage of the various themes and templates available. Working with themes and templates can help you determine how a special document, such as a newsletter, or a special worksheet, such as an invoice, should be laid out. So instead of reinventing the wheel, it makes sense to take advantage of the benefits a template can provide. You can also use themes to great advantage when you are creating a "family" of documents that are related. For example, you might use the same theme for a Word document, an Excel worksheet, and a PowerPoint presentation that are related to a specific project you are developing.

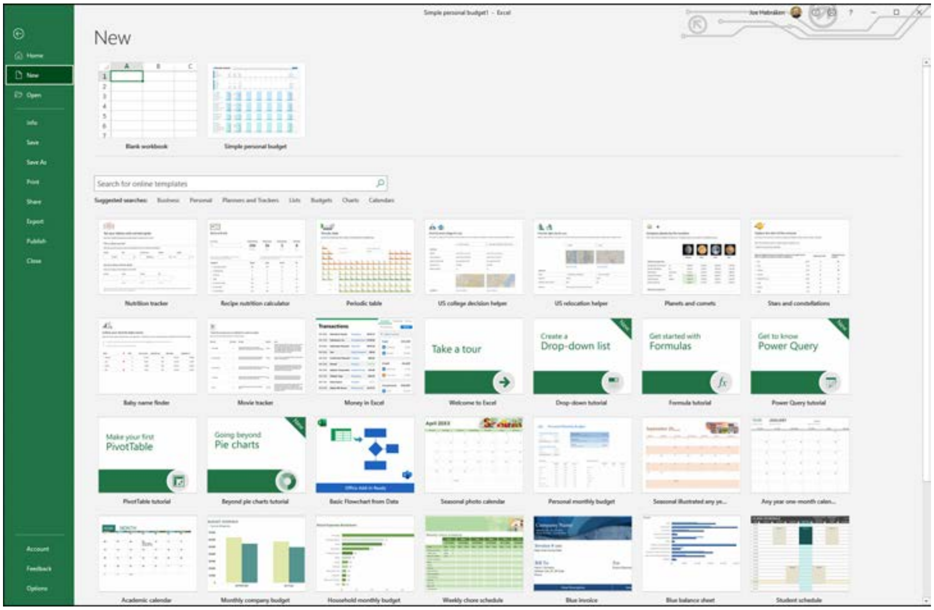

Simple personal budget1 - Excel
Joe Habraken
Home
New
Open
Info
Save
Save As
Print
Share
Export
Publish
Close
Account
Feedback
Options
New
Blank workbook
Simple personal budget
Search for online templates
Suggested searches: Business Personal Planners and Trackers Lists Budgets Charts Calendars
Nutrition tracker
Recipe nutrition calculator
Periodic table
US college decision helper
US relocation helper
Planets and comets
Stars and constellations
Take a tour
Create a Drop-down list
Get started with Formulas
Get to know Power Query
Baby name finder
Movie tracker
Money in Excel
Welcome to Excel
Drop-down tutorial
Formula tutorial
Power Query tutorial
Make your first PivotTable
Going beyond Pie charts
PivotTable tutorial
Beyond pie charts tutorial
Basic Flowchart from Data
Seasonal photo calendar
Personal monthly budget
Seasonal illustrated any ye...
Any year one-month calen...
Academic calendar
Monthly company budget
Household monthly budget
Weekly chore schedule
Blue invoice
Blue balance sheet
Student schedule

Figure 3-6 Create a new file based on a template or theme.

Managing files

Managing files effectively is a bit of an art form. You need to create some sort of structured environment that keeps your saved files organized but also makes it easy for you to find the files you work with often. Your particular situation might also require that you store your files in particular network shares (folders) so that others can easily access them. The Microsoft applications have adopted a cloud storage strategy that also makes it possible for you to easily store files on your OneDrive (both the free version and the version available with a Microsoft 365 subscription—OneDrive for Business), or a corporate SharePoint site.

Whether you store your files on your computer's hard drive, on a shared drive on a network server, or in the cloud on your OneDrive, you still must adopt a strategy for organizing your files. And whether you are talking about a hard drive or OneDrive, these storage containers can still be seen as the electronic equivalent of a filing cabinet. Each drawer in the filing cabinet is equivalent to a folder on the drive. The hanging file folders inside filing cabinet drawers are equivalent to the subfolders inside the main folders.

The naming conventions you use for the folders and subfolders you create are really up to you but should reflect some sort of system. For example, you could have a folder named Projects that contains subfolders named for each of the specific projects you are working on. Take some time to figure out your folder taxonomy. If you end up with a folder named Miscellaneous, I recommend that you rethink your naming system.

NOTE

You might want to use your Documents folder as the parent container for the subfolders you create for your various projects. This enables you to create the necessary folder structure without cluttering the C: drive with a lot of new folders. This method of organizing files in folders and subfolders has been around as long as the Windows operating system.

An alternative to organizing files in folders and subfolders is to take advantage of the file library that is provided by Windows 10. The library approach helps you organize and access your files, no matter where you store them on your computer (or your network).

In Windows 10, a library is a container that gathers files from different locations on your computer and your network and displays them as a collection that you can access. By default, Windows 10 provides the Documents, Music, Pictures, and Videos libraries. You can toggle the libraries on (if you don't see them) in the File Explorer by right-clicking the Navigation pane and selecting Show Libraries.

So you can go "old school" and create folders and subfolders on your computer's hard drive, or you can take advantage of libraries to give you easy access to the files you use. Whether you are creating new folders on your computer or on a network share assigned to you, you can use the File Explorer as your primary tool. The same goes if you want to create new libraries: Use the File Explorer.

The next two sections look more closely at creating folders and libraries on your computer's hard drive. Working in the cloud and organizing cloud storage is similar in most respects to organizing a "physical" drive. You can create folders on both your OneDrive or other network drives that you access. OneDrive for Business also gives you the capability to create and manage libraries. Both OneDrive for Business and Windows 10 allow you to create libraries that serve as virtual containers for the files that you create and share.

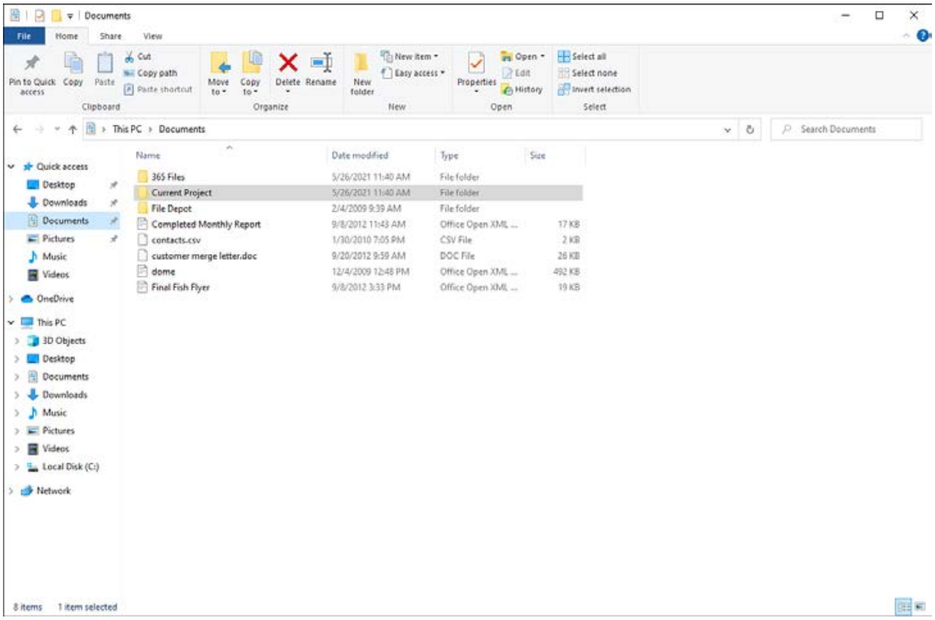
Creating a new folder

In Windows 10, switch to the desktop and then click the File Explorer icon on the taskbar. File Explorer (shown in Figure 3-7) provides links on the left side of the window, such as various links to the desktop or your current libraries (Documents, Music, and so on). In its main pane, you can see a listing of the hard drives, DVD drives, CD drives, and so forth on your computer and any network shares (in the Network Location area) configured for your use (including SharePoint sites).

TIP

You can also create new folders in a 365 application's Save As dialog box. Navigate to where you want to create the new folder, and then select New Folder on the toolbar in the Save As dialog box. Provide a name for the folder. You can now use the folder as a location to save the current file (and subsequent files) as needed.

To view the folders on a particular drive, such as the C: drive (which is typically the default drive on most PCs), double-click the drive. You can create new folders on any drive or in existing folders, such as the Documents folder. Navigate to the drive or folder you want to serve as the parent container, and then click the New Folder button on File Explorer's ribbon. Type a new name for the folder, and you are good to go. You can drag existing files and folders into the new folder (using File Explorer) and specify the new folder when you save a file in the Save As dialog box.


Documents
File
Home
Share
View
Pin to Quick access
Copy
Paste
Cut
Copy path
Paste shortcut
Clipboard
Move to
Copy to
Delete
Rename
Organize
New folder
New item
Easy access
New
Properties
Open
Edit
History
Open
Select all
Select none
Invert selection
Select
This PC
Documents
Search Documents
Quick access
Desktop
Downloads
Documents
Pictures
Music
Videos
OneDrive
This PC
3D Objects
Desktop
Documents
Downloads
Music
Pictures
Videos
Local Disk (C:)
Network
8 items
1 item selected

Name	Date modified	Type	Size
365 Files	5/26/2021 11:40 AM	File folder	
Current Project	5/26/2021 11:40 AM	File folder	
File Depot	2/4/2009 9:39 AM	File folder	
Completed Monthly Report	9/8/2012 11:43 AM	Office Open XML ...	17 KB
contacts.csv	1/30/2010 7:05 PM	CSV File	2 KB
customer merge letter.doc	9/20/2012 9:59 AM	DOC File	26 KB
dome	12/4/2009 12:48 PM	Office Open XML ...	492 KB
Final Fish Flyer	9/8/2012 3:33 PM	Office Open XML ...	19 KB

Figure 3-7 Create new libraries or folders using File Explorer.

Creating a new library

As already mentioned, a Windows library enables you to view and access files from different locations on your computer and your network. A library isn't really a container because a library doesn't store the actual files. A library is a kind of virtual container that can point to different folder locations and enable you to access related files (such as all the files related to a particular project).

To create a new library in File Explorer, follow these steps:

1. Right-click the Navigation pane and select Show Libraries. This places the Libraries icon in the Navigation pane.
2. Right-click the Libraries icon and point at New on the shortcut menu.

3. Select Library and a New Library appears in the Details pane.
4. Click on the default library name (New Library) and then type a name for the library.

Once you have created a library, you can add folders to the library as needed. Use File Explorer to navigate to any folder on your computer or your network. Right-click the folder and then point at Include In Library. A list of available libraries appears. Select the desired library.

When you are working in one of the 365 applications and want to open a particular file from one of your libraries using the Open dialog box, select the desired library in the Location list and then locate the file you want to open. You can also save your files to folders in a library when you are in the Save As dialog box.

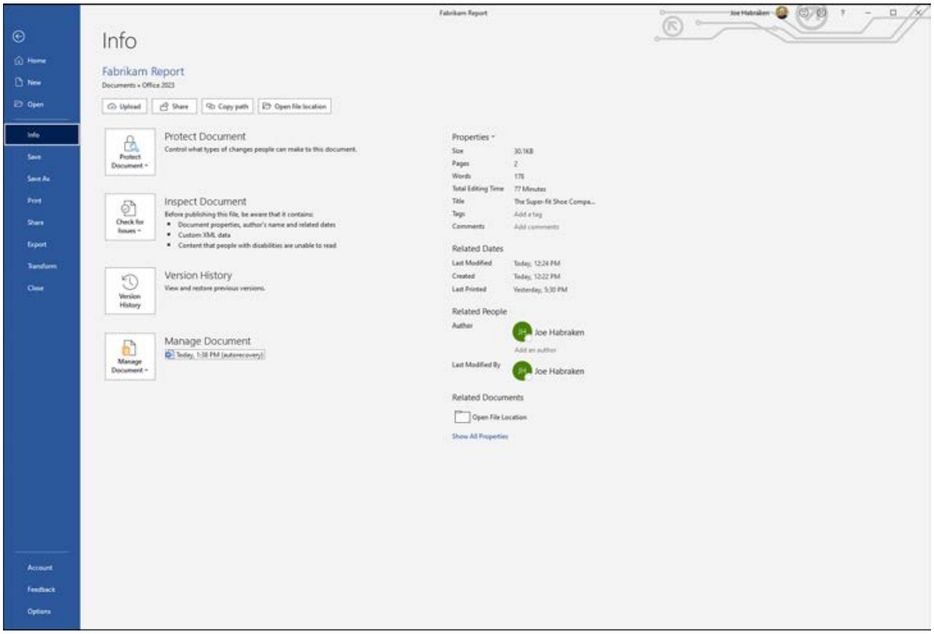
Viewing file versions in an application

When you are working in an application such as Word or Excel, the application uses the AutoRecover feature to create different versions of the file on which you are working. By default, the 365 applications save AutoRecover information for your current file every 10 minutes. If you accidentally close a document or workbook in Word or Excel without saving, the last AutoRecovered version of your file is saved so that you can access it. This is also a default setting in the application's Save options.

When you save a file and close it, all the AutoRecovered versions of the file are deleted. But you can peruse the different versions of your file saved by the AutoRecover feature as you work on the document. This includes any unsaved versions of the document that exist because you did not save changes that you made to the file before you closed it.

To view any unsaved versions of the current file, such as a Word document, select File to open the Backstage and then click Info. Figure 3-8 shows the Info window for a Word document. The area of interest in this window is the Manage Document area. Note that in Figure 3-8, a version of the file exists (from earlier in the day) because the Word document was autosaved (which happens by default every 10 minutes).

You can also browse for unsaved versions of a file by clicking the Manage Document button and then selecting Recover Unsaved Documents. This enables you to browse for any unsaved versions stored on your computer. Any unsaved versions of the current document that have been automatically saved are listed in the Versions area of the window.


Fabrikam Report
Joe Habraken
Info
Home
New
Open
Info
Save
Save As
Print
Share
Export
Transform
Close
Account
Feedback
Options
Upload
Share
Copy path
Open file location
Protect Document
Check for Issues
Version History
Manage Document
Show All Properties

Fabrikam Report
Documents » Office 2023

Protect Document
Control what types of changes people can make to this document.

Inspect Document
Before publishing this file, be aware that it contains:
- Document properties, author's name and related dates
- Custom XML data
- Content that people with disabilities are unable to read

Version History
View and restore previous versions.

Manage Document
Today, 1:38 PM (autorecovery)

Properties
Size 30.1KB
Pages 2
Words 178
Total Editing Time 77 Minutes
Title The Super-fit Shoe Compa...
Tags Add a tag
Comments Add comments

Related Dates
Last Modified Today, 12:24 PM
Created Today, 12:22 PM
Last Printed Yesterday, 5:30 PM

Related People
Author Joe Habraken
Add an author
Last Modified By Joe Habraken

Related Documents
Open File Location

Figure 3-8 The Word Info page

You can open a version of the file from the list by selecting it. When you open the automatically saved version of the file (which is labeled “Unsaved”), a message bar appears at the top of the document window below the ribbon. It states that the current document is a “Recovered Unsaved File” and the file is temporarily stored on the computer. You are provided two options: Compare and Restore. You can select Compare to compare this version of the file with the current version of the file. Any differences between the two files are detailed using the Track Changes feature and are displayed in the document and the Reviewing pane. You can go through each of the changes marked in the document and accept or reject them as needed.

You also have the option of selecting Restore. This option saves the AutoRecovered version of the file over the current copy of the file. A message box opens, letting you know that the current version will be overwritten by the restored version. Click OK to overwrite the current version.

Searching for 365 files

If you haven’t done a good job of keeping your files organized and can’t seem to locate the file you need, you have a couple of ways to search for files. One option is to use the Search box provided by File Explorer. Open File Explorer, and then select the location for the search using the icons on the left of the File Explorer window. You can then type the file name or a portion of the file name in the search box; the search begins automatically.

The File Explorer window supplies the results of the search. You can modify the search as needed. You can also open a file listed in the search results. The Close Search button closes the search and returns you to the previous File Explorer window.

NOTE

The File Explorer provides you with a tab of Search Tools when you run a search. Location commands enable you to specify where the search should take place (current folder versus subfolders). Commands are also available to refine the search, such as Date Modified, Kind, and Size.

Another option for searching your files is to search in an application's Open dialog box. This is particularly useful if you remember at least part of the file name but don't really remember what folder contains the actual file. To access the Open dialog box, select File to open the Backstage. Then select Open. On the Open page, select a particular location, such as Computer. You can then select the Browse button to access the Open dialog box.

In the Open dialog box, navigate to the drive, folder, or library that you want to search for the file. Type your keywords for the search into the Search box in the upper-right corner of the Open dialog box. Files that match your search criteria have the search keywords highlighted in both the document title and document content, as shown in Figure 3-9.

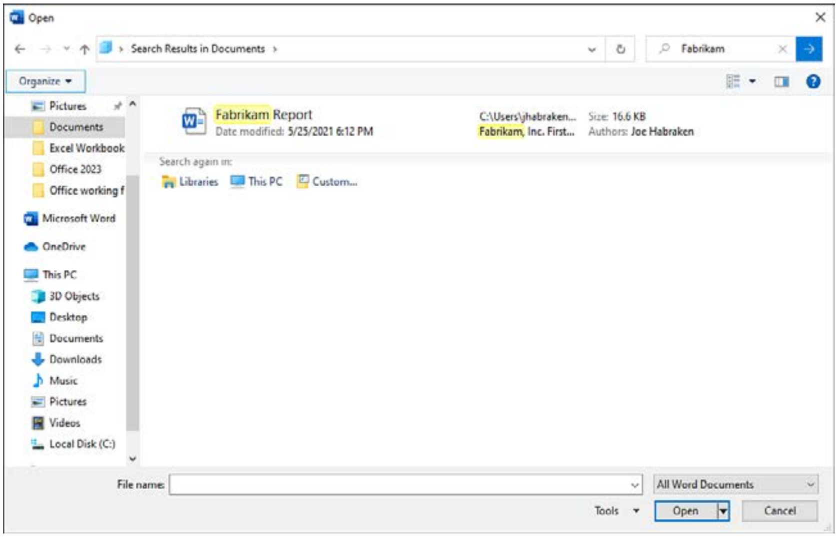
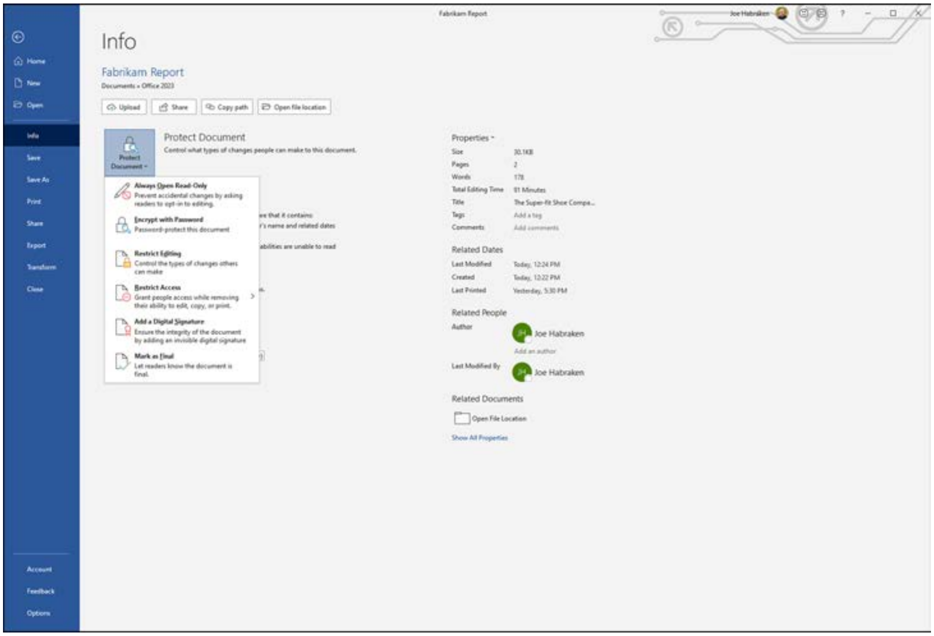

Open
Search Results in Documents
Fabrikam
Organize
Pictures
Documents
Excel Workbook
Office 2023
Office working f
Microsoft Word
OneDrive
This PC
3D Objects
Desktop
Documents
Downloads
Music
Pictures
Videos
Local Disk (C:)
Fabrikam Report
Date modified: 5/25/2021 6:12 PM
C:\Users\jhabraken...
Fabrikam, Inc. First...
Size: 16.6 KB
Authors: Joe Habraken
Search again in:
Libraries
This PC
Custom...
File name:
All Word Documents
Tools
Open
Cancel

Figure 3-9 The Word Open dialog box, as it appears after you have searched by keyword

If you want to search a different folder using the same search, select that folder in the Organize list and then click the Search box to select your recently used keywords. When you want to open a file that has been identified by the search, double-click the file name to open it in the current application.

Protecting a 365 file

The 365 applications enable you to protect a file (such as a document or workbook) that is shared with other users (particularly users on a network). The Protect Document settings help protect the content of the file and can also potentially restrict what can be changed in the document and by whom. To view these options, click the Protect Document button in the Info window, as shown in Figure 3-10.


Fabrikam Report
Joe Habraken
Home
New
Open
Info
Save
Save As
Print
Share
Export
Transform
Close
Account
Feedback
Options
Info
Fabrikam Report
Documents » Office 2023
Upload
Share
Copy path
Open file location
Protect Document
Always Open Read-Only
Encrypt with Password
Restrict Editing
Restrict Access
Add a Digital Signature
Mark as Final
Properties
Related Dates
Related People
Related Documents
Open File Location
Show All Properties

Protect Document
Control what types of changes people can make to this document.

Always Open Read-Only
Prevent accidental changes by asking readers to opt-in to editing.

Encrypt with Password
Password-protect this document

Restrict Editing
Control the types of changes others can make

Restrict Access
Grant people access while removing their ability to edit, copy, or print.

Add a Digital Signature
Ensure the integrity of the document by adding an invisible digital signature

Mark as Final
Let readers know the document is final.

Size 30.1KB
Pages 2
Words 178
Total Editing Time 81 Minutes
Title The Super-fit Shoe Compa...
Tags Add a tag
Comments Add comments

Last Modified Today, 12:24 PM
Created Today, 12:22 PM
Last Printed Yesterday, 5:30 PM

Author Joe Habraken
Add an author
Last Modified By Joe Habraken

Figure 3-11 Select a document protection strategy on the Info page.

The following options are available:

- **Always Open Read-Only:** When you choose this option, documents you share are opened in read-only mode. This feature is primarily designed to keep users from inadvertently making changes to a file upon first inspection.
- **Encrypt With Password:** The file is encrypted and protected with a password. When you select this option, you are required to enter a password for the file. Only users with the password can open the file.
- **Restrict Editing:** This command opens the Restrict Formatting and Editing task pane in the document, presentation, or worksheet window. You can restrict formatting to a selection of styles and specify editing restrictions for the document, including making the document read-only.

- **Restrict Access:** This option enables you to take advantage of a Digital Rights Management server. This type of service allows you to assign users different permission levels for the file.
- **Add A Digital Signature:** You can digitally sign a file to prove its authenticity. Signing a file digitally requires that you obtain a digital certificate. A certificate authority can provide digital certificates.
- **Mark As Final:** This command marks the file as final and makes the file read-only. All editing commands for the file are disabled; however, any user opening the document can remove the Mark As Final setting in the Backstage.

The first three options provided by Protect Document are available to 365 users (home, small business, or big business). The Always Open Read-Only option is useful when you want your collaborators to opt-in to editing privileges by providing for a read-only look at the document prior to having editing access to the file.

Encrypting the document with a password (the second option) definitely limits access to the file because the password is necessary to open it. This means that you also must keep track of the password because it is the only way to open the encrypted file. This is a strong security measure, but it can backfire if you forget the password for the file.

The Restrict Editing setting enables you to be somewhat selective in what you allow other users to do to the file. You can specify both formatting and editing restrictions using the Restrict Editing task pane. You can also choose parts of a document or worksheet and specify the users who can edit those portions of the file. This feature requires that you have user groups on your network, such as domain user groups on a Windows Server network.

The Restrict Access setting requires that you have access to a Digital Rights Management server (DRM server). So if you work in a corporate environment that provides a DRM server, you can take advantage of this way of securing your files. Restricting access using a DRM server enables you to specify a particular user (by username or email address) and then assign a level of access to that user.

Digitally signing a file is a way to authenticate that a file is from a trusted source. So adding a digital signature to a file is more about letting users with whom you share the file know that the file is authentic and does not contain any malicious code that might damage their computers or computer files. Adding a digital signature to a file protects your collaborators—the people who review the shared file—more than it protects you from a particular security problem.

To digitally sign a file, you need a digital certificate. You can obtain digital certificates from an online certificate authority such as Global Sign (*globalsign.com*) and Digicert (*digicert.com*); depending on the size of your business, you might find digital certificates cost prohibitive. CAcert (*www.cacert.org*) is a community-based certificate authority that offers certificates to members for free.

You can also create a digital certificate using the Digital Certificate for VBA Projects utility provided with 365. Appendix B, "365 macros," provides a walkthrough of using this utility in the section "Digitally signing macros."

You should digitally sign a file only when you are providing a final draft to your collaborators. Signing the file marks the file as final, which makes it read-only. That means when you have a final file, and the certificate is on your computer, you are ready to go.

Click Protect Document and then Add A Digital Signature. The Sign dialog box opens. Enter the commitment type and the purpose for signing the file. Your default signing certificate is listed in the dialog box in the Signing As pane. You can click the Change button to locate a different certificate if you have multiple certificates on your computer.

When you are ready to sign the document, click Sign. The Signature Confirmation box opens, letting you know that your signature has been saved with the document. However, if the document is changed, the signature becomes invalid.

Preparing a file for sharing

The Microsoft 365 applications also give you tools for checking a document before you share it. These features are primarily designed for both security and accessibility issues. For example, you can check the document for any personal information that might be contained in it; this is a security check because you don't necessarily want to share personal information in the shared document. Or you might have text in the document that will be difficult for people with disabilities to read; this is an accessibility issue.

The Check For Issues button on the Info window in the Backstage provides three tools that check your file for possible issues related to sharing:

- **Inspect Document:** This tool inspects the document for specific content such as comments, annotations, document properties, and hidden text. The main purpose of the inspector is to help ferret out personal information that you might have inadvertently stored in the document.

- **Check Accessibility:** This tool opens the Accessibility Checker task pane in the document and provides a list of warnings related to accessibility issues in your document. For example, several blank lines between paragraphs might signal to a person using a screen reader that the document has ended. As you select each warning in the task pane, you are presented with information on why you should fix the issue and suggestions on how to fix it.

- **Check Compatibility:** This tool checks the file for items that are not supported by earlier versions of the application you are using. For example, you might have used the Citation and Bibliography features in Word, but the Compatibility Checker tells you the earlier versions of Word (Word 97–2003) need to convert these items to static text.

As already mentioned, you can run these tools from the Backstage in the Info window. The purpose of these tools is to negate the chance of sharing personal information (Inspect Document), to make sure that the file is accessible to users with disabilities (Check Accessibility), and to ensure that users of earlier versions of Microsoft products can access the file and view its content (Check Compatibility).

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