WestVirginiaUniversity.
OSHER LIFELONG LEARNING INSTITUTE

Microsoft Office: The Basics

Table of Contents

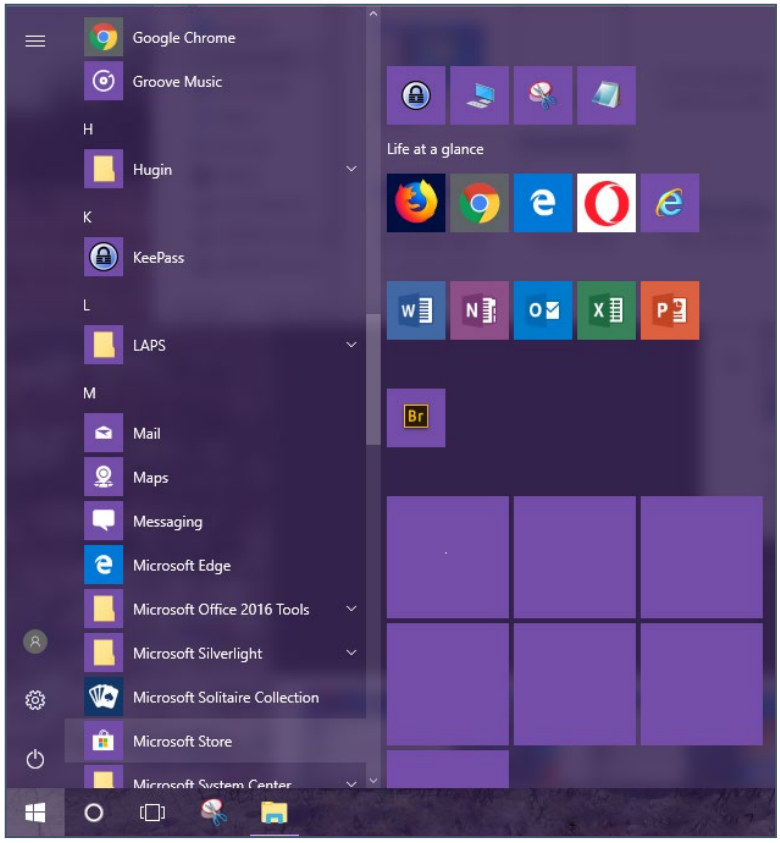
Operating System versus Office Suite 2
The Main Window 3
The Ribbon 4
Context Sensitive Tabs 4
Quick Access Toolbar 5
Window Size / State 5
Dialog Boxes 6
Zoom 6
Backstage View / File Tab 7
Moving Through a Document 8
Selecting Text 8
Undo/Redo 8
Copy and Paste 9
Copy and Paste Using Keyboard Commands 9
Text Formatting 10
Mini Toolbar 10
Font 10
Format Painter 11
Document Layout 11
Find and Replace 12
Pictures and Images 12
Resizing Images 13
Aligning Images 13
Screenshots 14
Printing 15
Program Options 16
Default Settings 17
Index 18

Updated: 22 March 2023

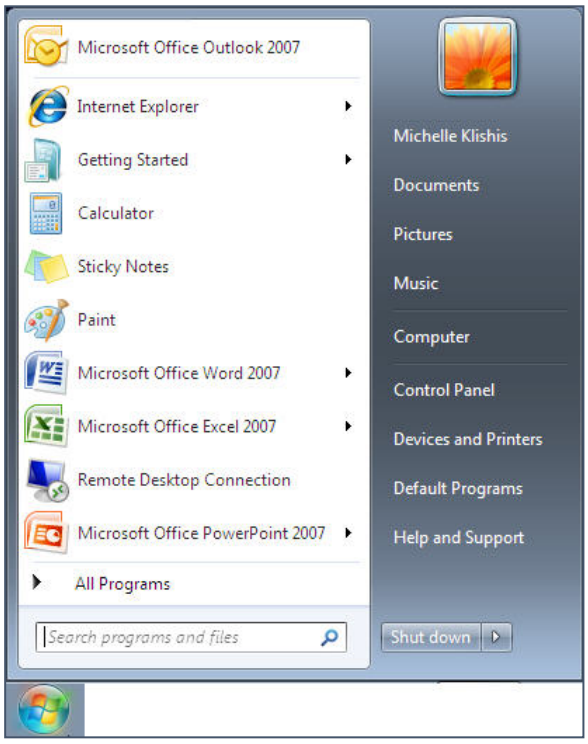
Operating System versus Office Suite

Because both are Microsoft products, we want to make clear the difference between Microsoft Windows (the operating system) and Microsoft Office (the productivity suite).

Windows is an operating system (OS)—the platform on which the programs on your computer run. Other operating systems are Linux and Mac OS. The most current Microsoft operating system is Windows 10. The previous versions were Windows 8 (which everyone hated) and Windows 7, which is at the end of its life cycle.



Windows 10



Windows 7

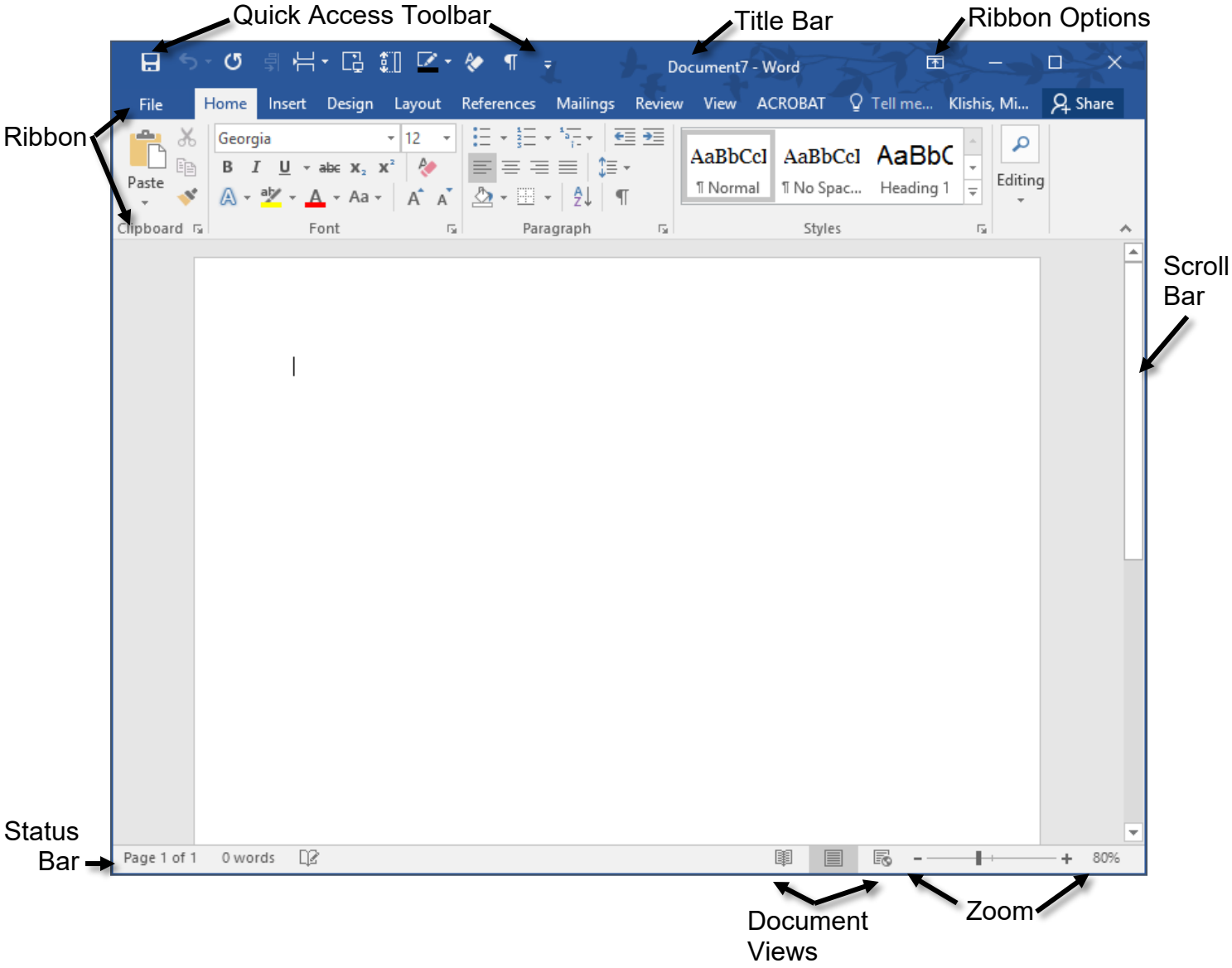
Microsoft Office is the suite or productivity programs that allow you to do specific tasks. Word allows you to compose written documents, like letters or novels. Excel is a spreadsheet program that allows you to manipulate numbers and data, like a budget or an address list. PowerPoint is the program for creating presentations, such as class presentations or electronic photo albums. There are other programs in the Office suite, but those three are the ones people are most familiar with.

The version of Office used in creating these handouts was Office 365, Microsoft's Office subscription service.

Many of the commands discussed here will also work throughout the Windows operating system.

The Main Window

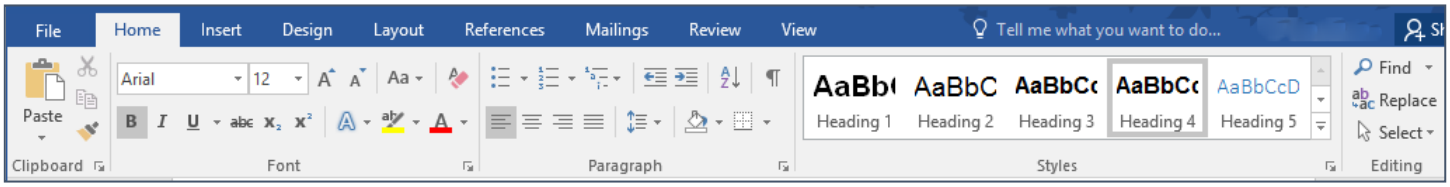
All programs in the Office suite have a similar layout. We'll use Word here as an example, but the basics are the same across all the programs, as well as across most of the Windows OS.



Quick Access Toolbar	Personalized frequently used commands
Ribbon	The collection of commands; Each tab contains related commands
Ribbon Options	Changes the display of the ribbon
Scroll	Move through the document
Status Bar	Information about the document
Title Bar	The name of the document
Zoom	Changes the size of the displayed document

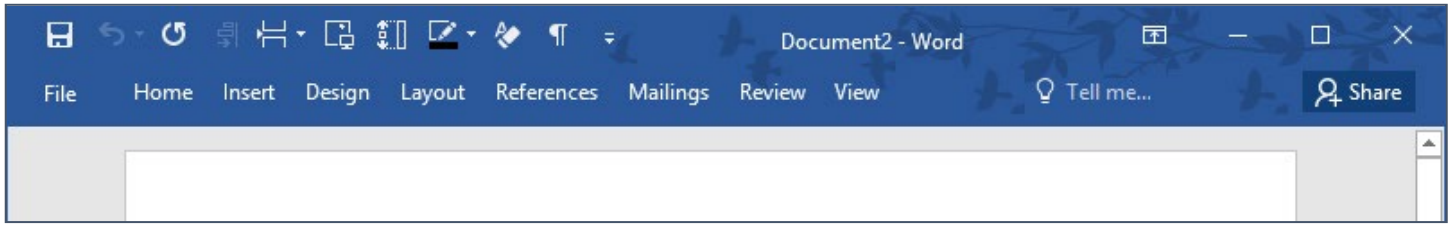
The Ribbon

The ribbon provides access to the commands available in Word, grouped by use. Selecting a tab provides a display of the available commands. The number of commands displayed changes with the width of the window—the larger the window, the more commands are visible at a glance.



The ribbon has multiple tabs, each of which gives you access to groups of related commands.

On a laptop or smaller screen, the ribbon can be hidden to save screen real estate. When the ribbon is hidden, clicking on a tab temporarily displays the commands for that tab. Most of these commands work across the Windows OS.



Changing the Visibility of the Ribbon

Double click on any tab of the ribbon.

OR

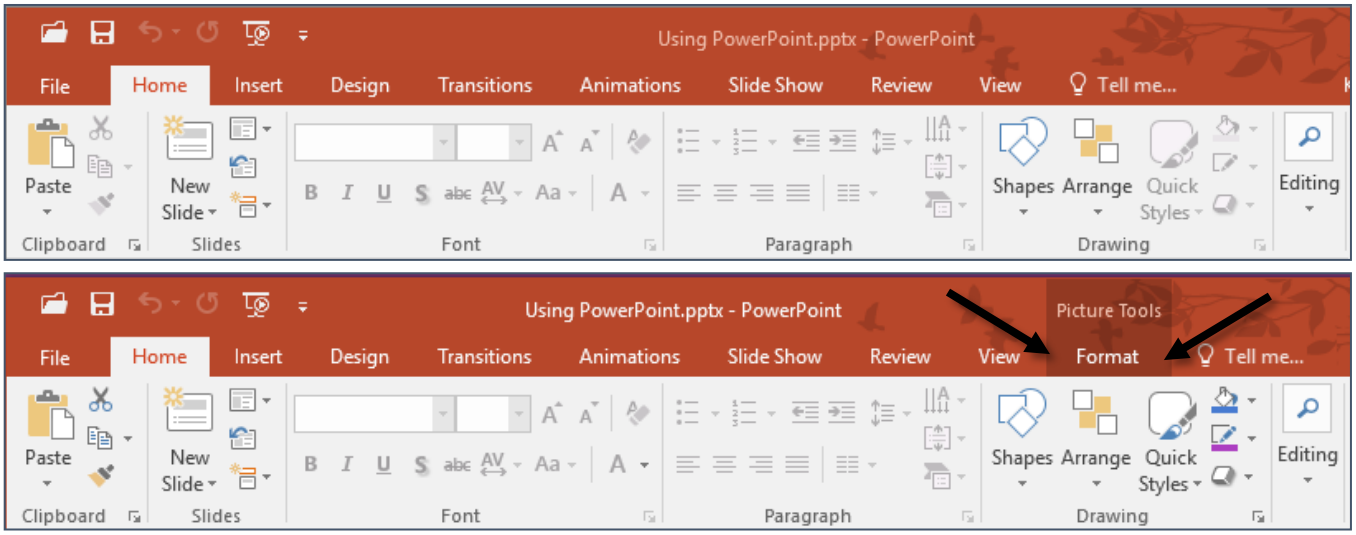
Click on the **Ribbon Display Options** icon.

OR

Use the keyboard command **Ctrl + F1**.

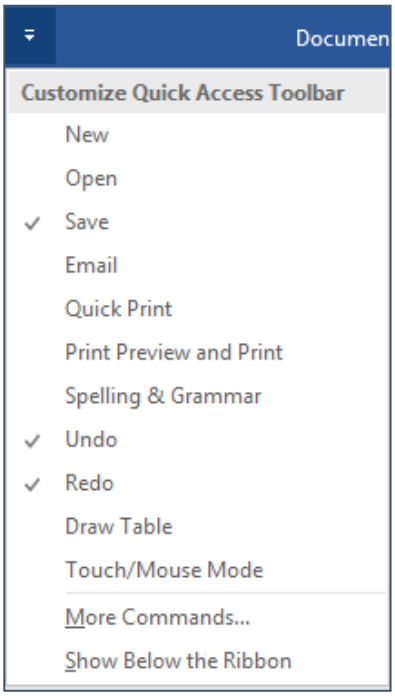
Context Sensitive Tabs

The ribbon has context sensitive tabs, or tabs that are available only when specific conditions are met, such as selection of a picture.



Quick Access Toolbar

Office allows you to customize the Quick Access Toolbar to place frequently used commands there. These commands will be available no matter what tab is visible.



Customizing the Quick Access Toolbar

1. Click the down arrow beside the Quick Access Toolbar.
2. From the drop down menu, select one of the available commands, or for more options, choose **More Commands**.

Window Size / State

As with all other Windows programs, each MS Office program can be on one of three states while open: Minimized, Floating, and Maximized.

A maximized window takes up the entire screen of your monitor. A floating window takes up part of the monitor and can be resized to a have multiple programs or windows visible on a single screen.

Maximizing a Window

Click on the center, single square button at the top right corner of the window.

OR

Double click on the title bar of the window.

Restoring/Resizing a Window

Click the middle, double square icon at the top right corner of the window.

OR

Click on the program icon on the Windows task bar.

Minimizing a Window

Click the left, horizontal line icon at the top right corner of the window.

Closing a Window

Click the **X** in the upper right corner of the window.

OR

Right click on the program icon on the Windows task bar, and from the menu select **Close window**.

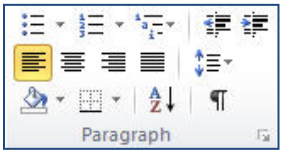
OR

Select the **File** tab and from the left pane select **Close**.

Dialog Boxes

Dialog boxes are accessed through the ribbon or a context menu and display additional commands not available directly from the ribbon.

Opening a Dialog Box



1. Find the tab on the ribbon that contains the section of interest. For instance, select the Home tab and go to the Paragraph section to make changes to the paragraph formatting of your text.
2. Click the small arrow in the lower right corner of the desired section. The dialog box for the selected section opens.

Zoom

The Zoom option is in the Zoom Slider section of the Status Bar and under the View tab of the ribbon. Increasing the zoom makes the text size larger. Decreasing the zoom allows you to see more of the page on your screen.

Using the Zoom Slider

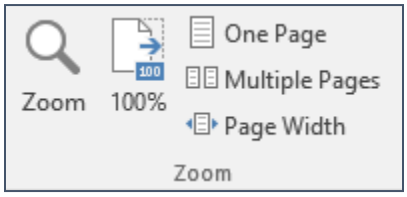
1. Press the + button to increase the zoom, or press the – button to decrease the zoom.

   OR

   Click and drag the slider to increase or decrease the zoom.

Changing the Zoom from the ribbon

1. Select the **View** tab.
2. In the Zoom section, select one of the zoom options, or click the **Zoom** button.
3. If you click the Zoom button, in the Zoom dialog box, select the desired option.
4. Click **OK**.



Changing the Zoom with the Mouse

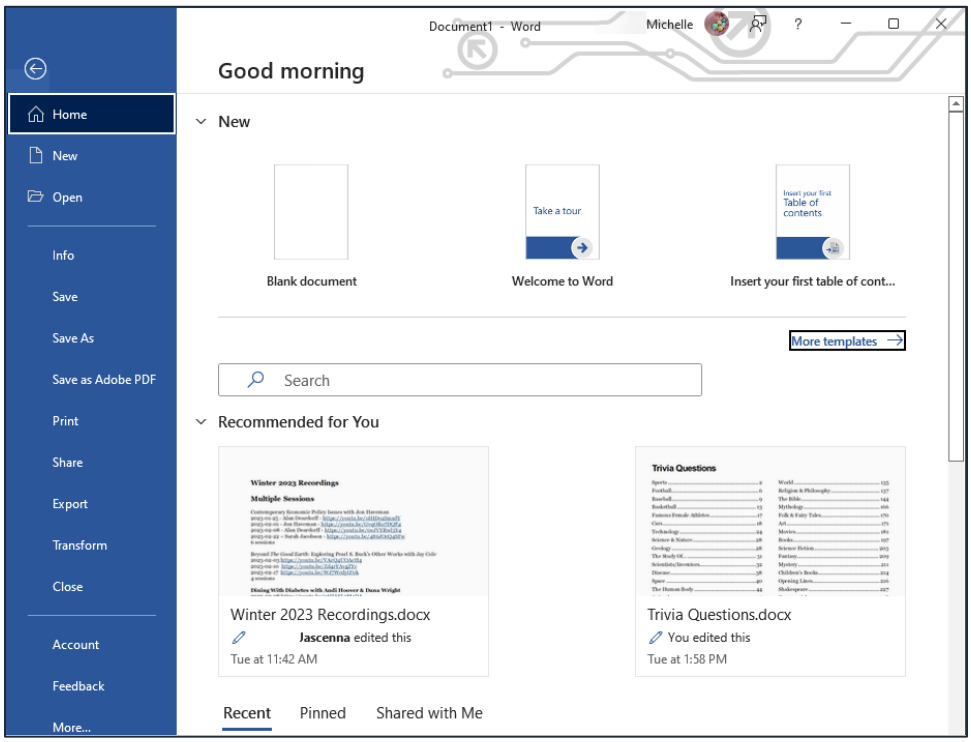
1. Press the **Ctrl** key on the keyboard.
2. Use the scroll wheel on your mouse to change the zoom of the selected window.

Backstage View / File Tab

The Backstage View provides access to the commands you use to manipulate the file, such as Save As and Print.

Accessing the Backstage View

1. Click once on the **File** tab.



Opening a Document

1. Click once on the **File** tab, and then choose **Open**.

OR

1. Use the keyboard command **Ctrl + O**.

Creating a New Document

1. Click on the **File** tab.
2. Click on the **New** tab along the left side of the screen.
3. Click on **Blank document** to create a new blank document.

OR

1. Use the keyboard command **Ctrl + N**.

Saving a Document

1. Click on the **File** tab.
2. Click **Save**.

OR

1. Use **Save** icon in the Quick Access Toolbar.

OR

1. Use the keyboard command **Ctrl + S**.

Saving a Document with a New Name

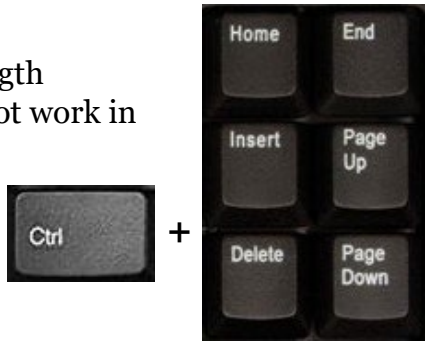
1. Click the **File** tab.
2. Click on **Save As** along the left side of the screen. On the right side of the screen select **Current Folder** or the other location where the file should be saved.
3. In the dialog box, give the file a new name.

Moving Through a Document

In addition to using your mouse or your scroll bars to move through a document, Office also allows you to use the keyboard to move through your document.

Moving through a Document

- **Page Up** and **Page Down** move the cursor up or down a screen length
- **Home** moves the cursor of the beginning of the current line (does not work in Excel)
- **End** moves the cursor to the end of the current line
- **Ctrl + Home** moves the cursor to the beginning of the document
- **Ctrl + End** moves the cursor to the end of the document



Selecting Text

In addition to clicking and dragging, Office provides multiple ways to select text. These methods are often faster and more accurate than clicking and dragging.

Selecting Text with the Keyboard

- **Ctrl + Shift + left/right arrow** selects whole words
- **Ctrl + Shift + up/down arrow** selects whole paragraphs
- **Ctrl + A** selects entire document

Selecting Text with the Mouse

- **Double click** in a word to select the whole word
- **Triple click** in a paragraph to select the entire paragraph (Does not work in Excel)
- Hold the cursor to the left of a line and **click** to select a single line (Word only)
- Hold the cursor to the left of a line and **double click** to select an entire paragraph (Word only)
- **Ctrl + click** to select an entire sentence (Does not work in Excel)

Undo/Redo

On purpose or accidentally we make changes to our document that we did not mean or like. Perhaps you wrote something and then decided you prefer what you deleted. Or perhaps the cat jumped on the keyboard and erased your entire document. The undo command exists for just those situations.

Undo allows you to take back your most recent actions on an open document. Redo allows you to take back your taking back, or to repeat an action.

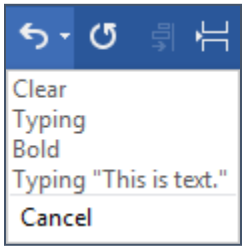
Using Undo

1. In the Quick Access Toolbar, click the **Undo** button.

   OR

   Use the keyboard command **Ctrl + Z**.

To Undo Multiple Actions



1. In the Quick Access Toolbar, click the down arrow beside the **Undo** button.
2. Use the mouse or arrow key to move down the list and choose how many actions you want to take back.

Using Redo

1. In the Quick Access Toolbar, click the **Redo** button.

   OR

   Use the keyboard command **Ctrl + Y**.

Copy and Paste

You can cut (move) or copy selected objects within a document.

Copy and Paste Using Keyboard Commands

Ctrl + X	**Cut**
Ctrl + C	**Copy**
Ctrl + V	**Paste**

Sometimes, pasting data from one document to another creates formatting issues. Paste special is used to resolve some of these problems.

Using Paste Special

1. Select the **Home** tab of the ribbon.
2. Click the down arrow under **Paste** and choose **Paste Special**.
3. Select one of the options from the Paste Special drop down menu.
4. Additional options are available if you choose **Paste Special** from the drop down menu.

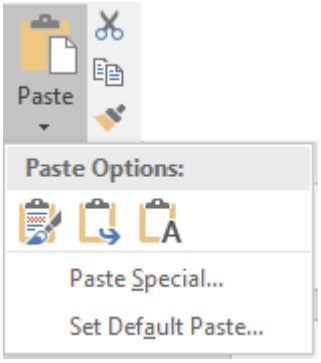
Paste Options

Paste special provides different options for copying data from one location to another.

Keep Source Formatting

Merge Formatting

Keep Text Only

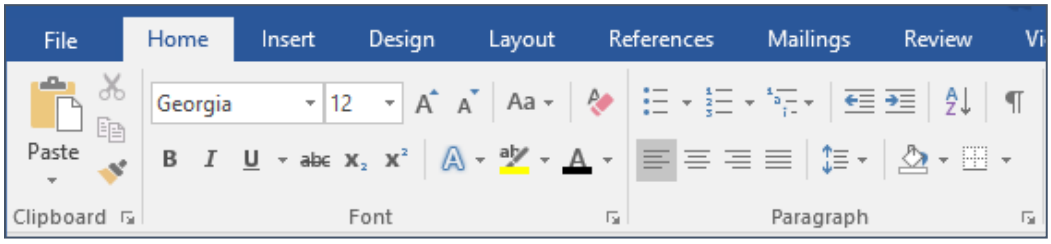


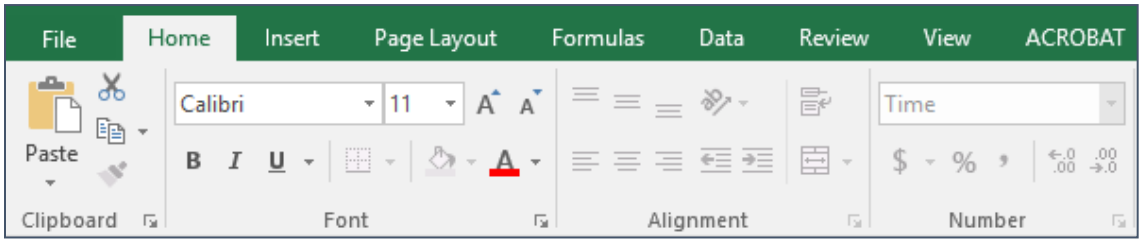
Text Formatting

The buttons for formatting text are available from the Home tab.

Formatting Text

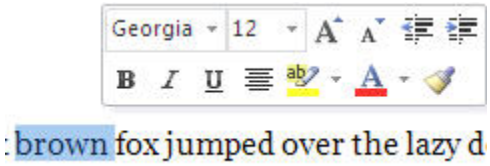
1. Select the text to be formatted.
2. Select the **Home** tab of the ribbon.
3. Choose the desired options.





Mini Toolbar

Some font changes can be made from the Mini toolbar that appears when you have selected text. When the Mini toolbar first appears it is faded; placing your cursor over the toolbar makes the toolbar brighter and allows you to select an option.

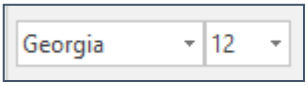


Font

The font is the appearance of the text, generally the typeface and size. Some common fonts are Arial, Times New Roman, and Tahoma. This document was printed in Georgia.

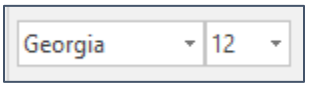
Changing the Font with the Ribbon

1. Select the text to be modified.
2. In the **Home** tab, in the Font area, click the **Font** drop down menu.
3. Select a font from the list. Notice that as you scroll over the font list, the font of your selected text changes, to show you a preview of how your text will that font.



Changing the Text Size with the Ribbon

1. Select the text to be modified.
2. In the **Home** tab, in the Font area, click the **Font Size** drop down menu.
3. Notice that as you scroll down the list the size of your text changes, previewing how your document will appear. Select a font size from the list.



OR

1. Type a text size into the text box. Press **Enter**.

OR

1. Use the Increase/Decrease Font Size buttons.

Using Bold and Italic

1. Select the text to be modified.
2. Select the desired button from the ribbon.

OR

3. Use one of the keyboard commands to apply a style to the text.
   To apply bold, use **Ctrl + B**
   To apply italic, use **Ctrl + I**
   To apply underlining, use **Ctrl + U**

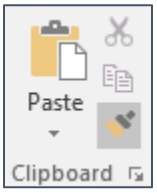
Removing Text Formatting

1. Highlight the text the problematic formatting.
2. Select the **Home** tab.
3. In the Font section, click the **Clear Formatting** button.

Format Painter

The format painter allows you to copy formatting from one section of text to another. The format painter is especially useful when applying extensive formatting from one paragraph to another.

Using the Format Painter



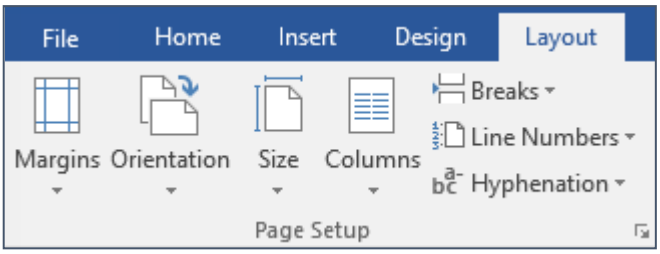
1. Highlight the text from which the formatting should be copied.
2. Select the **Home** tab, then select the **Format Painter** icon.
3. Highlight the text to apply the new formatting.

OR

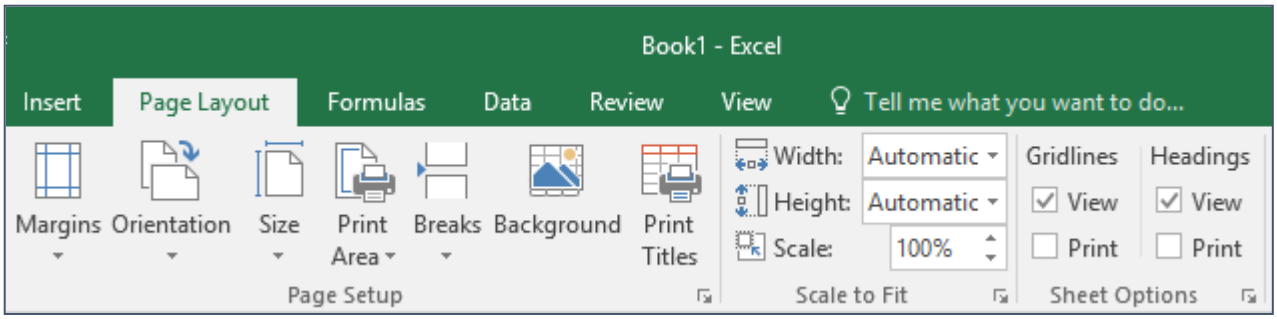
1. Highlight the text from which the formatting should be copied.
2. Use the keyboard command **Ctrl + Shift + C**.
3. Highlight the text to receive the new formatting.
4. Use the keyboard command **Ctrl + Shift + V**.

Document Layout

The options associated with document layout are available under the Page Layout tab in Excel, and the Layout tab in Word. These are where the options for margins, paper size, page orientation etc. are located.



Additionally, in Excel, Layout is where you toggle the settings for gridlines both on the screen and when the worksheet is printed.



In PowerPoint there is a **Design** tab that allows you to change options such as Slide size.

Find and Replace

Find and Replace are two of the most underutilized commands in the office suite. With them you can not only exchange one word (or name) for another, you can even search for formatting and special characters. One of the things I often use it for is removing extra spaces by entering two spaces in the **Find what** text box, and entering a single space in the **Replace with** text box.

These commands work with most Windows programs.

Finding Text

1. On the **Home** tab, click the **Find** button.

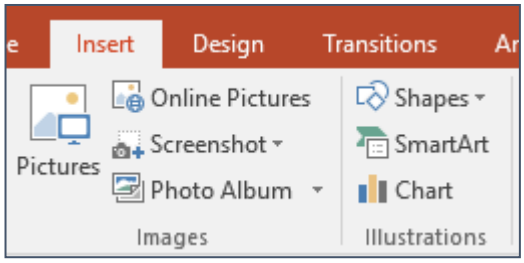
OR

1. Use the keyboard command **Ctrl + F**.
2. Type the word or term for which you are searching.
3. All matches are highlighted in the document. To jump to a specific match, select that match in the left panel.

Pictures and Images

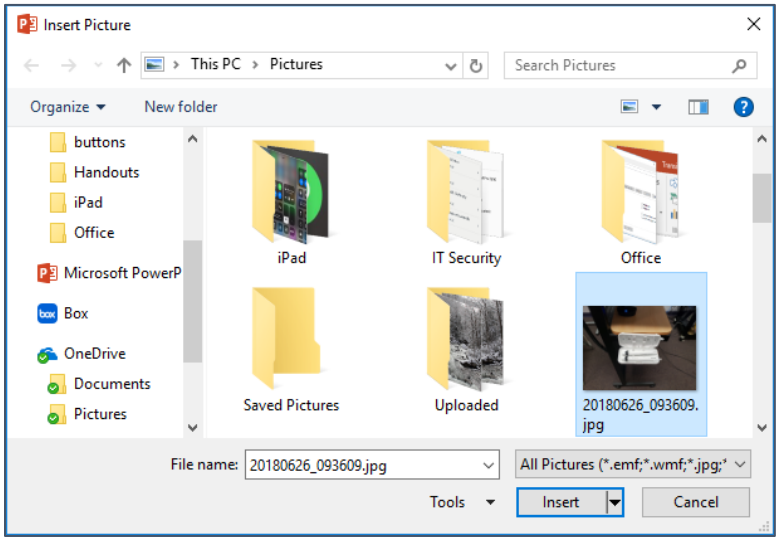
Pictures and images can be inserted by either dragging & dropping them from the folder where they are located or by using the dialog boxes.

Once you have added an image or shape to your document, additional tabs will appear on the ribbon, with commands for formatting and manipulating that picture.



Adding a Picture to your Document

1. On the **Insert** tab, click the **Pictures** icon.
2. Browse to the location where the picture you want to add is saved.
3. Select the picture.
4. Click the **Insert** button.
5. The picture is inserted into your document.
6. When you click on the picture to select it, the **Picture Tools Format** tab appears in the ribbon.



Formatting and placing pictures and images once you have added them into a Word document is a frustrating task

Resizing Images

Word allows you to change the size of an image to better fit the available space. Use the sizing handles at the corners of the image to maintain the proportion of the image—resizing from the edges may cause the image to become skewed.

Resizing an Image

1. Select the image.
2. Place the cursor over the one of the sizing handles in the corner of the image. A double headed arrow appears.
3. Click and drag until the image is the desired size.

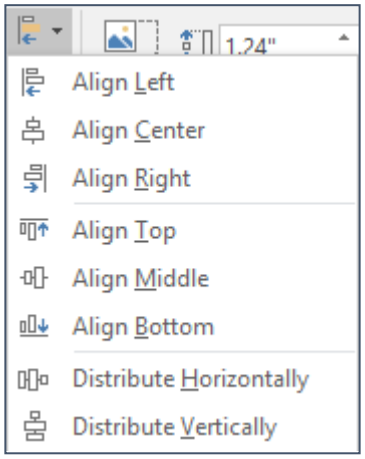
OR

1. Select the image.
2. Select the Picture Tools Format tab.
3. In the Size section, type or select a new number in the height or width spin box.

Aligning Images

The context sensitive Pictures Tools Format tab has multiple align options; these allow you to align a single image within a page—or multiple images with each other.

Aligning Images



1. Select the image(s). To select multiple images, hold down the **Ctrl** key on your keyboard and click with your mouse on each image to be selected.
2. Select the **Picture Tools Format** tab of the ribbon.
3. Click the **Align** (also called Align Objects) button.
4. From the drop down menu select the desired alignment options.

If a single image is selected, the selected option will change how that image is aligned on the page. (Align Right moves the image flush with the right margin, such as the image displayed here.)

If multiple images are selected, the images are aligned with each other. For example, Align Top shifts the images so that the top of all selected images are at the same place in the document.

Screenshots

You can take pictures or screenshots of other windows and programs on your computer, and insert those images into your MS Office document.

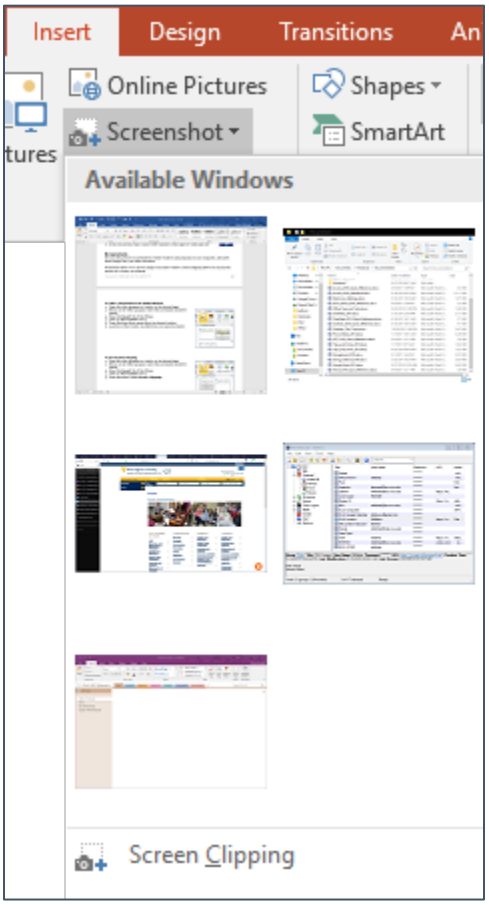
Screenshots allow you to grab an image of an entire window. Screen Clipping allows you to get just a portion of a window or program.

Taking a Screenshot of an Entire Window

1. Open the other program or window to the desired page.
2. Return to the Office program where the screenshot should be placed.
3. Select the **Insert** tab.
4. Click the **Screenshot** button.
5. From the drop down menu select the desired window.
6. A picture of that window is added into your open document.

Using Screen Clipping

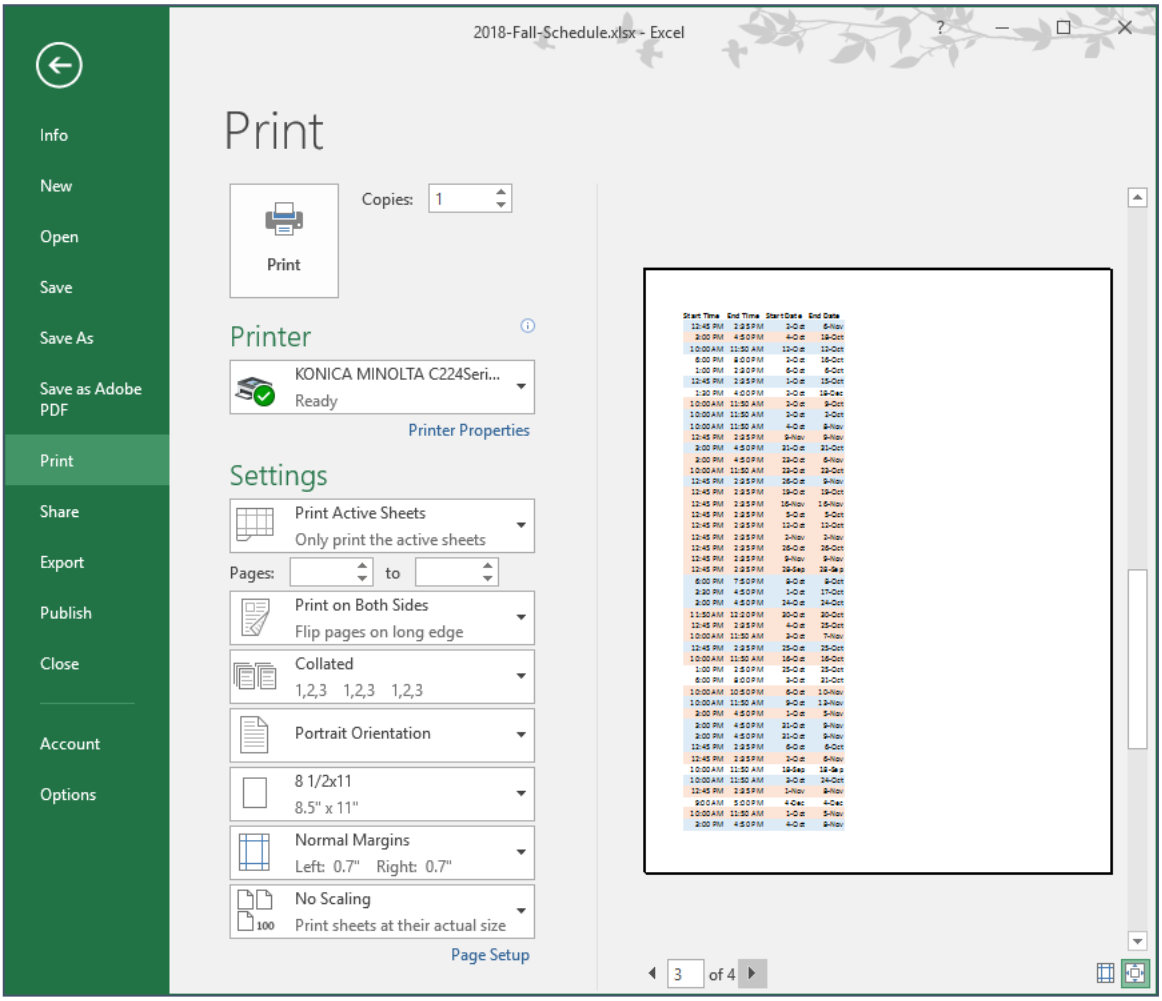
1. Open the other program or window to the desired page.
2. Return to the Office program where the screenshot should be placed.
3. Select the **Insert** tab.
4. Click the **Screenshot** button.
5. From the menu, select **Screen Clipping**.
6. The Office program in which you are working minimizes, the main screen becomes washed out, and a large plus sign (+) appears.
7. Click and drag to select the area you want to capture.
8. When you release the mouse, the office program from which you started the screen capture returns, and the image is inserted into your document.



Similar to screen clipping is the Snipping Tool, which is available on all Windows 10 computers.

Printing

When you select the **Print** tab, the various printing options appear in a list immediately to the right of the tabs. A preview of the document appears to the right of the printing options.



Printing

1. Select the **File** tab, in the left pane, select the **Print** tab

OR

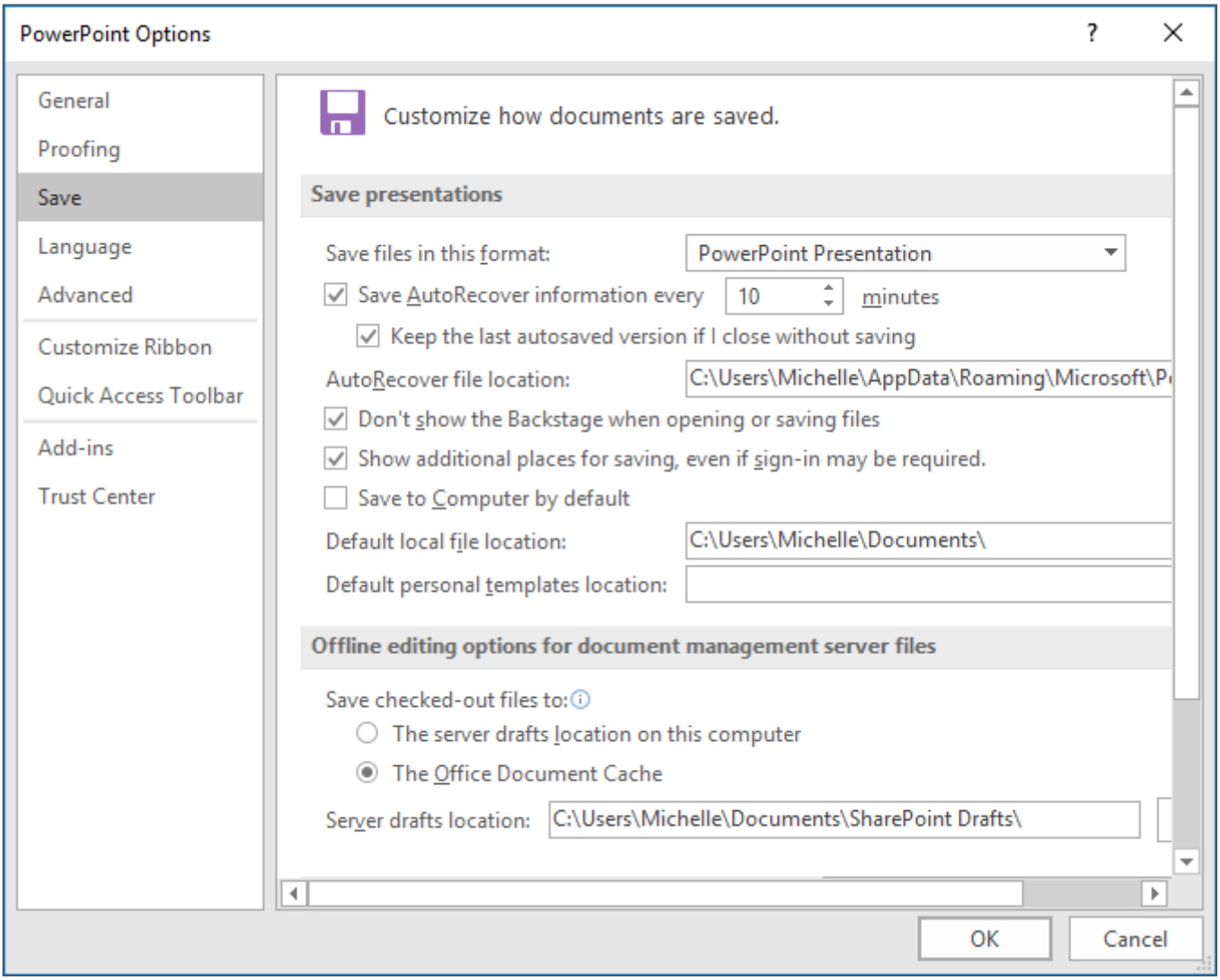
1. Use the keyboard command **Ctrl + P**.
2. To the right of the print tab, select the desired settings.
3. Click the **Print** button to send the document to the printer.

Program Options

Program options are available from the File tab.

Modifying Program Options

1. Click the **File** tab.
2. In the left pane click the **Options** tab.
3. The Program Options dialog box opens.
4. Select a category from the left panel. In the right panel, change the desired options.

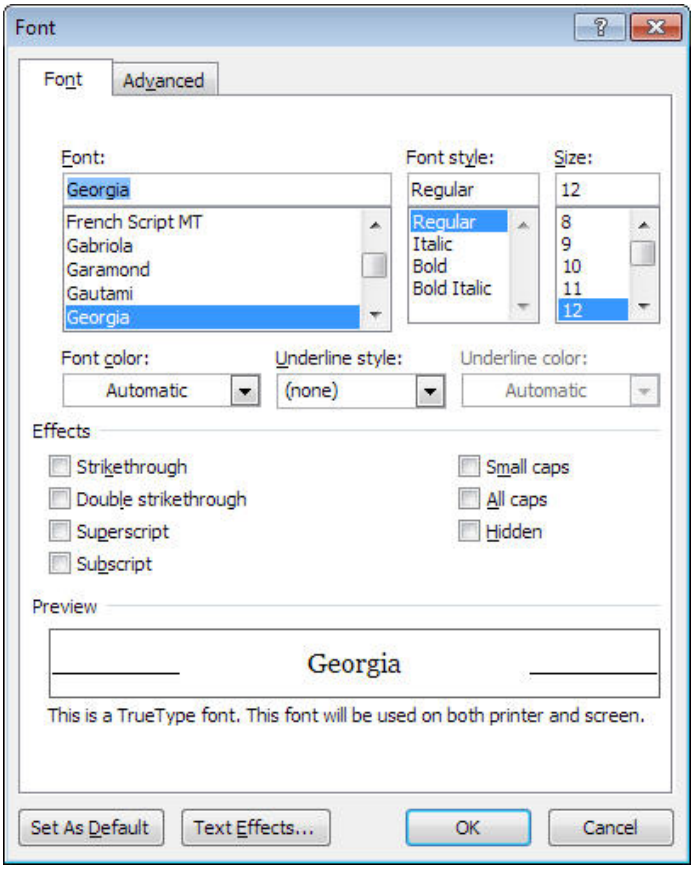


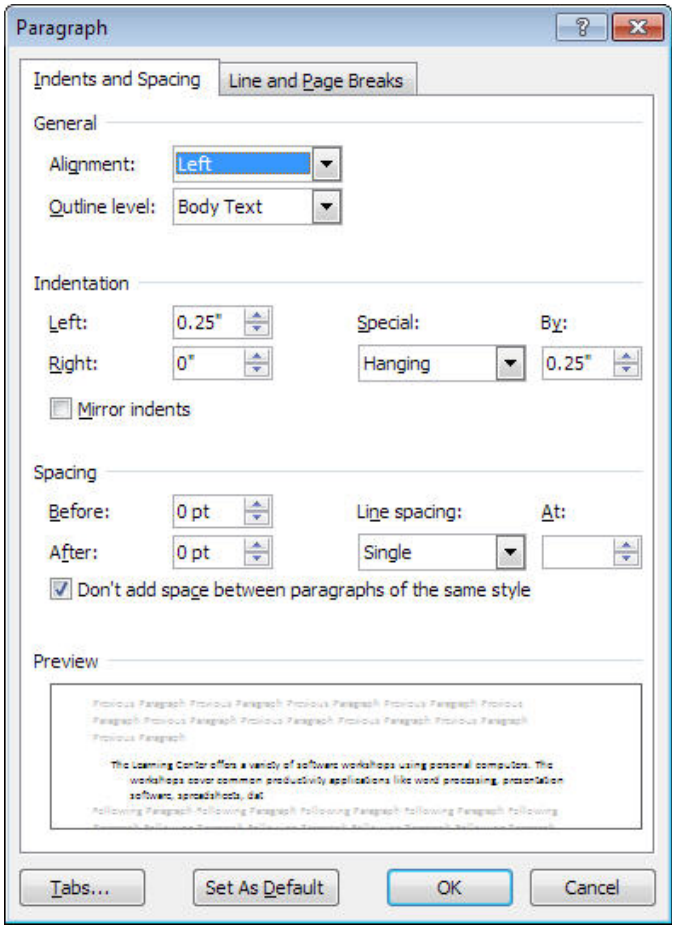
Default Settings

Microsoft has default settings for some options that may be different from your default settings. For instance, you may prefer to use a different font, or different margin settings. In Word, these things can be changed from the Page Setup dialog box and the Font dialog box.

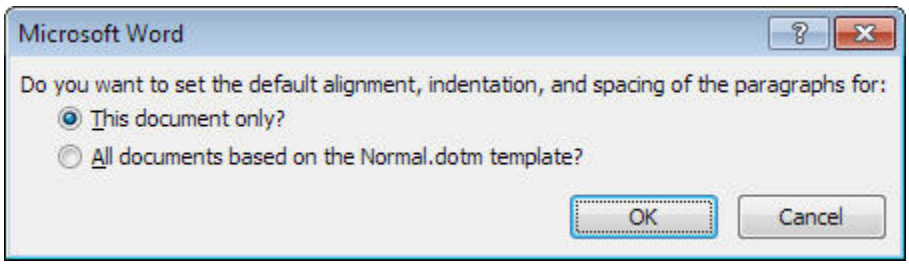
Changing a Default Setting

1. Open a new document.
2. Change the settings as desired.
3. Open the Font or Paragraph dialog box. (See page 6.)
4. Click the **Set as Default** button.





5. A dialog box appears asking whether you want to change your default settings. Choose "All documents based on the Normal template. Click **OK**.



Index

Changing the Visibility of the Ribbon 4
Customizing the Quick Access Toolbar 5
Maximizing a Window 5
Restoring/Resizing a Window 5
Minimizing a Window 5
Closing a Window 5
Opening a Dialog Box 6
Using the Zoom Slider 6
Changing the Zoom from the ribbon 6
Changing the Zoom with the Mouse 6
Accessing the Backstage View 7
Opening a Document 7
Creating a New Document 7
Saving a Document 7
Saving a Document with a New Name 8
Moving through a Document 8
Selecting Text with the Keyboard 8
Selecting Text with the Mouse 8
Using Undo 8
To Undo Multiple Actions 9
Using Redo 9
Using Paste Special 9
Paste Options 9
Formatting Text 10
Changing the Font with the Ribbon 10
Changing the Text Size with the Ribbon 10
Using Bold and Italic 10
Removing Text Formatting 11
Using the Format Painter 11
Finding Text 12
Adding a Picture to your Document 12
Resizing an Image 13
Aligning Images 13
Taking a Screenshot of an Entire Window 14
Using Screen Clipping 14
Printing 15
Modifying Program Options 16
Changing a Default Setting 17

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