

# Microsoft Office® 365 Basics

Quick Reference Guide for Excel®, PowerPoint® and Word

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## Interface Terms

### Understanding the Start Screen & the Ribbon

Use the **Start Screen** to open an existing file or create a new document. The Start Screen launches when starting Excel, PowerPoint or Word without a document. If a document is open, choose the "File" tab in the Ribbon to enter Backstage View and then select "New" or "Open" from the menu for similar options.



The **Ribbon** is displayed along the top of the application window. The Ribbon is divided into tabs. Within these tabs are different groups of commands that perform various functions, accessed through the use of buttons, boxes, and menus.



## Interface Basics

### Using the Ribbon

1. To **hide and show the contents in the Ribbon**, double-click the active tab in the Ribbon.
2. To **change button groups shown in the Ribbon**, click the tabs at the top of the Ribbon.
3. To **show or hide "Contextual" tabs**, click to select or click away to de-select the object.
4. To **access commands**, click a Ribbon tab and use the buttons, boxes and menus within the command groups of the active tab.
5. To **access advanced options**, click the "Dialog Box Launcher" button in the lower-right corner of a button group, if available.

### Using the File Tab & Backstage View

1. To **open "Backstage View" and perform file management**, click the "File" tab at the left end of the Ribbon.
2. To **see additional options for a command**, click on a command in the left section of "Backstage View."

### Using the Quick Access Toolbar

1. To **change the Quick Access Toolbar's location**, click the "Customize Quick Access Toolbar" button and select either "Show Below the Ribbon" or "Show Above the Ribbon."
2. To **add a button**, right-click on a command button or function in the Ribbon and choose the "Add to Quick Access Toolbar" command.
3. To **remove a button**, right-click the button in the Quick Access Toolbar and choose the "Remove from Quick Access Toolbar" command.
4. To **access advanced customization**, click the "Customize Quick Access Toolbar" button, select "More Commands" and then a command group from the drop-down at the top of the left column. To **add a command**, select it on the left, click the "Add" button and then "OK." To **remove a command**, select it on the right and click the "Remove" button and then "OK."

### Enabling and Disabling Touch Mode

1. Click the "Customize Quick Access Toolbar" button in the Quick Access Toolbar and choose the "Touch/Mouse Mode" option.
2. Click the "Touch/Mouse Mode" button that appears in the Quick Access Toolbar and select either "Mouse" or "Touch."

### Using the Status Bar

The Status Bar runs along the bottom of the program window. By default, it contains document view buttons and the Zoom Slider.

To **customize the Status Bar**, right-click anywhere on the Status Bar and check (to display) or un-check (to hide) any available features.

### Changing Document Views

1. Click one of the three "View" buttons at the far-right of the Status Bar or click the "View" tab in the Ribbon and click one of the views in the "Views," "Presentation Views," or "Workbook Views" group.
2. To **use the "Zoom Slider"**, click and drag the slider control at the far-right end of the Status Bar.
3. To **use a preset magnification**, click the "View" tab in the Ribbon and then click the "Zoom" button in the "Zoom" group to select a magnification and click "OK."

## File Management

### Creating New Documents

Click the "File" tab in the Ribbon and select "New" from the menu on the left within Backstage View.

1. To **create a new document**, click either the BLANK document thumbnail or a template thumbnail (and any available variants) and then click the "Create" button.
2. To **find online templates**, click a "Suggested searches" link or type in the "Search for online templates" text box and press "Enter" or click the "Start searching" button.
3. To **view custom templates**, click the "Personal" link.
4. To **pin templates to the "Featured" list**, hover over the template and click the "Pin to list" button.

### Saving Documents

To **overwrite a file that has already been saved**, click the "File" tab in the Ribbon and click the "Save" command at the left of Backstage View.

To **save a file for the first time or to save with a different name or location**:

1. Click the "File" tab in the Ribbon and click the "Save As" command at the left of Backstage View.
2. Click to select a location ("This PC," "OneDrive," or other location, such as a SharePoint Server for some Office 365 subscribers).
3. Click a folder name or the "Browse" button.
4. Navigate to the location where you want to save the file in the "Save As" dialog box.
5. Type a name in the "File name" text box and click the "Save" button.

### Saving Documents as a PDF or XPS

PDF and XPS are standardized file formats that can be read and printed with a free copy of Adobe Reader or XPS Reader and don't require Office to be installed to view the files. To **save a file as a PDF or XPS**:

1. Click the "File" tab in the Ribbon and choose the "Export" command at the left of Backstage View.
2. Click the "Create PDF/XPS Document" command in the "Export" area.
3. Click the "Create PDF/XPS" button.
4. Navigate to the location where you want to save the file in the "Publish as PDF or XPS" dialog box.
5. Type a name in the "File name" text box, choose either "PDF" or "XPS Document" from the "Save as type" drop-down, and click the "Publish" button.

### Opening Documents

Click the "File" tab in the Ribbon and choose the "Open" command at the left of Backstage View, if necessary. To **pin a recent document to the "Pinned" list for easy access later**, hover over the file and click the "Pin this item to the list" push pin. To **un-pin**, click it again.

To **open a document**, click to select a "Recent" or "Pinned" file. Or:

1. Click to select the file's location ("This PC," "OneDrive," or other location).
2. Click a recent folder or the "Browse" button.
3. Navigate to the file and click the "Open" button.

### Opening Files Containing Macros

Macros are small programs that perform frequent tasks within applications. Macros are usually harmless, but **can** contain malicious code. By default, Office disables macros. To **enable macros**, click the "Enable Content" button in the Message Bar.

### Recovering Unsaved Documents

1. Select the "File" tab in the Ribbon and choose the "Open" command at the left of Backstage View.
2. Select the "Recent" command in the "Open" area in the middle pane.
3. Scroll to the bottom of the "Recent" pane at the right and click the "Recover Unsaved Workbooks," "Recover Unsaved Documents," or "Recover Unsaved Presentations" button.
4. Select the file in the "Open" dialog box in the "UnsavedFiles" folder.
5. Click the "Open" button.

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