

Learn Office 2011 for Mac OS X



Guy Hart-Davis

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This book is dedicated to the memory of Paul Raven.

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Jennifer Ackerman Kettell has written and contributed to dozens of books about software applications, web design, and digital photography. She has worked for Microsoft and other top companies, and has done freelance web design and online community management. Jenn has lived all over the United States, but currently calls upstate New York home.

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- John Collin for creating the index

Introduction

Do you need to get your work done with the Office:Mac 2011 applications—smoothly, easily, and quickly? Good! You’ve picked up the right book.

Who Is This Book For?

This book is designed to help beginning and intermediate users get up to speed quickly with the Office:Mac 2011 applications and immediately become productive with them.

If you need to learn to use Word, Excel, PowerPoint, and Outlook to get everyday tasks done, at work or at home, you will benefit from this book’s focused approach and detailed advice. You can either start from the beginning of the book and work through it, or use the Table of Contents or the Index to find the topic you need immediately, and then jump right in there.

What Does This Book Cover?

This book contains five parts that cover the shared Office features and the four applications.

Part 1 of the book brings you up to speed with the common features that the Office applications share:

- Chapter 1, “Getting Started with Office 2011,” introduces you to Office’s four applications—Word, Excel, PowerPoint, and Outlook—and what you can do with them. You learn how to open and close the applications; you meet key features such as the new Ribbon interface; and you create, save, close, and reopen documents.
- Chapter 2, “Learning Common Tools Across the Office Suite,” shows you how to control the Office applications using the menus, the toolbars, and the Ribbon, and how to make the most of the tools in the Toolbox. This chapter also explains Office’s common ways of sharing a document with others, how to save time and effort by using the AutoCorrect and AutoFormat features the smart way, and how to use the spelling and grammar checkers. You’ll also learn how to print documents.
- Chapter 3, “Working with Text,” shows you how to do everything from entering text (using the keyboard or other means) to creating tables and hyperlinks. Along the way, you’ll learn how to work with cut, copy, and paste, and how to use the Find and Replace features.

- Chapter 4, “Using Pictures and Shapes in Your Documents,” teaches you how to add visual interest to your Office document by adding pictures and shapes. You’ll learn how to insert clip art, pictures (such as photos), and shapes; how to rotate and position graphical objects; and how to use Office’s tools for making pictures look the way you want them. This chapter also covers inserting SmartArt diagrams and arranging graphical objects to control which is visible.
- Chapter 5, “Customizing Office to Suit You,” walks you through customizing the toolbars, the Ribbon, and keyboard shortcuts to make the applications easier and faster to use. You’ll also learn how to set essential preferences in the applications, such as the General preferences and the Save preferences.

Part 2 of the book covers using Microsoft Word, the powerful word processing application:

- Chapter 6, “Entering Text and Using Views,” shows you how to enter text quickly in Word documents. You’ll learn how to select text in advanced ways with the mouse and the keyboard, how to move around your documents, and how to tell Word where to find your custom templates. You’ll also learn to create backup documents automatically, and to make the most of Word’s seven different views of a document.
- Chapter 7, “Adding Style: Formatting Your Documents,” teaches you the right way to format a document quickly and consistently by using styles rather than applying direct formatting bit by bit. It also shows you how to get around your documents by using the Sidebar and the Find feature, and how to harness the power of the Replace feature.
- Chapter 8, “Creating Complex Documents and Layouts,” starts by showing you how to use Word’s extra features for creating tables. The chapter then explains how to break a document into multiple sections; how to add headers, footers, and page numbers; and how to create newspaper-style columns of text. You’ll learn to use bookmarks and cross-references, develop your documents using Word’s powerful Outline view, and add footnotes and endnotes to your documents.
- Chapter 9, “Creating Business Documents with Mail Merge,” shows you how to use Word to create business documents swiftly and efficiently. You’ll learn to set up mail merge documents (such as letters or labels), connect them to data sources, and save or print the results.
- Chapter 10, “Revising and Reviewing Documents,” covers how to use Word’s features for working with your colleagues on documents. You’ll learn how to edit a document either simultaneously or separately, how to use the Track Changes feature to mark revisions, and how to integrate changes into a document. You’ll also see how to add comments to a document and compare two document versions that contain untracked changes.
- Chapter 11, “Printing, Sharing, and Securing Documents,” explains how to print an entire document or just parts of it, with or without markup, and how to print markup without the document. You’ll also learn how to remove sensitive information from documents, create a document you can open with earlier versions of Word, and create PDF files from documents.

Part 3 teaches you to create spreadsheets and charts with Excel:

- Chapter 12, “Creating Workbooks and Entering Data,” covers creating different types of workbooks in Excel and entering data in them. You’ll learn how to navigate the Excel interface, use workbooks and worksheets, and use Excel’s views and features to see the data you need.
- Chapter 13, “Formatting Your Worksheets,” explains how to insert, delete, and format rows and columns in worksheets; how to format cells and ranges; and how to use the advanced conditional-formatting and data-validation features to identify unusual values or erratic input. This chapter also shows you how to format quickly and consistently with styles, how to add headers and footers to worksheets, and how to share workbooks effectively with your colleagues.
- Chapter 14, “Creating Powerful and Persuasive Charts,” teaches you how Excel’s charts work and how to add them to your workbooks. You’ll learn how to lay out a chart effectively, how to make it look good, and how to hide any components you don’t want to display. You’ll even learn how to save time by reusing the custom chart formatting you create.
- Chapter 15, “Crunching Numbers with Formulas and Functions,” makes clear the difference between a formula and a function, and shows you first how to create custom formulas and then how to use Excel’s built-in functions.
- Chapter 16, “Creating Simple Databases and Solving Business Problems,” shows you how to use Excel to create databases for storing and manipulating your information. You’ll learn how to enter information into a database, how to sort the information, and how to filter it to find only the results you want. You’ll also learn how to use the Goal Seek feature and scenarios to work out solutions to business problems.
- Chapter 17, “Manipulating Data with PivotTables,” explains how to use Excel’s powerful PivotTable feature to manipulate your data so that you can discover the information you need. PivotTables take a few minutes to grasp, but you’ll be surprised how easy they are to use.

Part 4 of the book takes you through creating good-looking, persuasive presentations with PowerPoint:

- Chapter 18, “Starting to Build a Presentation,” gets you started by creating a presentation document using either a design template or a content template. The chapter then shows you how to add, delete, and rearrange slides; how to use PowerPoint’s views effectively; how to develop the outline of a presentation; and how to break a presentation into separate sections. You’ll also learn how to collaborate with your colleagues on creating a presentation.
- Chapter 19, “Creating Clear and Convincing Slides,” guides you through the toughest part of creating a good presentation: creating slides that convey your meaning clearly and powerfully. This chapter shows you how to plan a presentation, choose suitable layouts (or create your own), and add text and other content to your slides.
- Chapter 20, “Adding Life and Interest to a Presentation,” shows you ways of spicing up a presentation by using graphics, movies, sounds, animations, and transitions. You’ll also learn how to hide slides to keep them up your sleeve and how to build custom slide shows that enable you to reveal only part of a larger presentation.

- Chapter 21, “Delivering a Presentation Live or Online,” explains how to deliver the presentation you’ve created. You can deliver the presentation live in person, broadcast it across the Internet, or create a version of the presentation that you can share via e-mail or in other ways. You’ll also learn how to use PowerPoint’s Presenter view and how to create a handout for a presentation.

Part 5 of the book shows you how to manage your e-mail, schedule, contacts, and tasks with Outlook:

- Chapter 22, “Using E-mail Effectively,” first shows you how to set up Outlook to work with your ISP or e-mail provider’s servers. Once Outlook is working, you’ll learn how to get around its complex user interface, how to send and receive e-mail, and how to manage your messages.
- Chapter 23, “Keeping Your Contacts in Order,” covers creating contacts either from scratch or importing them from your address books, spreadsheets, or other sources. The chapter also shows you how to view and sort your contacts, add or update their contact information, and quickly create communications to your contacts.
- Chapter 24, “Managing Your Calendar,” brings you up to speed with Outlook’s Calendar interface, shows you how to customize it, and teaches you to use its views. After that, it explains how to create one-shot appointments and repeating appointments, schedule meetings, and respond to meeting requests.
- Chapter 25, “Working with Tasks and Notes,” shows you how to use Outlook to define the tasks you need to complete and track your progress on completing them. This chapter also explains how to use Outlook’s Notes feature to jot down information as you work.

Conventions Used in This Book

This book uses several conventions to make its meaning clear without wasting words:

- *Ribbon commands and menu commands:* The ► sign shows the sequence for choosing an item from the Ribbon or a command from the menu bar. For example, “Choose Home ► Paragraph ► Decrease indent from the Ribbon” means that you click the Home tab of the Ribbon (displaying the tab’s contents), go to the Paragraph group, and then click the Decrease Indent button. Similarly, the ► sign indicates a menu sequence. For example, “Choose Insert ► Photo ► Picture from File from the menu bar” means that you click the Insert menu on the menu bar to open the menu, click the Photo item to open the Photo submenu, and then click the Picture from File item on the Photo submenu.
- *Special paragraphs:* Special paragraphs present information that you may want to pay extra attention to. Note paragraphs contain information you may want to know; Tip paragraphs present techniques you may benefit from using; and Caution paragraphs warn you of potential problems.

- *Check boxes:* The Office applications use many check boxes—the square boxes that can either have a check mark in them (indicating that the option is turned on) or not (indicating that the option is turned off). This book tells you to “select” a check box when you need to put a check mark in the check box, and to “clear” a check box when you need to remove the check mark from it. If the check box is already selected or cleared, you don’t need to change it.
- *Keyboard shortcuts:* In the Office applications, you can often save time and effort by using a keyboard shortcut rather than a Ribbon command. This book uses + signs to represent keyboard shortcuts. For example, “press Cmd+S” means that you hold down the Cmd key, press the S key, and then release the Cmd key. “Press Cmd+Option+T” means that you hold down the Cmd key and the Option key, press the T key, and then release the Cmd key and the Option key.

Building Essential Office Skills

To save you time and effort, the Office:Mac 2011 applications share many common features. This part of the book shows you how to get started quickly with the applications and learn to use these common features.

In Chapter 1, you'll quickly meet Office's four main applications—Word, Excel, PowerPoint, and Outlook—and learn what you can do with them. You'll grasp essential moves, such as opening and closing the applications; and you'll create, save, close, and reopen documents.

In Chapter 2, you'll take control of the applications using the menus, the toolbars, and the ribbon. You'll learn how to share a document with others, how to save time and effort by using the AutoCorrect and AutoFormat features the smart way, and how to use the spelling and grammar checkers. You'll also learn how to print documents.

In Chapter 3, you'll study how to work with text—everything from entering text using the keyboard to creating tables and hyperlinks. By the end of the chapter, you'll also know how to work with cut, copy, and paste, and how to use the Find and Replace features.

In Chapter 4, you'll add visual interest to your Office document by inserting pictures and shapes. You'll learn how to insert clip art, pictures (such as photos), and shapes; how to rotate and position graphical objects; and how to use Office's tools for making pictures look the way you want them. When you need more complex illustrations, you can add SmartArt diagrams and arrange graphical objects to overlap each other, with fine control over which object is visible.

In Chapter 5, you'll make the Office applications easier and faster to use by customizing the toolbars, the Ribbon, and keyboard shortcuts. You'll also learn how to set essential preferences in the applications, such as the general and save preferences.

Getting Up to Speed with the Office Applications

You're probably in a hurry to start being productive using Office 2011, so this chapter gets you moving quickly. First, you'll meet each of the applications, find out what you can do with them, and come to grips with key features such as the Ribbon and the toolbars. Then, I'll show you how to launch the applications or make them launch themselves. Finally, you'll look at how to create, save, and close documents, as well as how to reopen them when you need to work on them again.

Meeting the Office Applications and Learning What You Can Do with Them

Microsoft Office 2011 comes in two versions and includes either three or four main applications, which this section briefly introduces. The basic version, Microsoft Office Home & Student, includes Microsoft Word, Microsoft Excel, and Microsoft PowerPoint; the more expensive version, Microsoft Office Home & Business, adds Microsoft Outlook to those three applications. This book shows you how to become proficient with these four applications.

NOTE: Apart from the four main applications, Office also includes the Microsoft Messenger instant messaging application, the Microsoft Communicator telephony and conferencing application, the Remote Desktop Connection application for connecting remotely to Windows computers, and the Microsoft Document Connection application for connecting to SharePoint sites and Windows Live SkyDrive. This book focuses on the four main applications and doesn't cover the others.

For ease of use and to save time, the four main applications share many features, from the ways in which you create, save, and open documents to common actions you

perform in them, such as copying text from one part of a document and pasting it in at another part.

Part 1 of this book discusses these common features. Parts 2 through 5 of the book then examine each of the applications in turn.

Microsoft Word

Microsoft Word (see Figure 1–1) is a word processing application that you can use to create everything from a single-page letter to a 1,000-page book complete with a table of contents, an index, and cross-references between different parts of the book.

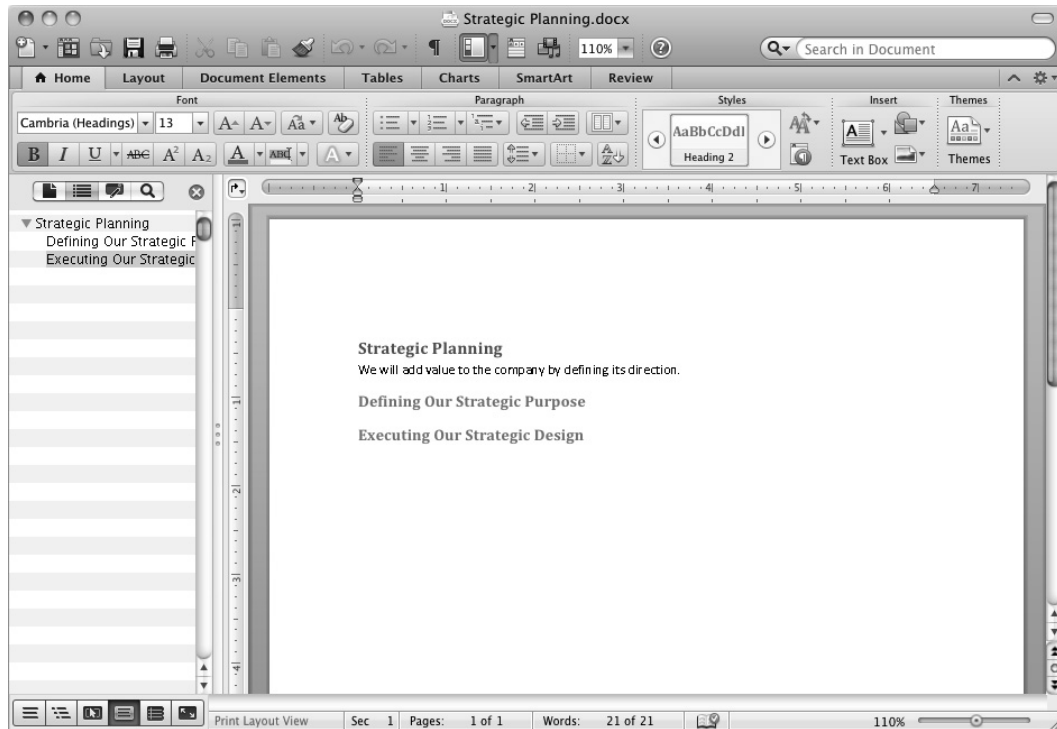


Figure 1–1. Microsoft Word is the Office application for creating text-based documents.

Part 2 of this book explains how to make the most of Microsoft Word.

Microsoft Excel

Microsoft Excel (see Figure 1–2) is a spreadsheet application that you can use to record, calculate, and analyze data. Excel includes features for creating many different types of charts for presenting your data clearly and effectively.

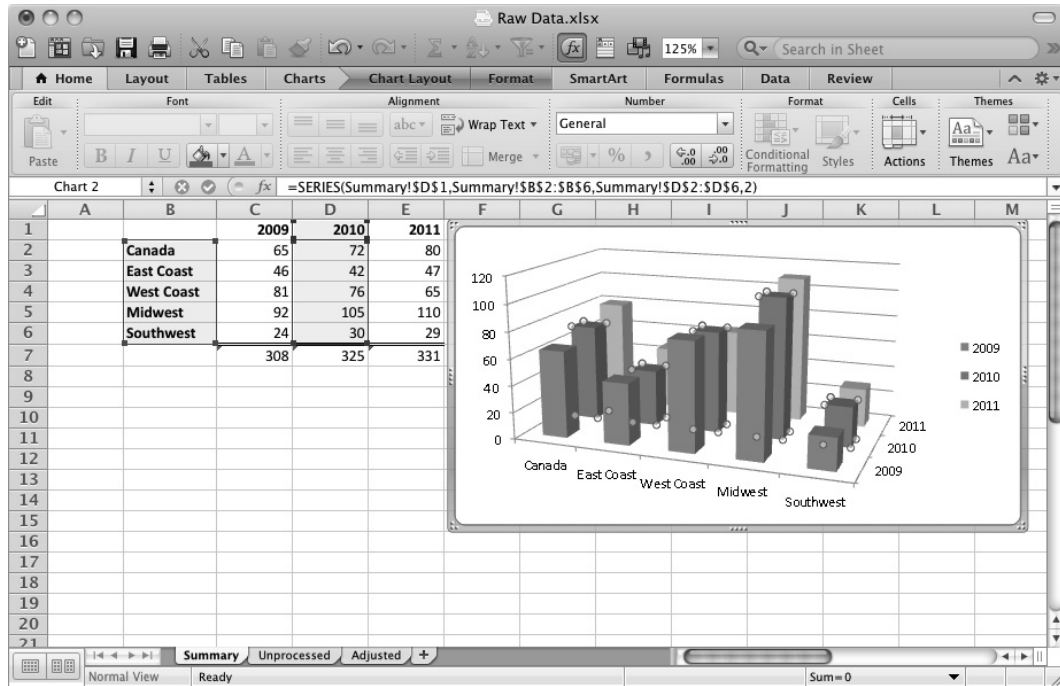


Figure 1–2. Each Microsoft Excel workbook contains as many worksheets as you need for entering and analyzing your data.

Part 3 of this book shows you how to work quickly and effectively in Microsoft Excel.

Microsoft PowerPoint

Microsoft PowerPoint (see Figure 1–3) is an application for creating and delivering presentations. Each presentation consists of slides, to which you can add any data from straightforward text to charts and movies. You can also add animations and transition effects to provide visual interest.

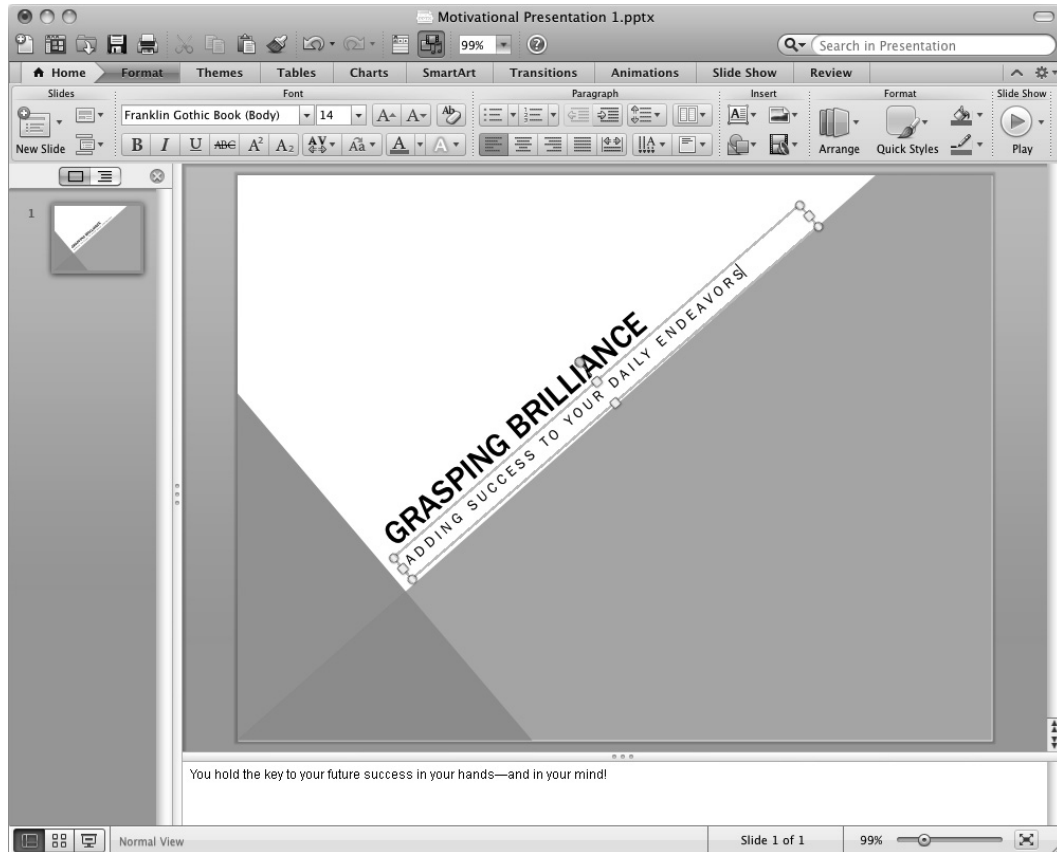


Figure 1–3. In Microsoft PowerPoint, you create slides and organize them into slide shows.

Part 4 of this book covers creating persuasive presentations in PowerPoint and delivering them to your audience either in person or online.