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Office 365: One Step Beyond

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IN THIS CHAPTER

- » Personalizing the Ribbon
- » Changing around the Quick Access toolbar
- » Choosing what appears on the status bar
- » Choosing a new screen background and Office theme

Chapter 1

Customizing an Office Program

This short chapter describes a handful of things you can do to customize Office 365 programs. Don't be afraid to make like a software developer and change a program to your liking. Many people are wary of retooling Office programs, but you can always reverse the changes you make if you don't like them, as I explain throughout this chapter.

This chapter shows how to put your favorite button commands on the Ribbon and Quick Access toolbar. Instead of fishing around for your favorite commands, you can assemble them on the Ribbon or Quick Access toolbar and locate them right away. You also discover how to change around the status bar, dress up an Office program in a new set of clothes, and designate your own keyboard shortcuts in Word.

Customizing the Ribbon

As you surely know by now, the Ribbon is the stretch of ground across the top of all Office programs. The Ribbon is composed of tabs. On each tab, commands are arranged by group. To undertake a task, you visit a tab on the Ribbon, find the group with the command you want, and choose the command. If you are so

inclined, you can customize the Ribbon. You can place the tabs and commands you know and love where you want to find them on the Ribbon. And you can remove tabs and commands that aren't useful to you.

To customize the Ribbon, open the Customize Ribbon tab of the Options dialog box with one of these techniques:

- »» On the File tab, choose Options, and select the Customize Ribbon category in the Options dialog box.
- »» Right-click a tab or button and choose Customize the Ribbon.

You see commands for customizing the Ribbon, as shown in Figure 1-1. The right side of the dialog box (“Customize the Ribbon”) lists the names of tabs, groups within tabs, and commands within groups that are currently on the Ribbon. To customize the Ribbon, you arrange the right side of the dialog box to your liking. You list the tabs, groups, and commands that you want for the Ribbon on the right side of the dialog box.

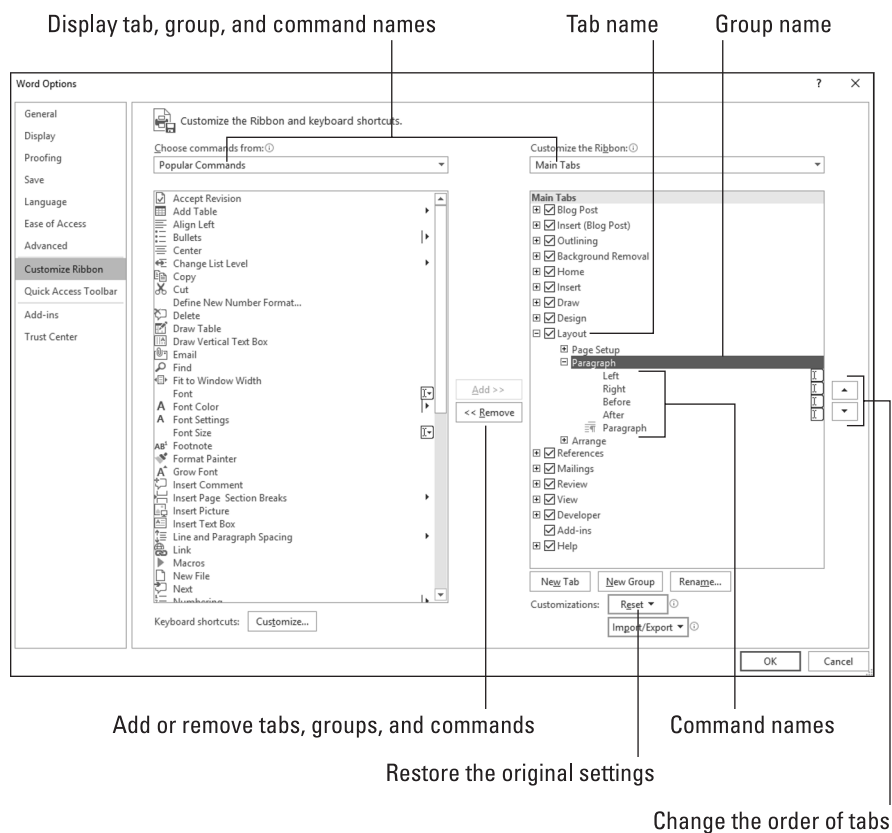


FIGURE 1-1: Starting in the Customize Ribbon category of the Options dialog box, you can customize the Ribbon.

The left side of the dialog box (“Choose Commands From”) presents every tab, group, and command in your Office program. To customize the Ribbon, you select a tab, group, or command on the left side of the dialog box and move it to the right side by clicking the Add button.

Keep reading to find out how to display tabs, groups, and commands in the Options dialog box and how to do all else that pertains to customizing the Ribbon. In case you make a hash of the Ribbon, you also find instructions for restoring the Ribbon to its original state.

Displaying and selecting tab, group, and command names

To customize the Ribbon, you need to display and select tab names, group names, and command names in the Options dialog box (refer to Figure 1-1). Start by opening the drop-down lists and choosing a display option:

- » **Choose Commands From:** Choose an option to locate the tab, group, or command you want to add to the Ribbon. For example, choose All Commands to see an alphabetical list of all the commands in the Office program you’re working in; choose Main Tabs to see a list of tabs.
- » **Customize the Ribbon:** Choose an option to display the names of all tabs, main tabs, or tool tabs. Tool tabs are the context-sensitive tabs that appear after you insert or click something. For example, the Table Tools tabs appear when you construct tables in Word.

After you choose display options on the drop-down lists, you can display the names of groups and commands (refer to Figure 1-1):

- » **Displaying group names:** Click a plus sign icon next to a tab name to see the names of its groups. You can click the minus sign icon to fold group names back into a tab name.
- » **Displaying command names in groups:** Click the plus sign icon next to a group name to see the names of its commands. You can click the minus sign icon to collapse command names.

After you display the tab, group, or command name, click to select it.

Moving tabs and groups on the Ribbon

To change the order of tabs on the Ribbon or groups on a tab, go to the Customize Ribbon category of the Options dialog box (refer to Figure 1-1) and select the name of a tab or group on the right side of the dialog box. Then click the Move Up or Move Down button (the arrow buttons located on the right side of the dialog box). Click these buttons as necessary until tabs or groups are in the order that you see fit.



WARNING

Be careful about moving groups by clicking the Move Up or Move Down button. Clicking these buttons too many times can move a group to a different tab on the Ribbon.

Adding, removing, and renaming tabs, groups, and commands

In the Options dialog box (refer to Figure 1-1), display and select the tab, group, or command you want to add, remove, or rename. Then proceed to add, remove, or rename it. (Earlier in this chapter, “Displaying and selecting tab, group, and command names” explains how to display items in the Options dialog box.)

Adding items to the Ribbon

Follow these steps to add a tab, group, or command to the Ribbon:

- 1. On the left side of the Customize Ribbon category of the Options dialog box, select the tab, group, or command you want to add.**

For example, to add the Tables group to the Home tab, select the Tables group.

Commands can be added only to custom groups. To add a command to the Ribbon, create a new group for the command (see “Creating new tabs and groups,” later in this chapter).

- 2. On the right side of the dialog box, select the tab or custom group where you want to place the item.**

If you’re adding a tab to the Ribbon, select a tab. The tab you add will go after the tab you select.

- 3. Click the Add button.**



WARNING

Removing items from the Ribbon

Follow these steps to remove a tab, group, or command from the Ribbon:

1. On the right side of the Customize Ribbon category of the Options dialog box, select the tab, group, or command you want to remove.
2. Click the Remove button.



WARNING

Except for tabs you create yourself, you can't remove tabs from the Ribbon. And you can't remove a command unless you remove it from a group you created yourself.

Renaming tabs and groups

Sorry, you can't rename a command. Follow these steps to rename a tab or group:

1. On the right side of the Customize Ribbon category of the Options dialog box, select the tab or group you want to rename.
2. Click the Rename button.

You see the Rename dialog box, as shown in Figure 1-2.

3. Enter a new name and click OK.

When renaming a group that you created yourself, you can choose a symbol for the group in the Rename dialog box (see Figure 1-2).

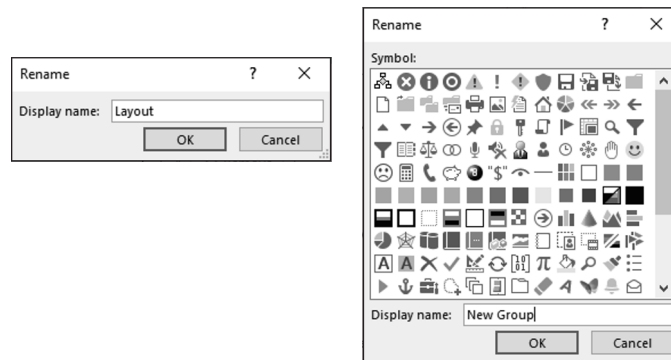


FIGURE 1-2:
Renaming
a tab (left) and
a group (right).

Creating new tabs and groups

Create new tabs and groups on the Ribbon for commands that are especially useful to you. Follow these steps on the Customize Ribbon category of the Options dialog box (refer to Figure 1-1) to create a new tab or group:

- 1. On the right side of the dialog box, display and select the name of a tab or group.**

Earlier in this chapter, “Displaying and selecting tab, group, and command names” explains how to select items in the Options dialog box.

- **Tab:** If you’re creating a tab, select a tab name. The tab you create will appear after the tab you select.
- **Group:** If you’re creating a group, select a group name. The group you create will appear after the group you select.

- 2. Click the New Tab or New Group button.**

Your Office program creates a new tab or group called “New Tab (Custom)” or “New Group (Custom).” If you created a tab, Office also creates a new group inside your new tab.

- 3. Click the Rename button to give the tab, group, or both a name.**

In the Rename dialog box, enter a descriptive name and click OK. If you’re naming a group, the Rename dialog box gives you the opportunity to select an icon to help identify the group (see Figure 1-2).

- 4. Add groups, commands, or both to your newly made tab or group.**

For instructions, see “Adding items to the Ribbon,” earlier in this chapter.

Resetting your Ribbon customizations

If you make a hash of the Ribbon, all is not lost because you can restore the original settings. In the Options dialog box, click the Reset button (refer to Figure 1-1) and choose one of these commands on the drop-down list:

- » **Reset Only Selected Ribbon Tab:** Select a tab name on the right side of the Options dialog box and choose this command to restore a tab to its original state.
- » **Reset All Customizations:** Choose this command to restore the Ribbon in its entirety. All changes you made are reversed.

EXPORTING AND IMPORTING PROGRAM CUSTOMIZATIONS

You can preserve your Ribbon and Quick Access toolbar customizations for posterity in a special file called an Import Customization file; these files have the `.exportedUI` file extension. Keep the file on hand for when you need it, or distribute the file to coworkers. For that matter, a coworker who is proud of his or her customizations can send them to you in a file and you can load the customizations into your Office program.

To save your Ribbon and Quick Access toolbar customization settings in a file, go to the File tab, choose Options, and visit to the Customize Ribbon or Quick Access toolbar category of the Options dialog box. Then click the Import/Export button and choose Export All Customizations on the drop-down list. The File Save dialog box opens. Give the customizations file a name and click the Save button.

To load customizations from a file into your Office program, return to the Customize Ribbon or Quick Access toolbar category of the Options dialog box, click the Import/Export button, and choose Import Customization File. You see the File Open dialog box. Select the file and click the Open button.

You can also remove tabs and groups you created if you discover you don't need them. See “Removing items from the Ribbon,” earlier in this chapter.

Customizing the Quick Access Toolbar

No matter where you go in Office, you see the Quick Access toolbar in the upper-left corner of the screen. This toolbar offers the AutoSave, Save, Undo, and Redo buttons, as well as the Touch/Mouse Mode button if your computer has a touchscreen. However, which buttons appear on the Quick Access toolbar is entirely up to you. You can put your favorite buttons on the toolbar to keep them within reach. And if the Quick Access toolbar gets too big, you can move it below the Ribbon, as shown in Figure 1-3. Adding buttons to and removing buttons from the Quick Access toolbar is, I'm happy to report, a piece of cake. And moving the toolbar below the Ribbon is as easy as pie.

Right-click a button to add it to the Quick Access toolbar

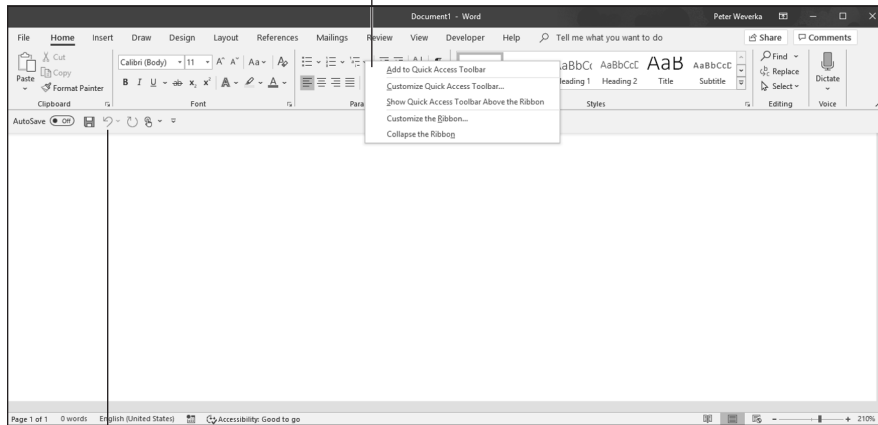


FIGURE 1-3: Merely by right-clicking, you can add a button to the Quick Access toolbar.

The Quick Access toolbar below the Ribbon

Adding buttons to the Quick Access toolbar

Use one of these techniques to add buttons to the Quick Access toolbar:

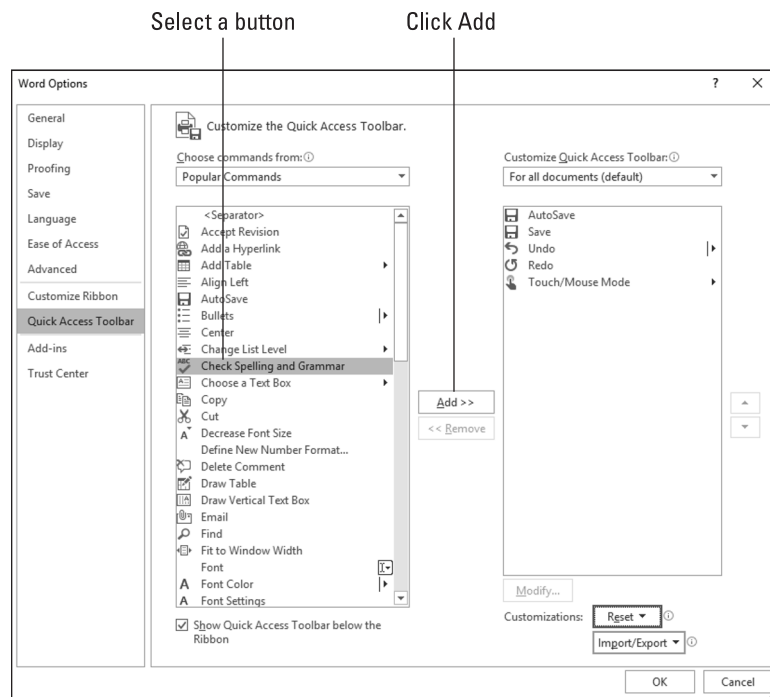
- » Right-click a button you want to see on the toolbar and choose Add to Quick Access toolbar on the shortcut menu (refer to Figure 1-3). You can add all the commands in a group to the Quick Access toolbar by right-clicking the group name and choosing Add to Quick Access toolbar.
- » Click the Customize Quick Access toolbar button (located to the right of the Quick Access toolbar) and choose a button on the drop-down list. The list offers buttons deemed most likely to be placed on the Quick Access toolbar by the makers of Office.
- » On the File tab, choose Options, and go to the Quick Access toolbar category in the Options dialog box (or right-click any button or tab and choose Customize Quick Access toolbar on the shortcut menu). You see the Quick Access toolbar category of the Options dialog box, as shown in Figure 1-4. On the Choose Commands From drop-down list, select the name of the button you want to add to the Quick Access toolbar. Then click the Add button.



TIP

To restore the Quick Access toolbar to its original buttons, click the Reset button in the Options dialog box (refer to Figure 1-4) and choose Reset Only Quick Access toolbar on the drop-down list. Choosing Reset All Customizations resets Ribbon customizations as well as Quick Access toolbar customizations.

FIGURE 1-4:
Add, remove, and
reorder Quick
Access toolbar
buttons in the
Options dialog
box.



Changing the order of buttons on the Quick Access toolbar

Follow these steps to change the order of buttons on the Quick Access toolbar:

1. Click the **Customize Quick Access toolbar** button and choose **More Commands** on the drop-down list.

The Quick Access toolbar category of the Options dialog box appears (refer to Figure 1-4). You can also open this dialog box by right-clicking any button or tab and choosing **Customize Quick Access toolbar**.

2. Select the name of a button on the right side of the dialog box and click the **Move Up** or **Move Down** button.

These arrow buttons are located on the right side of the dialog box.

3. Repeat Step 2 until the buttons are in the right order.
4. Click **OK**.

Removing buttons from the Quick Access toolbar

Use one of these techniques to remove buttons from the Quick Access toolbar:

- » Right-click a button and choose Remove from Quick Access toolbar on the shortcut menu.
- » Right-click any button or tab and choose Customize Quick Access toolbar. You see the Quick Access toolbar category of the Options dialog box (refer to Figure 1-4). Select the button you want to remove on the right side of the dialog box and click the Remove button.



REMEMBER

You can click the Reset button in the Options dialog box (refer to Figure 1-4) to remove all the buttons you placed on the Quick Access toolbar.

Placing the Quick Access toolbar above or below the Ribbon

The Ribbon is the stretch of ground along the top of the screen where the tabs and buttons are found. If your Quick Access toolbar contains many buttons, consider placing it below the Ribbon, not above it (refer to Figure 1-3). Follow these instructions to place the Quick Access toolbar above or below the Ribbon:

- » **Quick Access toolbar below the Ribbon:** Right-click the toolbar, and on the shortcut menu, choose Show Quick Access Toolbar Below the Ribbon.
- » **Quick Access toolbar above the Ribbon:** Right-click the toolbar, and on the shortcut menu, choose Show Quick Access Toolbar Above the Ribbon.

The Options dialog box offers a check box called Show Quick Access Toolbar Below the Ribbon (refer to Figure 1-4). You can select this check box as well to move the toolbar below the Ribbon.

Customizing the Status Bar

The status bar along the bottom of the window gives you information about the file you're working on. The Word status bar, for example, tells you which page you're on, how many pages are in your document, and several other things. In PowerPoint, the status bar tells you which slide you're looking at. It also presents the view buttons and Zoom controls.

To choose what appears on the status bar, right-click the status bar. You see a drop-down list similar to the one in Figure 1-5. By selecting and deselecting items in this list, you can decide what appears on the status bar.

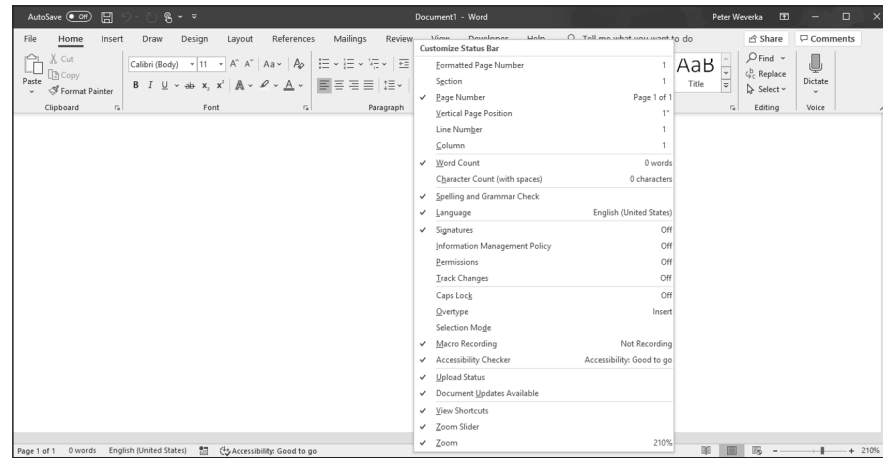


FIGURE 1-5:
Right-click
the status bar to
customize it.

Changing the Screen Background and Office Theme

Starting on the Accounts screen, you can change the screen background and Office theme. The *screen background* is the fluff that appears along the top of Office application windows. The *Office theme* is the color (or lack thereof) that appears around the perimeter of Office application windows. You are encouraged to experiment with screen backgrounds and Office themes until you find a combination that works for you.

Follow these steps to choose a screen background and Office theme:

- 1. On the File tab, choose Account.**
You see the Account screen, as shown in Figure 1-6.
- 2. Open the Office Background drop-down list and choose an option.**
- 3. Open the Office Theme drop-down menu and choose an option.**
- 4. Save your changes.**

How do you like your new get-up? If you don't like it, repeat these steps until you get it right.

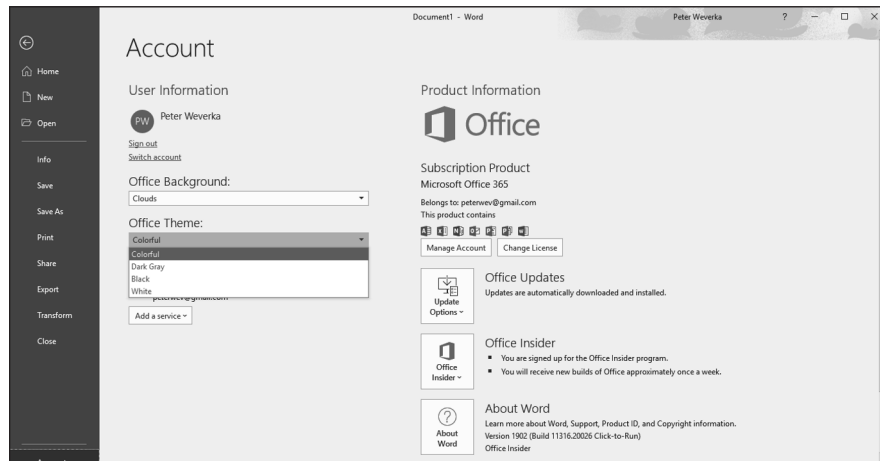
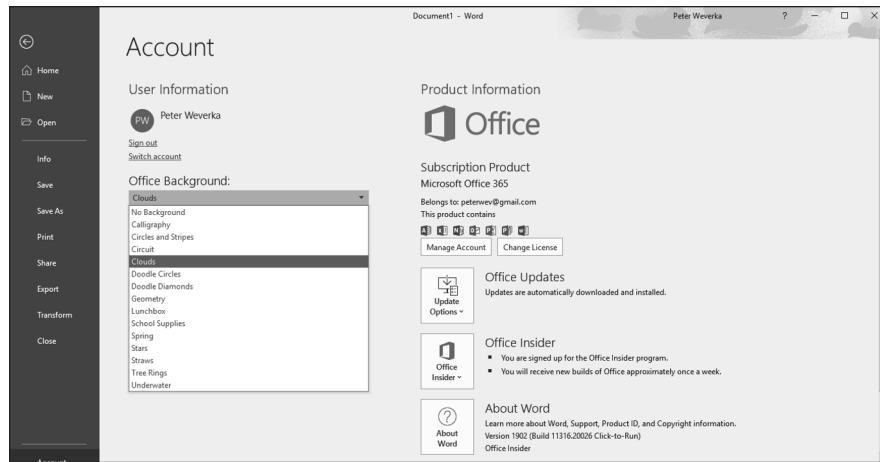


FIGURE 1-6:
Changing the screen background (top) and Office theme (bottom).



REMEMBER

A screen background and Office theme you apply in one Office program applies to all the other programs as well.

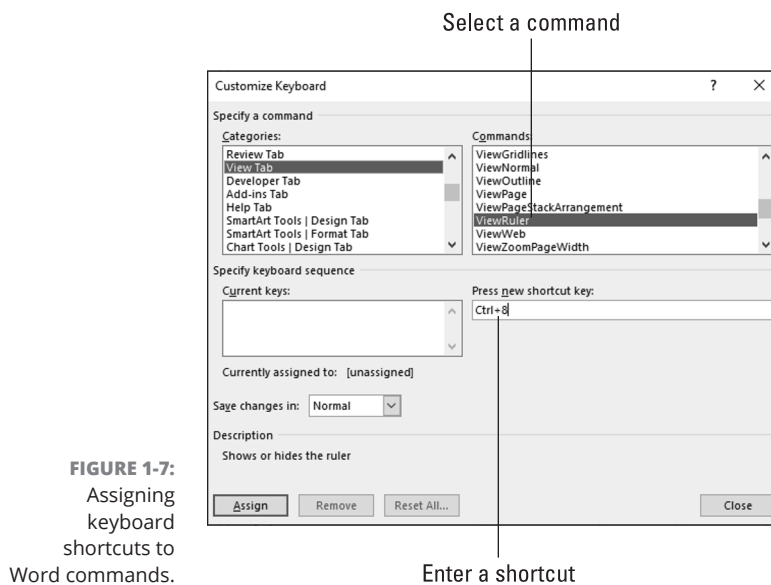
Customizing Keyboard Shortcuts in Word

In Microsoft Word, you can change the keyboard shortcuts. A *keyboard shortcut* is a combination of keys that you press to give a command. For example, pressing Ctrl+P opens the Print window; pressing Ctrl+S gives the Save command. If you don't like a keyboard shortcut in Word, you can change it and invent a keyboard shortcut of your own. You can also assign keyboard shortcuts to symbols, macros, fonts, building blocks, and styles.

Follow these steps to choose keyboard shortcuts of your own in Microsoft Word:

- 1. On the File tab, choose Options.**
You see the Word Options dialog box.
- 2. Go to the Customize Ribbon category.**
- 3. Click the Customize button (you can find it at the bottom of the dialog box next to the words “Keyboard Shortcuts”).**

You see the Customize Keyboard dialog box, as shown in Figure 1-7.



- 4. In the Categories list, choose the category with the command to which you want to assign the keyboard shortcut.**

At the bottom of the list are the Macros, Fonts, Building Blocks, Styles, and Common Symbols categories.

- 5. Choose the command name, macro, font, building block, style, or symbol name in the Commands list.**

6. In the Press New Shortcut Key box, type the keyboard shortcut.

Press the actual keys. For example, if the shortcut is Ctrl+8, press the Ctrl key and the 8 key — don't type C-t-r-l+8.

If you try to assign a shortcut that has already been assigned, the words "Currently assigned to" and a command name appear below the Current Keys box. You can override the preassigned keyboard assignment by entering a keyboard assignment of your own.

7. If you want the keyboard shortcut changes you make to apply to the document you're working on, not to all documents created with the template you're working with, open the Save Changes In drop-down list and choose your document's name.

8. Click the Assign button.

9. When you finish assigning keyboard shortcuts, close the Customize Keyboard dialog box.

To delete a keyboard shortcut, display it in the Current Keys box, select it, and click the Remove button.



REMEMBER

You can always get the old keyboard shortcuts back by clicking the Reset All button in the Customize Keyboard dialog box.

IN THIS CHAPTER

- » Printing files
- » Saving files so that others can read them in Adobe Acrobat Reader
- » Sending a file by email
- » Saving a file so that it can be viewed in a web browser

Chapter 2

Ways of Distributing Your Work

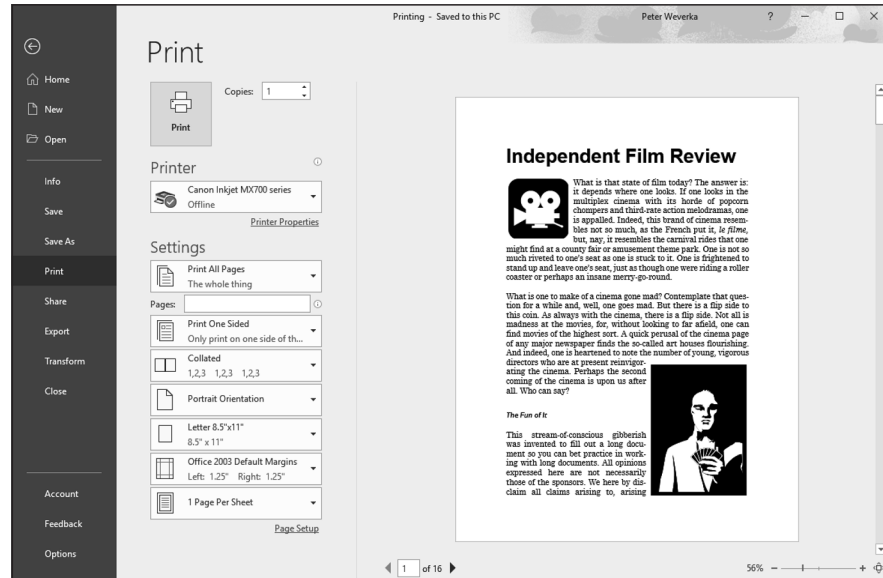
This chapter explains how to distribute your work to coworkers and friends. You'll be glad to know that people who don't have Office 365 can still read and review an Office file you created. You can print it for them, save it so that it can be read in Adobe Acrobat Reader, or save it as a web page. This chapter explains all that as well as how to send a file right away by email. By the way, Book 4, Chapter 5 describes other ways to distribute PowerPoint presentations. You can provide audience handouts, ship presentations on CDs, and save presentations as video files.

Printing — the Old Standby

In spite of predictions to the contrary, the paperless office is still a pipe dream. The day has yet to materialize when Johnny at his computer is completely digitized and communicating with his colleagues without having to print anything on paper. The office is still awash in paper, and all Johnny can do for consolation is try his best to recycle.

To print a file, preview a file before you print it, and do all else that pertains to printing, go to the File tab and choose Print (or press Ctrl+P). You land in the Print window, as shown in Figure 2-1. From here, you can choose how many copies to print, choose a part of a file to print, and get a look at your file before you print it. Notice that the Print window offers Zoom controls buttons and buttons for going from page to page (or slide to slide).

FIGURE 2-1: Starting in the Print window, you can preview and print files.

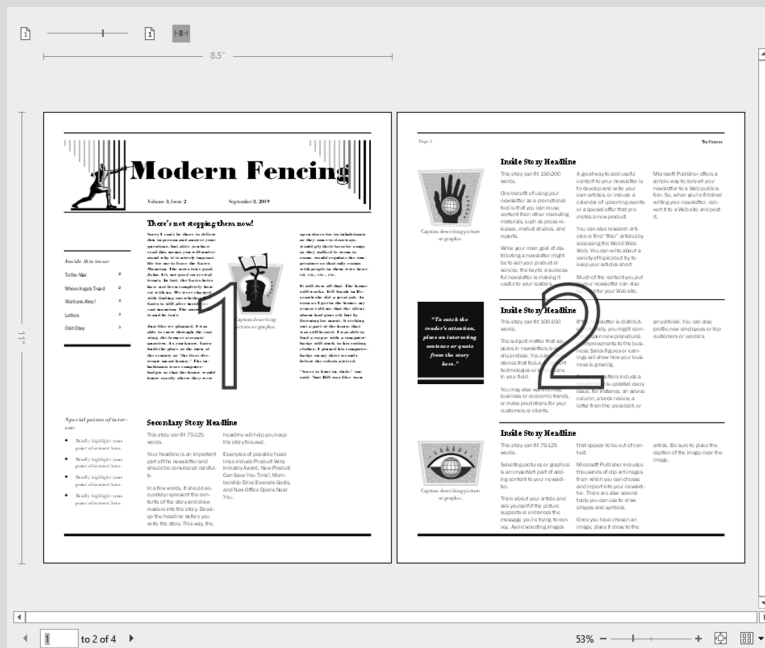


MAKING USE OF THE PRINT WINDOW

The right side of the Print window offers a handful of tools for previewing files to determine whether they are ready for printing:

- **Page Navigator:** In a multipage file, you can go from page to page by clicking arrows or entering a page number in the Page Navigator.
- **Zoom slider:** Zoom in or out by dragging the Zoom slider. You can also click the Zoom In or Zoom Out button. These buttons are located on either side of the Zoom slider.
- **Fit To button:** Click this button to enlarge the page you're viewing so that it fills the screen.

- **Show Margins button (Excel only):** Click this button to see a worksheet's page margins. You can drag the margin boundaries onscreen to adjust the size of margins.
- **Page number slider (Publisher only):** Drag this slider to make page numbers appear so that you know which page or pages you're viewing. The farther you drag to the right, the more visible page numbers are. The Page number slider is located at the top of the Print window.
- **Ruler button (Publisher only):** Click the Ruler button to make page-size measurements appear. This button is located at the top of the window.
- **View Multiple Sheets button (Publisher only):** Click this button and choose an option on the drop-down list to view more than one page at a time.



Distributing a File in PDF Format

As shown in Figure 2-2, you can save and distribute a file in the PDF (portable document format) format if the person to whom you want to give the file doesn't have the program with which it was created. For example, someone who doesn't have Excel can still view your Excel file in PDF format. Moreover, you can post PDF files on the Internet so that others can view them there. Most browsers are capable of displaying PDF files.

FIGURE 2-2:
A Word
document in the
Edge browser.



About PDF files

PDF files are designed to be viewed and printed in web browsers and in a program called Adobe Acrobat Reader. Nearly every computer has Adobe Acrobat Reader. If individuals to whom you sent a PDF file don't have the program, they can download it for free at this web page:

<http://get.adobe.com/reader/>

Book 2, Chapter 2 explains how you can open and edit PDF files in Word 365.

Saving an Office file as a PDF

Follow these steps to save an Office file as a PDF file:

1. **Go to the File tab and choose Export to open the Export window.**
2. **Choose Create PDF/XPS Document.**
3. **Click the Create PDF/XPS button.**

The Publish as PDF or XPS dialog box appears. If your goal is to create an XPS file, not a PDF file, open the Save As Type drop-down list and choose XPS Document (*.xps). Microsoft created the XPS format to compete with the PDF format. As are PDF files, XPS files are meant to present data from different programs, in this case in Internet Explorer. However, the XPS format is not nearly as well known or frequently used as the PDF format.

4. Select a folder for storing your PDF (or XPS) file, give it a name, and click the Publish button.

Your file opens in the Edge browser application (or whatever your computer's default web browser is). You can also open it in Adobe Acrobat Reader.

Later in this chapter, "Saving an Office File as a Web Page" explains another way to distribute Office files to people who don't have Office — by saving the files as web pages.

Sending Your File in an Email Message

As long as you handle your email with Outlook, you can send the file you're working on to a friend or coworker without having to open Outlook. Moreover, you can send a PDF or XPS version of the file. You simply choose a command and send the thing over the Internet. Follow these steps to send an open file you're working on to a friend or coworker:

1. Go to the File tab and choose Share.

The Share window opens.

2. Under Attach a Copy Instead, choose an Email option.

How do you want to send your file? Click one of these buttons:

- **Send as a File:** Send the file as an attachment to an email message.
- **Send as a PDF:** Send a PDF version of the file as an attachment to an email message.

An Outlook message window appears with the name of your file on the subject line and the file itself in the Attached box. Your file is ready to send along with the email message.

3. Enter the recipient's address in the To box and a message in the Message box.

Book 5, Chapter 3 explains how to address, compose, and send email messages with Outlook.

4. Click the Send button.

That was fast! It was faster than opening Outlook and attaching the file to the email message on your own.

Saving an Office File as a Web Page

Figure 2-3 shows what a Word document looks like after it is saved as a web page and displayed in a web browser. Looks like a normal Word document, doesn't it? Anyone with a web browser can view a Word document or other Office file after it's saved as a web page. Save an Office file as a web page and post it on the Internet so that people who don't have Office can view it.

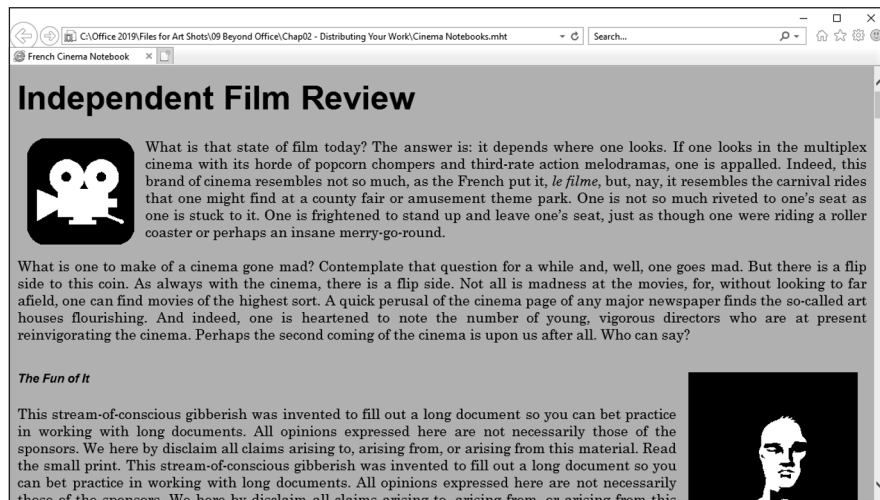


FIGURE 2-3:
A Word document saved as a web page, as seen through the eyes of a web browser.

These pages explain how to save an Office file as a web page and open a web page you created in a web browser.

Turning a file into a web page

Follow these steps to save an Office file as a web page:

- 1. Go to the File tab and choose Export.**
The Export window opens.
- 2. Choose Change File Type.**
Change File Type options appear, as shown in Figure 2-4.
- 3. Choose the Single File Web Page option and click the Save As button.**
The Save As dialog box opens.

4. Click the Change Title button, enter a descriptive title in the Enter Text dialog box, and click OK.

The title you enter will appear in the title bar along the top of the web browser window.

5. Choose a folder for storing your new web page.

6. Click the Save button.

If your file includes features that can't be displayed in a web browser, the Compatibility Checker dialog box tells you what those features are. Click the Continue button to create your web page.

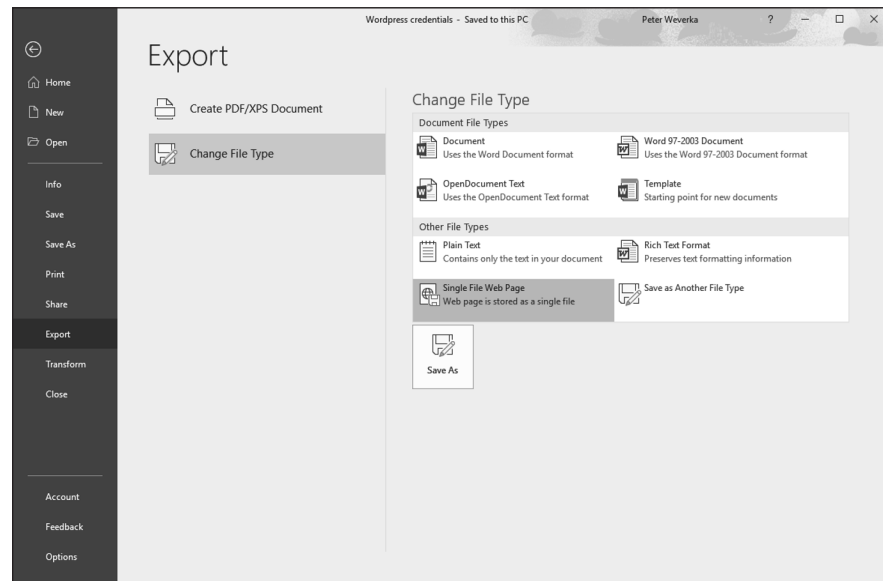


FIGURE 2-4: Change the file type to turn an Office file into a web page.

Opening a web page in your browser

To open a web page that you fashioned from an Office file, open the folder where you stored the web page in File Explorer and double-click the .mht file. For example, if your file is called Sales Projections, double-click the Sales Projections.htm or Sales Projections.mht file to open the web page.

