

THE THIRD AGE TRUST



THE UNIVERSITY OF THE THIRD AGE



Discover How to:

- Produce letters, posters and newsletters
- Manage your accounts, address book and budgets
- Email friends and family
- Show off your holiday snaps



Sean McManus

Microsoft® Office

for the Older and Wiser

Get Up and Running with Office 2010 and Office 2007

Microsoft Office for the Older and Wiser

Get up and running with
Office 2010 and Office 2007

Sean McManus



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Dedication

To Karen

About the Author

Sean McManus is a technology and business author. His previous books include *Social Networking for the Older and Wiser*, *Small Business Websites That Work*, and a novel about the music industry called *University of Death*. His tutorials and articles have appeared in magazines including *Internet Magazine*, *Internet Works*, *Business 2.0*, *Making Music*, *Melody Maker* and *Personal Computer World*. He created Wild Mood Swings (www.wildmoodswings.co.uk), a web toy that shows you websites to match your mood, and blogs regularly on his personal website at www.sean.co.uk.

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Icons used in this book

Throughout this book, we've used icons to help focus your attention on certain information. This is what they mean:



Equipment
needed

Lets you know in advance the equipment you will need to hand as you progress through the chapter.



Skills

Placed at the beginning of each chapter to help identify the skills you'll need for the chapter ahead.



Tip

Tips and suggestions to help make life easier.



Note

Take note of these little extras to avoid confusion.



Warning

Read carefully; a few things could go wrong at this point.



Try It

Go on, enjoy yourself; you won't break it.



Trivia

A little bit of fun to bring a smile to your face.



Summary

A short recap at the end of each chapter.



Brain
Training

Test what you've learned from the chapter.

The Third Age Trust

The Third Age Trust is the body which represents all U3As in the UK. The U3A movement is made up of over 700 self-governing groups of older men and women who organise for themselves activities which may be educational, recreational or social in kind. Calling on their own experience and knowledge they demand no qualifications nor do they offer any. The movement has grown at a remarkable pace and offers opportunities to thousands of people to demonstrate their own worth to one another and to the community. Their interests are astonishingly varied but the members all value the opportunity to share experiences and learning with like-minded people. The Third Age Trust's endorsement of the Older and Wiser series hints at some of that width of interest.



Introduction

I know what you're thinking: "Office? That sounds a bit dull." But don't let the name put you off reading this book. Although Microsoft Office can be used to manage your household accounts and write letters to the bank, it also enables you to enjoy fun projects like creating party invitations, making posters, planning your holidays, putting together slide shows and compiling recipe books. In fact, once you understand the basics of how to use Microsoft Office, your imagination is the only limit. Soon you'll be thinking of more and more ways to use Microsoft Office and unleash the full power of your PC.

Whether you're a beginner or are already using it, you'll discover that there are two main benefits to mastering Microsoft Office. Firstly, it makes life easier. If you're still writing out your Christmas card envelopes by hand, or struggling to work out how much interest the bank is due to pay you, let the computer take the strain. Computers love complex and repetitive tasks and once you've learned how to set things up they'll happily beaver away on your behalf while you put your feet up. It's like having that robot they always promised us, although it still won't make the tea or vacuum the living room. (Microsoft, if you're listening, please dedicate some boffins to making that happen!)

Secondly, Microsoft Office can empower you in your hobbies and creative pastimes. If you've always wanted to write a novel, word processing is your tool. If you want to keep track of the number of birds you've spotted or train timetables, a spreadsheet can help. If you are ever called upon to deliver a presentation, whether it's showcasing photos to your family or sharing your expertise with the local horticulture society, a PowerPoint presentation helps you organise your thoughts and tell your story.



Microsoft says that 500 million people worldwide use Microsoft Office.

What is Microsoft Office?

Twenty years ago, Microsoft cofounder Bill Gates' vision was for there to be "a computer on every desk and in every home", and in the developed economies we're not far off that. In fact, computers are probably the main reason people buy desks today.

Microsoft Office is a collection of programs (called a 'suite'), which enables you to create different types of documents on your computer. So, you ask, what are the programs (or 'applications') and what might you use them for?

- **Microsoft Word:** this is word-processing software, which is the great-great-grandchild of the typewriter. You type in the content of your document, and you can edit it until you're happy with it (including moving whole paragraphs around, and adding or deleting them). You can change the way your document looks, from simple styles like bold and underlined text all the way up to complex newsletter layouts, as you'll be finding out. Microsoft Word can be used for letters (see Chapter 1), diaries, posters (see Chapter 2), newsletters (see Chapter 3) and even books. I'm using it right now to write this book.
- **Microsoft Excel:** this is spreadsheet software, which is used for structuring words and/or numbers in a grid. It helps you to organise information. At its simplest, it can be used to lay out data like timetables and address books (see Chapter 4) and to create nice, clear coloured charts. Its sophistication enables it to carry out calculations using numbers you have entered in the boxes in the grid, as you'll see in Chapter 5. I'm also using Excel right now, to keep track of the number of words I'm writing for each chapter.
- **Microsoft PowerPoint:** this software is most often used for presentations where somebody stands up and talks through a series of slides. If you're invited to give a talk to your local U3A group or another community organisation, PowerPoint will make sure your presentation looks slick. You can also use it with friends and family to create a photo slide show, as you'll see in Chapter 7.
- **Microsoft OneNote:** this is the newest and most overlooked program in Microsoft Office. It's a bit like a scrapbook on your PC, in which you can keep

interesting web pages, paste pictures and write notes. It's powerful because of the way you can group related information and search through your notebooks, and because of the ease with which you can add information. In Chapter 8, you'll learn how to make a recipe book using it OneNote. I use it mainly for organising my ideas when I'm writing fiction.

These four programs make up the Home and Student version of Microsoft Office. This version is the one that you're most likely to have on your home PC, partly because it's sold at a family-friendly price – and all you'll ever need to create beautiful documents.

There is also a free Starter Edition, which comes installed on some new PCs. This version includes cut-down versions of Word and Excel, with adverts shown on screen. Personally I'd find the adverts too distracting while I was trying to work, but you can't argue with the price. If you're new to Microsoft Office, this version provides you with a risk-free way to try out the applications and you should be able to carry out most of the Word and Excel projects in this book using it, then buy the full version should you wish to do so.

Microsoft Office is also available in other, much more expensive editions, which are mostly sold to companies. You may already be familiar with these versions or have heard of them through family or friends. Two of the better known programs in these editions include:

- **Microsoft Outlook:** this is one of the most popular programs for email. This book doesn't cover Outlook but, in Chapter 9, I will show you how you can use email to share your ideas and your Microsoft Office documents over the Internet.
- **Microsoft Publisher:** this is used for laying out documents such as brochures, and it's particularly appealing for small businesses. This book doesn't cover Publisher but most home users find that they can design the documents they need using Microsoft Word, which we'll cover in depth in this book.

There have been many versions of Microsoft Office over the years, but in this book the focus is on Office 2010 and Office 2007. (The software is named after the year of its release.) The earlier version, Office 2007, is very similar to Office 2010 – they're a bit like identical twins. If you're already familiar with Office 2007 you might spot the odd difference in Office 2010, but they look more or less the same and it can be hard to tell them apart at a glance.

If you've used an even earlier version of Microsoft Office, you may notice that Microsoft has overhauled the buttons and menus for Office 2007 and has kept this new layout for Office 2010. The redesign annoyed quite a few long-term users, because when they looked for commands in the old places, they weren't there any more. It was a bit like somebody coming into your house while you were asleep and moving all the furniture around: unwelcome and extremely confusing, especially when you were looking for something like a pair of scissors. After acclimatising for a short while, however, I found that the new design made the software much easier to use. The new screen design lays out all the options for you rather than hiding them in a menu, so you can see what you're looking for. It's also quicker because you can use fewer mouse clicks than in older versions of Microsoft Office. Generally speaking, anything you can do with 2007, you can also do with 2010. A few features introduced in 2010 aren't available in older versions of Microsoft Office, but I'll flag those up as we come across them in the projects.

If you've recently upgraded to Microsoft Office 2010 or 2007, the information given in this book helps you to navigate around the new interface, as well as showing you how to make the most of the software.

How this book is structured

The best way to learn how to do something is by *doing* it, so this book provides you with practical projects to help you explore the various functions that Microsoft Office has to offer, whether you're just starting out or haven't previously used the software to its full potential. I'll begin with some simple projects for you to complete, such as writing a letter and managing your address book, and then you'll work your way up to something more ambitious, such as creating personalised party invitations. As you work your way through the book, the projects build on skills you've learned in earlier chapters, so you can reinforce what you learned previously through practice, and concentrate your efforts on what's new.

This book is divided into three parts:

Part I introduces you to Microsoft Word, with projects on how to write a letter, create a poster and publish a newsletter.

Part II introduces you to Microsoft Excel, with projects on how to manage your address book and create a basic holiday budget. You'll also learn how to use Word and Excel together to create personalised party invitations.

Part III shows you how to organise and share your photos and ideas, with projects to help you create a holiday slide show, keep a recipe book and share your thoughts over the Internet by email.

At first glance, you might assume that there are only nine projects in this book, but the skills you learn will enable you to do many more. In fact, each chapter concludes with suggestions for other ways to use the skills you've learned in that chapter. Along the way, I'm sure you'll have a few 'aha!' moments of your own, as you work out how you can adapt the projects to your own needs.

The chapters are arranged to be read in order, but if you're already familiar with using Microsoft Office, you may prefer to skip the more basic chapters or even use the book as a reference work.

At the end of the book, you'll find an appendix of the most commonly used keyboard shortcuts (Appendix 1). If you find using the mouse a bit fiddly, or even just want to speed things up, these key combinations provide rapid access to some of the most popular features of the software.

There's also a glossary of commonly used terms you might not be familiar with (Appendix 2), as well as an index, to make it easier for you to find the solution when you can't work out how to do something.

For best results, I recommend that you try out all the projects in this book. If you don't fancy too much typing, you can download the sample files from my website at www.sean.co.uk. You can then experiment with editing these samples, or even use them as the basis of your own documents. Sometimes you may find it easier to take something that's not quite ideal and modify it, rather than starting from scratch. The website also includes updates, all the links from the book and supporting resources.

What you will need

You now know a little more about Microsoft Office and what you can use it for, so let's look at what you'll need to complete the projects in this book:

- **Personal computer (PC) – desktop or laptop.** The technical specifications for the computer can be a bit baffling; Microsoft says you need a 500MHz

processor, 256MB of RAM (512MB for graphics features), 1.5GB of hard drive space, and a monitor with a resolution of 1024x768. But there is an easy way to understand whether or not your computer will be okay. If you bought your computer with Windows XP, Windows Vista, or Windows 7 already on it, it will probably be fine. If your computer had Windows 98 or Windows 95 on it when you bought it, it's likely to struggle and it might be time to consider buying a new computer. I'm using a PC running Windows 7, which is the latest version of Windows. You might notice the occasional difference between my screenshots in this book and what you see on your screen, but I'll clarify anything that might cause confusion.

- **Mouse or trackball.** I'll tell you when it's quicker or less fiddly to use the keyboard, but you'll need to have a mouse or trackball to get the best from Microsoft Office. Some people find a trackball easier to use, especially if they have arthritic hands. For ease of reading I'll just talk about mouse movements in this book, but the information applies equally to trackballs. If you struggle with the mouse, don't forget to make use of Appendix 1, which lists keyboard shortcuts you can often use instead.
- **Office 2010 or Office 2007.** The applications we use in this book are Microsoft Word, Microsoft Excel, Microsoft PowerPoint, and Microsoft OneNote. They're cheapest if you buy them in the Microsoft Office Home & Student version, but you can also buy them individually. You might find that starter versions of Word and Excel come pre-installed if you buy a new PC.
- **Printer.** I recommend a printer that prints on A4 paper (or US 'letter' size in the US), because you'll be creating letters, posters, and newsletters as you work through the projects in this book. Colour printers are affordable nowadays, but you can use a black and white printer if you're happy to create monochrome documents. There are other ways to share your documents so a printer isn't essential, but it is extremely helpful.
- **Internet connection.** During the projects, you'll discover how to download content from the Internet and incorporate it into your documents. In the final chapter, you'll find out how to share your own documents over the Internet, too. You'll also need to be connected to the Internet in order to download the sample files from the book's website at www.sean.co.uk.

For the projects in this book, I assume that you have this equipment and it's all working fine. It's not hard to install Microsoft Office if you haven't already got it installed on your computer. Usually, you just insert the disk and then say 'yes'

when it asks you if you want to accept the default settings. Getting the printer and Internet connections set up can be a bit trickier, so if you have a computer whizz-kid in the family, ask them for help. Alternatively, phone a friend or one of the many helpful small PC troubleshooting companies – preferably recommended by a friend. Then unleash them on your PC and stand well back.

Familiarising yourself with the keyboard and the mouse

In this book, I'll assume that you have some basic knowledge of using a computer. Even if you do, however, you might find that you need to use keys on the keyboard that you haven't come across before, or you might need to use the mouse in new ways. Here are some pointers to help you.

Using the keyboard

A computer keyboard has more keys than a typewriter keyboard because it has a number of keys that perform special functions. Some of these will be familiar to you. You might have used the Start button, for example, to run programs like your Internet browser or to play solitaire. If you've shopped online, you might have used the backspace key or cursor keys to correct your address as you entered it.

The Shift, Alt and Control keys don't seem to do anything when you press them. That's because you have to hold them down and then press another key to do something.

The Shift key is used to access the symbol written on the top half of the key, where there is one. To type an exclamation mark, for example, you hold down the Shift key and press the number 1 key in the main part of the keyboard. You also hold down Shift and press a letter key to type an upper case letter.

The Control and Alt keys are used to perform certain functions in the program and usually provide a keyboard shortcut for doing something you can also do using the mouse and menus on screen. Control and S together enable you to save your document, for example. You'll learn more about that and other keyboard shortcuts in the projects.

Figure 0.1 provides a handy reference to some of the keys you'll need to use for the projects in this book. Your keyboard layout might look a bit different. You will

find that most of the keys are in the same place, and that the main cluster around the letter keys, the cursor keys and the numeric keypad will be exactly the same. The keys between them are bonus keys that might be arranged differently.

You don't need to learn all these keys now: the illustration is here so you can refer back to it whenever you want. You'll be introduced to the various keys as you need them for the projects.

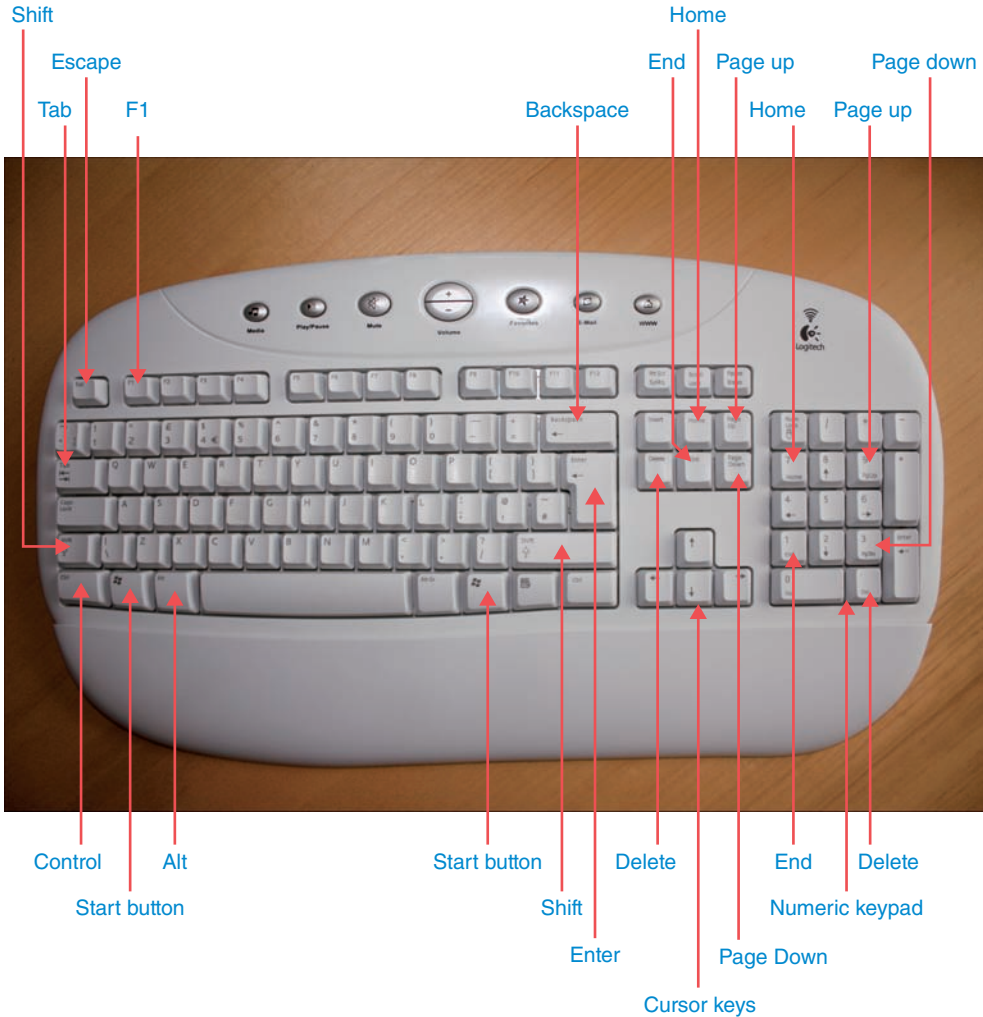


Figure 0.1

Using the mouse

I'll assume that you're familiar with the basics of using the mouse, including moving the mouse pointer around the screen. With most activities, you can use just one of the two buttons on a PC mouse, but when using Microsoft Office, you might sometimes need to use the other button too.

To avoid confusion, here are some terms I'll use:

- 'Click the menu' means you should put your mouse pointer over a menu on screen and then press the left mouse button. If it doesn't say which mouse button to press, it's always the left one.
- 'Right-click the menu' means you should put your mouse pointer over the menu and then press the right mouse button. You'll use this much less often, and only when explicitly told to use the right mouse button.
- A 'double-click' is when you press the mouse button twice in quick succession.

Making mouse control easier

Microsoft has built accessibility options into Windows so that you can still use the software even if you find it difficult to control a mouse.

From the Start menu, go to Control Panel and then double-click on Mouse. You can then change a wide range of options, including how fast the mouse moves and how quickly you have to click to register a double-click. You can also switch on trails so that you can see your cursor move more easily.

If you can't move the mouse, you can use the numeric keypad instead, by switching mousekeys on. You'll find the controls to do this in the Ease of Access Centre in Windows Vista and Windows 7, or in the Accessibility Options in the Control Panel in earlier versions of Windows.

There are many powerful tools in Windows to help ensure that physical or visual impairments don't prevent people from being able to use software like Microsoft Office. There isn't room to go into full details here, but Microsoft provides extensive help on its website.

You can minimise your use of the mouse by learning keyboard shortcuts, too. I'll tell you about the most useful ones, and you can refer to Appendix 1 at the back of the book for a fuller list.

Backing up your files

To protect yourself against the risk of losing your Microsoft Office files, you should keep a *backup copy*. A backup copy is just a spare copy of a file, in case something happens to the original. If your computer breaks, for example, you might lose all your information if you only have one copy of it. If you have a copy that's stored outside the computer for safekeeping, you can switch to using that instead.

You should keep a backup copy of your files on a separate device to your computer. Suitable devices include:

- **An external hard drive.** These can have enough capacity to store everything on your computer and can be bought for under £100, sometimes even under £50. These are fairly bulky devices, about the size of a small box of soap powder. If you want to back up everything on your computer, get an external drive that has the same storage capacity as your computer.
- **A USB key** (also known as a flash drive). These tiny devices can fit on your keyring, so you can take your backup everywhere (not a bad idea). Prices start at under £10 and are available from well-known brands (including Sony and SanDisk) for under £20. The prices vary depending on how much information the device can store (measured in gigabytes or GB), and how well known the supplier is. These devices might not store all the data from your computer, but they can store thousands of typical office documents. An 8GB USB key could store over 8,000 typical Word or Excel documents, although any pictures or sound files would eat up the available space quickly.

These devices are great because you can store a copy of a file on them and update it whenever you need to. If you don't already have a suitable device to back up your files on to, I suggest you buy a USB key. You can use Windows to copy your files on to the USB key. It isn't possible to go into depth on how to do that here, but if you know someone who understands Windows, it will only take them a few minutes to show you how to make a backup copy.

Choosing the right application for the job

As I've already mentioned, there are four applications in Microsoft Office (Home & Student version): Word, Excel, PowerPoint and OneNote. Sometimes, you can do the same job in different applications – so how do you know which one is best?

As you complete the projects in this book and work on your own projects, you'll develop an instinct for the best tool for the job, but Table 1 offers some guidance to help you choose.

Table 1: How to choose the right Microsoft Office application

Ask yourself...	If yes, then use...
Is your document predominantly about the words you type in, such as a letter or a story?	Word
Is your document likely to be many pages long?	Word
Do you want to control the layout and design of your document? Examples might include greeting cards or leaflets.	Word
Does your document lend itself naturally to a grid layout, such as a study timetable?	Excel
Is your project about organising information?	Excel
Does your document include a lot of arithmetic or numbers?	Excel
Does your document include a lot of the same type of information about a lot of different people or things? Examples might include addresses of friends or details of trains you have spotted.	Excel
Does your project involve presenting information to other people?	PowerPoint
Is your project about gathering information for yourself, without plans to share it?	OneNote
Will your document be read mostly on paper?	Word
Will your document be read mostly on screen?	Excel, PowerPoint, OneNote

This information is only intended to be a rule of thumb and, depending on your project, you might find the above guidelines contradictory. In that case, treat each guideline as a 'vote' for an application. If there's a tie between two or more contenders, make them arm-wrestle for it! Sometimes there really is no single right answer.

In Chapter 6, I'll show you how to use different programs from the Microsoft Office suite together to create personalised invitations. There are many other examples of how you can break a project down into smaller parts so that you can use the best tool for each part. You can switch between the different tools easily, and can even copy something you have prepared in one application and paste it into a different one. For example, say you are going to write an annual report for the local WI group and it needs to include a report about all the great activities you've done this year together with a financial breakdown. Word is best for the wordy stuff and Excel excels at the maths, so in this case you could create the maths part in Excel, copy it and then paste it into your Word document, using Word to produce the final layout.

Don't worry if this doesn't make too much sense to you now. It's here for you to refer back to, and as your knowledge of Microsoft Office increases, you'll find it starts to make more sense.

PRACTICE MAKES PERFECT

To build upon the lessons learnt in this book, visit www.pcwisdom.co.uk

- More training tutorials
- Links to resources
- Advice through frequently asked questions
- Social networking tips
- Videos and podcasts from the author
- Author blogs



PART I

Using Microsoft Word



This is the rudest, most offensive and irate letter we've had so far this week. Nice layout and typeface, though...

