Slack

Quick Reference Guide

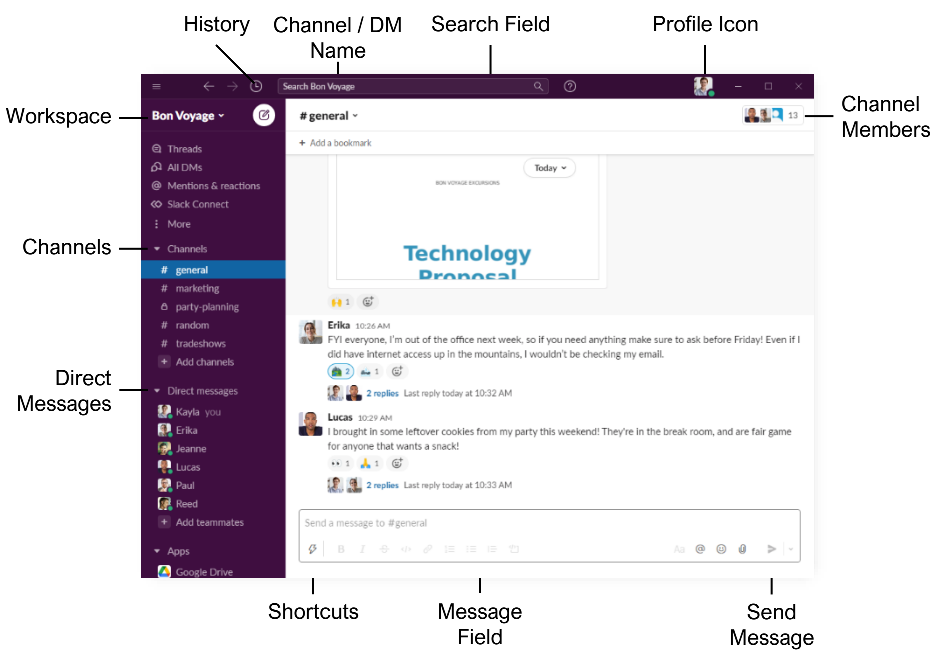
CustomGuide

your logo

Free Quick References

Visit ref.customguide.com

The Slack Program Screen



Getting Started

Sign In to Slack: Click the **Sign In to Slack** button, enter your email address, click **Sign In with Email**, check your email for the message with the login code, then enter the login code into the login code field.

Sign Out of Slack: Click your profile icon, then select **Sign Out of** [**your workspace**].

View a Direct Message: Click someone's name under the Direct Messages heading in the sidebar.

View a Channel: Click a channel's name under the Channels heading in the sidebar.

View Threads: Click the **Threads** link in the sidebar.

View All Direct Messages: Click the **All DMs** link in the sidebar.

View Mentions & Reactions: Click the **More** link in the sidebar, then select **Mentions & Reactions**.

View All Unreads: Click the **More** link in the sidebar, then select **All Unreads**.

View History: Click the **History** button at the top of the window. Select an item from the history menu to view it in context.

Set a New Status: Click your profile icon, select **Update your status**, and select a suggested status or enter a new status. Click the status emoji, select a relevant emoji, click the **Clear After** menu, select when you want the status cleared, then click **Save**.

Clear a Status: Click your profile icon, then select **Clear Status**.

Change Availability: Click your profile icon, then select **Set yourself as away** (or **Set yourself as active**).

View your Profile: Click your profile icon and select **View Profile**.

Edit your Profile: Click your profile icon, select **Edit Profile**, edit the information in the available fields, then click **Save Changes**.

Pause Notifications: Click your profile icon, select **Pause Notifications**, then select how long to pause notifications for.

Change a Channel's Notifications: Right-click a channel in the sidebar, select **Change Notifications**, select which notifications you want to see, then click **Save Changes**.

Mute a Channel or DM: Right-click a channel or DM, then select **Mute Channel** / **Conversation**.

Keyboard Shortcuts

General

New message	**Ctrl** + **N**
Set your status	**Ctrl** + **Shift + Y**
Preferences	**Ctrl** + **,**
Toggle left sidebar	**Ctrl** + **Shift + D**
Toggle right sidebar	**Ctrl** + **.**
Upload a file	**Ctrl** + **U**
View all downloads	**Ctrl** + **Shift** + **J**
Create a text snippet	**Ctrl** + **Shift** + **Enter**
Add emoji reaction	**Ctrl** + **Shift** + ****
Open the directory	**Ctrl** + **Shift** + **E**
Search	**Ctrl** + **G**
Search a conversation	**Ctrl** + **F**
Toggle full-screen	**Ctrl** + **Shift** + **F**
Go back in history	**Alt** + ←
Go forward in history	**Alt** + →
Next unread	**Alt** + **Shift** + ↓
Previous unread	**Alt** + **Shift** + ↑
Mark all messages in conversation as read	**Esc**
Mark all messages as read	**Shift** + **Esc**
Mark a message as unread	**Alt** + **Click**

Change Views

Threads	**Ctrl** + **Shift** + **T**
DMs	**Ctrl** + **Shift** + **K**
All Unreads	**Ctrl** + **Shift** + **A**
Mentions/Reactions	**Ctrl** + **Shift** + **M**
Saved Items	**Ctrl** + **Shift** + **S**
Browse channels	**Ctrl** + **Shift** + **L**
Conversation details	**Ctrl** + **Shift** + **I**

Call Controls

Toggle mute	**M**
Toggle video	**V**
Invite people to a call	**+**

Format Messages

Create a new line	**Shift** + **Enter**
Bold	**Ctrl** + **B**
Italicize	**Ctrl** + **I**
Strikethrough	**Ctrl** + **Shift** + **X**
Hyperlink	**Ctrl** + **Shift** + **U**
Code	**Ctrl** + **Shift** + **C**

Messaging

Start a New Direct Message: Click the **New Message** button, then enter the name(s) of the person(s) you want to message or select their name(s) from the suggestions list. Click in the message field, enter a message, then click **Send**.

Send a Message to a Channel: Click a channel in the left pane to view that channel, click in the message field, enter a message, then click **Send**.

Reply to a Message in a Channel: Hover your mouse cursor over a message in a channel, click the **Reply to thread** button, enter a message in the reply field, then click **Send**.

Mention a Person in a Message: While composing a message, type the '@' symbol, type a person's name or select them from the suggestions list, then finish the message and click **Send**.

Tag Everyone in a Channel: While composing a message, type the '@' symbol, type 'channel' to tag everyone in the channel or 'here' to notify everyone that's currently online, then finish the message and click **Send**.

Format Message Text: Select the text in the message field that you want to format, then click one of the formatting buttons (bold, italicize, strikethrough, hyperlink, numbered or bulleted list, quote, code, or code block).

Use Quick Text Formatting: Use the following formatting shortcuts to apply formatting while typing, without using the formatting buttons.

`*Bold*`	**Bold**
`_Italics_`	*Italics*
`-Strikethrough-`	~~Strikethrough~~
`` `Computer Code` ``	`Computer Code`
`* List Item`	• List Item
`1. List Item`	1. List Item

Insert Emoji: Click the **Emoji** button below the message field, click a category or search for an emoji, then click an emoji to insert it into the message field.

React With an Emoji: Hover your mouse cursor over a message, then click an emoji reaction in the popup menu. You can also click the **Find another reaction** button to select an emoji from the menu.

Save a Message: Hover your mouse cursor over a message, then click the **Add to saved items** button.

Channels

Create a Channel: Click **Add Channel** at the bottom of the Channels list, then select **Create a new channel**. Enter a channel name and description, choose whether to make the channel private or public, then click **Create**. Enter the names for people to invite and select them from the suggestions list, then click **Add**, or click **Skip for Now** to invite people later.

Join a Channel: Click **Add Channel** at the bottom of the Channels list, then select **Browse All Channels**. Hover your mouse cursor over a channel and click **Join**, or click a channel to preview it first.

Sort Channels: While browsing the channel list, click the **Sort** button, then choose a sorting method.

- Oldest or Newest
- Most or Fewest Members
- A to Z (or Z to A)

Filter Channels: While browsing the channel list, click the **Filter** button. Click the **Channel Type** menu arrow and select a channel type:

- Public channels
- Private channels
- Archived channels

View a Channel's Membership: Click a channel in the left pane, then click the member profile icons at the top.

Invite Someone to a Channel: Click a channel in the left pane, then click the member profile icons at the top. Click **Add People**, enter someone's name or email address, select them from the Suggestions list, then click **Add**.

Remove Someone from a Channel: Click a channel in the left pane, then click the member profile icons at the top. Click the **Remove** button next to someone's name, then click **Yes, Remove Them**.

View a Channel's Details: Click a channel in the left pane, then click the name of the channel at the top of the window.

Edit a Channel's Details: Click a channel in the left pane, then click the name of the channel at the top of the window. Click the **Edit** button for the topic or description, edit the topic or description in the text field, click **Save**, and then click **Close**.

Leave a Channel: Click a channel in the sidebar, click the name of the channel at the top of the window, click **Leave Channel**, then click **Leave Channel** again to confirm that you want to leave.

Calls

Make a Call: Open a direct message conversation with a person or click their name to display their profile card. Then, click the **Call** button.

Make a Group Call: Open a direct message conversation with a group of people, click the **Call** button, then click the **Start Call** button to confirm that you want to start the call.

Start a Channel Call: View the channel you want to call, click the channel's name to display the Details window, and click the **Start a Call** button. Then, click the **Start Call** button to confirm that you want to start the call.

Calls

Send an Emoji Reaction in a Call: While in a call, click the **Reactions** button, then select an emoji reaction.

Send a Text Reaction in a Call: While in a call, click the **Reactions** button, click the **Type Message** button, enter a message, then click **Send**.

Add a Person to a Call: While in a call, click the **Add People** button. Enter the name or email address of the person you want to add, select that person from the suggestions list, then click the **Invite** button.

Share a Link to a Call: While in a call, click the **Add People** button, click the **Copy link** button, then paste the call link into an instant message or email.

Share Your Screen on a Call: While in a call, click the **Share Screen** button, select a desktop or window, then click the **Share** button. Click the **Stop Sharing** button when you're finished sharing.

Productivity Tools

Star a Conversation or Channel: View the conversation or channel you want to star, click the name of the conversation or channel at the top of the window, and click the **Star Conversation / Channel** button. Select **Starred**, then click **Close**. Or, right-click a conversation or channel in the left pane and select **Star Conversation / Channel**.

Create a New Sidebar Section: Click the **Section Options** button next to the Channels or Direct Messages heading in the sidebar. Select **Create New Section**, give the section a name, then click **Create**.

Add a Conversation or Channel to a Section: View the conversation or channel you want to move, click the name of the conversation or channel at the top of the window, and click the **Star Conversation / Channel** button. Select a section, then click **Close**.

Add Notification Keywords: Click your profile icon, select **Preferences**, click in the **My keywords** text field on the Notification preferences tab, enter keywords separated by commas, then click the **Close** button.

Create a Reminder: Click the **Shortcuts** button, select the **Slack** app, then select **Set yourself a reminder**. Select a date and time, enter a description, then click **Create**.

View your Reminders List: Click **View Reminders** in the confirmation message after creating a reminder; or, enter the command `/remind list` in the message field.

Mark a Reminder as Complete: Click a reminder's notification when it appears; or, click the **Slackbot** direct message, then click the reminder's **Mark as Complete** button.

Microsoft®

Excel for Mac Intermediate

Quick Reference Guide

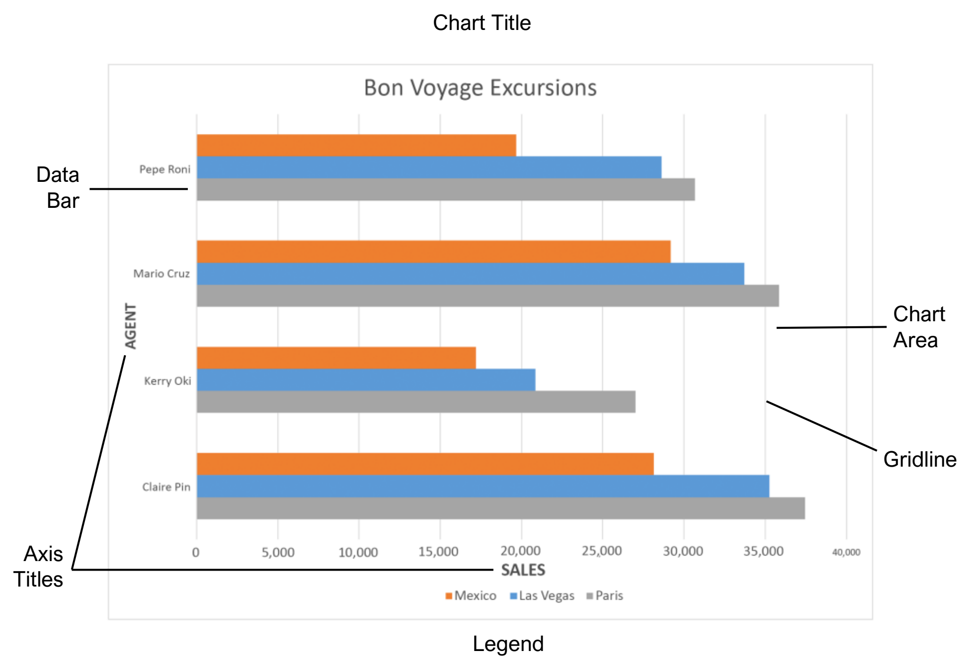
CustomGuide

your logo

Free Cheat Sheets

Visit ref.customguide.com

Chart Elements



Charts

Create a Chart: Select the cell range that contains the data you want to chart. Click the **Insert** tab on the ribbon. Click a chart type button in the Charts group and select the chart you want to insert.

Move or Resize a Chart: Select the chart you want to manipulate. Place the cursor over the chart's border and, with the 4-headed arrow showing, click and drag to move it. Or, click and drag a sizing handle to resize it.

Change the Chart Type: Select the chart you want to change and click the **Chart Design** tab on the ribbon. Click the **Change Chart Type** button and select a different chart from the available options. Or, right-click the chart, select **Change Chart Type** and select a chart type from the menu.

Filter a Chart: Select a cell within the range being charted, click the **Sort & Filter** button in the Home tab and select **Filter**. Click a filter list arrow and deselect the items you want to hide.

Insert a Sparkline: Select the cell range that contains the data you want to chart and click the **Insert** tab on the ribbon. Click the **Sparklines** button and select the sparkline you want to insert. Select the cell or cell range where you want to add the sparkline and click **OK**.

Charts

Insert a Trendline: Select the chart where you want to add a trendline. Click the **Chart Design** tab on the ribbon and click the **Add Chart Element** button. Select **Trendline** from the menu.

Print and Distribute

Set the Page Size: Click the **Page Layout** tab. Click the **Size** button and select the page size desired for the worksheet.

Set the Print Area: Select the cell range you want to print. Click the **Page Layout** tab, click the **Print Area** button, and select **Set Print Area**.

Print Titles, Gridlines, and Headings: Click the **Page Layout** tab. Click the **Print Titles** button and use the dialog box to set which items you wish to print.

Add a Header or Footer: Click the **Insert** tab on the ribbon and click the **Header & Footer** button. Add the desired information to the header and footer fields that appear in the worksheet.

Adjust Margins and Orientation: Click the **Page Layout** tab. Click the **Margins** button to select from a list of common page margins. Click the **Orientation** button to choose from either Portrait or Landscape orientation.

Chart Options

Chart Types

Column: Used to compare different values vertically side-by-side. Each value is represented in the chart by a vertical bar.

Line: Used to illustrate trends over time (days, months, years). Each value is plotted as a point on the chart and values are connected by a line.

Pie: Useful for showing values as a percentage of a whole when all the values add up to 100%. The values for each item are represented by different colors.

Bar: Similar to column charts, except they display information in horizontal bars rather than in vertical columns.

Area: Similar to line charts, except the areas beneath the lines are filled with color.

XY (Scatter): Used to plot clusters of values using single points. Multiple items can be plotted by using different colored points or different point symbols.

Stock: Effective for reporting the fluctuation of stock prices, such as the high, low, and closing points for a certain day.

Surface: Useful for finding optimum combinations between two sets of data. Colors and patterns indicate values that are in the same range.

Additional Chart Elements

Data Labels: Display values from the cells of the worksheet on the plot area of the chart.

Data Table: A table added next to the chart that shows the worksheet data the chart is illustrating.

Error Bars: Help you quickly identify standard deviations and error margins.

Trendline: Identifies the trend of the current data, not actual values. Can also identify forecasts for future data.

Contact Us: sales@customguide.com

Intermediate Formulas

Absolute References: Absolute references always refer to the same cell, even if the formula is moved. In the formula bar, add dollar signs ($) to the reference you want to remain absolute (for example, **$A$1** makes the column and row remain constant).

Name a Cell or Range: Select the cell(s), click the Name box in the Formula bar, type a name for the cell or range, and press **Enter**. Names can be used in formulas instead of cell addresses, for example: **=B4*Rate**.

Reference Other Worksheets: To reference another worksheet in a formula, add '!' after the sheet name in the formula, for example: =FebruarySales!B4.

Reference Other Workbooks: To reference another workbook in a formula, add brackets '[ ]' around the file name in the formula, for example: =[FebraurySales.xlsx]Sheet1!$B$4.

Order of Operations: When calculating a formula, Excel performs operations in the following order: Parentheses, Exponents, Multiplication and Division, and finally Addition and Subtraction (as they appear left to right). Use this mnemonic device to help you remember the order of operations:

Please	Parentheses
Excuse	Exponents
My	Multiplication
Dear	Division
Aunt	Addition
Sally	Subtraction

Concatenate Text: Use the CONCAT function **=CONCAT (text1,text2,…)** to join the text from multiple cells into a single cell. Use the arguments within the function to define the text you want to combine as well as any spaces or punctuation.

The Payment Function: Use the PMT function **=PMT(rate,nper,pv,…)** to calculate a loan amount. Use the arguments within the function to define the loan rate, number of periods, and present value and Excel calculates the payment amount.

Date Functions: Date functions are used to add a specific date to a cell. Some common date functions in Excel include:

Date	=DATE(year,month,day)
Today	=TODAY()
Now	=NOW()

Display Worksheet Formulas: Click the **Formulas** tab on the ribbon and then click the **Show Formulas** button. Click the **Show Formulas** button again to turn off the formula view.

Manage Data

Export Data: Click **File** on the menu bar and select **Save As**. Click the File Format menu arrow to select a file type, specify where you want to save the file and click **Save**.

Import Data: Click the **Data** tab on the ribbon. In the Get External Data group, select the source from which you want to import data. Locate the file with data to import and click **Open** or **Get Data**, depending on your selection.

Outline and Subtotal: Click the **Data** tab on the ribbon and click the **Subtotal** button. Use the dialog box to define which column you want to subtotal and the calculation you want to use. Click **OK**. **Note:** After the subtotals are applied, outline buttons appear to the left of the data.

Use Flash Fill: Click in the cell to the right of the cell(s) where you want to extract or combine data. Start typing the data in the column. When a pattern is recognized, Excel predicts the remaining values for the column. Press **Enter** to accept the Flash Fill values.

Create a Data Validation Rule: Select the cells you want to validate. Click the **Data** tab and click the **Data Validation** button. Click the **Allow** list arrow and select the data you want to allow. Set additional validation criteria options and click **OK**.

Tables

Format a Cell Range as a Table: Select the cells you want to apply table formatting to. Click the **Format as Table** button in the Styles group of the Home tab and select a table format from the gallery.

	A	B	C	D
1	Excursion	Jan	Feb	Mar
2	Beijing	6,010	7,010	6,520
3	Las Vegas	35,250	28,125	37,455
4	México DF	20,850	17,200	27,010
5	Paris	33,710	29,175	35,840
6	Tokyo	12,510	14,750	11,490
7	Total	108,330	96,260	118,315

Sort Data: Select a cell in the column you want to sort. Click the **Sort & Filter** button on the Home tab. Select a sort order or select **Custom Sort** to define specific sort criteria.

Filter Data: Click the filter arrow for the column you want to filter. Uncheck the boxes for any data you want to hide.

Add Table Rows or Columns: Select a cell in the row or column next to where you want to add blank cells. Click the **Insert** button list arrow on the Home tab. Select either **Insert Table Rows Above** or **Insert Table Columns to the Left**.

Table Style Options: Click any cell in the table. Click the **Table** tab on the ribbon and select an option in the Table Style Options group.

Tables

Remove Duplicate Values: Click any cell in the table and click the **Data** tab on the ribbon. Click the **Remove Duplicates** button. Select which columns you want to check for duplicates and click **OK**.

Insert a Slicer: With any cell in the table selected, click the **Table** tab on the ribbon. Click the **Insert Slicer** button. Select the columns you want to use as slicers and click **OK**.

Intermediate Formatting

Apply Conditional Formatting: Select the cells you want to format. On the **Home** tab, click the **Conditional Formatting** button. Select a conditional formatting category and then the rule you want to use. Specify the format to apply and click **OK**.

Apply Cell Styles: Select the cell(s) you want to format. On the Home tab, click the **Cell Styles** button and select a style from the menu. You can also select **New Cell Style** to define a custom style.

Create a Custom Cell Style: Apply the desired formatting to a cell in the worksheet. Click the **Cell Styles** button on the Home tab. Select **New Cell Style** in the menu. In the dialog box, the formatting from the selected cell is captured. Enter a name for the custom style and click **OK**.

Apply a Workbook Theme: Click the **Page Layout** tab on the ribbon. Click the **Themes** button and select a theme from the menu.

Collaborate with Excel

Add a Cell Comment: Click the cell where you want to add a comment. Click the **Review** tab on the ribbon and click the **New Comment** button. Type your comment and then click outside of it to save the text.

Share a Workbook: Click the **Share** button on the ribbon. Enter the email addresses of people you want to share the workbook with. Click the permissions button, select a permission level, and click **Apply**. Type a short message and click **Send**.

Protect a Worksheet: Before protecting a worksheet, you need to unlock any cells you want to remain editable after the protection is applied. Then, click the **Review** tab on the ribbon and click the **Protect Sheet** button. Select what you want to remain editable after the sheet is protected. If you wish, add a password to unprotect the sheet and click the **OK** button.

Add a Workbook Password: Click **File** on the menu bar and select **Save As**. Click the **Options** button in the dialog box and set a password to open and/or modify the workbook. Click **OK** and confirm the password. Click **OK**.

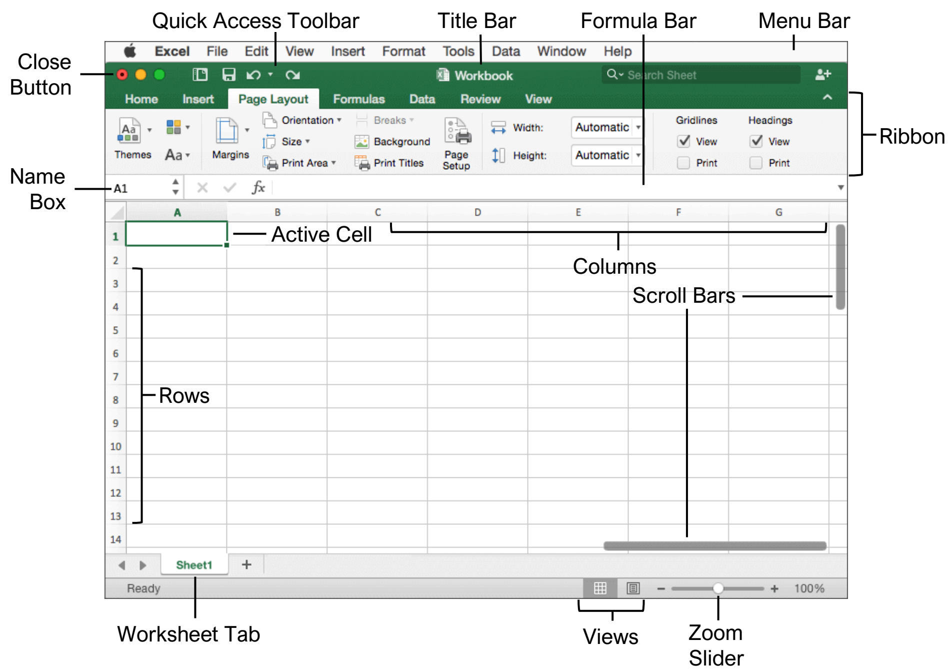
Microsoft®

Excel for Mac Basic

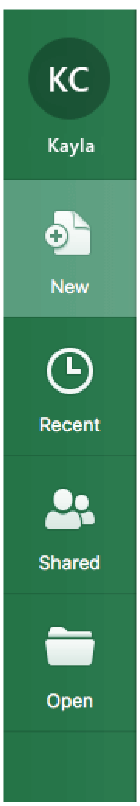
Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

The Excel for Mac Program Screen



Getting Started



Create a Workbook: Click **File** on the menu bar and select **New Workbook** or press **Cmd** + **N**.

Open a Workbook: Click **File** on the menu bar and select **Open** or press **Cmd** + **O**. Select a recent file or navigate to the location where the file is saved.

Preview and Print a Workbook: Click **File** on the menu bar and select **Print**.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Use Zoom: Click and drag the zoom slider to the left or right.

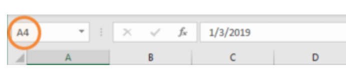
Select a Cell: Click a cell or use the keyboard arrow keys to select it.

Select a Cell Range: Click and drag to select a range of cells. Or, press and hold down the **Shift** key while using the arrow keys to move the selection to the last cell of the range.

Select an Entire Worksheet: Click the **Select All** button where the column and row headings meet.

Select Non-Adjacent Cells: Click the first cell or cell range, hold down the **Cmd** key, and select any non-adjacent cell or cell range.

Cell Address: Cells are referenced by an address made from their column letter and row number, such as cell A1, B2, etc.



Jump to a Cell: Click in the **Name Box**, type the cell address you want to go to, and press **Enter**.

Change Views: Click a **View** button in the status bar. Or, click the **View** tab and select a view.

Adjust AutoRecover Settings: Click **Excel** on the menu bar, select **Preferences**, and click **Save**. Make sure the AutoRecover feature is turned on and adjust the time interval. Close the dialog box.

Keyboard Shortcuts

General

Open a workbook	**Cmd** + **O**
Create a new workbook	**Cmd** + **N**
Save a workbook	**Cmd** + **S**
Print a workbook	**Cmd** + **P**
Close a workbook	**Cmd** + **W**
Help	**Fn** + **F1**
Spell check	**Fn** + **F7**
Calculate worksheets	**F9**
Fill down	**Cmd** + **D**
Create absolute reference	**Cmd** + **T**

Navigation

Move between cells	↑, ↓, ←, →
Right one cell	**Tab**
Left one cell	**Shift** + **Tab**
Down one cell	**Enter**
Up one cell	**Shift** + **Enter**
Down one screen	**Fn** + ↓
To first cell of active row	**Fn** + ←
Enable End mode	**Fn** + →
To cell A1	**Cmd** + ←
To last cell	**Cmd** + →

Editing

Cut	**Cmd** + **X**
Copy	**Cmd** + **C**
Paste	**Cmd** + **V**
Undo	**Cmd** + **Z**
Redo	**Cmd** + **Y**
Find	**Cmd** + **F**
Replace	**Ctrl** + **H**
Edit active cell	**Fn** + **F2**
Clear cell contents	**Delete**

Formatting

Bold	**Cmd** + **B**
Italics	**Cmd** + **I**
Underline	**Cmd** + **U**
Open Format Cells dialog box	**Cmd** + **1**
Select All	**Cmd** + **A**
Select entire row	**Shift** + **Space**
Select entire column	**Ctrl** + **Space**
Hide selected rows	**Cmd** + **9**
Hide selected columns	**Cmd** + **0**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Edit a Workbook

Edit a Cell's Contents: Select a cell and click in the Formula Bar, or double-click the cell. Edit the cell's contents and press **Enter**.

Clear a Cell's Contents: Select the cell(s) and press the **Delete** key. Or, click **Edit** on the menu bar and click **Clear**. Select **Contents**.

Cut or Copy Data: Select cell(s) and click the **Cut** or **Copy** button on the Home tab.

Paste Data: Select the cell where you want to paste the data and click the **Paste** button on the Home tab.

Paste Special: Select the destination cell(s), click the **Paste** button list arrow on the Home tab, and select **Paste Special**. Select an option and click **OK**.

Transpose Data: Select a cell range and click **Copy**. Click the cell where you want to paste the data, click the **Paste** button list arrow, and select **Transpose**.

Move or Copy Cells Using Drag and Drop: Select the cell(s) you want to move or copy, position the pointer over any border of the selected cell(s), then drag to the destination cells. To copy, hold down the **Option** key before starting to drag.

Find and Replace Text: Click the **Find & Select** button, select **Replace**. Type the text you want to find in the Find what box. Type the replacement text in the Replace with box. Click the **Replace All** or **Replace** button.

Insert a Column or Row: Right-click to the right of the column or below the row you want to insert. Select **Insert** in the menu, or click the **Insert** button on the Home tab.

Delete a Column or Row: Select the row or column heading(s) you want to remove. Right-click and select **Delete** from the contextual menu, or click the **Delete** button on the Home tab.

Hide Rows or Columns: Select the rows or columns you want to hide, click the **Format** button on the Home tab, select **Hide & Unhide**, and select **Hide Rows** or **Hide Columns**.

Basic Formatting

Format Text: Use the commands in the Font group on the Home tab, or click **Format** on the menu bar and select **Cells**. Click the **Font** tab to see the font dialog box.

Format Values: Use the commands in the Number group on the Home tab, or click the Number Format list arrow and select **More Number Formats** to open the Format Cells dialog box.

Change Cell Alignment: Select the cell(s) you want to align and click a vertical alignment , , button or a horizontal alignment , , button on the Home tab.

Basic Formatting

Wrap Text in a Cell: Select the cell(s) that contain text you want to wrap and click the **Wrap Text** button on the Home tab.

Merge Cells: Select the cells you want to merge. Click the **Merge & Center** button list arrow on the Home tab and select a merge option.

Cell Borders and Shading: Select the cell(s) you want to format. Click the **Borders** button and/or the **Fill Color** button list arrow and select an option to apply to the selected cell.

Copy Formatting with the Format Painter: Select the cell(s) with the formatting you want to copy. Click the **Format** button in the Clipboard group on the Home tab. Then, select the cell(s) you want to apply the copied formatting to.

Adjust Column Width or Row Height: Click and drag the right border of the column header or the bottom border of the row header. Double-click the border to AutoFit the column or row according to its contents.

Basic Formulas

Enter a Formula: Select the cell where you want to insert the formula. Type **=** and enter the formula using values, cell references, operators, and functions. Press **Enter**.

Insert a Function: Select the cell where you want to enter the function and click the **Insert Function** f_x button next to the formula bar.

Reference a Cell in a Formula: Type the cell reference (for example, B5) in the formula or click the cell you want to reference.

SUM Function: Click the cell where you want to insert the total and click the **Sum** Σ button in the Editing group on the Home tab. Enter the cells you want to total and then press the **Enter** key.

MIN and MAX Functions: Click the cell where you want to place a minimum or maximum value for a given range. Click the **Sum** Σ button list arrow on the Home tab and select either **Min** or **Max**. Enter the cell range you want to reference, and press **Enter**.

COUNT Function: Click the cell where you want to place a count of the number of cells in a range that contain numbers. Click the **Sum** Σ button list arrow on the Home tab and select **Count Numbers**. Enter the cell range you want to reference, and press **Enter**.

Complete a Series Using AutoFill: Select the cells that define the pattern, i.e. a series of months or years. Click and drag the fill handle to adjacent blank cells to complete the series.

Insert Objects

Insert an Image: Click the **Insert** tab on the ribbon, click the **Pictures** button and select either the **Photo Browser**, **Picture from File**, or **Online Pictures** button in the Illustrations group, select the image you want to insert, and click **Insert**.

Insert a Shape: Click the **Insert** tab on the ribbon, click the **Shapes** button in the Illustrations group, and select the shape you wish to insert.

Hyperlink Text or Images: Select the text or graphic you want to use as a hyperlink. Click the **Insert** tab, then click the **Link** button. Choose a type of hyperlink in the Insert Hyperlink dialog box. Fill in the necessary informational fields in the text boxes, then click **OK**.

Modify Object Properties: Right-click an object. Select **Format Picture** in the menu, and from the Format Picture pane, click **Size & Properties**.

Add Alternative Text: Right-click an object and select **Edit Alt Text** in the menu. Enter alternative text for the object.

View and Manage Worksheets

Insert a New Worksheet: Click the **Insert Worksheet** + button next to the sheet tabs below the active sheet.

Delete a Worksheet: Right-click the sheet tab and select **Delete** from the menu.

Hide a Worksheet: Right-click the sheet tab and select **Hide** from the menu.

Rename a Worksheet: Double-click the sheet tab, enter a new name for the worksheet, and press **Enter**.

Change a Worksheet's Tab Color: Right-click the sheet tab, select **Tab Color**, and choose the color you want to apply.

Move or Copy a Worksheet: Click and drag a worksheet tab left or right to move it to a new location in the workbook. Hold down the **Option** key while clicking and dragging to copy the worksheet.

Freeze Panes: Activate the cell where you want to freeze the window, click the **View** tab on the ribbon and click the **Freeze Panes** button in the Window group.

Select a Print Area: Select the cell range you want to print, click the **Page Layout** tab on the ribbon, click the **Print Area** button, and select **Set Print Area**.

Adjust Page Margins, Orientation, Size, and Breaks: Click the **Page Layout** tab on the ribbon and use the commands in the Page Setup group, or click the **Page Setup** button in the Page Setup group to open the Page Setup dialog box.

Contact Us: sales@customguide.com

Cyber Security
Quick Reference Guide

CustomGuide

your logo

Free Cheat Sheets
Visit ref.customguide.com

Security Risks

Businesses worldwide are at risk for security breaches. While large, well-known companies seem like a likely target, small and medium-sized organizations and individuals are also at risk. There are many ways data can be compromised, including viruses, phishing scams, hardware and software vulnerabilities, and network security holes.

Did you know?

11% of U.S. adults have had personal information stolen

1 in 5 people have had an email or social media account hacked

98% of software applications are vulnerable

Only **40%** of adults know how to protect themselves online

Confidential Information

When dealing with security, confidentiality means private information is never viewed by unauthorized parties. Confidential information must only be accessible to those authorized to view the sensitive data. Confidential information includes:

Personal Information

- Social Security Number
- Home Address
- Salary History
- Performance Issues
- Credit Card Numbers

Corporate Information

- Processes
- Customer Lists
- Research and Development
- Business Strategies
- Objectives and Projections

Firewalls

A firewall acts like a security guard and prevents unauthorized people or programs from accessing a network or computer from the Internet. There are hardware-based firewalls, which create a protective barrier between internal networks and the outside world, and software firewalls, which are often part of your operating system.

Passwords

The first line of defense in maintaining system security is using complex passwords. Use passwords that are at least 8 characters long and include a combination of numbers, upper and lowercase letters, and special characters. Hackers have tools that can break easy passwords in just a few minutes.

How Long Does it Take to Crack a Password?

There are 2 kinds of passwords:

Simple

Lowercase letters only

Complex

Upper & lowercase letters, numbers, & special characters

Complex passwords are
EXPONENTIALLY
More difficult to crack

Use them!

Here's how long it takes to crack a password when it's **simple** vs. **complex**

Characters	Password	Time to crack
8	ghiouhel	4 hours, 7 min
	ghiouH3l	6 months
9	houtheouh	4 days, 11 hours
	Houtheo!2	1060 years
10	ghotuhilhg	112 days
	gh34uhilh!	1500 years
11	wopthiendhf	8 years, 3 months
	w3pthi7ndh!	232,800 years
12	whithgildnzq	210 years
	@hi3hg5ldnq!	15,368,300 years

Source: mywot.com

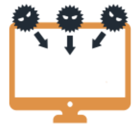
Malware

Malware is short for "malicious software." It is written to infect the host computer. Common types of malware include:

VIRUS

Replicating computer program that infects computers

ADWARE



Hijacks your computer or browser and displays annoying advertisements

SPYWARE

Secretly tracks your internet activities and information

TROJAN

Malicious program that tries to trick you into running it

Online Browsing

Browsers communicate to websites with a protocol called HTTP, which stands for Hyper Text Transfer Protocol. HTTPS is the secure version of HTTP. Websites that use HTTPS encrypt all communication between your browser and the site.

Secure sites have an indicator, like a padlock, in the address bar to show the site is secure. You should always ensure security when logging in or transferring confidential information.

Sites without HTTPS are not secure and should never be used when dealing with personal data. If you are simply reading an article or checking the weather, HTTP is acceptable.

Network Security

- Use Wi-Fi password security and change the default password
- Set permissions for shared files
- Only connect to known, secure public Wi-Fi and ensure HTTPS-enabled sites are used for sensitive data
- Keep your operating system updated
- Perform regular security checks
- Browse smart!

Email and Phishing

A phishing email tries to trick consumers into providing confidential data to steal money or information. These emails appear to be from a credible source, such as a bank, government entity, or service provider. Here are some things to look for in a phishing email:

Grammatical Errors

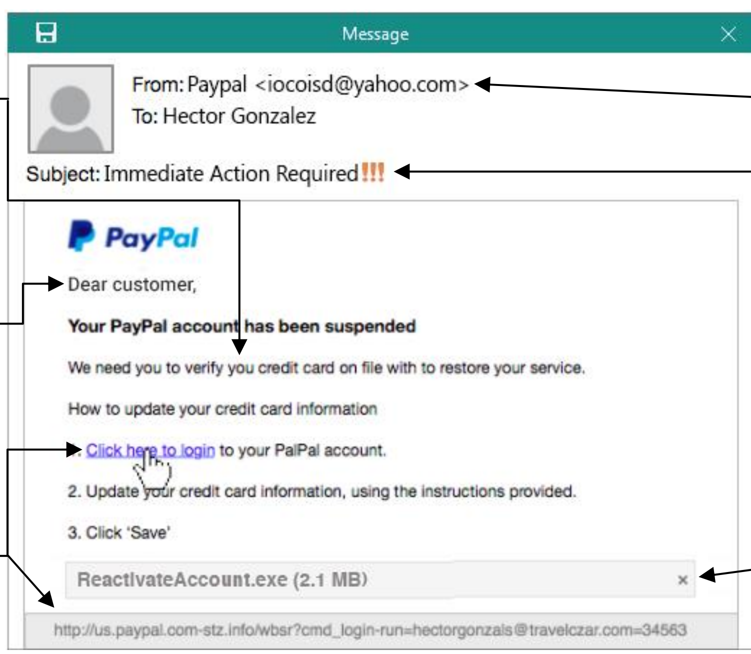
Spelling mistakes and poor grammar

Generic References

Not being addressed by your name

Hover Link

Always check where links lead before clicking



Sender's Address

The address should be correlated with the sender

Immediate Action

Beware of anything that calls for urgent action

Attachments

Never open an attachment you aren't expecting

Microsoft®

Word 2013 Advanced

Quick Reference Guide

CustomGuide

your logo

Free Cheat Sheets

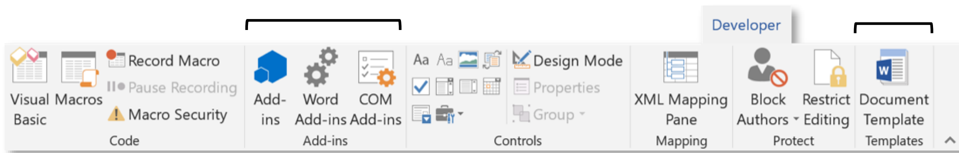
Visit ref.customguide.com

The Developer Tab

The **Add-ins** group configures add-ins to extend the functionality of Word.

The **Mapping** group lets you link content controls to external XML

The **Templates** group lets you switch document templates and other add-ins.



The **Code** group contains commands to record and edit macros, as well as control the level of macro security in Word.

The **Controls** group lets you add form controls to a document. Click **Design Mode**, then click a form control button to insert it. Click **Design Mode** again when you're finished.

The **Protect** group lets you restrict the ability to make changes to a document (or certain parts of a document).

Collaborate in Word

Share a Document: Make sure the document is shared to an online-accessible location, such as OneDrive or SharePoint. Click the **Share** button above the ribbon and enter someone's email address in the Invite People field (or, click the **Address Book** button and select someone in the Address Book dialog box). Choose their permission level by clicking the permissions list arrow and selecting a level. Enter a short message (optional), then click the **Share** button.

Highlight Text: Select the text you want to highlight, click the **Text Highlight Color** button list arrow on the Home tab, and select a highlight color.

Insert a Comment: Select the text you want to add a comment to, click the **Review** tab, click the **New Comment** button, and add your comment. Click outside of the comment field when you're finished.

Delete a Comment: Click a comment to select it, click the **Review** tab, and click the **Delete** button.

Reply to a Comment: Click a comment to select it, and click the **Reply** button in the comment. Type your response, and click outside the comment field when you're finished.

Show / Hide Comments: Click the **Review** tab and click the **Show Comments** button to toggle it on or off.

Toggle Track Changes: Click the **Review** tab and click the **Track Changes** button in the Tracking group.

View Markup: Click the **Review** tab, click the **Show Markup** button in the Tracking group, and select a type of markup to show or hide.

Review Revisions: Click the **Review** tab, then click the **Next Change** and **Previous Change** buttons in the Changes group. Click the **Accept** button to accept a change, or the **Reject** button to reject it.

Compare Two Documents: Click the **Review** tab, click the **Compare** button, and select **Compare**. Select the original document from the **Original Document** list arrow (or click the **Browse** icon and select it), then select the revised document from the **Revised Document** list arrow (or click the **Browse** icon and select it). Click the **More** button and select what types of differences to look for (optional). Click **OK**.

Add Line Numbers: Click the **Layout** tab, click the **Line Numbers** button, and select an option.

Forms

Add Forms to a Document

Enable the Developer Tab: Before adding forms, you must enable the Developer tab on the ribbon. Click the **File** tab, click **Options**, click **Customize Ribbon**, check the **Developer** check box, and click **OK**.

Add a Form Control: Place the text cursor where you want the form control, click the **Developer** tab, click the **Design Mode** button in the Controls group, and click the button for the form control you want to add. Click the **Design Mode** button again when you're finished adding form controls.

Finalize a Form: Click the **Developer** tab and click the **Restrict Editing** button to open the Restrict Editing pane. Check the **Editing Restrictions** check box, click the **Editing Restrictions** list arrow, and select **Filling in forms**. Click the **Yes, Start Enforcing Protections** button, enter a password (optional), and click **OK**.

Types of Form Controls

Different types of form controls allow a user to enter different types of data into a form.

Rich Text allows users to enter text that can be formatted with different fonts and font styles.

Plain Text allows users to enter text, but not to format that text.

Picture allows the user to add a picture from their computer or an online location to the form.

Check Box places a form with a check box that the user can check or uncheck.

Combo Box adds a list with a text box, where users can choose an option or enter their own.

Drop-Down List adds a list with several options that a user can choose from.

Date Picker lets the user choose a date from a calendar.

Repeating Section contains other types of content controls and repeats as many times as you need it.

Legacy Types of content controls were used in older versions of Word. You can still use them in a Word 97-2003 document.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Collaborate in Word

Customize Line Numbers: Click the **Layout** tab, click the **Line Numbers** button, and select **Line Numbering Options** to open the Page Setup dialog box. Click the **Line Numbers** button. Customize where the line numbers start, how far they appear from the text, and how often they appear. Click **OK**, then click **OK** again.

Protect a Document: Click the **File** tab, click the **Protect Document** button, and select **Mark as Final**. Click **OK** in both the confirmation dialog boxes.

Password Protect a Document: Click the **File** tab, click the **Protect Document** button, and select **Encrypt with a Password**. Enter a password and click **OK**, then enter that password again to confirm it, and click **OK** again.

Remove a Password: Click the **File** tab, click the **Protect Document** button, select **Encrypt with a Password**, remove the password from the text field and click **OK**.

Inspect a Document: Click the **File** tab, click the **Check for Issues** button, and select **Inspect a Document**. Select the types of content you want to check for, then click **Inspect**. After inspection, click **Remove All** for any content that you want to remove, then click **Close**.

Macros

Enable the Developer Tab: Before adding macros, you must enable the Developer tab on the ribbon. Click the **File** tab, click **Options**, click **Customize Ribbon**, check the **Developer** check box, and click **OK**.

Record a Macro: Click the **Developer** tab, click the **Record Macro** button, and give the macro a name. Click either **Button** or **Keyboard** to assign a button or keyboard shortcut to the new macro (optional). Click **OK**. Perform the tasks you want to record, then click the **Stop Recording** button.

Run a Macro: Place the text cursor where you want the macro to run. Click the **Developer** tab, click the **Macros** button, select a macro, and click **Run**.

Edit a Macro: Click the **Developer** tab, click the **Macros** button, select a macro, and click **Edit**. Modify the macro using the Visual Basic editor, then close Visual Basic.

Advanced Documents

Customize Word's Options: Click the **File** tab and click **Options**. Select a category on the left, and then customize options on the right. Click **OK** when you're finished.

Customize the Ribbon: Click the **File** tab, click **Options**, then click the **Customize Ribbon** tab. Select and expand a ribbon tab, then select and expand a group. Select a command from the left column, then click **Add** to add it, or select a command from the right column and click **Remove** to remove it from the ribbon.

Advanced Documents

Change Word's Default Font: Start in a new, blank document. Open the Font dialog box by clicking the **Font** group's dialog box launcher. Choose the new default font or font style, then click the **Set as Default** button. Select **All documents based on the Normal template**, then click **OK**.

Create a Building Block: Select the text or objects you want to use as a building block. Then, click the **Insert** tab, click the **Explore Quick Parts** button, and select **Save Selection to Quick Parts Gallery**.

Insert a Building Block: Place the text cursor where you want a building block placed. Click the **Insert** tab, click the **Explore Quick Parts** button, and either select a building block from the menu, or select **Building Blocks Organizer**. Select a building block, and then click **Insert**.

Find and Replace Using Wildcards: Click the **Find** button list arrow, select **Advanced Find**, and expand the dialog box by clicking the **More** button. Check the **Use Wildcards** check box, then while entering a search phrase in the **Find What** field, click the **Special** button and select a wildcard.

Wildcard Examples

?	any single character
*****	any number of characters
[ ]	one of these characters
[-]	one of these characters in a range
[!]	none of the specified characters
<	beginning of a word
>	end of a word
@	one or more instances of a character
{n}	exactly *n* instances of a character
{n, }	at least *n* instances of a character
{n, m}	between *n* and *m* instances of a character

Find and Replace Special Characters: Click the **Find** button list arrow, select **Advanced Find**, and expand the dialog box by clicking the **More** button. While entering a search phrase in the **Find What** field, click the **Special** button and select a special character.

Edit a Document in Multiple Languages: Select the text in another language, click the **Review** tab, click the **Language** button, and select **Set Proofing Language**. Select a language and click **OK**.

Add Additional Editing Languages: Click the **Review** tab, click the **Language** button, and select **Language Preferences**. Click the **Add additional editing languages** list arrow and select a language. Click **Add**, then click **OK**.

Insert a Date and Time Field: Click the **Insert** tab, click the **Date and Time** button, select a date format, check the **Update Automatically** check box, and click **OK**.

Advanced Documents

Insert a Field: Click the **Insert** tab, click the **Explore Quick Parts** button, and select **Field**. Select a field category, then a field. Click **OK**.

View Field Codes: Right-click a field and select **Toggle Field Codes**.

Mail Merge

1 – Start the Mail Merge Wizard: Click the **Mailings** tab, click the **Start Mail Merge** button, and select **Step by Step Mail Merge Wizard**.

2 – Choose a Document Type: In the Mail Merge pane, select a document type, then click **Next**.

3 – Select a Document: In the Mail Merge pane, select whether to use the current document, start a new document from a template, or use another existing file, then click **Next**.

4 – Select Recipients: In the Mail Merge pane, select whether to use an existing list, select contacts from Outlook, or type a new list.

If using an existing list, click the **Browse** button, select a file with a list of recipients, and click **Open**. Select which contacts in the list you want to use by checking or unchecking them, then click **OK**.

If selecting contacts from Outlook, click the **Choose Contacts Folder** button, select a contacts folder to import, and click **OK**. Select which contacts in the list you want to use by checking or unchecking them, then click **OK**.

If typing a new list, click the **Create** button, then fill out the fields for each address. Click **OK** when finished.

Click **Next**.

5 – Write Your Letter: Place the text cursor where you want an element, then click the button for the element you want to add (such as an **Address Block** or a **Greeting Line**), choose an element's options, then click **OK**. Or, click the **More Items** button, select a specific field to insert, click **Insert**, and then click **Close**. When you've added all the fields you need, click **Next**.

6 – Preview Your Letter: In the Mail Merge pane, click the **<<** and **>>** buttons to preview the placeholders filled in with a recipient's data. When you're finished previewing, click **Next**.

7 – Complete the Merge: In the Mail Merge pane, click **Print** to print the finished mail merged documents, or click **Edit individual letters** to create a new document for all or some of the records.

Close the Mail Merge pane when you're finished with the merge.

Contact Us: sales@customguide.com

Microsoft®

Word 2013 Intermediate

Quick Reference Guide

CustomGuide

your logo

Free Cheat Sheets

Visit ref.customguide.com

Elements of a Table

Table Selector

Column

Header Row

Selected Cell

Row

Resize Handle

Location	Excursion Length	Standard	Loyalty
Las Vegas	3-day	$1,000	$850
Paris	3-day	$2,000	$1,600
Beijing	3-day	$4,000	$3,500
Las Vegas	5-day	$1,700	$1,400
Paris	5-day	$3,400	$3,000
Beijing	5-day	$5,000	$4,500
Las Vegas	7-day	$2,500	$2,000
Paris	7-day	$5,000	$4,500
Beijing	7-day	$7,000	$6,500

Tables

Insert a Table: Click the **Insert** tab, click the **Table** button, and select the number of rows and columns that you want.

Add a Row or Column: Click in a cell next to where you want to add a row or column. Click the Table Tools **Layout** tab, then click **Insert Above**, **Insert Below**, **Insert Left**, or **Insert Right**, depending on where you want the row or column to be added.

Delete a Row or Column: Click in a cell in the row or column you want to delete, click the Table Tools **Layout** tab, click the **Delete** button, then select **Delete Row** or **Delete Column**.

Convert a Table to Text: Select the table, click the Table Tools **Layout** tab, click the **Convert to Text** button, choose how to separate the cells, and click **OK**.

Manually Resize a Table Row or Column: Click and drag the cell border.

Automatically Resize a Table Row or Column: Click within the table, click the Table Tools **Layout** tab, click the **AutoFit** button, and select an option.

Merge Cells: Select multiple cells that share a border, click the Table Tools **Layout** tab, and click the **Merge Cells** button.

Split Cells: Select a cell, click the Table Tools **Layout** tab, click the **Split Cells** button, enter the number of rows and columns, and click **OK**.

Distribute Rows and Columns: Click within the table, click the Table Tools **Layout** tab, click the **Distribute Rows** button to distribute the rows evenly, or click the **Distribute Columns** button to distribute the columns evenly.

Apply a Table Style: Click inside the table, click the Table Tools **Design** tab, and select a style from the Table Styles gallery.

Apply Text Alignment: Select the cell(s), click the Table Tools **Layout** tab, and select an option from the Alignment group.

Add a Border to a Table: Select a table, click the Table Tools **Design** tab, click the **Border Styles** button list arrow, select a border style, click the **Borders** button list arrow, and select a border option.

Add Cell Shading: Select the cell(s), click the **Shading** button list arrow, and select a color.

Split a Table: Click in the row where the second table will start, click the Table Tools **Layout** tab, and click the **Split Table** button.

Navigating a Table

Navigating a Table

Next cell........................**Tab**

Previous cell..................**Shift** + **Tab**

Next row ....↓

Previous row ....↑

First cell in a row.............**Alt** + **Home**

Last cell in a row.............**Alt** + **End**

First cell in a column ....**Alt** + **Page Up**

Last cell in a column ....**Alt** + **Page Down**

Selecting Cells

Select a Single Cell: Click in the lower-left corner of a cell, when the cursor changes to an arrow; or triple-click a cell; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Cell**.

Select a Row: Click to the left of the table row (just outside the table itself); or click the Table Tools **Layout** tab, click **Select**, and choose **Select Row**.

Select a Column: Click above a column, when the cursor changes to an arrow ⬇; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Column**.

Select an Entire Table: Click the table selector button in the upper-left corner of a table; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Table**.

Table Style Options

Configure Table Style Options: With the text cursor within the table, click the Table Tools **Design** tab, then check the check boxes in the Table Style Options group to toggle certain table elements.

The appearance of these elements will vary, based on the current Table Style.

- Header Row: Applies special formatting to the first row of a table.
- Total Row: Applies special formatting to the final row of a table.
- Banded Rows: Alternates the shading for the body rows between two different colors.
- First Column: Applies special formatting to the first column in a table.
- Last Column: Applies a special formatting to the last column in a table.
- Banded Columns: Alternates the shading for body columns between two different colors.

Contact Us: sales@customguide.com

Graphics

Insert a Picture: Place the text cursor where you want to insert a picture, click the **Insert** tab, click the **Pictures** button, select a picture, and click **Insert**.

Remove a Picture's Background: Select a picture, click the **Format** tab, and click the **Remove Background** button. Areas that will be removed are highlighted. Click the **Mark Areas to Keep** button to draw over any area accidentally highlighted, and click the **Mark Areas to Remove** button to draw over any area that needs to be removed. Click the **Keep Changes** button.

Insert a Text Box: Click the **Insert** tab, click the **Text Box** button, and select a style of text box.

Insert a Shape: Click the **Insert** tab, click the **Shapes** button, select a shape, then click to place a shape (or click and drag to place the shape at a certain size).

Format a Shape: Select a shape, then click the **Format** tab and use the options in the Shape Styles group to customize the appearance of the shape.

- Click the **Shape Fill** button and select a color to change the shape's fill color.
- Click the **Shape Outline** button and select a color and weight for the shape's outline, as well as dash and arrow styles.
- Click the **Shape Effects** button and select a shape effect, such as shadow, glow, or bevel.
- Select a shape style preset from the Shape Styles gallery. Click the gallery's **More** button to expand the gallery to see more presets.

Insert WordArt: Click the **Insert** tab, click the **Insert WordArt** button, and select a style of WordArt.

Insert a Chart: Click the **Insert** tab, click the **Add a Chart** button, select a chart category on the left, select a chart type, and click **OK**. Edit the chart data in the window that opens.

Resize an Object: Select an object, then click and drag the sizing handles on the sides and corners until it's the size you want.

Move an Object: Select an object, then click and drag it to a new location.

Rotate an Object: Select an object, then click and drag the rotate handle to the left or right. Or, select an object, click the **Format** tab, click the **Rotate Objects** button, and select a rotation option.

Flip an Object: Select an object, click the **Format** tab, click the **Rotate Objects** button and select **Flip Vertical** or **Flip Horizontal**.

Delete an Object: Select an object, then press the **Delete** key.

Graphics

Position an Object on the Page: Select an object, click the **Format** tab, click the **Position** button, and select a position.

Wrap Text Around an Object: Select an object, click the **Format** tab, click the **Wrap Text** button, and select a text wrapping style.

Move an Object Up or Down One Layer: Select an object, click the **Format** tab, and click the **Bring Forward** button to move the object forward one layer, or click the **Send Backward** button to send the object backward one layer.

Move an Object to the Front or Back: Select an object and click the **Format** tab. Click the **Bring Forward** button list arrow and select **Bring to Front** to bring the object to the front-most layer. Or, click the **Send Backward** button list arrow and select **Send to Back** to move the object to the back-most layer.

Group Objects: Select multiple objects, click the **Format** tab, click the **Group Objects** button, and select **Group**.

Ungroup Objects: Select a group, click the **Format** tab, click the **Group Objects** button, and select **Ungroup**.

Align Objects: Select multiple objects, click the **Format** tab, click the **Align** button, and select an alignment option.

Distribute Objects: Select multiple objects, click the **Format** tab, click the **Align** button, and select **Distribute Horizontally** or **Distribute Vertically**.

Styles, Themes, and Templates

Apply a Style: Place the text cursor in a paragraph and select a style from the Styles gallery on the Home tab. Click the gallery's **More** button to see additional styles.

Display the Styles Pane: Click the dialog box launcher in the **Styles** group on the Home tab.

Create a Style: Select some text that's formatted the way you want the style to appear, then click the Styles gallery's **More** button and select **Create a Style** (or, click the **New Style** button in the Styles pane). Give the new style a name and click **OK**.

Apply a Theme: Click the **Design** tab, click the **Themes** button, and select a theme.

Use a Document Template: Click the **File** tab, click **New**, search for a template in the search field or select a recommended template, select a template, and click **Create**.

Create a Document Template: Click the **File** tab, click **Save As**, select a location, give the file a name, click the **Save As Type** list arrow, select **Word Template**, and click **Save**.

Long Documents

Use Outline View: Click the **View** tab and click the **Outline** button.

Demote Items: While in Outline view, click the item you want to demote and click the **Demote** button (or the **Demote to Body Text** button).

Promote Items: While in Outline view, click the item you want to promote and click the **Promote** button (or the **Promote to Heading 1** button).

Navigate Long Documents: Click the **View** tab, check the **Navigation Pane** check box, and use the Pages tab to browse by page, or use the Headings tab to navigate by headings.

Add a Bookmark: Select the text you want to bookmark, click the **Insert** tab, click the **Bookmark** button in the Links group, give the bookmark a name, and click **Add**.

Insert a Section Break: Place the cursor where you want the section to start, click the **Layout** tab, click the **Breaks** button, and select a type of section break.

Insert a Hyperlink: Select the text you want to use as a link, click the **Insert** tab, click the **Hyperlink** button, choose what type of link to create, choose where to link to, and click **OK**.

Create Footnotes and Endnotes: Click the text that you want the footnote / endnote to refer to, click the **References** tab, click the **Insert Footnote** (or **Insert Endnote**) button, and type your footnote / endnote.

Insert a Table of Contents: Place the text cursor where you want to insert a table of contents, click the **References** tab, click the **Table of Contents** button, and select a table of contents style.

Insert an Index Entry: Select the text you want the index entry to refer to, click the **References** tab, and click the **Mark Entry** button. Set any index entry options you want, then click **Mark** (or, click **Mark All** to mark all instances of the text). Click **Close**.

Insert an Index: Place the text cursor where you want to insert an index, click the **References** tab, click the **Insert Index** button. Set up the index's options, then click **OK**.

Create a Citation: Click the **References** tab, click the **Insert Citation** list arrow, and select **Add New Source**. Enter the source's information, then click **OK**.

Insert a Citation: Click the **References** tab, click the **Insert Citation** button, and select a citation.

Insert a Bibliography: Click the **References** tab, click the **Bibliography** button, then select a bibliography style.

Contact Us: sales@customguide.com

Microsoft®

Word 2013 Basic

Quick Reference Guide

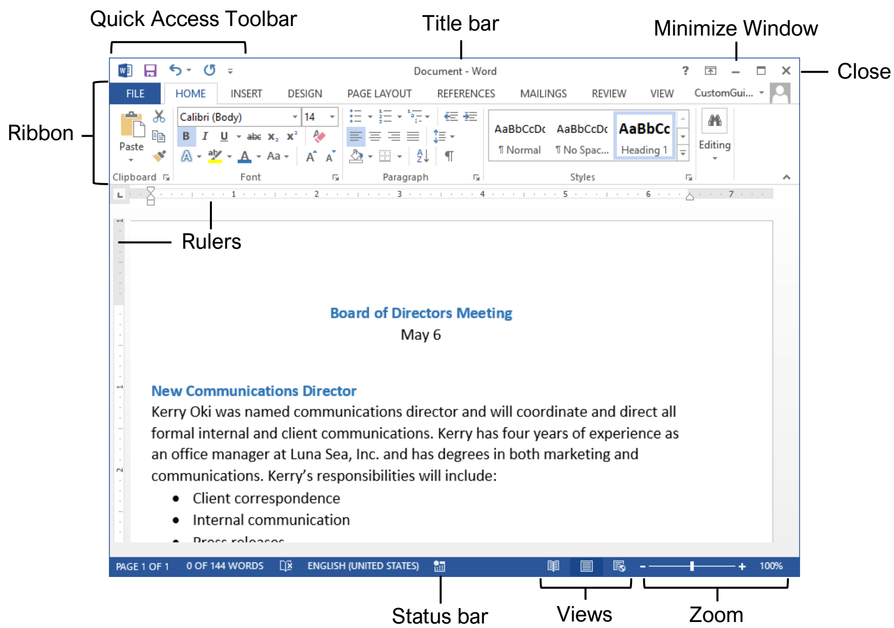
CustomGuide

your logo

Free Cheat Sheets

Visit ref.customguide.com

The Word 2013 Program Screen



The Fundamentals

Create a Blank Document: Click the **File** tab, select **New**, and click **Blank document**; or, press **Ctrl** + **N**.

Open a Document: Click the **File** tab and select **Open**, or press **Ctrl** + **O**. Select a location with a file you want, then select a file and click **Open**.

Save a Document: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Recover an Unsaved Document: Restart Word after a crash. If an unsaved document can be recovered, it will appear in the Document Recovery pane. Or, click the **File** tab, click **Recover unsaved documents** to open the pane, and select a document from the pane.

Change Document Views: Click the **View** tab and select a view, or click one of the **View** buttons at the bottom of the window.

Reading View

Print Layout View

Web Layout View

Print: Click the **File** tab, select **Print**, specify print settings, and click **Print**.

Select and Edit Text

Select a Block of Text: Click and drag across the text you want to select; or, click at the beginning of a text block, hold down the **Shift** key, and click at the end of a text block.

Select a Sentence: Press the **Ctrl** key and click in a sentence.

Select a Line of Text: Click in the left margin for the line you want to select.

Select a Paragraph: Double-click in the left margin for the paragraph you want to select.

Select Everything: Click the **Select** button on the **Home** tab and click **Select All**, or press **Ctrl** + **A**.

Edit Text: Select the word you want to replace and type a new word.

Cut, Copy and Paste: Select the text you want to cut or copy and click the **Cut** or **Copy** button on the Home tab. Click where you want to paste the text, and click the **Paste** button.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Keyboard Shortcuts

General

Open a document	**Ctrl** + **O**
Create a new document	**Ctrl** + **N**
Save a document	**Ctrl** + **S**
Print a document	**Ctrl** + **P**
Close a document	**Ctrl** + **W**

Navigation

Move the text cursor	↑, ↓, ←, →
Up one screen	**Page Up**
Down one screen	**Page Down**
Beginning of a line	**Home**
End of a line	**End**
Beginning of a document	**Ctrl** + **Home**
End of a document	**Ctrl** + **End**
Open Go To dialog box	**Ctrl** + **G**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Select All	**Ctrl** + **A**
Check Spelling and Grammar	**F7**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Align Left	**Ctrl** + **L**
Align Center	**Ctrl** + **E**
Align Right	**Ctrl** + **R**
Justify	**Ctrl** + **J**
Indent a paragraph	**Ctrl** + **M**
Remove an indent	**Ctrl** + **Shift** + **M**
Increase font size	**Ctrl** + **Shift** + **>**
Decrease font size	**Ctrl** + **Shift** + **<**
Increase font size 1pt	**Ctrl** + **]**
Decrease font size 1pt	**Ctrl** + **[**
Copy formatting	**Ctrl** + **Shift** + **C**
Paste formatting	**Ctrl** + **Shift** + **V**
Show/Hide Formatting Marks	**Ctrl** + **Shift** + *****

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Select and Edit Text

Spelling and Grammar Errors: Potential spelling errors are underlined in red and potential grammar errors are underlined in blue.

Correct a Spelling or Grammar Error: Manually make the correction, or right-click the error and select a suggestion you want to use.

Ignore a Spelling or Grammar Error: Right-click the error and select **Ignore All**.

Check Spelling and Grammar: Click the **Review** tab and click the **Spelling & Grammar** button.

Find the Word Count: Click the word count in the lower-left corner; or click the **Review** tab and click the **Word Count** button.

Use the Thesaurus: Click the word you want to replace, click the **Thesaurus** button on the **Review** tab, click a word's list arrow, and select **Insert**; or, right-click the word you want to replace, select **Synonyms**, and select a word from the menu.

Find Text: Click the **Find** button on the Home tab, type the text you want to find in the **Search** box, and click an item to jump to it in the document.

Replace Text: Click the **Replace** button on the Home tab. Enter the word you want to find in the **Find What** field, then enter the text that will replace it in the **Replace With** field. Click **Replace** or **Replace All**. Click **OK** when finished.

Insert a Symbol: Click where you want to insert the symbol. Click the **Insert** tab, click the **Symbol** Ω button, and either select a symbol from the menu or select **More Symbols**. Select a symbol, and click **Insert**.

Insert Text from Another File: Place the cursor where you want to insert the text. Click the **Insert** tab, click the **Object** button list arrow, and select **Text from File**. Select the file containing the text you want to insert, then click the **Insert** button.

Format Text and Paragraphs

Change the Font: Select the text you want to change, click the **Font** list arrow, and select a new font.

Change the Font Size: Select the text you want to change, click the **Font Size** list arrow, and select a new font size.

Change the Font Color: Select the text you want to change, click the **Font Color** button list arrow, and select a new color.

Apply Bold, Italic, or an Underline: Click the **Bold** **B**, **Italic** *I* or **Underline** U button in the Font group on the Home tab.

Clear Formatting: Select the text you want to clear formatting from, then click the **Clear All Formatting** button.

Format Text and Paragraphs

Create a Bulleted List: Select the text you want to make into a bulleted list, and click the **Bullets** button.

Change a Bulleted List Style: Select a bulleted list, click the **Bullets** button list arrow, and select a bullet symbol.

Create a Numbered List: Select the text you want to make into a numbered list, and click the **Numbering** button.

Change a Numbered List Style: Select a numbered list, click the **Numbering** button list arrow, and select a numbered list style.

Align a Paragraph: Click anywhere in the paragraph you want to align and click an alignment option in the Paragraph group on the Home tab.

Left aligned

Center aligned

Right aligned

Add a Border: Click in the paragraph where you want to add a border, click the **Borders** button list arrow, and select a border.

Add Shading: Click in the paragraph where you want to add shading, click the **Shading** button list arrow, and select a shading color.

Change Line Spacing: Select the paragraph you want to adjust, click the **Line Spacing** button, and select a spacing option.

Change Paragraph Spacing: Click the Paragraph group's dialog box launcher, change the values in the **Before** or **After** spacing fields, and click **OK**.

Copy Formatting: Select the formatted text you want to copy, click the **Format Painter** button, and select the text you want to apply formatting to.

Indent Paragraphs: Click anywhere in the paragraph you want to indent and click the **Increase Indent** or **Decrease Indent** button on the Home tab.

Set Custom Indents: Click anywhere in the paragraph you want to indent and click the Paragraph group's dialog box launcher. Adjust the values in the **Left** and **Right** fields, then click **OK**.

Enable the Ruler: Click the **View** tab, then check the **Ruler** check box.

Set a Tab Stop: Click anywhere in the paragraph you want to add a tab stop to, then click a spot on the ruler. Or, click the Paragraph group's dialog box launcher, click the **Tabs** button, enter a tab stop position in the text field, and then click **Set**. Click **OK** when you're finished adding tab stops.

Format Text and Paragraphs

Types of Tab Stop: Pressing the **Tab** key will advance the cursor to the next tab stop and align the text at that point, depending on the type of tab stop.

Left aligned will align the left side of the text with the tab stop.

Center aligned will align the text so that it's centered under the tab stop.

Right aligned will align the right side of the text with the tab stop.

Decimal aligned will align text and numbers by a decimal point.

Remove a Tab Stop: Click and drag a tab stop off of the ruler.

Format the Page

Choose a Margin Size: Click the **Layout** tab, click the **Margins** button, and select a common margin setting.

Change Paper Size: Click the **Layout** tab, click the **Size** button, and select the size you want to use.

Change Paper Orientation: Click the **Layout** tab, click the **Orientation** button, and select **Portrait** or **Landscape**.

Use a Header or Footer: Click the **Insert** tab, click either the **Header** or **Footer** button and select an option.

Add Page Numbers: Click the **Insert** tab, click the **Page Number** button, select a part of the page, and select a page number style.

Format Columns: Click the Layout tab, click the **Columns** button, and select a column option.

Insert Column Breaks: Place your cursor where you want to start a new column, click the **Layout** tab, click the **Breaks** button, then select **Column**.

Insert Page Breaks: Place your cursor where you want to start a new page, click the **Insert** tab, and click the **Page Break** button.

Add a Watermark: Click the **Design** tab, click the **Watermark** button, and select a watermark style.

Add Page Color: Click the **Design** tab, click the **Page Color** button, and select a page color.

Add Page Borders: Click the **Design** tab, then click the **Page Borders** button. In the Borders and Shading dialog box, customize the border style, color, and width, as well as which sides the border will appear on, then click **OK**.

Contact Us: sales@customguide.com

Microsoft®

Word 2016 Advanced

Quick Reference Guide

CustomGuide

your logo

Free Cheat Sheets

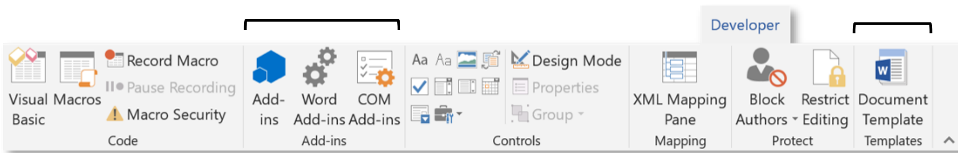
Visit ref.customguide.com

The Developer Tab

The **Add-ins** group configures add-ins to extend the functionality of Word.

The **Mapping** group lets you link content controls to external XML

The **Templates** group lets you switch document templates and other add-ins.



The **Code** group contains commands to record and edit macros, as well as control the level of macro security in Word.

The **Controls** group lets you add form controls to a document. Click **Design Mode**, then click a form control button to insert it. Click **Design Mode** again when you're finished.

The **Protect** group lets you restrict the ability to make changes to a document (or certain parts of a document).

Collaborate in Word

Share a Document: Make sure the document is shared to an online-accessible location, such as OneDrive or SharePoint. Click the **Share** button above the ribbon and enter someone's email address in the Invite People field (or, click the **Address Book** button and select someone in the Address Book dialog box). Choose their permission level by clicking the permissions list arrow and selecting a level. Enter a short message (optional), then click the **Share** button.

Highlight Text: Select the text you want to highlight, click the **Text Highlight Color** button list arrow on the Home tab, and select a highlight color.

Insert a Comment: Select the text you want to add a comment to, click the **Review** tab, click the **New Comment** button, and add your comment. Click outside of the comment field when you're finished.

Delete a Comment: Click a comment to select it, click the **Review** tab, and click the **Delete** button.

Reply to a Comment: Click a comment to select it, and click the **Reply** button in the comment. Type your response, and click outside the comment field when you're finished.

Show / Hide Comments: Click the **Review** tab and click the **Show Comments** button to toggle it on or off.

Toggle Track Changes: Click the **Review** tab and click the **Track Changes** button in the Tracking group.

View Markup: Click the **Review** tab, click the **Show Markup** button in the Tracking group, and select a type of markup to show or hide.

Review Revisions: Click the **Review** tab, then click the **Next Change** and **Previous Change** buttons in the Changes group. Click the **Accept** button to accept a change, or the **Reject** button to reject it.

Compare Two Documents: Click the **Review** tab, click the **Compare** button, and select **Compare**. Select the original document from the **Original Document** list arrow (or click the **Browse** icon and select it), then select the revised document from the **Revised Document** list arrow (or click the **Browse** icon and select it). Click the **More** button and select what types of differences to look for (optional). Click **OK**.

Add Line Numbers: Click the **Layout** tab, click the **Line Numbers** button, and select an option.

Forms

Add Forms to a Document

Enable the Developer Tab: Before adding forms, you must enable the Developer tab on the ribbon. Click the **File** tab, click **Options**, click **Customize Ribbon**, check the **Developer** check box, and click **OK**.

Add a Form Control: Place the text cursor where you want the form control, click the **Developer** tab, click the **Design Mode** button in the Controls group, and click the button for the form control you want to add. Click the **Design Mode** button again when you're finished adding form controls.

Finalize a Form: Click the **Developer** tab and click the **Restrict Editing** button to open the Restrict Editing pane. Check the **Editing Restrictions** check box, click the **Editing Restrictions** list arrow, and select **Filling in forms**. Click the **Yes, Start Enforcing Protections** button, enter a password (optional), and click **OK**.

Types of Form Controls

Different types of form controls allow a user to enter different types of data into a form.

Rich Text allows users to enter text that can be formatted with different fonts and font styles.

Plain Text allows users to enter text, but not to format that text.

Picture allows the user to add a picture from their computer or an online location to the form.

Check Box places a form with a check box that the user can check or uncheck.

Combo Box adds a list with a text box, where users can choose an option or enter their own.

Drop-Down List adds a list with several options that a user can choose from.

Date Picker lets the user choose a date from a calendar.

Repeating Section contains other types of content controls and repeats as many times as you need it.

Legacy Types of content controls were used in older versions of Word. You can still use them in a Word 97-2003 document.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Collaborate in Word

Customize Line Numbers: Click the **Layout** tab, click the **Line Numbers** button, and select **Line Numbering Options**. Click the **Line Numbers** button. Customize where the line numbers start, how far they appear from the text, and how often they appear. Click **OK**, then click **OK** again.

Protect a Document: Click the **File** tab, click the **Protect Document** button, and select **Mark as Final**. Click **OK** in both the confirmation dialog boxes.

Password Protect a Document: Click the **File** tab, click the **Protect Document** button, and select **Encrypt with a Password**. Enter a password, click **OK**, then enter that password again to confirm it, and click **OK** again.

Remove a Password: Click the **File** tab, click the **Protect Document** button, select **Encrypt with a Password**, remove the password from the text field and click **OK**.

Inspect a Document: Click the **File** tab, click the **Check for Issues** button, and select **Inspect Document**. Select the types of content you want to check for, then click **Inspect**. After inspection, click **Remove All** for any content that you want to remove, then click **Close**.

Macros

Enable the Developer Tab: Before adding macros, you must enable the Developer tab on the ribbon. Click the **File** tab, click **Options**, click **Customize Ribbon**, check the **Developer** check box, and click **OK**.

Record a Macro: Click the **Developer** tab, click the **Record Macro** button, and give the macro a name. Click either **Button** or **Keyboard** to assign a button or keyboard shortcut to the new macro (optional). Click **OK**. Perform the tasks you want to record, then click the **Stop Recording** button.

Run a Macro: Place the text cursor where you want the macro to run. Click the **Developer** tab, click the **Macros** button, select a macro, and click **Run**.

Edit a Macro: Click the **Developer** tab, click the **Macros** button, select a macro, and click **Edit**. Modify the macro using the Visual Basic editor, then close Visual Basic.

Advanced Documents

Customize Word's Options: Click the **File** tab and click **Options**. Select a category on the left, and then customize options on the right. Click **OK** when you're finished.

Customize the Ribbon: Click the **File** tab, click **Options**, then click the **Customize Ribbon** tab. Select and expand a ribbon tab, then select and expand a group. Select a command from the left column, then click **Add** to add it, or select a command from the right column and click **Remove** to remove it from the ribbon.

Advanced Documents

Change Word's Default Font: Start in a new, blank document. Click the **Font** group's dialog box launcher. Choose the new default font or font style, then click the **Set as Default** button. Select **All documents based on the Normal template**, then click **OK**.

Create a Building Block: Select the text or objects you want to use as a building block. Then, click the **Insert** tab, click the **Explore Quick Parts** button, and select **Save Selection to Quick Parts Gallery**.

Insert a Building Block: Place the text cursor where you want a building block placed. Click the **Insert** tab, click the **Explore Quick Parts** button, and either select a building block from the menu, or select **Building Blocks Organizer**. Select a building block, and then click **Insert**.

Find and Replace Using Wildcards: Click the **Find** button list arrow, select **Advanced Find**, and expand the dialog box by clicking the **More** button. Check the **Use Wildcards** check box, then while entering a search phrase in the **Find What** field, click the **Special** button and select a wildcard.

Wildcard Examples

?	any single character
*****	any number of characters
[ ]	one of these characters
[-]	one of these characters in a range
[!]	none of the specified characters
<	beginning of a word
>	end of a word
@	one or more instances of a character
{*n*}	exactly *n* instances of a character
{*n*, }	at least *n* instances of a character
{*n*, *m*}	between *n* and *m* instances of a character

Find and Replace Special Characters: Click the **Find** button list arrow, select **Advanced Find**, and expand the dialog box by clicking the **More** button. While entering a search phrase in the **Find What** field, click the **Special** button and select a special character.

Edit a Document in Multiple Languages: Select the text in another language, click the **Review** tab, click the **Language** button, and select **Set Proofing Language**. Select a language and click **OK**.

Add Additional Editing Languages: Click the **Review** tab, click the **Language** button, and select **Language Preferences**. Click the **Add additional editing languages** list arrow and select a language. Click **Add**, then click **OK**.

Insert a Date and Time Field: Click the **Insert** tab, click the **Date and Time** button, select a date format, check the **Update Automatically** check box, and click **OK**.

Advanced Documents

Insert a Field: Click the **Insert** tab, click the **Explore Quick Parts** button, and select **Field**. Select a field category, then a field. Click **OK**.

View Field Codes: Right-click a field and select **Toggle Field Codes**.

Mail Merge

1 – Start the Mail Merge Wizard: Click the **Mailings** tab, click the **Start Mail Merge** button, and select **Step by Step Mail Merge Wizard**.

2 – Choose a Document Type: In the Mail Merge pane, select a document type, then click **Next**.

3 – Select a Document: In the Mail Merge pane, select whether to use the current document, start a new document from a template, or use another existing file, then click **Next**.

4 – Select Recipients: In the Mail Merge pane, select whether to use an existing list, select contacts from Outlook, or type a new list.

If using an existing list, click the **Browse** button, select a file with a list of recipients, and click **Open**. Select which contacts in the list you want to use by checking or unchecking them, then click **OK**.

If selecting contacts from Outlook, click the **Choose Contacts Folder** button, select a contacts folder to import, and click **OK**. Select which contacts in the list you want to use by checking or unchecking them, then click **OK**.

If typing a new list, click the **Create** button, then fill out the fields for each address. Click **OK** when finished.

Click **Next**.

5 – Write Your Letter: Place the text cursor where you want an element, then click the button for the element you want to add (such as an **Address Block** or a **Greeting Line**), choose an element's options, then click **OK**. Or, click the **More Items** button, select a specific field to insert, click **Insert**, and then click **Close**. When you've added all the fields you need, click **Next**.

6 – Preview Your Letter: In the Mail Merge pane, click the **<<** and **>>** buttons to preview the placeholders filled in with a recipient's data. When you're finished previewing, click **Next**.

7 – Complete the Merge: In the Mail Merge pane, click **Print** to print the finished mail merged documents, or click **Edit individual letters** to create a new document for all or some of the records.

Close the Mail Merge pane when you're finished with the merge.

Contact Us: sales@customguide.com

Microsoft®

Word 2016 Intermediate

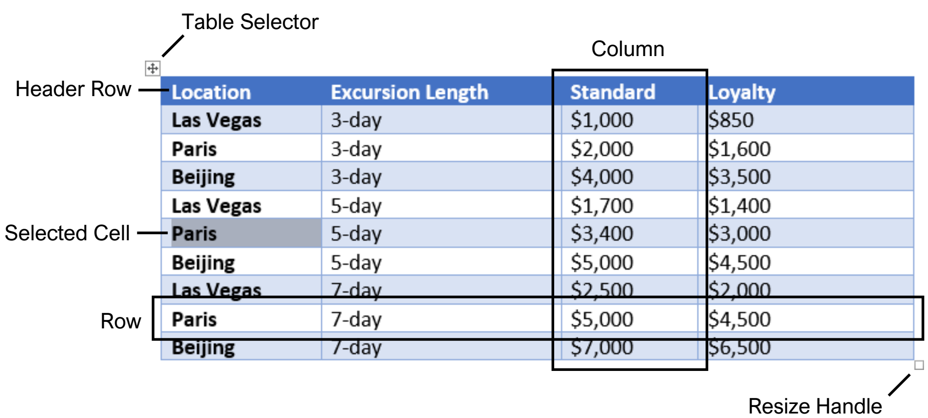
Quick Reference Guide

your logo

Free Cheat Sheets

Visit ref.customguide.com

Elements of a Table



Location	Excursion Length	Standard	Loyalty
Las Vegas	3-day	$1,000	$850
Paris	3-day	$2,000	$1,600
Beijing	3-day	$4,000	$3,500
Las Vegas	5-day	$1,700	$1,400
Paris	5-day	$3,400	$3,000
Beijing	5-day	$5,000	$4,500
Las Vegas	7-day	$2,500	$2,000
Paris	7-day	$5,000	$4,500
Beijing	7-day	$7,000	$6,500

Tables

Insert a Table: Click the **Insert** tab, click the **Table** button, and select the number of rows and columns that you want.

Add a Row or Column: Click in a cell next to where you want to add a row or column. Click the Table Tools **Layout** tab, then click **Insert Above**, **Insert Below**, **Insert Left**, or **Insert Right**, depending on where you want the row or column to be added.

Delete a Row or Column: Click in a cell in the row or column you want to delete, click the Table Tools **Layout** tab, click the **Delete** button, then select **Delete Row** or **Delete Column**.

Convert a Table to Text: Select the table, click the Table Tools **Layout** tab, click the **Convert to Text** button, choose how to separate the cells, and click **OK**.

Manually Resize a Table Row or Column: Click and drag the cell border.

Automatically Resize a Table Row or Column: Click within the table, click the Table Tools **Layout** tab, click the **AutoFit** button, and select an option.

Merge Cells: Select multiple cells that share a border, click the Table Tools **Layout** tab, and click the **Merge Cells** button.

Split Cells: Select a cell, click the Table Tools **Layout** tab, click the **Split Cells** button, enter the number of rows and columns, and click **OK**.

Distribute Rows and Columns: Click within the table, click the Table Tools **Layout** tab, click the **Distribute Rows** button to distribute the rows evenly, or click the **Distribute Columns** button to distribute the columns evenly.

Apply a Table Style: Click inside the table, click the Table Tools **Design** tab, and select a style from the Table Styles gallery.

Apply Text Alignment: Select the cell(s), click the Table Tools **Layout** tab, and select an option from the Alignment group.

Add a Border to a Table: Select a table, click the Table Tools **Design** tab, click the **Border Styles** button list arrow, select a border style, click the **Borders** button list arrow, and select a border option.

Add Cell Shading: Select the cell(s), click the **Shading** button list arrow, and select a color.

Split a Table: Click in the row where the second table will start, click the Table Tools **Layout** tab, and click the **Split Table** button.

Navigating a Table

Navigating a Table

Next cell	**Tab**
Previous cell	**Shift** + **Tab**
Next row	↓
Previous row	↑
First cell in a row	**Alt** + **Home**
Last cell in a row	**Alt** + **End**
First cell in a column	**Alt** + **Page Up**
Last cell in a column	**Alt** + **Page Down**

Selecting Cells

Select a Single Cell: Click in the lower-left corner of a cell, when the cursor changes to an arrow; or triple-click a cell; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Cell**.

Select a Row: Click to the left of the table row (just outside the table itself); or click the Table Tools **Layout** tab, click **Select**, and choose **Select Row**.

Select a Column: Click above a column, when the cursor changes to an arrow; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Column**.

Select an Entire Table: Click the table selector button in the upper-left corner of a table; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Table**.

Table Style Options

Configure Table Style Options: Place the text cursor within the table, click the Table Tools **Design** tab, then check the check boxes in the Table Style Options group to toggle certain table elements.

The appearance of these elements will vary, based on the current Table Style.

- Header Row applies special formatting to the first row of a table.
- Total Row applies special formatting to the final row of a table.
- Banded Rows alternates the shading for the body rows between two different colors.
- First Column applies special formatting to the first column in a table.
- Last Column applies a special formatting to the last column in a table.
- Banded Columns alternates the shading for body columns between two different colors.

Contact Us: sales@customguide.com

Graphics

Insert a Picture: Place the text cursor where you want to insert a picture, click the **Insert** tab, click the **Pictures** button, select a picture, and click **Insert**.

Remove a Picture's Background: Select a picture, click the **Format** tab, and click the **Remove Background** button. Areas that will be removed are highlighted. Click the **Mark Areas to Keep** button to draw over any area accidentally highlighted, and click the **Mark Areas to Remove** button to draw over any area that needs to be removed. Click the **Keep Changes** button.

Insert a Text Box: Click the **Insert** tab, click the **Text Box** button, and select a style of text box.

Insert a Shape: Click the **Insert** tab, click the **Shapes** button, select a shape, then click to place a shape (or click and drag to place the shape at a certain size).

Format a Shape: Select a shape, then click the **Format** tab and use the options in the Shape Styles group to customize the appearance of the shape.

- Click the **Shape Fill** button and select a color to change the shape's fill color.
- Click the **Shape Outline** button and select a color and weight for the shape's outline, as well as dash and arrow styles.
- Click the **Shape Effects** button and select a shape effect, such as shadow, glow, or bevel.
- Select a shape style preset from the Shape Styles gallery. Click the gallery's **More** button to expand the gallery to see more presets.

Insert WordArt: Click the **Insert** tab, click the **Insert WordArt** button, and select a style of WordArt.

Insert a Chart: Click the **Insert** tab, click the **Add a Chart** button, select a chart category on the left, select a chart type, and click **OK**. Edit the chart data in the window that opens.

Resize an Object: Select an object, then click and drag the sizing handles on the sides and corners until it's the size you want.

Move an Object: Select an object, then click and drag it to a new location.

Rotate an Object: Select an object, then click and drag the rotate handle to the left or right. Or, select an object, click the **Format** tab, click the **Rotate Objects** button, and select a rotation option.

Flip an Object: Select an object, click the **Format** tab, click the **Rotate Objects** button and select **Flip Vertical** or **Flip Horizontal**.

Delete an Object: Select an object, then press the **Delete** key.

Graphics

Position an Object on the Page: Select an object, click the **Format** tab, click the **Position** button, and select a position.

Wrap Text Around an Object: Select an object, click the **Format** tab, click the **Wrap Text** button, and select a text wrapping style.

Move an Object Up or Down One Layer: Select an object, click the **Format** tab, and click the **Bring Forward** button to move the object forward one layer, or click the **Send Backward** button to send the object backward one layer.

Move an Object to the Front or Back: Select an object and click the **Format** tab. Click the **Bring Forward** button list arrow and select **Bring to Front** to bring the object to the front-most layer. Or, click the **Send Backward** button list arrow and select **Send to Back** to move the object to the back-most layer.

Group Objects: Select multiple objects, click the **Format** tab, click the **Group Objects** button, and select **Group**.

Ungroup Objects: Select a group, click the **Format** tab, click the **Group Objects** button, and select **Ungroup**.

Align Objects: Select multiple objects, click the **Format** tab, click the **Align** button, and select an alignment option.

Distribute Objects: Select multiple objects, click the **Format** tab, click the **Align** button, and select **Distribute Horizontally** or **Distribute Vertically**.

Styles, Themes, and Templates

Apply a Style: Place the text cursor in a paragraph and select a style from the Styles gallery on the Home tab. Click the gallery's **More** button to see additional styles.

Display the Styles Pane: Click the dialog box launcher in the **Styles** group on the Home tab.

Create a Style: Select some text that's formatted the way you want the style to appear, then click the Styles gallery's **More** button and select **Create a Style** (or, click the **New Style** button in the Styles pane). Give the new style a name and click **OK**.

Apply a Theme: Click the **Design** tab, click the **Themes** button, and select a theme.

Use a Document Template: Click the **File** tab, click **New**, search for a template in the search field or select a recommended template, select a template, and click **Create**.

Create a Document Template: Click the **File** tab, click **Save As**, select a location, give the file a name, click the **Save As Type** list arrow, select **Word Template**, and click **Save**.

Long Documents

Use Outline View: Click the **View** tab and click the **Outline** button.

Demote Items: While in Outline view, click the item you want to demote and click the **Demote** button (or the **Demote to Body Text** button).

Promote Items: While in Outline view, click the item you want to promote and click the **Promote** button (or the **Promote to Heading 1** button).

Navigate Long Documents: Click the **View** tab, check the **Navigation Pane** check box, and use the Pages tab to browse by page, or use the Headings tab to navigate by headings.

Add a Bookmark: Select the text you want to bookmark, click the **Insert** tab, click the **Bookmark** button in the Links group, give the bookmark a name, and click **Add**.

Insert a Section Break: Place the cursor where you want the section to start, click the **Layout** tab, click the **Breaks** button, and select a type of section break.

Insert a Hyperlink: Select the text you want to use as a link, click the **Insert** tab, click the **Link** button, choose what type of link to create, choose where to link to, and click **OK**.

Create Footnotes and Endnotes: Click the text that you want the footnote / endnote to refer to, click the **References** tab, click the **Insert Footnote** (or **Insert Endnote**) button, and type your footnote / endnote.

Insert a Table of Contents: Place the text cursor where you want to insert a table of contents, click the **References** tab, click the **Table of Contents** button, and select a table of contents style.

Insert an Index Entry: Select the text you want the index entry to refer to, click the **References** tab, and click the **Mark Entry** button. Set any index entry options you want, then click **Mark** (or, click **Mark All** to mark all instances of the text). Click **Close**.

Insert an Index: Place the text cursor where you want to insert an index, click the **References** tab, click the **Insert Index** button. Set up the index's options, then click **OK**.

Create a Citation: Click the **References** tab, click the **Insert Citation** list arrow, and select **Add New Source**. Enter the source's information, then click **OK**.

Insert a Citation: Click the **References** tab, click the **Insert Citation** button, and select a citation.

Insert a Bibliography: Click the **References** tab, click the **Bibliography** button, then select a bibliography style.

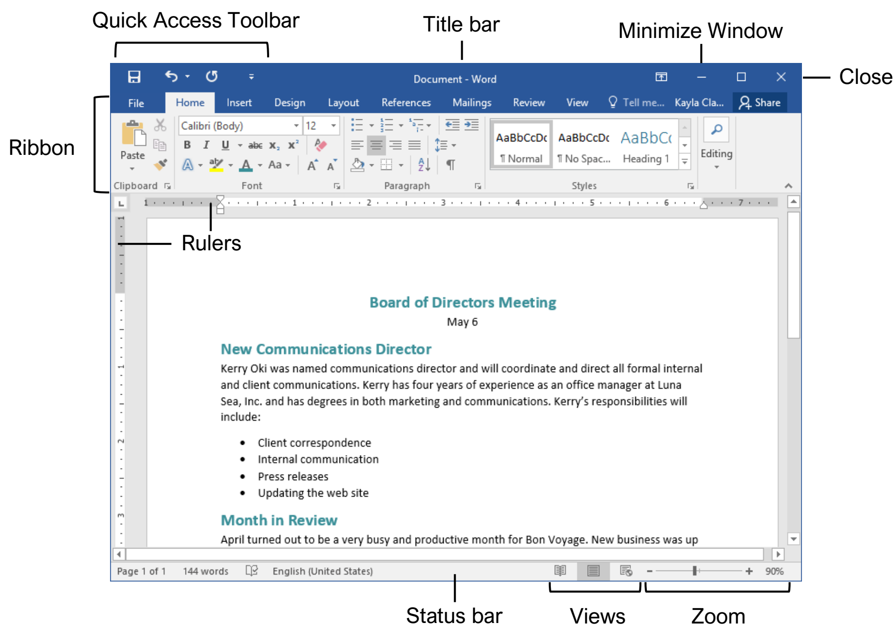
Contact Us: sales@customguide.com

Microsoft®
Word 2016 Basic
Quick Reference Guide

your logo

Free Cheat Sheets
Visit ref.customguide.com

The Word 2016 Program Screen



The Fundamentals

Create a Blank Document: Click the **File** tab, select **New**, and click **Blank document**; or, press **Ctrl** + **N**.

Open a Document: Click the **File** tab and select **Open**, or press **Ctrl** + **O**. Select a location with a file you want, then select a file and click **Open**.

Save a Document: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Recover an Unsaved Document: Restart Word after a crash. If an unsaved document can be recovered, the Recovered header will appear. Click **Show Recovered Files**, then select the document from the Document Recovery pane.

Change Document Views: Click the **View** tab and select a view, or click one of the **View** buttons at the bottom of the window.

Reading View

Print Layout View

Web Layout View

Print: Click the **File** tab, select **Print**, specify print settings, and click **Print**.

Select and Edit Text

Select a Block of Text: Click and drag across the text you want to select; or, click at the beginning of a text block, hold down the **Shift** key, and click at the end of a text block.

Select a Sentence: Press the **Ctrl** key and click in a sentence.

Select a Line of Text: Click in the left margin for the line you want to select.

Select a Paragraph: Double-click in the left margin for the paragraph you want to select.

Select Everything: Click the **Select** button on the **Home** tab and click **Select All**, or press **Ctrl** + **A**.

Edit Text: Select the word you want to replace and type a new word.

Cut, Copy and Paste: Select the text you want to cut or copy and click the **Cut** or **Copy** button on the Home tab. Click where you want to paste the text, and click the **Paste** button.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Keyboard Shortcuts

General

Open a document	**Ctrl** + **O**
Create a new document	**Ctrl** + **N**
Save a document	**Ctrl** + **S**
Print a document	**Ctrl** + **P**
Close a document	**Ctrl** + **W**

Navigation

Move the text cursor	↑, ↓, ←, →
Up one screen	**Page Up**
Down one screen	**Page Down**
Beginning of a line	**Home**
End of a line	**End**
Beginning of a document	**Ctrl** + **Home**
End of a document	**Ctrl** + **End**
Open Go To dialog box	**Ctrl** + **G**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Select All	**Ctrl** + **A**
Check Spelling and Grammar	**F7**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Align Left	**Ctrl** + **L**
Align Center	**Ctrl** + **E**
Align Right	**Ctrl** + **R**
Justify	**Ctrl** + **J**
Indent a paragraph	**Ctrl** + **M**
Remove an indent	**Ctrl** + **Shift** + **M**
Increase font size	**Ctrl** + **Shift** + **>**
Decrease font size	**Ctrl** + **Shift** + **<**
Increase font size 1pt	**Ctrl** + **]**
Decrease font size 1pt	**Ctrl** + **[**
Copy formatting	**Ctrl** + **Shift** + **C**
Paste formatting	**Ctrl** + **Shift** + **V**
Show/Hide Formatting Marks	**Ctrl** + **Shift** + *****

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Select and Edit Text

Spelling and Grammar Errors: Potential spelling errors are underlined in red and potential grammar errors are underlined in blue.

Correct a Spelling or Grammar Error: Manually make the correction, or right-click the error and select a suggestion you want to use.

Ignore a Spelling or Grammar Error: Right-click the error and select **Ignore All**.

Check Spelling and Grammar: Click the **Review** tab and click the **Spelling & Grammar** button.

Find the Word Count: Click the word count in the lower-left corner; or click the **Review** tab and click the **Word Count** button.

Use the Thesaurus: Click the word you want to replace, click the **Thesaurus** button on the **Review** tab, click a word's list arrow, and select **Insert**; or, right-click the word you want to replace, select **Synonyms**, and select a word from the menu.

Find Text: Click the **Find** button on the Home tab, type the text you want to find in the **Search** box, and click an item to jump to it in the document.

Replace Text: Click the **Replace** button on the Home tab. Enter the word you want to find in the **Find What** field, then enter the text that will replace it in the **Replace With** field. Click **Replace** or **Replace All**. Click **OK** when finished.

Insert a Symbol: Click where you want to insert the symbol. Click the **Insert** tab, click the **Symbol** button, and either select a symbol from the menu or select **More Symbols**. Select a symbol, and click **Insert**.

Insert Text from Another File: Place the cursor where you want to insert the text. Click the **Insert** tab, click the **Object** button list arrow, and select **Text from File**. Select the file containing the text you want to insert, then click the **Insert** button.

Format Text and Paragraphs

Change the Font: Select the text you want to change, click the **Font** list arrow, and select a new font.

Change the Font Size: Select the text you want to change, click the **Font Size** list arrow, and select a new font size.

Change the Font Color: Select the text you want to change, click the **Font Color** button list arrow, and select a new color.

Apply Bold, Italic, or an Underline: Click the **Bold** B, **Italic** *I* or **Underline** U button in the Font group on the Home tab.

Clear Formatting: Select the text you want to clear formatting from, then click the **Clear All Formatting** button.

Format Text and Paragraphs

Create a Bulleted List: Select the text you want to make into a bulleted list, and click the **Bullets** button.

Change a Bulleted List Style: Select a bulleted list, click the **Bullets** button list arrow, and select a bullet symbol.

Create a Numbered List: Select the text you want to make into a numbered list, and click the **Numbering** button.

Change a Numbered List Style: Select a numbered list, click the **Numbering** button list arrow, and select a numbered list style.

Align a Paragraph: Click anywhere in the paragraph you want to align and click an alignment option in the Paragraph group on the Home tab.

Left aligned

Center aligned

Right aligned

Add a Border: Click in the paragraph where you want to add a border, click the **Borders** button list arrow, and select a border.

Add Shading: Click in the paragraph where you want to add shading, click the **Shading** button list arrow, and select a shading color.

Change Line Spacing: Select the paragraph you want to adjust, click the **Line Spacing** button, and select a spacing option.

Change Paragraph Spacing: Click the Paragraph group's dialog box launcher, change the values in the **Before** or **After** spacing fields, and click **OK**.

Copy Formatting: Select the formatted text you want to copy, click the **Format Painter** button, and select the text you want to apply formatting to.

Indent Paragraphs: Click anywhere in the paragraph you want to indent and click the **Increase Indent** or **Decrease Indent** button on the Home tab.

Set Custom Indents: Click anywhere in the paragraph you want to indent and click the Paragraph group's dialog box launcher. Adjust the values in the **Left** and **Right** fields, then click **OK**.

Enable the Ruler: Click the **View** tab, then check the **Ruler** check box.

Set a Tab Stop: Click anywhere in the paragraph you want to add a tab stop to, then click a spot on the ruler. Or, click the Paragraph group's dialog box launcher, click the **Tabs** button, enter a tab stop position in the text field, and then click **Set**. Click **OK** when you're finished adding tab stops.

Format Text and Paragraphs

Types of Tab Stop: Pressing the **Tab** key will advance the cursor to the next tab stop and align the text at that point, depending on the type of tab stop.

Left aligned will align the left side of the text with the tab stop.

Center aligned will align the text so that it's centered under the tab stop.

Right aligned will align the right side of the text with the tab stop.

Decimal aligned will align text and numbers by a decimal point.

Remove a Tab Stop: Click and drag a tab stop off of the ruler.

Format the Page

Choose a Margin Size: Click the **Layout** tab, click the **Margins** button, and select a common margin setting.

Change Paper Size: Click the **Layout** tab, click the **Size** button, and select the size you want to use.

Change Paper Orientation: Click the **Layout** tab, click the **Orientation** button, and select **Portrait** or **Landscape**.

Use a Header or Footer: Click the **Insert** tab, click either the **Header** or **Footer** button and select an option.

Add Page Numbers: Click the **Insert** tab, click the **Page Number** button, select a part of the page, and select a page number style.

Format Columns: Click the Layout tab, click the **Columns** button, and select a column option.

Insert Column Breaks: Place your cursor where you want to start a new column, click the **Layout** tab, click the **Breaks** button, then select **Column**.

Insert Page Breaks: Place your cursor where you want to start a new page, click the **Insert** tab, and click the **Page Break** button.

Add a Watermark: Click the **Design** tab, click the **Watermark** button, and select a watermark style.

Add Page Color: Click the **Design** tab, click the **Page Color** button, and select a page color.

Add Page Borders: Click the **Design** tab, then click the **Page Borders** button. In the Borders and Shading dialog box, customize the border style, color, and width, as well as which sides the border will appear on, then click **OK**.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Microsoft®
Word 2019 Advanced
Quick Reference Guide

CustomGuide

your logo

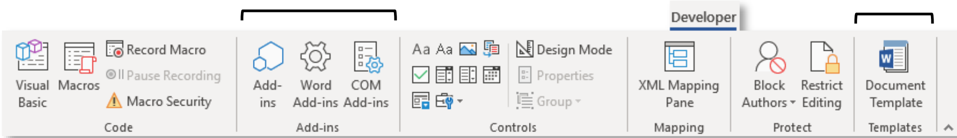
Free Cheat Sheets
Visit ref.customguide.com

The Developer Tab

The **Add-ins** group configures add-ins to extend the functionality of Word.

The **Mapping** group lets you link content controls to external XML

The **Templates** group lets you switch document templates and other add-ins.



The **Code** group contains commands to record and edit macros, as well as control the level of macro security in Word.

The **Controls** group lets you add form controls to a document. Click **Design Mode**, then click a form control button to insert it. Click **Design Mode** again when you're finished.

The **Protect** group lets you restrict the ability to make changes to a document (or certain parts of a document).

Collaborate in Word

Share a Document: Make sure the document is shared to an online-accessible location, such as OneDrive or SharePoint. Click the **Share** button above the ribbon and enter someone's email address in the Invite People field (or, click the **Address Book** button and select someone in the Address Book dialog box). Choose their permission level by clicking the permissions list arrow and selecting a level. Enter a short message (optional), then click the **Share** button.

Highlight Text: Select the text you want to highlight, click the **Text Highlight Color** button list arrow on the Home tab, and select a highlight color.

Insert a Comment: Select the text you want to add a comment to, click the **Review** tab, click the **New Comment** button, and add your comment. Click outside of the comment field when you're finished.

Delete a Comment: Click a comment to select it, click the **Review** tab, and click the **Delete** button.

Reply to a Comment: Click a comment to select it and click the **Reply** button in the comment. Type your response, then click outside the comment field when you're finished.

Show / Hide Comments: Click the **Review** tab and click the **Show Comments** button to toggle it on or off.

Toggle Track Changes: Click the **Review** tab and click the **Track Changes** button in the Tracking group.

View Markup: Click the **Review** tab, click the **Show Markup** button in the Tracking group, and select a type of markup to show or hide.

Review Revisions: Click the **Review** tab, then click the **Next Change** and **Previous Change** buttons in the Changes group. Click the **Accept** button to accept a change, or the **Reject** button to reject it.

Compare Two Documents: Click the **Review** tab, click the **Compare** button, and select **Compare**. Select the original document from the **Original Document** list arrow (or click the **Browse** icon and select it), then select the revised document from the **Revised Document** list arrow (or click the **Browse** icon and select it). Click the **More** button and select what types of differences to look for (optional). Click **OK**.

Add Line Numbers: Click the **Layout** tab, click the **Line Numbers** button, and select an option.

Forms

Add Forms to a Document

Enable the Developer Tab: Before adding forms, you must enable the Developer tab on the ribbon. Click the **File** tab, click **Options**, click **Customize Ribbon**, check the **Developer** check box, and click **OK**.

Add a Form Control: Place the text cursor where you want the form control, click the **Developer** tab, click the **Design Mode** button in the Controls group, and click the button for the form control you want to add. Click the **Design Mode** button again when you're finished adding form controls.

Finalize a Form: Click the **Developer** tab and click the **Restrict Editing** button to open the Restrict Editing pane. Check the **Editing Restrictions** check box, click the **Editing Restrictions** list arrow, and select **Filling in forms**. Click the **Yes, Start Enforcing Protections** button, enter a password (optional), and click **OK**.

Types of Form Controls

Form Controls: You can add different types of form controls that allow a user to enter different types of data into a form.

- **Rich Text** Aa allows users to enter text that can be formatted with different fonts and font styles.
- **Plain Text** Aa allows users to enter text, but not to format that text.
- **Picture** allows the user to add a picture from their computer or an online location to the form.
- **Check Box** places a form with a check box that the user can check or uncheck.
- **Combo Box** adds a list with a text box, where users can choose an option or enter their own.
- **Drop-Down List** adds a list with several options that a user can choose from.
- **Date Picker** lets the user choose a date from a calendar.
- **Repeating Section** contains other types of content controls and repeats as many times as you need it.
- **Legacy Types** of content controls were used in older versions of Word. You can still use them in a Word 97-2003 document.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Collaborate in Word

Customize Line Numbers: Click the **Layout** tab, click the **Line Numbers** button, and select **Line Numbering Options**. Click the **Line Numbers** button. Customize where the line numbers start, how far they appear from the text, and how often they appear. Click **OK**, then click **OK** again.

Protect a Document: Click the **File** tab, click the **Protect Document** button, and select **Mark as Final**. Click **OK** in both the confirmation dialog boxes.

Password Protect a Document: Click the **File** tab, click the **Protect Document** button, and select **Encrypt with Password**. Enter a password, click **OK**, then enter that password again to confirm it, and click **OK** again.

Remove a Password: Click the **File** tab, click the **Protect Document** button, select **Encrypt with Password**, remove the password from the text field and click **OK**.

Inspect a Document: Click the **File** tab, click the **Check for Issues** button, and select **Inspect Document**. Select the types of content you want to check for, then click **Inspect**. After inspection, click **Remove All** for any content that you want to remove, then click **Close**.

Macros

Enable the Developer Tab: Before adding macros, you must enable the Developer tab on the ribbon. Click the **File** tab, click **Options**, click **Customize Ribbon**, check the **Developer** check box, and click **OK**.

Record a Macro: Click the **Developer** tab, click the **Record Macro** button, and give the macro a name. Click either **Button** or **Keyboard** to assign a button or keyboard shortcut to the new macro (optional). Click **OK**. Perform the tasks you want to record, then click the **Stop Recording** button.

Run a Macro: Place the text cursor where you want the macro to run. Click the **Developer** tab, click the **Macros** button, select a macro, and click **Run**.

Edit a Macro: Click the **Developer** tab, click the **Macros** button, select a macro, and click **Edit**. Modify the macro using the Visual Basic editor, then close Visual Basic.

Advanced Documents

Customize Word's Options: Click the **File** tab and click **Options**. Select a category on the left, and then customize options on the right. Click **OK** when you're finished.

Customize the Ribbon: Click the **File** tab, click **Options**, then click the **Customize Ribbon** tab. Select and expand a ribbon tab, then select and expand a group. Select a command from the left column, then click **Add** to add it, or select a command from the right column and click **Remove** to remove it from the ribbon.

Advanced Documents

Change Word's Default Font: Start in a new, blank document. Click the **Font** group's dialog box launcher. Choose the new default font or font style, then click the **Set as Default** button. Select **All documents based on the Normal template**, then click **OK**.

Create a Building Block: Select the text or objects you want to use as a building block. Then, click the **Insert** tab, click the **Explore Quick Parts** button, and select **Save Selection to Quick Part Gallery**.

Insert a Building Block: Place the text cursor where you want a building block placed. Click the **Insert** tab, click the **Explore Quick Parts** button, and either select a building block from the menu, or select **Building Blocks Organizer**. Select a building block, and then click **Insert**.

Find and Replace Using Wildcards: Click the **Find** button list arrow, select **Advanced Find**, and expand the dialog box by clicking the **More** button. Check the **Use Wildcards** check box, then while entering a search phrase in the **Find What** field, click the **Special** button and select a wildcard.

Wildcard Examples

?	any single character
*****	any number of characters
[ ]	one of these characters
[-]	one of these characters in a range
[!]	none of the specified characters
<	beginning of a word
>	end of a word
@	one or more instances of a character
{*n*}	exactly *n* instances of a character
{*n*, }	at least *n* instances of a character
{*n*, *m*}	between *n* and *m* instances of a character

Find and Replace Special Characters: Click the **Find** button list arrow, select **Advanced Find**, and expand the dialog box by clicking the **More** button. While entering a search phrase in the **Find What** field, click the **Special** button and select a special character.

Edit a Document in Multiple Languages: Select the text in another language, click the **Review** tab, click the **Language** button, and select **Set Proofing Language**. Select a language and click **OK**.

Add Additional Editing Languages: Click the **Review** tab, click the **Language** button, and select **Language Preferences**. Click the **Add additional editing languages** list arrow and select a language. Click **Add**, then click **OK**.

Insert a Date and Time Field: Click the **Insert** tab, click the **Date and Time** button, select a date format, check the **Update Automatically** check box, and click **OK**.

Advanced Documents

Insert a Field: Click the **Insert** tab, click the **Explore Quick Parts** button, and select **Field**. Select a field category, then a field. Click **OK**.

View Field Codes: Right-click a field and select **Toggle Field Codes**.

Mail Merge

1 – Start the Mail Merge Wizard: Click the **Mailings** tab, click the **Start Mail Merge** button, and select **Step-by-Step Mail Merge Wizard**.

2 – Choose a Document Type: In the Mail Merge pane, select a document type, then click **Next**.

3 – Select a Document: In the Mail Merge pane, select whether to use the current document, start a new document from a template, or use another existing file, then click **Next**.

4 – Select Recipients: In the Mail Merge pane, select whether to use an existing list, select contacts from Outlook, or type a new list.

If using an existing list, click the **Browse** button, select a file with a list of recipients, and click **Open**. Select which contacts in the list you want to use by checking or unchecking them, then click **OK**.

If selecting contacts from Outlook, click the **Choose Contacts Folder** button, select a contacts folder to import, and click **OK**. Select which contacts in the list you want to use by checking or unchecking them, then click **OK**.

If typing a new list, click the **Create** button, then fill out the fields for each address. Click **OK** when finished.

Click **Next**.

5 – Write Your Letter: Place the text cursor where you want an element, then click the button for the element you want to add (such as an **Address Block** or a **Greeting Line**), choose an element's options, then click **OK**. Or, click the **More Items** button, select a specific field to insert, click **Insert**, and then click **Close**. When you've added all the fields you need, click **Next**.

6 – Preview Your Letter: In the Mail Merge pane, click the **<<** and **>>** buttons to preview the placeholders filled in with a recipient's data. When you're finished previewing, click **Next**.

7 – Complete the Merge: In the Mail Merge pane, click **Print** to print the finished mail merged documents, or click **Edit individual letters** to create a new document for all or some of the records.

Close the Mail Merge pane when you're finished with the merge.

Contact Us: sales@customguide.com

Microsoft®

Word 2019 Intermediate

Quick Reference Guide

CustomGuide

your logo

Free Cheat Sheets

Visit ref.customguide.com

Elements of a Table

Table Selector

Column

Header Row

Selected Cell

Row

Total Row

Resize Handle

Location	Excursion Length	Packages	Sales
Las Vegas	3-day	8	$8,000
Paris	3-day	2	$4,000
Beijing	3-day	0	$0
Las Vegas	5-day	6	$10,200
Paris	5-day	8	$27,200
Beijing	5-day	4	$20,000
Las Vegas	7-day	0	$0
Paris	7-day	4	$20,000
Beijing	7-day	6	$42,000
		38	**$131,400**

Tables

Insert a Table: Click the **Insert** tab, click the **Table** button, and select the number of rows and columns that you want.

Add a Row or Column: Click in a cell next to where you want to add a row or column. Click the Table Tools **Layout** tab, then click **Insert Above**, **Insert Below**, **Insert Left**, or **Insert Right**, depending on where you want the row or column to be added.

Delete a Row or Column: Click in a cell in the row or column you want to delete, click the Table Tools **Layout** tab, click the **Delete** button, then select **Delete Row** or **Delete Column**.

Convert a Table to Text: Select the table, click the Table Tools **Layout** tab, click the **Convert to Text** button, choose how to separate the cells, and click **OK**.

Manually Resize a Table Row or Column: Click and drag the cell border.

Automatically Resize a Table Row or Column: Click within the table, click the Table Tools **Layout** tab, click the **AutoFit** button, and select an option.

Merge Cells: Select multiple cells that share a border, click the Table Tools **Layout** tab, and click the **Merge Cells** button.

Split Cells: Select a cell, click the Table Tools **Layout** tab, click the **Split Cells** button, enter the number of rows and columns, and then click **OK**.

Distribute Rows and Columns: Click within the table, click the Table Tools **Layout** tab, click the **Distribute Rows** button to distribute the rows evenly, or click the **Distribute Columns** button to distribute the columns evenly.

Apply a Table Style: Click inside the table, click the Table Tools **Design** tab, and select a style from the Table Styles gallery.

Apply Text Alignment: Select the cell(s), click the Table Tools **Layout** tab, and select an option from the Alignment group.

Add a Border to a Table: Select a table, click the Table Tools **Design** tab, click the **Border Styles** button list arrow, select a border style, click the **Borders** button list arrow, and select a border option.

Add Cell Shading: Select the cell(s), click the **Shading** button list arrow, and select a color.

Split a Table: Click in the row where the second table will start, click the Table Tools **Layout** tab, and click the **Split Table** button.

Navigating a Table

Navigating a Table

Next cell........................**Tab**

Previous cell...................**Shift** + **Tab**

Next row ....↓

Previous row ....↑

First cell in a row.............**Alt** + **Home**

Last cell in a row..............**Alt** + **End**

First cell in a column ....**Alt** + **Page Up**

Last cell in a column ....**Alt** + **Page Down**

Selecting Cells in a Table

Select a Single Cell: Click in the lower-left corner of a cell, when the cursor changes to an arrow; or triple-click a cell; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Cell**.

Select a Row: Click to the left of the table row (just outside the table itself); or click the Table Tools **Layout** tab, click **Select**, and choose **Select Row**.

Select a Column: Click above a column, when the cursor changes to an arrow; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Column**.

Select an Entire Table: Click the table selector button in the upper-left corner of a table; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Table**.

Table Style Options

Configure Table Style Options: Place the text cursor within the table, click the Table Tools **Design** tab, then check the check boxes in the Table Style Options group to toggle certain table elements.

The appearance of these elements will vary, based on the current Table Style.

- Header Row applies special formatting to the first row of a table.
- Total Row applies special formatting to the final row of a table.
- Banded Rows alternates the shading for the body rows between two different colors.
- First Column applies special formatting to the first column in a table.
- Last Column applies a special formatting to the last column in a table.
- Banded Columns alternates the shading for body columns between two different colors.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Graphics

Insert a Picture: Place the text cursor where you want to insert a picture, click the **Insert** tab, click the **Pictures** button, select a picture, and click **Insert**.

Remove a Picture's Background: Select a picture, click the **Format** tab, and click the **Remove Background** button. Areas that will be removed are highlighted. Click the **Mark Areas to Keep** button to draw over any area accidentally highlighted, and click the **Mark Areas to Remove** button to draw over any area that needs to be removed. Click the **Keep Changes** button.

Insert a Text Box: Click the **Insert** tab, click the **Text Box** button, and select a style of text box.

Insert a Shape: Click the **Insert** tab, click the **Shapes** button, select a shape, then click to place a shape (or click and drag to place the shape at a certain size).

Insert a Drawing: Click the **Draw** tab, click the **Draw with Touch** button, then click and drag the mouse (or use your finger on a touchscreen) to draw a shape. Click the **Draw with Touch** button again when you're done drawing.

Format a Shape: Select a shape, then click the **Format** tab and use the options in the Shape Styles group to customize the appearance of the shape.

- Click the **Shape Fill** button and select a color to change the shape's fill color.
- Click the **Shape Outline** button and select a color and weight for the shape's outline, as well as dash and arrow styles.
- Click the **Shape Effects** button and select a shape effect, such as shadow, glow, or bevel.
- Select a shape style preset from the Shape Styles gallery. Click the gallery's **More** button to see more presets.

Insert WordArt: Click the **Insert** tab, click the **Insert WordArt** button, and select a style of WordArt.

Insert a Chart: Click the **Insert** tab, click the **Add a Chart** button, select a chart category on the left, select a chart type, and click **OK**. Edit the chart data in the window that opens.

Resize an Object: Select an object, then click and drag the sizing handles on the sides and corners until it's the size you want.

Move an Object: Select an object, then click and drag it to a new location.

Rotate an Object: Select an object, then click and drag the rotate handle to the left or right. Or, select an object, click the **Format** tab, click the **Rotate Objects** button, and select a rotation option.

Graphics

Flip an Object: Select an object, click the **Format** tab, click the **Rotate Objects** button and select **Flip Vertical** or **Flip Horizontal**.

Position an Object on the Page: Select an object, click the **Format** tab, click the **Position** button, and select a position.

Wrap Text Around an Object: Select an object, click the **Format** tab, click the **Wrap Text** button, and select a text wrapping style.

Move an Object Up or Down One Layer: Select an object, click the **Format** tab, and click the **Bring Forward** button to move the object forward one layer, or click the **Send Backward** button to send the object backward one layer.

Group Objects: Select multiple objects, click the **Format** tab, click the **Group Objects** button, and select **Group**.

Ungroup Objects: Select a group, click the **Format** tab, click the **Group Objects** button, and select **Ungroup**.

Align Objects: Select multiple objects, click the **Format** tab, click the **Align** button, and select an alignment option.

Distribute Objects: Select multiple objects, click the **Format** tab, click the **Align** button, and select **Distribute Horizontally** or **Distribute Vertically**.

Styles, Themes, and Templates

Apply a Style: Place the text cursor in a paragraph and select a style from the Styles gallery on the Home tab. Click the gallery's **More** button to see additional styles.

Display the Styles Pane: Click the dialog box launcher in the **Styles** group on the Home tab.

Create a Style: Select some text that's formatted the way you want the style to appear, then click the Styles gallery's **More** button and select **Create a Style** (or, click the **New Style** button in the Styles pane). Give the new style a name and click **OK**.

Modify a Style: Change the formatting for some text with a style applied, right-click the style in the Styles gallery (or in the Styles pane) and select **Update ___ to Match Selection**.

Apply a Theme: Click the **Design** tab, click the **Themes** button, and select a theme.

Use a Document Template: Click the **File** tab, click **New**, search for a template in the search field or select a recommended template, select a template, and click **Create**.

Create a Document Template: Click the **File** tab, click **Save As**, select a location, give the file a name, click the **Save As Type** list arrow, select **Word Template**, and click **Save**.

Long Documents

Use Outline View: Click the **View** tab and click the **Outline** button. Click the **Close Outline View** button to return to the previous view.

Demote Items: While in Outline view, click the item you want to demote and click the **Demote** button (or the **Demote to Body Text** button).

Promote Items: While in Outline view, click the item you want to promote and click the **Promote** button (or the **Promote to Heading 1** button).

Navigate Long Documents: Click the **View** tab, check the **Navigation Pane** check box, and use the Pages tab to browse by page, or use the Headings tab to navigate by headings.

Add a Bookmark: Select the text you want to bookmark, click the **Insert** tab, click the **Bookmark** button in the Links group, give the bookmark a name, and click **Add**.

Insert a Section Break: Place the cursor where you want the section to start, click the **Layout** tab, click the **Breaks** button, and select a type of section break.

Insert a Link: Select the text you want to use as a link, click the **Insert** tab, click the **Link** button, choose what type of link to create, choose where to link to, and click **OK**.

Create Footnotes and Endnotes: Click the text that you want the footnote / endnote to refer to, click the **References** tab, click the **Insert Footnote** (or **Insert Endnote**) button, and type your footnote / endnote.

Insert a Table of Contents: Place the text cursor where you want to insert a table of contents, click the **References** tab, click the **Table of Contents** button, and select a table of contents style.

Insert an Index Entry: Select the text you want the index entry to refer to, click the **References** tab, and click the **Mark Entry** button. Set any index entry options you want, then click **Mark** (or, click **Mark All** to mark all instances of the text). Click **Close**.

Insert an Index: Place the text cursor where you want to insert an index, click the **References** tab, click the **Insert Index** button. Set up the index's options, then click **OK**.

Create a Citation: Click the **References** tab, click the **Insert Citation** button, and select **Add New Source**. Enter the source's information, then click **OK**.

Insert a Citation: Click the **References** tab, click the **Insert Citation** button, and select a citation from the menu.

Insert a Bibliography: Click the **References** tab, click the **Bibliography** button, then select a bibliography style.

Contact Us: sales@customguide.com

Microsoft®

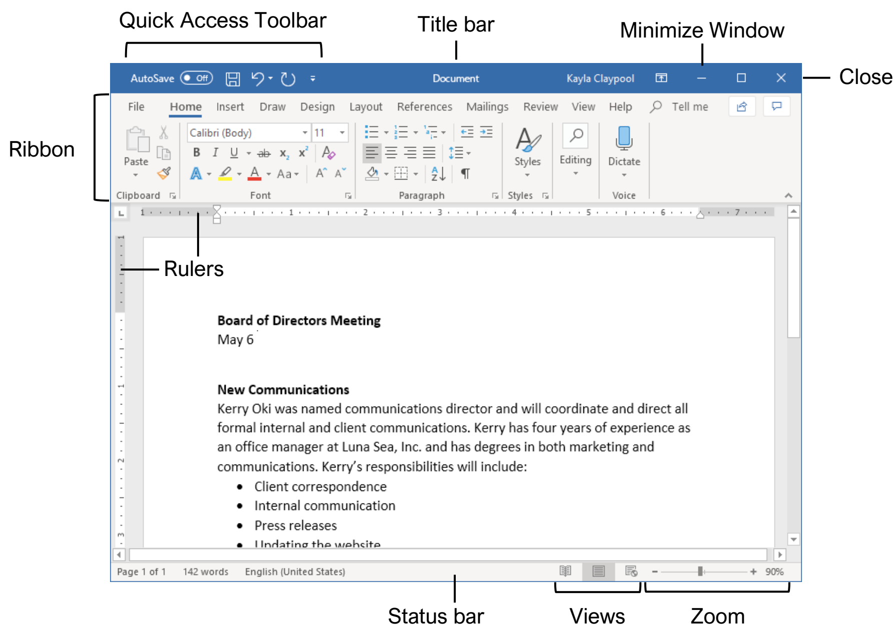
Word 2019 Basic

Quick Reference Guide

your logo

Free Cheat Sheets
Visit ref.customguide.com

The Word 2019 Program Screen



Word Fundamentals

Create a Blank Document: Click the **File** tab, select **New**, and click **Blank document**; or, press **Ctrl** + **N**.

Open a Document: Click the **File** tab and select **Open**, or press **Ctrl** + **O**. Select a location with a file you want, then select a file and click **Open**.

Save a Document: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Recover an Unsaved Document: Restart Word after a crash. If a document can be recovered, the **Recover unsaved documents** link will appear on the start screen. Click the link to open the Document Recovery pane, then select an autorecovered document.

Change Document Views: Click the **View** tab and select a view, or click one of the **View** buttons at the bottom of the window.

- **Reading View**
- **Print Layout View**
- **Web Layout View**

Print: Click the **File** tab, select **Print**, specify print settings, and click **Print**.

Select and Edit Text

Select a Block of Text: Click and drag across the text you want to select; or, click at the beginning of a text block, hold down the **Shift** key, and click at the end of a text block.

Select a Sentence: Press the **Ctrl** key and click in a sentence.

Select a Line of Text: Click in the left margin for the line you want to select.

Select a Paragraph: Double-click in the left margin for the paragraph you want to select.

Select Everything: Click the **Select** button on the Home tab and click **Select All**, or press **Ctrl** + **A**.

Edit Text: Select the text you want to replace and type new text.

Cut, Copy and Paste: Select the text you want to cut or copy and click the **Cut** or **Copy** button on the Home tab. Click where you want to paste the text, and click the **Paste** button.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Keyboard Shortcuts

General

Open a document	**Ctrl** + **O**
Create a new document	**Ctrl** + **N**
Save a document	**Ctrl** + **S**
Print a document	**Ctrl** + **P**
Close a document	**Ctrl** + **W**

Navigation

Move the text cursor	↑, ↓, ←, →
Up one screen	**Page Up**
Down one screen	**Page Down**
Beginning of a line	**Home**
End of a line	**End**
Beginning of a document	**Ctrl** + **Home**
End of a document	**Ctrl** + **End**
Open Go To dialog box	**Ctrl** + **G**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Select All	**Ctrl** + **A**
Check Spelling and Grammar	**F7**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Align Left	**Ctrl** + **L**
Align Center	**Ctrl** + **E**
Align Right	**Ctrl** + **R**
Justify	**Ctrl** + **J**
Indent a paragraph	**Ctrl** + **M**
Remove an indent	**Ctrl** + **Shift** + **M**
Increase font size	**Ctrl** + **Shift** + **>**
Decrease font size	**Ctrl** + **Shift** + **<**
Increase font size 1pt	**Ctrl** + **]**
Decrease font size 1pt	**Ctrl** + **[**
Copy formatting	**Ctrl** + **Shift** + **C**
Paste formatting	**Ctrl** + **Shift** + **V**
Show/Hide Formatting Marks	**Ctrl** + **Shift** + *****

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Select and Edit Text

Spelling and Grammar Errors: Potential spelling errors are underlined in red and potential grammar errors are underlined in blue.

Correct a Spelling or Grammar Error: Manually make the correction, or right-click the error and select a suggestion you want to use.

Ignore a Spelling or Grammar Error: Right-click the error and select **Ignore All**.

Check Spelling and Grammar: Click the **Review** tab and click the **Spelling & Grammar** button.

Find the Word Count: Click the word count in the lower-left corner; or click the **Review** tab and click the **Word Count** button.

Use the Thesaurus: Click the word you want to replace, click the **Thesaurus** button on the Review tab, click a word's list arrow, and select **Insert**; or, right-click the word you want to replace, select **Synonyms**, and select a word from the menu.

Find Text: Click the **Find** button on the Home tab, type the text you want to find in the **Search** box, and click an item to jump to it in the document.

Replace Text: Click the **Replace** button on the Home tab. Enter the word you want to find in the **Find What** field, then enter the text that will replace it in the **Replace With** field. Click **Replace** or **Replace All**. Click **OK** when finished.

Insert a Symbol: Click where you want to insert the symbol. Click the **Insert** tab and click the **Symbol** button. Either select a symbol from the menu or select **More Symbols**, select a symbol, and click **Insert**.

Insert Text from Another File: Place the cursor where you want to insert the text. Click the **Insert** tab, click the **Object** button list arrow, and select **Text from File**. Select the file containing the text you want to insert, then click the **Insert** button.

Format Text and Paragraphs

Change the Font: Select the text you want to change, click the **Font** list arrow, and select a new font.

Change the Font Size: Select the text you want to change, click the **Font Size** list arrow, and select a new font size.

Change the Font Color: Select the text you want to change, click the **Font Color** button list arrow, and select a new color.

Apply Bold, Italic, or an Underline: Click the **Bold** B, **Italic** *I* or **Underline** U button in the Font group on the Home tab.

Clear Formatting: Select the text you want to clear formatting from, then click the **Clear All Formatting** button.

Format Text and Paragraphs

Create a Bulleted List: Select the text you want to make into a bulleted list, and click the **Bullets** button.

Change a Bulleted List Style: Select a bulleted list, click the **Bullets** button list arrow, and select a bullet symbol.

Create a Numbered List: Select the text you want to make into a numbered list, and click the **Numbering** button.

Change a Numbered List Style: Select a numbered list, click the **Numbering** button list arrow, and select a numbered list style.

Align a Paragraph: Click anywhere in the paragraph you want to align and click an alignment option in the Paragraph group on the Home tab.

Left aligned

Center aligned

Right aligned

Add a Border: Click in the paragraph where you want to add a border, click the **Borders** button list arrow, and select a border.

Add Shading: Click in the paragraph where you want to add shading, click the **Shading** button list arrow, and select a shading color.

Change Line Spacing: Select the paragraph you want to adjust, click the **Line Spacing** button, and select a spacing option.

Change Paragraph Spacing: Click the Paragraph group's dialog box launcher, change the values in the **Before** or **After** spacing fields, and click **OK**.

Copy Formatting: Select the formatted text you want to copy, click the **Format Painter** button, and select the text you want to apply formatting to.

Indent Paragraphs: Click anywhere in the paragraph you want to indent and click the **Increase Indent** or **Decrease Indent** button on the Home tab.

Set Custom Indents: Click anywhere in the paragraph you want to indent and click the Paragraph group's dialog box launcher. Adjust the values in the **Left** and **Right** fields, then click **OK**.

Enable the Ruler: Click the **View** tab, then check the **Ruler** check box.

Set a Tab Stop: Click anywhere in the paragraph you want to add a tab stop to, then click a spot on the ruler. Or, click the Paragraph group's dialog box launcher, click the **Tabs** button, enter a tab stop position in the text field, and then click **Set**. Click **OK** when you're finished adding tab stops.

Format Text and Paragraphs

Types of Tab Stops: Pressing the **Tab** key will advance the cursor to the next tab stop and align the text at that point, depending on the type of tab stop.

Left aligned will align the left side of the text with the tab stop.

Center aligned will align the text so that it's centered under the tab stop.

Right aligned will align the right side of the text with the tab stop.

Decimal aligned will align text and numbers by a decimal point.

Remove a Tab Stop: Click and drag a tab stop off of the ruler.

Format the Page

Choose a Margin Size: Click the **Layout** tab, click the **Margins** button, and select a common margin setting. Or, click and drag the **Adjust Left**, **Adjust Right**, **Adjust Top**, or **Adjust Bottom** line on the Ruler.

Change Paper Size: Click the **Layout** tab, click the **Size** button, and select the size you want to use.

Change Paper Orientation: Click the **Layout** tab, click the **Orientation** button, and select **Portrait** or **Landscape**.

Use a Header or Footer: Click the **Insert** tab, click either the **Header** or **Footer** button, and select an option.

Add Page Numbers: Click the **Insert** tab, click the **Page Number** button, select a part of the page, and select a page number style.

Format Columns: Click the **Layout** tab, click the **Columns** button, and select a column option.

Insert Column Breaks: Place your cursor where you want to start a new column, click the **Layout** tab, click the **Breaks** button, then select **Column**.

Insert Page Breaks: Place your cursor where you want to start a new page, click the **Insert** tab, and click the **Page Break** button.

Add a Watermark: Click the **Design** tab, click the **Watermark** button, and select a watermark style.

Add Page Color: Click the **Design** tab, click the **Page Color** button, and select a page color.

Add Page Borders: Click the **Design** tab, then click the **Page Borders** button. In the Borders and Shading dialog box, customize the border style, color, and width, as well as which sides the border will appear on, and then click **OK**.

Contact Us: sales@customguide.com

Microsoft®

Word 2021 Advanced

Quick Reference Guide

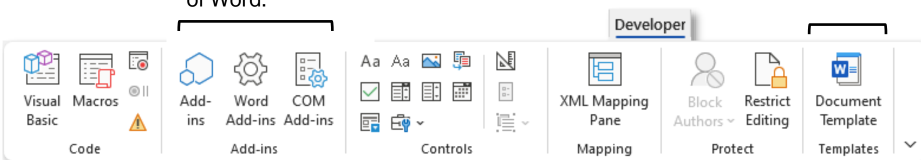
Free Cheat Sheets
Visit ref.customguide.com

The Developer Tab

The **Add-ins** group configures add-ins to extend the functionality of Word.

The **Mapping** group lets you link content controls to external XML

The **Templates** group lets you switch document templates and other add-ins.



The **Code** group contains commands to record and edit macros, as well as control the level of macro security in Word.

The **Controls** group lets you add form controls to a document. Click **Design Mode**, then click a form control button to insert it. Click **Design Mode** again when you're finished.

The **Protect** group lets you restrict the ability to make changes to a document (or certain parts of a document).

Collaborate in Word

Share a Document: Make sure the document is shared to an online-accessible location, such as OneDrive or SharePoint. Click the **Share** button above the ribbon and enter someone's email address in the Invite People field (or, click the **Address Book** button and select someone in the Address Book dialog box). Choose their permission level by clicking the permissions list arrow and selecting a level. Enter a short message (optional), then click the **Share** button.

Highlight Text: Select the text you want to highlight, click the **Text Highlight Color** button list arrow on the Home tab, and select a highlight color.

Insert a Comment: Select the text you want to add a comment to, click the **Review** tab, click the **New Comment** button, and add your comment. Click outside of the comment field when you're finished.

Delete a Comment: Click a comment to select it, click the **Review** tab, and click the **Delete** button.

Reply to a Comment: Click a comment to select it and click the **Reply** button in the comment. Type your response, then click outside the comment field when you're finished.

Show / Hide Comments: Click the **Review** tab and click the **Show Comments** button to toggle it on or off.

Toggle Track Changes: Click the **Review** tab and click the **Track Changes** button in the Tracking group.

View Markup: Click the **Review** tab, click the **Show Markup** button in the Tracking group, and select a type of markup to show or hide.

Review Revisions: Click the **Review** tab, then click the **Next Change** and **Previous Change** buttons in the Changes group. Click the **Accept** button to accept a change, or the **Reject** button to reject it.

Compare Two Documents: Click the **Review** tab, click the **Compare** button, and select **Compare**. Select the original document from the **Original Document** list arrow (or click the **Browse** icon and select it), then select the revised document from the **Revised Document** list arrow (or click the **Browse** icon and select it). Click the **More** button and select what types of differences to look for (optional). Click **OK**.

Add Line Numbers: Click the **Layout** tab, click the **Line Numbers** button, and select an option.

Forms

Add Forms to a Document

Enable the Developer Tab: Before adding forms, you must enable the Developer tab on the ribbon. Click the **File** tab, click **Options**, click **Customize Ribbon**, check the **Developer** check box, and click **OK**.

Add a Form Control: Place the text cursor where you want the form control, click the **Developer** tab, click the **Design Mode** button in the Controls group, and click the button for the form control you want to add. Click the **Design Mode** button again when you're finished adding form controls.

Finalize a Form: Click the **Developer** tab and click the **Restrict Editing** button to open the Restrict Editing pane. Check the **Editing Restrictions** check box, click the **Editing Restrictions** list arrow, and select **Filling in forms**. Click the **Yes, Start Enforcing Protections** button, enter a password (optional), and click **OK**.

Types of Form Controls

Form Controls: You can add different types of form controls that allow a user to enter different types of data into a form.

- **Rich Text** Aa allows users to enter text that can be formatted with different fonts and font styles.
- **Plain Text** Aa allows users to enter text, but not to format that text.
- **Picture** allows the user to add a picture from their computer or an online location to the form.
- **Check Box** places a form with a check box that the user can check or uncheck.
- **Combo Box** adds a list with a text box, where users can choose an option or enter their own.
- **Drop-Down List** adds a list with several options that a user can choose from.
- **Date Picker** lets the user choose a date from a calendar.
- **Repeating Section** contains other types of content controls and repeats as many times as you need it.
- **Legacy Types** of content controls were used in older versions of Word. You can still use them in a Word 97-2003 document.

Contact Us: sales@customguide.com

Collaborate in Word

Customize Line Numbers: Click the **Layout** tab, click the **Line Numbers** button, and select **Line Numbering Options**. Click the **Line Numbers** button. Customize where the line numbers start, how far they appear from the text, and how often they appear. Click **OK**, then click **OK** again.

Protect a Document: Click the **File** tab, click the **Protect Document** button, and select **Mark as Final**. Click **OK** in both the confirmation dialog boxes.

Password Protect a Document: Click the **File** tab, click the **Protect Document** button, and select **Encrypt with Password**. Enter a password, click **OK**, then enter that password again to confirm it, and click **OK** again.

Remove a Password: Click the **File** tab, click the **Protect Document** button, select **Encrypt with Password**, remove the password from the text field and click **OK**.

Inspect a Document: Click the **File** tab, click the **Check for Issues** button, and select **Inspect Document**. Select the types of content you want to check for, then click **Inspect**. After inspection, click **Remove All** for any content that you want to remove, then click **Close**.

Macros

Enable the Developer Tab: Before adding macros, you must enable the Developer tab on the ribbon. Click the **File** tab, click **Options**, click **Customize Ribbon**, check the **Developer** check box, and click **OK**.

Record a Macro: Click the **Developer** tab, click the **Record Macro** button, and give the macro a name. Click either **Button** or **Keyboard** to assign a button or keyboard shortcut to the new macro (optional). Click **OK**. Perform the tasks you want to record, then click the **Stop Recording** button.

Run a Macro: Place the text cursor where you want the macro to run. Click the **Developer** tab, click the **Macros** button, select a macro, and click **Run**.

Edit a Macro: Click the **Developer** tab, click the **Macros** button, select a macro, and click **Edit**. Modify the macro using the Visual Basic editor, then close Visual Basic.

Advanced Documents

Customize Word's Options: Click the **File** tab and click **Options**. Select a category on the left, and then customize options on the right. Click **OK** when you're finished.

Customize the Ribbon: Click the **File** tab, click **Options**, then click the **Customize Ribbon** tab. Select and expand a ribbon tab, then select and expand a group. Select a command from the left column, then click **Add** to add it, or select a command from the right column and click **Remove** to remove it from the ribbon.

Advanced Documents

Change Word's Default Font: Start in a new, blank document. Click the **Font** group's dialog box launcher. Choose the new default font or font style, then click the **Set as Default** button. Select **All documents based on the Normal template**, then click **OK**.

Create a Building Block: Select the text or objects you want to use as a building block. Then, click the **Insert** tab, click the **Explore Quick Parts** button, and select **Save Selection to Quick Part Gallery**.

Insert a Building Block: Place the text cursor where you want a building block placed. Click the **Insert** tab, click the **Explore Quick Parts** button, and either select a building block from the menu, or select **Building Blocks Organizer**. Select a building block, and then click **Insert**.

Find and Replace Using Wildcards: Click the **Find** button list arrow, select **Advanced Find**, and expand the dialog box by clicking the **More** button. Check the **Use Wildcards** check box, then while entering a search phrase in the **Find What** field, click the **Special** button and select a wildcard.

Wildcard Examples

?	any single character
*****	any number of characters
[ ]	one of these characters
[-]	one of these characters in a range
[!]	none of the specified characters
<	beginning of a word
>	end of a word
@	one or more instances of a character
{*n*}	exactly *n* instances of a character
{*n*, }	at least *n* instances of a character
{*n*, *m*}	between *n* and *m* instances of a character

Find and Replace Special Characters: Click the **Find** button list arrow, select **Advanced Find**, and expand the dialog box by clicking the **More** button. While entering a search phrase in the **Find What** field, click the **Special** button and select a special character.

Edit a Document in Multiple Languages: Select the text in another language, click the **Review** tab, click the **Language** button, and select **Set Proofing Language**. Select a language and click **OK**.

Add Additional Editing Languages: Click the **Review** tab, click the **Language** button, and select **Language Preferences**. Click the **Add additional editing languages** list arrow and select a language. Click **Add**, then click **OK**.

Insert a Date and Time Field: Click the **Insert** tab, click the **Date and Time** button, select a date format, check the **Update Automatically** check box, and click **OK**.

Advanced Documents

Insert a Field: Click the **Insert** tab, click the **Explore Quick Parts** button, and select **Field**. Select a field category, then a field. Click **OK**.

View Field Codes: Right-click a field and select **Toggle Field Codes**.

Mail Merge

1 – Start the Mail Merge Wizard: Click the **Mailings** tab, click the **Start Mail Merge** button, and select **Step-by-Step Mail Merge Wizard**.

2 – Choose a Document Type: In the Mail Merge pane, select a document type, then click **Next**.

3 – Select a Document: In the Mail Merge pane, select whether to use the current document, start a new document from a template, or use another existing file, then click **Next**.

4 – Select Recipients: In the Mail Merge pane, select whether to use an existing list, select contacts from Outlook, or type a new list.

If using an existing list, click the **Browse** button, select a file with a list of recipients, and click **Open**. Select which contacts in the list you want to use by checking or unchecking them, then click **OK**.

If selecting contacts from Outlook, click the **Choose Contacts Folder** button, select a contacts folder to import, and click **OK**. Select which contacts in the list you want to use by checking or unchecking them, then click **OK**.

If typing a new list, click the **Create** button, then fill out the fields for each address. Click **OK** when finished.

Click **Next**.

5 – Write Your Letter: Place the text cursor where you want an element, then click the button for the element you want to add (such as an **Address Block** or a **Greeting Line**), choose an element's options, then click **OK**. Or, click the **More Items** button, select a specific field to insert, click **Insert**, and then click **Close**. When you've added all the fields you need, click **Next**.

6 – Preview Your Letter: In the Mail Merge pane, click the **<<** and **>>** buttons to preview the placeholders filled in with a recipient's data. When you're finished previewing, click **Next**.

7 – Complete the Merge: In the Mail Merge pane, click **Print** to print the finished mail merged documents, or click **Edit individual letters** to create a new document for all or some of the records.

Close the Mail Merge pane when you're finished with the merge.

Contact Us: sales@customguide.com

Microsoft®

Word 2021 Intermediate

Quick Reference Guide

CustomGuide

your logo

Free Cheat Sheets

Visit ref.customguide.com

Elements of a Table

Table Selector

Column

Header Row

Selected Cell

Row

Total Row

Resize Handle

Location	Excursion Length	Packages	Sales
Las Vegas	3-day	8	$8,000
Paris	3-day	2	$4,000
Beijing	3-day	0	$0
Las Vegas	5-day	6	$10,200
Paris	5-day	8	$27,200
Beijing	5-day	4	$20,000
Las Vegas	7-day	0	$0
Paris	7-day	4	$20,000
Beijing	7-day	6	$42,000
		38	**$131,400**

Tables

Insert a Table: Click the **Insert** tab, click the **Table** button, and select the number of rows and columns that you want.

Add a Row or Column: Click in a cell next to where you want to add a row or column. Click the Table Tools **Layout** tab, then click **Insert Above**, **Insert Below**, **Insert Left**, or **Insert Right**, depending on where you want the row or column to be added.

Delete a Row or Column: Click in a cell in the row or column you want to delete, click the Table Tools **Layout** tab, click the **Delete** button, then select **Delete Row** or **Delete Column**.

Convert a Table to Text: Select the table, click the Table Tools **Layout** tab, click the **Convert to Text** button, choose how to separate the cells, and click **OK**.

Manually Resize a Table Row or Column: Click and drag the cell border.

Automatically Resize a Table Row or Column: Click within the table, click the Table Tools **Layout** tab, click the **AutoFit** button, and select an option.

Merge Cells: Select multiple cells that share a border, click the Table Tools **Layout** tab, and click the **Merge Cells** button.

Split Cells: Select a cell, click the Table Tools **Layout** tab, click the **Split Cells** button, enter the number of rows and columns, and then click **OK**.

Distribute Rows and Columns: Click within the table, click the Table Tools **Layout** tab, click the **Distribute Rows** button to distribute the rows evenly, or click the **Distribute Columns** button to distribute the columns evenly.

Apply a Table Style: Click inside the table, click the Table Tools **Design** tab, and select a style from the Table Styles gallery.

Apply Text Alignment: Select the cell(s), click the Table Tools **Layout** tab, and select an option from the Alignment group.

Add a Border to a Table: Select a table, click the Table Tools **Design** tab, click the **Border Styles** button list arrow, select a border style, click the **Borders** button list arrow, and select a border option.

Add Cell Shading: Select the cell(s), click the **Shading** button list arrow, and select a color.

Split a Table: Click in the row where the second table will start, click the Table Tools **Layout** tab, and click the **Split Table** button.

Navigating a Table

Navigating a Table

Next cell........................**Tab**

Previous cell..................**Shift** + **Tab**

Next row ....↓

Previous row ....↑

First cell in a row.............**Alt** + **Home**

Last cell in a row.............**Alt** + **End**

First cell in a column ....**Alt** + **Page Up**

Last cell in a column ....**Alt** + **Page Down**

Selecting Cells in a Table

Select a Single Cell: Click in the lower-left corner of a cell, when the cursor changes to an arrow; or triple-click a cell; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Cell**.

Select a Row: Click to the left of the table row (just outside the table itself); or click the Table Tools **Layout** tab, click **Select**, and choose **Select Row**.

Select a Column: Click above a column, when the cursor changes to an arrow ⬇; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Column**.

Select an Entire Table: Click the table selector button in the upper-left corner of a table; or click the Table Tools **Layout** tab, click **Select**, and choose **Select Table**.

Table Style Options

Configure Table Style Options: Place the text cursor within the table, click the Table Tools **Design** tab, then check the check boxes in the Table Style Options group to toggle certain table elements.

The appearance of these elements will vary, based on the current Table Style.

- Header Row applies special formatting to the first row of a table.
- Total Row applies special formatting to the final row of a table.
- Banded Rows alternates the shading for the body rows between two different colors.
- First Column applies special formatting to the first column in a table.
- Last Column applies a special formatting to the last column in a table.
- Banded Columns alternates the shading for body columns between two different colors.

Contact Us: sales@customguide.com

Graphics

Insert a Picture: Place the text cursor where you want to insert a picture, click the **Insert** tab, click the **Pictures** button, select a picture, and click **Insert**.

Remove a Picture's Background: Select a picture, click the **Format** tab, and click the **Remove Background** button. Areas that will be removed are highlighted. Click the **Mark Areas to Keep** button to draw over any area accidentally highlighted, and click the **Mark Areas to Remove** button to draw over any area that needs to be removed. Click the **Keep Changes** button.

Insert a Text Box: Click the **Insert** tab, click the **Text Box** button, and select a style of text box.

Insert a Shape: Click the **Insert** tab, click the **Shapes** button, select a shape, then click to place a shape (or click and drag to place the shape at a certain size).

Insert a Drawing: Click the **Draw** tab, click the **Draw with Touch** button, then click and drag the mouse (or use your finger on a touchscreen) to draw a shape. Click the **Draw with Touch** button again when you're done drawing.

Format a Shape: Select a shape, then click the **Format** tab and use the options in the Shape Styles group to customize the appearance of the shape.

- Click the **Shape Fill** button and select a color to change the shape's fill color.
- Click the **Shape Outline** button and select a color and weight for the shape's outline, as well as dash and arrow styles.
- Click the **Shape Effects** button and select a shape effect, such as shadow, glow, or bevel.
- Select a shape style preset from the Shape Styles gallery. Click the gallery's **More** button to see more presets.

Insert WordArt: Click the **Insert** tab, click the **Insert WordArt** button, and select a style of WordArt.

Insert a Chart: Click the **Insert** tab, click the **Add a Chart** button, select a chart category on the left, select a chart type, and click **OK**. Edit the chart data in the window that opens.

Resize an Object: Select an object, then click and drag the sizing handles on the sides and corners until it's the size you want.

Move an Object: Select an object, then click and drag it to a new location.

Rotate an Object: Select an object, then click and drag the rotate handle to the left or right. Or, select an object, click the **Format** tab, click the **Rotate Objects** button, and select a rotation option.

Graphics

Flip an Object: Select an object, click the **Format** tab, click the **Rotate Objects** button and select **Flip Vertical** or **Flip Horizontal**.

Position an Object on the Page: Select an object, click the **Format** tab, click the **Position** button, and select a position.

Wrap Text Around an Object: Select an object, click the **Format** tab, click the **Wrap Text** button, and select a text wrapping style.

Move an Object Up or Down One Layer: Select an object, click the **Format** tab, and click the **Bring Forward** button to move the object forward one layer, or click the **Send Backward** button to send the object backward one layer.

Group Objects: Select multiple objects, click the **Format** tab, click the **Group Objects** button, and select **Group**.

Ungroup Objects: Select a group, click the **Format** tab, click the **Group Objects** button, and select **Ungroup**.

Align Objects: Select multiple objects, click the **Format** tab, click the **Align** button, and select an alignment option.

Distribute Objects: Select multiple objects, click the **Format** tab, click the **Align** button, and select **Distribute Horizontally** or **Distribute Vertically**.

Styles, Themes, and Templates

Apply a Style: Place the text cursor in a paragraph and select a style from the Styles gallery on the Home tab. Click the gallery's **More** button to see additional styles.

Display the Styles Pane: Click the dialog box launcher in the **Styles** group on the Home tab.

Create a Style: Select some text that's formatted the way you want the style to appear, then click the Styles gallery's **More** button and select **Create a Style** (or, click the **New Style** button in the Styles pane). Give the new style a name and click **OK**.

Modify a Style: Change the formatting for some text with a style applied, right-click the style in the Styles gallery (or in the Styles pane) and select **Update ___ to Match Selection**.

Apply a Theme: Click the **Design** tab, click the **Themes** button, and select a theme.

Use a Document Template: Click the **File** tab, click **New**, search for a template in the search field or select a recommended template, select a template, and click **Create**.

Create a Document Template: Click the **File** tab, click **Save As**, select a location, give the file a name, click the **Save As Type** list arrow, select **Word Template**, and click **Save**.

Long Documents

Use Outline View: Click the **View** tab and click the **Outline** button. Click the **Close Outline View** button to return to the previous view.

Demote Items: While in Outline view, click the item you want to demote and click the **Demote** button (or the **Demote to Body Text** button).

Promote Items: While in Outline view, click the item you want to promote and click the **Promote** button (or the **Promote to Heading 1** button).

Navigate Long Documents: Click the **View** tab, check the **Navigation Pane** check box, and use the Pages tab to browse by page, or use the Headings tab to navigate by headings.

Add a Bookmark: Select the text you want to bookmark, click the **Insert** tab, click the **Bookmark** button in the Links group, give the bookmark a name, and click **Add**.

Insert a Section Break: Place the cursor where you want the section to start, click the **Layout** tab, click the **Breaks** button, and select a type of section break.

Insert a Link: Select the text you want to use as a link, click the **Insert** tab, click the **Link** button, choose what type of link to create, choose where to link to, and click **OK**.

Create Footnotes and Endnotes: Click the text that you want the footnote / endnote to refer to, click the **References** tab, click the **Insert Footnote** (or **Insert Endnote**) button, and type your footnote / endnote.

Insert a Table of Contents: Place the text cursor where you want to insert a table of contents, click the **References** tab, click the **Table of Contents** button, and select a table of contents style.

Insert an Index Entry: Select the text you want the index entry to refer to, click the **References** tab, and click the **Mark Entry** button. Set any index entry options you want, then click **Mark** (or, click **Mark All** to mark all instances of the text). Click **Close**.

Insert an Index: Place the text cursor where you want to insert an index, click the **References** tab, click the **Insert Index** button. Set up the index's options, then click **OK**.

Create a Citation: Click the **References** tab, click the **Insert Citation** button, and select **Add New Source**. Enter the source's information, then click **OK**.

Insert a Citation: Click the **References** tab, click the **Insert Citation** button, and select a citation from the menu.

Insert a Bibliography: Click the **References** tab, click the **Bibliography** button, then select a bibliography style.

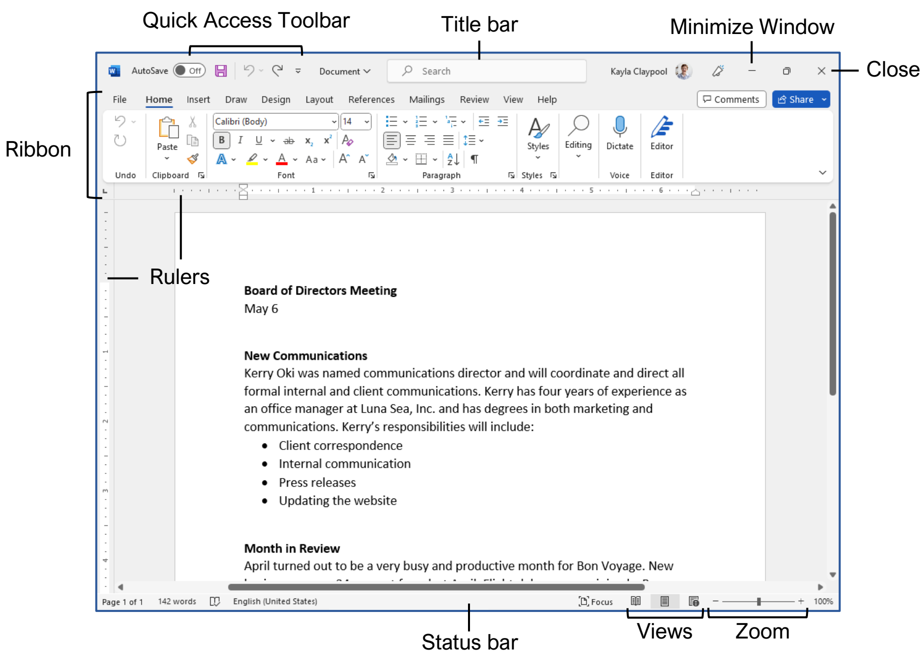
Microsoft®

Word 2021 Basic

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

The Word 2021 Program Screen



Word Fundamentals

Create a Blank Document: Click the **File** tab, select **New**, and click **Blank document**; or, press **Ctrl** + **N**.

Open a Document: Click the **File** tab and select **Open**, or press **Ctrl** + **O**. Select a location with a file you want, then select a file and click **Open**.

Save a Document: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Recover an Unsaved Document: Restart Word after a crash. If a document can be recovered, the **Recover unsaved documents** link will appear on the start screen. Click the link to open the Document Recovery pane, then select an autorecovered document.

Change Document Views: Click the **View** tab and select a view, or click one of the **View** buttons at the bottom of the window.

Reading View

Print Layout View

Web Layout View

Print: Click the **File** tab, select **Print**, specify print settings, and click **Print**.

Select and Edit Text

Select a Block of Text: Click and drag across the text you want to select; or, click at the beginning of a text block, hold down the **Shift** key, and click at the end of a text block.

Select a Sentence: Press the **Ctrl** key and click in a sentence.

Select a Line of Text: Click in the left margin for the line you want to select.

Select a Paragraph: Double-click in the left margin for the paragraph you want to select.

Select Everything: Click the **Select** button on the Home tab and click **Select All**, or press **Ctrl** + **A**.

Edit Text: Select the text you want to replace and type new text.

Cut, Copy and Paste: Select the text you want to cut or copy and click the **Cut** or **Copy** button on the Home tab. Click where you want to paste the text, and click the **Paste** button.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Keyboard Shortcuts

General

Open a document	**Ctrl** + **O**
Create a new document	**Ctrl** + **N**
Save a document	**Ctrl** + **S**
Print a document	**Ctrl** + **P**
Close a document	**Ctrl** + **W**

Navigation

Move the text cursor	↑, ↓, ←, →
Up one screen	**Page Up**
Down one screen	**Page Down**
Beginning of a line	**Home**
End of a line	**End**
Beginning of a document	**Ctrl** + **Home**
End of a document	**Ctrl** + **End**
Open Go To dialog box	**Ctrl** + **G**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Select All	**Ctrl** + **A**
Check Spelling and Grammar	**F7**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Align Left	**Ctrl** + **L**
Align Center	**Ctrl** + **E**
Align Right	**Ctrl** + **R**
Justify	**Ctrl** + **J**
Indent a paragraph	**Ctrl** + **M**
Remove an indent	**Ctrl** + **Shift** + **M**
Increase font size	**Ctrl** + **Shift** + **>**
Decrease font size	**Ctrl** + **Shift** + **<**
Increase font size 1pt	**Ctrl** + **]**
Decrease font size 1pt	**Ctrl** + **[**
Copy formatting	**Ctrl** + **Shift** + **C**
Paste formatting	**Ctrl** + **Shift** + **V**
Show/Hide Formatting Marks	**Ctrl** + **Shift** + *****

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Select and Edit Text

Spelling and Grammar Errors: Potential spelling errors are underlined in red and potential grammar errors are underlined in blue.

Correct a Spelling or Grammar Error: Manually make the correction, or right-click the error and select a suggestion you want to use.

Ignore a Spelling or Grammar Error: Right-click the error and select **Ignore All**.

Check Spelling and Grammar: Click the **Review** tab and click the **Spelling & Grammar** button.

Find the Word Count: Click the word count in the lower-left corner; or click the **Review** tab and click the **Word Count** button.

Use the Thesaurus: Click the word you want to replace, click the **Thesaurus** button on the Review tab, click a word's list arrow, and select **Insert**; or, right-click the word you want to replace, select **Synonyms**, and select a word from the menu.

Find Text: Click the **Find** button on the Home tab, type the text you want to find in the **Search** box, and click an item to jump to it in the document.

Replace Text: Click the **Replace** button on the Home tab. Enter the word you want to find in the **Find What** field, then enter the text that will replace it in the **Replace With** field. Click **Replace** or **Replace All**. Click **OK** when finished.

Insert a Symbol: Click where you want to insert the symbol. Click the **Insert** tab and click the **Symbol** button. Either select a symbol from the menu or select **More Symbols**, select a symbol, and click **Insert**.

Insert Text from Another File: Place the cursor where you want to insert the text. Click the **Insert** tab, click the **Object** button list arrow, and select **Text from File**. Select the file containing the text you want to insert, then click the **Insert** button.

Format Text and Paragraphs

Change the Font: Select the text you want to change, click the **Font** list arrow, and select a new font.

Change the Font Size: Select the text you want to change, click the **Font Size** list arrow, and select a new font size.

Change the Font Color: Select the text you want to change, click the **Font Color** button list arrow, and select a new color.

Apply Bold, Italic, or an Underline: Click the **Bold B**, **Italic I** or **Underline U** button in the Font group on the Home tab.

Clear Formatting: Select the text you want to clear formatting from, then click the **Clear All Formatting** button.

Format Text and Paragraphs

Create a Bulleted List: Select the text you want to make into a bulleted list, and click the **Bullets** button.

Change a Bulleted List Style: Select a bulleted list, click the **Bullets** button list arrow, and select a bullet symbol.

Create a Numbered List: Select the text you want to make into a numbered list, and click the **Numbering** button.

Change a Numbered List Style: Select a numbered list, click the **Numbering** button list arrow, and select a numbered list style.

Align a Paragraph: Click anywhere in the paragraph you want to align and click an alignment option in the Paragraph group on the Home tab.

Left aligned

Center aligned

Right aligned

Add a Border: Click in the paragraph where you want to add a border, click the **Borders** button list arrow, and select a border.

Add Shading: Click in the paragraph where you want to add shading, click the **Shading** button list arrow, and select a shading color.

Change Line Spacing: Select the paragraph you want to adjust, click the **Line Spacing** button, and select a spacing option.

Change Paragraph Spacing: Click the Paragraph group's dialog box launcher, change the values in the **Before** or **After** spacing fields, and click **OK**.

Copy Formatting: Select the formatted text you want to copy, click the **Format Painter** button, and select the text you want to apply formatting to.

Indent Paragraphs: Click anywhere in the paragraph you want to indent and click the **Increase Indent** or **Decrease Indent** button on the Home tab.

Set Custom Indents: Click anywhere in the paragraph you want to indent and click the Paragraph group's dialog box launcher. Adjust the values in the **Left** and **Right** fields, then click **OK**.

Enable the Ruler: Click the **View** tab, then check the **Ruler** check box.

Set a Tab Stop: Click anywhere in the paragraph you want to add a tab stop to, then click a spot on the ruler. Or, click the Paragraph group's dialog box launcher, click the **Tabs** button, enter a tab stop position in the text field, and then click **Set**. Click **OK** when you're finished adding tab stops.

Format Text and Paragraphs

Types of Tab Stops: Pressing the **Tab** key will advance the cursor to the next tab stop and align the text at that point, depending on the type of tab stop.

Left aligned will align the left side of the text with the tab stop.

Center aligned will align the text so that it's centered under the tab stop.

Right aligned will align the right side of the text with the tab stop.

Decimal aligned will align text and numbers by a decimal point.

Remove a Tab Stop: Click and drag a tab stop off of the ruler.

Format the Page

Choose a Margin Size: Click the **Layout** tab, click the **Margins** button, and select a common margin setting. Or, click and drag the **Adjust Left**, **Adjust Right**, **Adjust Top**, or **Adjust Bottom** line on the Ruler.

Change Paper Size: Click the **Layout** tab, click the **Size** button, and select the size you want to use.

Change Paper Orientation: Click the **Layout** tab, click the **Orientation** button, and select **Portrait** or **Landscape**.

Use a Header or Footer: Click the **Insert** tab, click either the **Header** or **Footer** button, and select an option.

Add Page Numbers: Click the **Insert** tab, click the **Page Number** button, select a part of the page, and select a page number style.

Format Columns: Click the **Layout** tab, click the **Columns** button, and select a column option.

Insert Column Breaks: Place your cursor where you want to start a new column, click the **Layout** tab, click the **Breaks** button, then select **Column**.

Insert Page Breaks: Place your cursor where you want to start a new page, click the **Insert** tab, and click the **Page Break** button.

Add a Watermark: Click the **Design** tab, click the **Watermark** button, and select a watermark style.

Add Page Color: Click the **Design** tab, click the **Page Color** button, and select a page color.

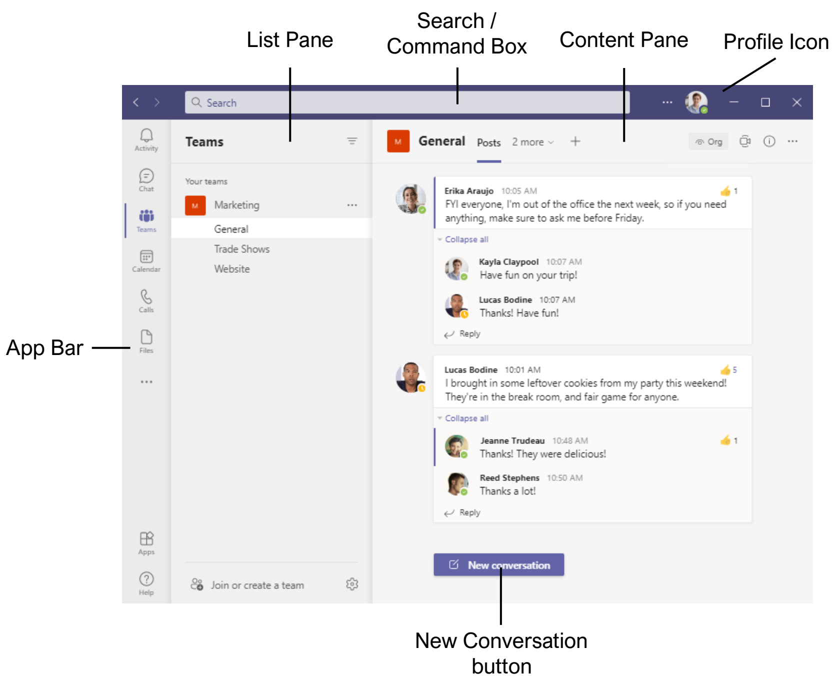
Add Page Borders: Click the **Design** tab, then click the **Page Borders** button. In the Borders and Shading dialog box, customize the border style, color, and width, as well as which sides the border will appear on, and then click **OK**.

Contact Us: sales@customguide.com

Microsoft Teams
Cheat Sheet

Free Cheat Sheets
Visit ref.customguide.com

The Teams Program Screen



Getting Started

Sign In: Enter your email address in the Sign In field, then click **Sign In**. Enter your password in the Password field, then click **Sign In**.

Sign Out: Click your account icon in the upper-right, then select **Sign Out**.

Set Your Status: Click your account icon in the upper-right, click your current status, then select a new status from the menu.

Available	Online and available
Busy	On a call, in a meeting, or otherwise busy
Do Not Disturb	Online, but does not want to be disturbed
Be Right Back	Will return shorty
Appear Away	Currently away from computer or idle

Set a Status Message: Click your account icon in the upper-right, then select **Set Status Message**. Enter a message into the text field, then click the **Clear status message after** list arrow and select when the message should expire. Click **Done**.

Chats

Start a New Chat: Click the **Chat** button on the App bar, then click the **New Chat** button at the top of the list pane. Start typing the name of the person you want to chat with, then select their name from the search results. Enter a message in the Compose box, then click **Send**.

Resume a Recent Chat: Click the **Chat** button on the App bar, then select a contact from under the Recent heading.

Start a Chat with a Contact: Click the **Chat** button on the App bar. Click the **Chat** heading at the top of the list pane, select **Contacts**, then select someone from the Contacts list.

Start a Group Chat: Click the **Chat** button on the App bar, then click the **New Chat** button at the top of the list pane. Start typing a person's name, then select their name from the search results. Start typing another name, then select another contact from the search results. Repeat until you have all the contacts you want.

Format Text: Click the **Format** button below the Compose box. Select the text you want to format, then use the formatting options available. Click the ••• **More Options** button to access additional formatting options.

Keyboard Shortcuts

General

- Go to Search .... **Ctrl** + **E**
- Start a New Chat .... **Ctrl** + **N**
- Show Commands .... **Ctrl** + **/**
- Show Keyboard Shortcuts .... **Ctrl** + **.**
- Goto .... **Ctrl** + **G**
- Help **F1**
- Settings .... **Ctrl** + **,**
- Zoom In .... **Ctrl** + **=**
- Zoom Out .... **Ctrl** + **-**

Navigation

- Activity .... **Ctrl** + **1**
- Chat .... **Ctrl** + **2**
- Teams .... **Ctrl** + **3**
- Calendar .... **Ctrl** + **4**
- Calls .... **Ctrl** + **5**
- Files .... **Ctrl** + **6**

Messaging

- Go to Compose box .... **C**
- Expand Compose box .... **Ctrl** + **Shift** + **X**
- Send from Expanded Compose Box .... **Ctrl** + **Enter**
- Attach file .... **Ctrl** + **O**
- New Line .... **Shift** + **Enter**

Meetings and Calls

- Accept Video Call .... **Ctrl** + **Shift** + **A**
- Accept Audio Call .... **Ctrl** + **Shift** + **S**
- Decline Call .... **Ctrl** + **Shift** + **D**
- Start Audio Call .... **Ctrl** + **Shift** + **C**
- Start Video Call .... **Ctrl** + **Shift** + **U**
- Toggle Mute .... **Ctrl** + **Shift** + **M**
- Toggle Video .... **Ctrl** + **Shift** + **O**
- Toggle Fullscreen .... **Ctrl** + **Shift** + **F**
- Toggle Background Blur .... **Ctrl** + **Shift** + **P**

Calendar

- Schedule a Meeting .... **Alt** + **Shift** + **N**
- Go to Current Time .... **Alt** + **.**
- Previous Day/Week .... **Ctrl** + **Alt** + **←**
- Next Day/Week .... **Ctrl** + **Alt** + **→**
- View Day .... **Ctrl** + **Alt** + **1**
- View Workweek .... **Ctrl** + **Alt** + **2**
- View Week .... **Ctrl** + **Alt** + **3**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Chats

Send Important and Urgent Messages: Click the **Set Delivery Options** button, then select **Important** or **Urgent**.

- **Important** messages will be marked with a ! symbol.
- **Urgent** messages will be marked with a symbol and will repeatedly notify the recipient until the message is read.

Insert an Emoji: Click the **Emoji** button and select an emoji from the menu.

Insert a GIF: Click the **GIF** button, then search for a GIF. Select a GIF from the search results.

Insert a Sticker: Click the **Sticker** button, select a sticker category or search for a sticker, then click a sticker.

Invite People to a Group Chat: Click the **Add People** button at the top of a chat screen. Start typing a person's name, then select their name from the search results. Choose how much of the conversation they'll be allowed to see, then click the **Add** button.

Pin a Chat to the Top of the List Pane: Hover your mouse over a chat in the list pane, click the ••• **More Options** button, then select **Pin**.

Mute a Chat's Notifications: Hover your mouse over a chat in the list pane, click the ••• **More Options** button, then select **Mute**.

Share a File: Click the **Attach File** button below the Compose box, select a file source, select a file, click **Open**, then click **Send**.

Teams

Join a Team: Click the **Teams** button on the App bar, then click **Join or create a team** at the bottom of the list pane. Select a public team, search for a team, or enter a team code in the **Enter code** field. Click a team's **Join Team** button.

Create a Team: Click the **Teams** button on the App bar, then click **Join or create a team** at the bottom of the list pane. Click the **Create Team** button, then click **From scratch**. Select a privacy level, enter a team name and description, then click **Create**. Add team members by searching for their names and selecting them from the search results, click **Add**, then click **Close**.

View a Team Channel: Click the **Teams** button on the App bar, then click a team channel in the list pane.

Start a Channel Conversation: While viewing a team channel, click the **New Conversation** button. Enter a message in the Compose box, then click **Send**.

Reply to a Channel Conversation: Click a conversation's **Reply** button, then enter a message and click **Send**.

Teams

React to a Message: Hover your mouse over a message in a team channel, then click a reaction from the menu that appears.

Save a Message: Hover your mouse over a message in a team channel, click the ••• **More Options** button, then select **Save this message**.

View Saved Messages: Click your account icon in the upper-right, then select **Saved**. Click a saved message to view it.

Create a New Channel: Hover your mouse over a team in the list pane, click the ••• **More Options** button, then select **Add channel**. Give the channel a name and description, set its privacy settings, then click **Add**.

View a Channel File Library: While viewing a team channel, click the **Files** tab.

Upload a File to a Library: While viewing a file library, click the **Upload** button, select **Files**, navigate to and select a file, then click **Open**.

Create a New File in a Library: While viewing a file library, click the **New** button, select a file type, then enter a file name and click **Create**.

Share a Link to a Library: While viewing a file library, click the **Copy Link** button, select whether you want a **Teams** link or a **SharePoint** link, then click the **Copy** button.

Meetings

Schedule a Meeting: Click the **Calendar** button on the App bar, then click the **New meeting** button. Enter a meeting's name, date, and time, then choose a location or team channel. Click **Save**.

Join a Meeting from a Channel: View the team channel the meeting is taking place in, locate the meeting in the Content pane, then click a meeting's **Join Now** button. Or, click the meeting to view its details and then click the **Join** button.

Join a Meeting from the Calendar: Click the **Calendar** button on the App bar, click a meeting, then click the **Join** button.

View a Meeting Conversation: While in a meeting, click the **Show Conversation** button on the controls toolbar.

Show Meeting Participants: While in a meeting, click the **Show Participants** button on the controls toolbar to display the People pane.

Mute a Meeting Participant: While the meeting's People pane is displayed, click a participant's ••• **More Options** button and select **Mute Participant**.

Take Meeting Notes: While in a meeting, click the ••• **More Actions** button on the controls toolbar and select **Meeting Notes**. Click the Take Notes button, then begin taking notes.

Meetings

View Meeting Notes: View the team channel that a meeting took place in, then click the **Meeting Notes** tab.

Record a Meeting: While in a meeting, click the ••• **More Actions** button on the controls toolbar and select **Start Recording**. Click the ••• **More Actions** button again and select **Stop Recording** when you're finished.

View a Meeting Recording: View the team channel that a meeting took place in, locate the meeting in the Content pane, click the recording, then click the **Play** button.

Toggle Camera: While in a meeting or call, click the **Camera** button on the controls toolbar to turn it on or off.

Toggle Microphone: While in a meeting or call, click the **Microphone** button on the controls toolbar to turn it on or off.

Change the Camera Background: While in a meeting or call, click the ••• **More Actions** button on the controls toolbar and select **Apply Background Effects**. Select an effect, then click **Apply**.

Change Audio and Video Devices: While in a meeting or call, click the ••• **More Actions** button on the controls toolbar and select **Device Settings**. Click the list arrows for audio devices and the camera to select a device.

Share Your Screen: While in a meeting or call, click the **Share Content** button on the controls toolbar. Select your whole screen, a specific window, or a PowerPoint presentation from the screen sharing pane. Click the **Stop Sharing** button when you're done.

Calls

Make a Call: Click the **Calls** button on the App bar. Enter a contacts name in the **Type a name** field, select them, then click the **Call** button; or click the **Contacts** tab in the list pane and click a contact's **Call** button.

Answer a Call: When someone calls you, a notification will appear.

- Click to answer as a video call.
- Click to answer as an audio call.
- Click to decline the call.

Place a Call on Hold: While on a call, click the ••• **More Actions** button on the controls toolbar and select **Hold**. Click the **Resume** button when you can return to the call.

Transfer a Call: While on a call, click the ••• **More Actions** button on the controls toolbar and select **Transfer**. Type the name of who you want to transfer the call to, select their name from the search results, then click **Transfer**.

Check Your Voicemail: Click the **Calls** button on the App bar and click **Voicemail** tab above the History group. Click a voicemail message, then click the **Play** button to play it.

Contact Us: sales@customguide.com

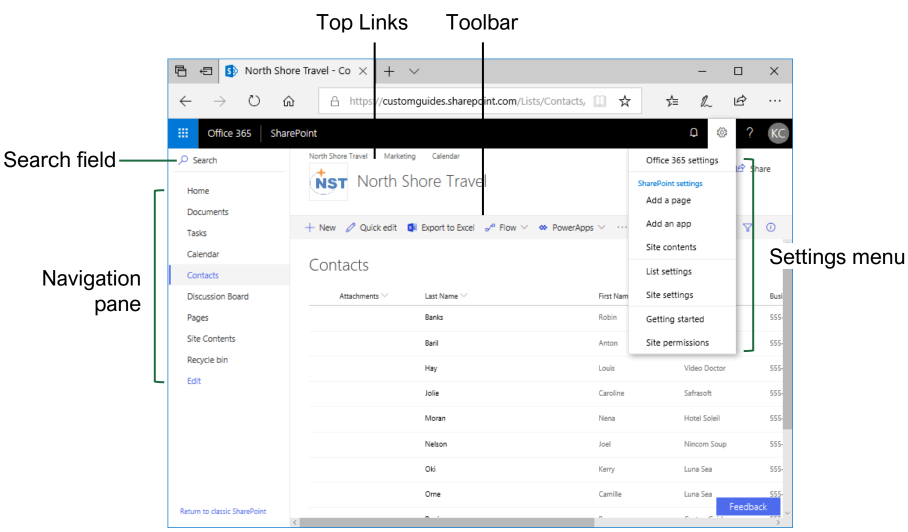
Microsoft®

SharePoint 2016

Quick Reference Guide

Free Quick References
Visit ref.customguide.com

The SharePoint 2016 Screen



The Fundamentals

Access a SharePoint Site: Enter the address for your SharePoint site into your browser, enter your username and password, then click **OK** (for on-premises instances), or open the SharePoint app on Office.com (for instances of SharePoint Online).

Navigate a SharePoint Site: Use the links at the top of the page, and in the Quick Launch area on the left side of the page, to visit pages and subsites.

Use the Ribbon: Click a ribbon tab to display its commands, then click a button on the ribbon. Click the **Browse** tab to close the ribbon.

Search a Site: Click in the **Search** field, enter search keywords, and press **Enter**.

Get Help: Click the ? **Help** icon in the upper right, enter a search topic in the **Search** box, then click a relevant article's title.

Delete an Item: Select an item in a library or list, click the 🗑 **Delete** button on the toolbar (or on the ribbon), and click **Delete** again to confirm.

Delete a List or Library: Open the Site Contents page, click the **⋮ Show actions** button next to a list or library, and select **Remove**. Click **Delete** to confirm.

Use Lists and Libraries

Create a List: Click the ⚙ **Settings** icon in the upper right, select **Add an app**, click a type of list, give it a name, and click **Create**.

Add a List Item: Open a list, click the + **New** button, fill out the available fields, then click the 🖫 **Save** button.

Use Quick Edit: Click the ✎ **Quick Edit** button, fill out the columns and rows to add list items, then click the ✓ **Exit Quick Edit** button.

Edit a List Item: Check a check box next to a list item to select it, click the ✎ **Edit** button, make changes to the item data, then click the 🖫 **Save** button.

Delete a List Item: Check a checkbox next to a list item to select it, click the 🗑 **Delete** button, and click **Delete** again to confirm.

Add a New List Column: While viewing a list, click the + **Add column** button at the right edge of the list. Select a column type, fill out that column's details, then click **Save**.

Edit a Column: Click the column's list arrow, select **Column Settings**, and select **Edit**. Modify that column's details, then click **Save**.

List and Library Types

Types of Lists

Announcements: Shares news and status updates.

Contacts: Stores information about people, such as names, company, phone numbers, and email addresses.

Discussion Boards: Contain discussion threads, with an option to store email discussions as well.

Links: Stores a list of links to websites, both external websites and internal SharePoint sites.

Calendar: Stores events, meetings, and other dates in a special list that can be viewed as a calendar. Calendar lists can also integrate with Outlook.

Tasks: Tracks information about projects, including who is assigned to each task, that task's progress, and due dates. Task lists are also able to integrate into Outlook.

Survey: Contains a list of questions to have people fill out.

Custom List: This type of list allows you to create it from scratch, adding just the columns that you need.

Types of Libraries

Asset Library: Stores media assets like images, video, and audio files. An asset library also stores thumbnails and metadata for media assets to make them easier to use.

Document Library: Stores many kinds of documents, including text documents, spreadsheets, and presentations.

Form Library: Stores XML-based data entry forms.

Picture Library: Stores pictures, while also offering several ways to view and edit the pictures in the library.

Report Library: Contains web pages and documents to track data reports and dashboards.

Wiki Page Library: Lets you create interconnected Wiki pages that can be easily created and modified by multiple users.

Use Lists and Libraries

Create a Library: Click the ⚙ **Settings** icon in the upper right, select **Add an app**, click a type of library, give it a name, and click **Create**.

Create a Document in a Library: Open the library, click the + **New** button, and select a type of document.

Upload a File: Open the library, click the ↑ **Upload** button, select **Files** or **Folder**, select files or a folder to upload, then click **Open**.

Sort a List or Library: Click a column header, then select a sorting option.

Filter a List or Library: Click the **Filter** button and check the check boxes for the filters you want to apply.

Clear a Filter: Click the **Clear Filters** button in the Filters pane.

Change Views: Click the **View Options** button (which will be labeled with the name of the current view) on the toolbar and select a view.

Create a Custom View: Click the ⚙ **Settings** icon, select **List Settings**, and click **Create View**. Select a view type, give the view a name, configure the view's settings, then click **OK**.

Edit a View: Click the **View Options** button on the toolbar, select **Edit Current View**, make changes to the view, and click **OK**.

Work with Documents

Open a File in the Browser: Click a file's name.

Open a File in Office: Select a file by checking its check box, click the **Open** button, and select **Open in [Office Program]**.

Download a File: Select a file, then click the ↓ **Download** button on the toolbar.

Check Out a File: Select a file, expand the toolbar by clicking the ··· **ellipsis** button (if necessary), and click the **Check out** button.

Check In a File: Select a file, expand the toolbar by clicking the ··· **ellipsis** button (if necessary), and click the **Check in** button. If necessary, enter details for the check-in and click **OK**.

View a File's Version History: Select a file, expand the toolbar by clicking the ··· **ellipsis** button (if necessary), and click the **Version history** button.

Create an Alert: Select a file, expand the toolbar by clicking the ··· **ellipsis** button (if necessary), and click the **Alert me** button. Configure the alert's settings, then click **OK**.

Work with Documents

Create a Folder: Click the + **New** button, select **Folder**, enter a name for the folder, and click **Create**.

Move a File to a Folder: Click and drag a file into a folder. Or, select a file, expand the toolbar by clicking the ··· **ellipsis** button (if necessary), click the **Move To** button. Select a library and folder, then click **Move Here**.

Share a File: Select a file, click the **Share** button, enter names or email addresses, select permissions, add a message, and click **Send**.

Work with Web Pages

Create a New Page: From the SharePoint home page, click the + **New** button and select **Page**. Enter a name in the Title field, then add content. Click the **Save and close** button.

View Site Pages: Click the ⚙ **Settings** icon in the upper right, select **Site Contents**, then click the **Site Pages** library.

Edit a Page: Open a page, then click the **Edit** button on the toolbar. Add, edit, or remove content, then click the **Save and close** button.

Publish a Page: While viewing a page you've created, click the **Publish** button on the toolbar.

Promote a Page: While viewing a page, click the **Promote** button in the toolbar, then select a promotion option from the pane.

- **Add Page to Navigation** will add a link to the page to the Navigation pane at the left.
- **Post the Page as News** will add a link and preview of the page to the site's home page, as well as the newsfeed of the site's users.
- **Email** will send an email containing a link to the page to a list of recipients.
- **Copy Address** will copy the page's URL to your clipboard to share in other ways.

Rename a Page: Select a page in the **Site Pages** library, expand the toolbar by clicking the ··· **ellipsis** button (if necessary), click the **Rename** button, enter a new name, then click **Save**.

Delete a Page: Select a page in the **Site Pages** library, click the **Delete** button on the toolbar, then click **Delete** to confirm.

Manage Sites and Subsites

View Site Contents: Click the ⚙ **Settings** icon in the upper right and select **Site Contents**.

Access Site Settings: From the Site Contents page, click the **Site Settings** link.

Manage Sites and Subsites

Create a Subsite: From the Site Contents page, click the + **New** button and select **Subsite**. Give the subsite a name, description, and

Manage Sites and Subsites

address. Select a site template, permissions, and navigation options, then click the **Create** button.

View a Subsite's Users: While viewing a subsite, click the ⚙ **Settings** icon in the upper right and select **Site Permissions**.

Add Users to a Group: While viewing a site or subsite, click the ⚙ **Settings** icon in the upper right, select **Site Permissions**, and click the **Advanced permissions settings** link. Click a group, click the **New** button, and select **Add Users**. Enter names or email addresses, add a message, and click the **Share** button.

Remove Users from a Group: While viewing a site or subsite, click the ⚙ **Settings** icon in the upper right, select **Site Permissions**, and click the **Advanced permissions settings** link. Click a group, select a user by checking its check box, click the **Actions** button, select **Remove Users from Group**, then click **OK**.

Manage Tasks and Events

Add a Task: While viewing a Task list, click ⊕**New Task**. Give the task a name, start and end date, then click **Save**.

Edit a Task List: While viewing a Task list, click **Edit**. Modify a task's details, then click **Stop**.

Add a Task to the Timeline: Click a task's ··· **ellipsis** button and select **Add to Timeline**.

Add a Calendar Event: While viewing a SharePoint calendar, click the **Events** tab, click the **New Event** button, enter an event's details, then click **Save**.

Use SharePoint with Office

Add a SharePoint Library to Office: From an Office app, click the **File** tab, select **Save As**, click **Add a Place**, and select **Office 365 SharePoint**. Enter your email address, click **Next**, enter your password, and click **Sign In**.

Connect a Calendar to Outlook: Open a calendar, click the **Calendar** tab on the ribbon, click the **Connect to Outlook** button, and click **Yes**. When Outlook asks if you want to add the calendar, click **Yes**.

Export a List from SharePoint to Excel: Open a list in SharePoint, click the **Export to Excel** button on the toolbar, and click **Save**. Open the downloaded file, then when asked about opening a data connection to SharePoint, click **Enable**. Choose how to import the table, then click **OK**.

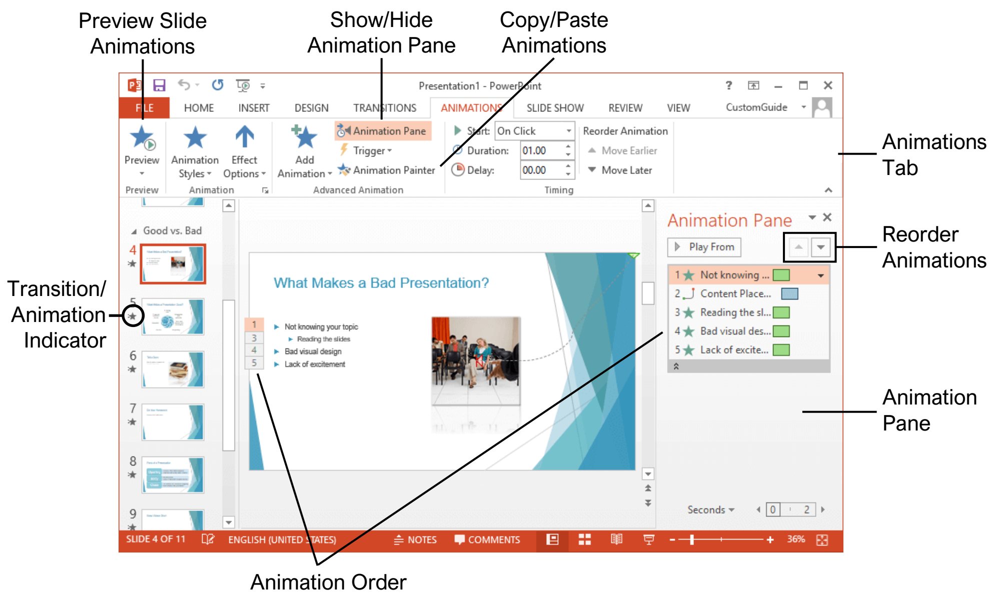
Microsoft®

PowerPoint 2013 Intermediate

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

Animations Tab & Pane



Transitions and Animations

Apply a Slide Transition: Select the slide(s) where you want to add a transition. Click the **Transitions** tab on the ribbon and click the **More** button in the Transition to This Slide group. Select the transition you want to use.

Modify a Transition: Click the **Transitions** tab on the ribbon and click the **Effect Options** button. Select an effect option in the menu.

Apply an Animation: Select the text or object you want to animate and click the **Animations** tab on the ribbon. Click the **Animation Styles** button and select the animation you want to use. Click the **Add Animation** button to add additional animations to the same object.

Modify an Animation: Click the **Animations** tab on the ribbon and click the **Effect Options** button. Select an option for the applied animation.

Copy Animations: Select an object with an animation applied. Click the **Animations** tab and click the **Animation Painter** button. Select the object you want the animation applied to.

Display the Animation Pane: Click the **Animations** tab on the ribbon and click the **Animation Pane** button. View and edit the timeline for animations on the current slide.

Formatting and Themes

Change the Font: Select the text you want to change, click the **Font** list arrow on the Home tab, and select a new font.

Change the Font Size: Select the text you want to change, click the **Font Size** list arrow on the Home tab, and select a new font size.

Change the Font Color: Select the text you want to change, click the **Font Color** list arrow, and select a new color.

Modify the Slide Background: Click the **Design** tab on the ribbon and click the **Format Background** button. Make the desired changes in the Format Background pane.

Apply a Presentation Theme: Click the **Design** tab on the ribbon. Click the **More** button in the Themes group and select a theme.

Modify Theme Elements: Click the **Design** tab on the ribbon and click the **More** button in the Variants group. Click **Colors**, **Fonts**, or **Effects** to expand the menu and select a new style that coordinates with the current theme.

Change the Slide Size: Click the **Design** tab, click the **Slide Size** button in the Customize group, and select a slide size.

Use a Presentation Template: Click the **File** tab on the ribbon and select **New**. Select a template in the list and click **Create**.

Styles

Animation Styles

Appear	Text or object appears on the slide.
Fade	Text or object fades into view.
Fly In	Text or object flies in from the specified direction.
Float In	Text or object floats in from a specified direction and becomes visible.
Split	Text or object becomes whole as its halves unite from a specified direction.
Wipe	Text or object is wiped on from a specified direction.
Shape	Text or object fills in from the edges of a specified shape and appears.
Wheel	Text or object rotates around a central hub and gradually comes into view.

Transition Styles

Fade	The previous slide fades away, revealing the current slide.
Push	The previous slide pushes the current slide into view.
Wipe	The previous slide disappears quickly as the current slide rolls over it.
Split	The previous slide divides at a center point and disappears, revealing the current slide.
Cut	The previous slide disappears almost instantly and the current slide pops into view.
Uncover	The previous slide moves out of the way quickly, revealing the current slide.
Flash	The previous slide disappears in a bright flash and the current slide eases into view.
Wind	The previous slide flutters slowly and then blows away, revealing the current slide.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Pictures

Insert a Picture Using Content Placeholders: Click a content slide's **Pictures** or **Online Pictures** button. Navigate to the picture you want to use and select it, then click **Insert**.

Insert from the Ribbon: Click the **Insert** tab on the ribbon. Click the **Pictures** or **Online Pictures** button. Navigate to the picture you want to use and select it, then click **Insert**.

Resize a Picture: Select a picture. Click and drag a resize handle around the outer edge to make the picture larger or smaller.

Crop a Picture: Select the picture you want to crop. Click the Picture Tools **Format** tab on the ribbon and click the **Crop** button. Click and drag the crop handles to remove any unwanted areas, then click the **Crop** button again.

Insert a Screenshot: Click the **Insert** tab on the ribbon and click the **Screenshot** button. Choose an open window to capture, or select **Screen Clipping**.

Remove a Picture's Background: Select a picture, click the Picture Tools **Format** tab on the ribbon, and click the **Remove Background** button. Resize the bounding box around what you want to keep. If needed, use the Refine group to mark specific areas to remove or keep, then click the **Keep Changes** button.

Apply Picture Adjustments: Select a picture, then click the Picture Tools **Format** tab on the ribbon. In the Adjust group, click the **Corrections**, **Color**, and/or **Artistic Effects** button and select an adjustment from the menu.

Reset Picture Formatting: Select a picture. Click the Picture Tools Format tab on the ribbon and click the **Reset Picture** button.

Apply a Picture Style: Select a picture, then click the Picture Tools **Format** tab on the ribbon. Select a style in the Picture Styles gallery.

Graphics

Insert a Text Box: Click the **Insert** tab on the ribbon and click the **Text Box** button. The cursor changes to a crosshair; click and drag to place the text box on the slide.

Insert a Shape: Click the **Insert** tab on the ribbon and click the **Shapes** button. Select the shape you want to use in the menu. Click and drag to place the shape on the slide.

Merge Shapes: Select two or more shapes to merge. Click the Drawing Tools **Format** tab on the ribbon and click the **Merge Shapes** button. Select a merge option in the menu.

Apply a Shape Style: Select a shape, then click the click Drawing Tools **Format** tab on the ribbon and select a style in the Shape Styles gallery.

Graphics

Insert WordArt: Click the Insert tab on the ribbon and click the **WordArt** button in the Text group. Select a WordArt style in the menu and replace the placeholder text.

Insert SmartArt: Click the **Insert** tab on the ribbon and click the **SmartArt** button in the Illustrations group. Select a graphic in the dialog box and click **OK**.

Insert a Chart: Click the **Insert Chart** button in a slide's content placeholder, or click the **Insert** tab and click the **Insert Chart** button. Select a chart type in the dialog box and click **OK**.

Insert a Table: Click the **Insert Table** button in a slide's content placeholder, or click the **Insert** tab and click the **Insert Table** button. Specify the number of rows and columns for the table and click **OK**.

Import Charts, Tables, or Graphics: Click the Insert tab on the ribbon and click the **Object** button in the Text group. Select **Create from file** at the left and click **Browse** to locate the file containing the graphic. Click **OK**, then click **OK** again.

Self-Run Presentations

Insert a Video: Click the **Insert** tab on the ribbon and click the **Video** button in the Media group. Select either **Online Video** or **Video on My PC**. Locate and select the video and click the **Insert** button.

Modify Video Playback Options: Select a video and click the Video Tools **Playback** tab on the ribbon. Use the options on this tab to perform tasks such as trimming the video, adding a fade in and out, and controlling how the video behaves in a live presentation.

Insert an Audio Clip: Click the **Insert** tab on the ribbon and click the **Audio** button in the Media group. Select **Audio on My PC** to locate an existing audio clip, or **Record Audio** to create a custom clip right within PowerPoint.

Insert Action Buttons: Click the **Insert** tab on the ribbon and click the **Shapes** button. In the menu, select a button in the Action Buttons category. Click and drag the cursor on the slide to place the button in the desired location.

Record Narration and Timing: Click the **Slide Show** tab, click **Record Slide Show**, and click the **Start Recording** button. The presentation starts, recording narration and timing for each slide as you move through the presentation. When you're done recording, click the **Options** button and select **End Show**,

Set up a Slide Show: Click the **Slide Show** tab on the ribbon and click the **Set Up Slide Show** button. Modify the options in the dialog box to specify how you want the slide show to run and click **OK**.

Slide Masters

Open Slide Master View: Click the **View** tab on the ribbon and click the **Slide Master** button.

Close Slide Master View: While in Slide Master view, click the **Slide Master** tab on the ribbon and click the **Close Master View** button.

Edit a Slide Master Layout: While in Slide Master view, select the layout you want to edit in the Thumbnails pane at the left. Modify existing placeholders, or add new ones using the Master Layout group on the Slide Master tab of the ribbon.

Create a Custom Slide Layout: While in Slide Master view, click in between two existing slide layouts in the Thumbnails pane. Click the **Insert Layout** button on the Slide Master tab of the ribbon. Insert and format the desired slide placeholders.

Add a Master Footer: While in Slide Master view, select the slide layout where you want to add a footer. Click the **Insert** tab on the ribbon and click the **Header & Footer** button. Modify the footer options and click **Apply**.

Modify a Master or Layout Background: While in Slide Master view, select a slide master or layout to edit. Right-click the thumbnail and select **Format Background**. Modify the options in the Format Background pane at the right, then close the pane when you're finished making changes.

Apply a Master Theme: While in Slide Master view, select a slide master. Click the **Themes** button on the Slide Master tab and select a theme to apply to the selected master and all its layouts.

Insert an Additional Slide Master: While in Slide Master view, click the **Slide Master** tab on the ribbon and click the **Insert Slide Master** button.

Rename a Slide Master or Layout: While in Slide Master view, select a slide master or layout to rename. Click the **Rename** button on the Slide Master tab of the ribbon. Type a new name and click the **Rename** button.

Delete a Slide Master or Layout: While in Slide Master view, select a slide master or layout to delete. Right-click the thumbnail and select **Delete Master** or **Delete Layout**.

Edit the Handout Master: Click the **View** tab on the ribbon and click the **Handout Master** button. Modify the handout master using the options on the Handout Master tab of the ribbon, then click the **Close Master View** button.

Edit the Notes Master: Click the **View** tab on the ribbon and click the **Notes Master** button. Modify the notes master using the options on the Notes Master tab of the ribbon, then click the **Close Master View** button.

Microsoft®

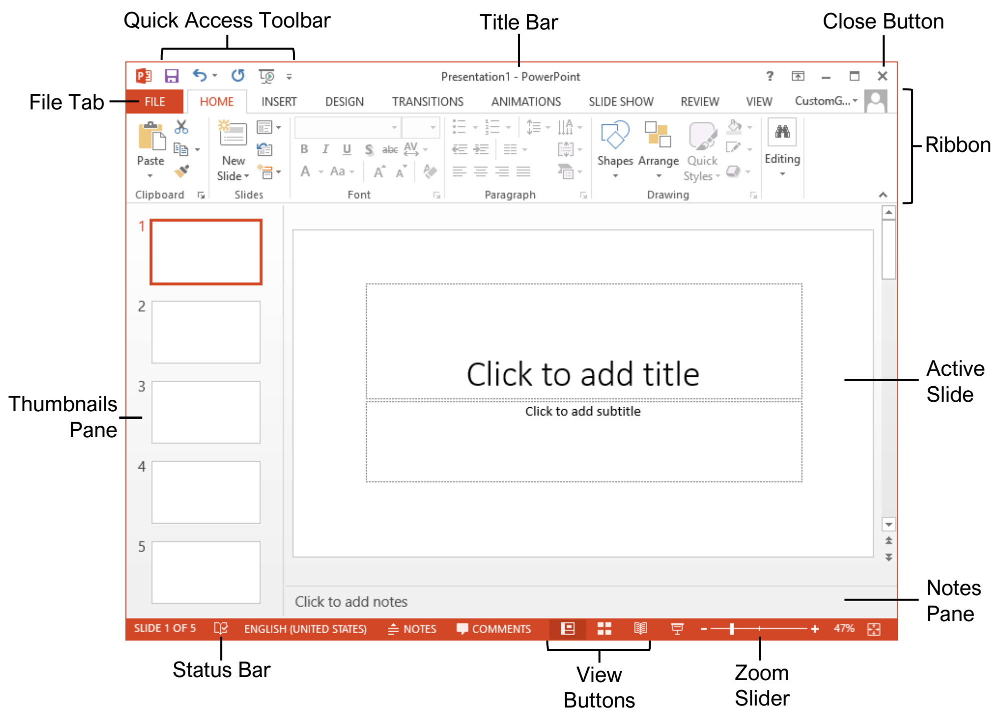
PowerPoint 2013 Basic

Quick Reference Guide

your logo

Free Cheat Sheets
Visit ref.customguide.com

The PowerPoint 2013 Program Screen



Getting Started

The File tab opens Backstage view, which contains commands for working with your files like Open, Save, New, Print, Share, and Close.

Create a New Presentation: Click the **File** tab, select **New**, and click **Blank Presentation**. Or, press **Ctrl** + **N**.

Open a Presentation: Click the **File** tab and select **Open**, or click **Ctrl** + **O**. Select a location with a file you want, then select a file and click **Open**.

Save a Presentation: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Preview and Print: Click the **File** tab, select **Print**, specify print settings, and click **Print**.

Close a Presentation: Click the **File** tab and select **Close**, or press **Ctrl** + **W**.

Close PowerPoint: Click the **Close** ✕ button in the upper-right corner.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Change Presentation Views: Click the **View** tab and select a view, or click one of the **View** buttons at the bottom of the window.

Normal View

Outline View

Slide Sorter View

Reading View

Get Help: Press **F1** to open the Help pane. Type your question and press **Enter**.

Use Zoom: Click and drag the zoom slider to the left or right.

Keyboard Shortcuts

General

Open a presentation	**Ctrl** + **O**
Create a new presentation	**Ctrl** + **N**
Save a presentation	**Ctrl** + **S**
Print a presentation	**Ctrl** + **P**
Insert a new slide	**Ctrl** + **M**
Toggle the Notes pane	**Ctrl** + **Shift** + **H**
Close a presentation	**Ctrl** + **W**
Exit PowerPoint	**Ctrl** + **Q**
Help	**F1**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Group	**Ctrl** + **G**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Select All	**Ctrl** + **A**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Align Left	**Ctrl** + **L**
Align Right	**Ctrl** + **R**
Center	**Ctrl** + **E**
Justify	**Ctrl** + **J**

Slide Show Delivery

Begin slide show	**F5**
Resume slide show	**Shift** + **F5**
End slide show	**Esc**
Go to next slide	**Page Down**
Go to previous slide	**Page Up**
Go to first slide	**Home**
Go to last slide	**End**
Jump to slide	**Slide #** + **Enter**
Toggle screen black	**B**
Toggle screen white	**W**
Pause show	**S**
Change arrow to pen	**Ctrl** + **P**
Change pen to arrow	**Ctrl** + **A**

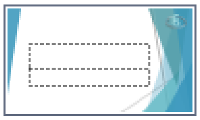
Click the [topic links]() for free lessons!

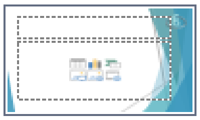
Contact Us: sales@customguide.com

Work with Presentations

Insert a New Slide: Click the **Home** tab and click the **New Slide** button in the Slides group, or press **Ctrl** + **M**.

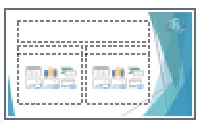
Change the Slide Layout: Click the **Home** tab, click the **Layout** button in the Slides group, and select a layout.


Title Slide


Title and Content


Section Header


Two Content


Comparison


Title Only


Blank

Add Slides from Another Presentation: Click the **New Slide** list arrow on the Home tab and select **Reuse Slides**. Click **Browse** and locate the file with slides you want to add. Click a slide in the Reuse Slides pane to add it to the current presentation.

Duplicate Slides: Select the slide you want to duplicate. Click the **New Slide** list arrow on the Home tab and select **Duplicate Selected Slides**.

Copy and Paste: Select the text you want to copy and click the **Copy** button on the Home tab. Then click where you want to paste the text and click the **Paste** button.

Cut and Paste: Select the text you want to cut and click the **Cut** button on the Home tab. Then click where you want to paste the text and click the **Paste** button.

Work with Presentations

Add Slide Notes: Click the **View** tab on the ribbon and click the **Notes** button in the Show group to turn on the Notes pane. Enter a slide note to use during the presentation or for slide handouts.

Add a Comment: Click the slide where you want to add a comment. Click the **Review** tab on the ribbon and click the **New Comment** button. Type your comment and click outside the Comments pane to save it.

Compare Two Presentations: Open the first presentation you want to compare. Click the **Review** tab on the ribbon and click the **Compare** button. Navigate to and select the second presentation you want to compare. Click the **Merge** button.

Check Spelling and Grammar: Click the **Review** tab and click the **Spelling** button.

Find Text: Click the **Find** button on the Home tab, enter the word you want to find in the Find what field, and click the **Find Next** button to locate the word in the presentation.

Replace Text: Click the **Replace** button on the **Home** tab. Enter the word you want to find in the Find what field, then enter the text that will replace it in the Replace with field. Click **Replace** or **Replace All**. Click **OK** when finished.

Edit Document Properties: Click the **File** tab and ensure **Info** is selected. The right column contains properties for the presentation such as file size, number of slides, hidden slides, and author, among others. Click in a field to edit it.

Password Protect a Presentation: Click the **File** tab. With Info selected at the left, click the **Protect Presentation** button and select **Encrypt with Password**. Enter a password to protect the presentation and click **OK**. Reenter the password and click **OK**.

Organize a Presentation

Add a Section: Select the slide where you want the section to start. Click the **Section** button on the Home tab and select **Add Section** from the menu.

Rename Sections: Click any section heading in the Thumbnails pane to select it. Click the **Section** button on the Home tab and select **Rename Section**. Type a new name for the section and click **Rename**.

Outline View: The Outline view allows you to focus on just the slide text without seeing any pictures or graphics. Click the **View** tab on the ribbon and click the **Outline View** button.

Slide Sorter View: The Slide Sorter view is the easiest way to rearrange and organize slides after a presentation is created. Click the **View** tab on the ribbon and click the **Slide Sorter** button.

Organize a Presentation

Move a Slide: While in Normal view, click a slide in the Thumbnails pane and drag it to a new location.

Hide or Unhide a Slide: Select a slide in the Thumbnails pane in Normal view. Click the **Slide Show** tab on the ribbon and click the **Hide Slide** button in the Set Up group to toggle the slide visibility.

Deliver a Slide Show

Start a Slide Show: Click the **Slide Show** tab on the ribbon and click either the **From Beginning** or **From Current Slide** button. Or, click the **Slide Show** button on the status bar, or press **F5**.

End a Slide Show: While presenting a slide show, click the **Options** button in the toolbar at the bottom left and select **End Show**. Or, press the **Esc** key.

Advance to the Next Slide: Press the **Spacebar**, click the left mouse button, or press the **Page Down** key.

Go Back to the Previous Slide: Press **Backspace** or the **Page Up** key.

Use the Laser Pointer: In Slide Show view, press and hold down the **Ctrl** key while clicking and holding the left mouse button.

Use the Pen: In Slide Show view, press **Ctrl** + **P** and then draw on the screen. Press **Ctrl** + **A** to switch back to the arrow pointer. Press **E** to erase your annotations.

Hide a Presentation Slide: In Slide Show view, temporarily hide the current slide. Press the **B** key to make the screen black or the **W** key to make it all white. Press the **Esc** key to make the slide visible once again.

Slide Zoom: In Slide Show view, click the **Zoom** button in the slide show toolbar. Click an area of the slide to zoom in. Right-click or press the **Esc** key to zoom out and view the entire slide.

Start Presenter View: While presenting, click the **Options** button in the slide show toolbar and select **Show Presenter View**.

End Presenter View: While in Presenter view, click the **Options** button in the slide show toolbar and select **Hide Presenter View**.

Create a Custom Slide Show: Click the **Slide Show** tab on the ribbon. Click the **Custom Slide Show** button and select **Custom Shows**. Click the **New** button. Select the slides you want to add to the custom show and click the **Add** button. Click **OK** to save the custom show.

Convert Presentations to Video: Click the **File** tab on the ribbon and select **Export** at the left. Click **Create a Video**. Adjust the video settings and click **Create Video**.

Contact Us: sales@customguide.com

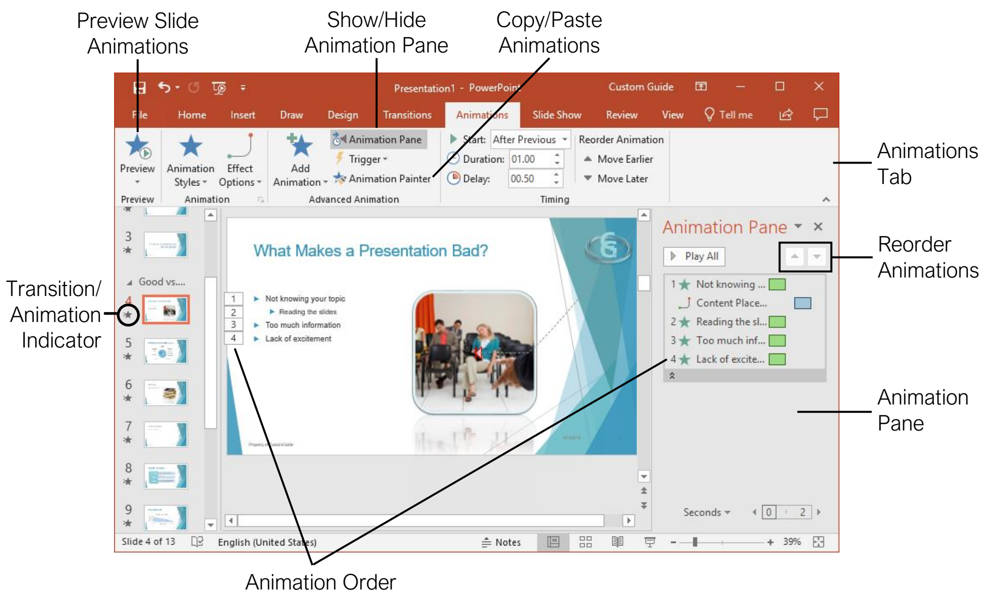
Microsoft®

PowerPoint 2016 Intermediate

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

Animations Tab & Pane



Transitions and Animations

Apply a Slide Transition: Select the slide(s) where you want to add a transition. Click the **Transitions** tab on the ribbon and click the **More** button in the Transition to This Slide group. Select the transition you want to use.

Modify a Transition: Click the **Transitions** tab on the ribbon and click the **Effect Options** button. Select an effect option in the menu.

Apply an Animation: Select the text or object you want to animate and click the **Animations** tab on the ribbon. Click the **Animation Styles** button and select the animation you want to use. Click the **Add Animation** button to add additional animations to the same object.

Modify an Animation: Click the **Animations** tab on the ribbon and click the **Effect Options** button. Select an option for the applied animation.

Copy Animations: Select an object with an animation applied. Click the **Animations** tab and click the **Animation Painter** button. Select the object you want the animation applied to.

Display the Animation Pane: Click the **Animations** tab on the ribbon and click the **Animation Pane** button. View and edit the timeline for animations on the current slide.

Formatting and Themes

Change the Font: Select the text you want to change, click the **Font** list arrow on the Home tab, and select a new font.

Change the Font Size: Select the text you want to change, click the **Font Size** list arrow on the Home tab, and select a new font size.

Change the Font Color: Select the text you want to change, click the **Font Color** list arrow, and select a new color.

Modify the Slide Background: Click the **Design** tab on the ribbon and click the **Format Background** button. Make the desired changes in the Format Background pane.

Apply a Presentation Theme: Click the **Design** tab on the ribbon. Click the **More** button in the Themes group and select a theme.

Modify Theme Elements: Click the **Design** tab on the ribbon and click the **More** button in the Variants group. Click **Colors**, **Fonts**, or **Effects** to expand the menu and select a new style that coordinates with the current theme.

Change the Slide Size: Click the **Design** tab, click the **Slide Size** button in the Customize group, and select a slide size.

Use a Presentation Template: Click the **File** tab on the ribbon and select **New**. Select a template in the list and click **Create**.

Styles

Animation Styles

Appear	Text or object appears on the slide.
Fade	Text or object fades into view.
Fly In	Text or object flies in from the specified direction.
Float In	Text or object floats in from a specified direction and becomes visible.
Split	Text or object becomes whole as its halves unite from a specified direction.
Wipe	Text or object is wiped on from a specified direction.
Shape	Text or object fills in from the edges of a specified shape and appears.
Wheel	Text or object rotates around a central hub and gradually comes into view.

Transition Styles

Fade	The previous slide fades away, revealing the current slide.
Push	The previous slide pushes the current slide into view.
Wipe	The previous slide disappears quickly as the current slide rolls over it.
Split	The previous slide divides at a center point and disappears, revealing the current slide.
Cut	The previous slide disappears almost instantly and the current slide pops into view.
Uncover	The previous slide moves out of the way quickly, revealing the current slide.
Flash	The previous slide disappears in a bright flash and the current slide eases into view.
Wind	The previous slide flutters slowly and then blows away, revealing the current slide.

Contact Us: sales@customguide.com

Pictures

Insert a Picture Using Content Placeholders: Click a content slide's **Pictures** or **Online Pictures** button. Navigate to the picture you want to use and select it, then click **Insert**.

Insert from the Ribbon: Click the **Insert** tab on the ribbon. Click the **Pictures** or **Online Pictures** button. Navigate to the picture you want to use and select it, then click **Insert**.

Resize a Picture: Select a picture. Click and drag a resize handle around the outer edge to make the picture larger or smaller.

Crop a Picture: Select the picture you want to crop. Click the Picture Tools **Format** tab on the ribbon and click the **Crop** button. Click and drag the crop handles to remove any unwanted areas, then click the **Crop** button again.

Insert a Screenshot: Click the **Insert** tab on the ribbon and click the **Screenshot** button. Choose an open window to capture, or select **Screen Clipping**.

Remove a Picture's Background: Select a picture, click the Picture Tools **Format** tab on the ribbon, and click the **Remove Background** button. Resize the bounding box around what you want to keep. If needed, use the Refine group to mark specific areas to remove or keep, then click the **Keep Changes** button.

Apply Picture Adjustments: Select a picture, then click the Picture Tools **Format** tab on the ribbon. In the Adjust group, click the **Corrections**, **Color**, and/or **Artistic Effects** button and select an adjustment from the menu.

Reset Picture Formatting: Select a picture. Click the Picture Tools Format tab on the ribbon and click the **Reset Picture** button.

Apply a Picture Style: Select a picture, then click the Picture Tools **Format** tab on the ribbon. Select a style in the Picture Styles gallery.

Graphics

Insert a Text Box: Click the **Insert** tab on the ribbon and click the **Text Box** button. The cursor changes to a crosshair; click and drag to place the text box on the slide.

Insert a Shape: Click the **Insert** tab on the ribbon and click the **Shapes** button. Select the shape you want to use in the menu. Click and drag to place the shape on the slide.

Merge Shapes: Select two or more shapes to merge. Click the Drawing Tools **Format** tab on the ribbon and click the **Merge Shapes** button. Select a merge option in the menu.

Apply a Shape Style: Select a shape, then click the click Drawing Tools **Format** tab on the ribbon and select a style in the Shape Styles gallery.

Graphics

Insert WordArt: Click the **Insert** tab on the ribbon and click the **WordArt** button in the Text group. Select a WordArt style in the menu and replace the placeholder text.

Insert SmartArt: Click the **Insert** tab on the ribbon and click the **SmartArt** button in the Illustrations group. Select a graphic in the dialog box and click **OK**.

Insert a Chart: Click the **Insert Chart** button in a slide's content placeholder, or click the **Insert** tab and click the **Insert Chart** button. Select a chart type in the dialog box and click **OK**.

Insert a Table: Click the **Insert Table** button in a slide's content placeholder, or click the **Insert** tab and click the **Insert Table** button. Specify the number of rows and columns for the table and click **OK**.

Import Charts, Tables, or Graphics: Click the Insert tab on the ribbon and click the **Object** button in the Text group. Select **Create from file** at the left and click **Browse** to locate the file containing the graphic. Click **OK**, then click **OK** again.

Self-Run Presentations

Insert a Video: Click the **Insert** tab on the ribbon and click the **Video** button in the Media group. Select either **Online Video** or **Video on My PC**. Locate and select the video and click the **Insert** button.

Modify Video Playback Options: Select a video and click the Video Tools **Playback** tab on the ribbon. Use the options on this tab to perform tasks such as trimming the video, adding a fade in and out, and controlling how the video behaves in a live presentation.

Insert an Audio Clip: Click the **Insert** tab on the ribbon and click the **Audio** button in the Media group. Select **Audio on My PC** to locate an existing audio clip, or **Record Audio** to create a custom clip right within PowerPoint.

Insert Action Buttons: Click the **Insert** tab on the ribbon and click the **Shapes** button. In the menu, select a button in the Action Buttons category. Click and drag the cursor on the slide to place the button in the desired location.

Record Narration and Timing: Click the **Slide Show** tab, click **Record Slide Show**, and click the **Start Recording** button. The presentation starts, recording narration and timing for each slide as you move through the presentation. When you're done recording, click the **Options** button and select **End Show**,

Set up a Slide Show: Click the **Slide Show** tab on the ribbon and click the **Set Up Slide Show** button. Modify the options in the dialog box to specify how you want the slide show to run and click **OK**.

Slide Masters

Open Slide Master View: Click the **View** tab on the ribbon and click the **Slide Master** button.

Edit a Slide Master Layout: While in Slide Master view, select the layout you want to edit in the Thumbnails pane at the left. Modify existing placeholders, or add new ones using the Master Layout group on the Slide Master tab of the ribbon.

Close Slide Master View: While in Slide Master view, click the **Slide Master** tab on the ribbon and click the **Close Master View** button.

Create a Custom Slide Layout: While in Slide Master view, click in between two existing slide layouts in the Thumbnails pane. Click the **Insert Layout** button on the Slide Master tab of the ribbon. Insert and format the desired slide placeholders.

Add a Master Footer: While in Slide Master view, select the slide layout where you want to add a footer. Click the **Insert** tab on the ribbon and click the **Header & Footer** button. Modify the footer options and click **Apply**.

Modify a Master or Layout Background: While in Slide Master view, select a slide master or layout to edit. Right-click the thumbnail and select **Format Background**. Modify the options in the Format Background pane at the right, then close the pane when you're finished making changes.

Apply a Master Theme: While in Slide Master view, select a slide master. Click the **Themes** button on the Slide Master tab and select a theme to apply to the selected master and all its layouts.

Insert an Additional Slide Master: While in Slide Master view, click the **Slide Master** tab on the ribbon and click the **Insert Slide Master** button.

Rename a Slide Master or Layout: While in Slide Master view, select a slide master or layout to rename. Click the **Rename** button on the Slide Master tab of the ribbon. Type a new name and click the **Rename** button.

Delete a Slide Master or Layout: While in Slide Master view, select a slide master or layout to delete. Right-click the thumbnail and select **Delete Master** or **Delete Layout**.

Edit the Handout Master: Click the **View** tab on the ribbon and click the **Handout Master** button. Modify the handout master using the options on the Handout Master tab of the ribbon, then click the **Close Master View** button.

Edit the Notes Master: Click the **View** tab on the ribbon and click the **Notes Master** button. Modify the notes master using the options on the Notes Master tab of the ribbon, then click the **Close Master View** button.

Contact Us: sales@customguide.com

Microsoft®

PowerPoint 2016 Basic

Quick Reference Guide

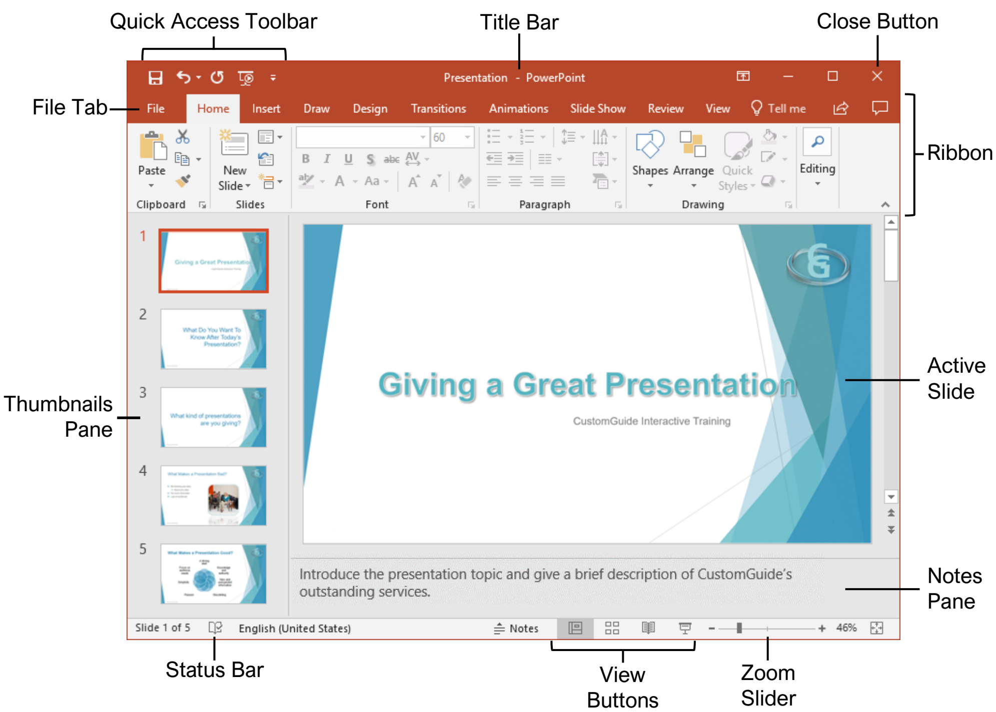
CustomGuide

your logo

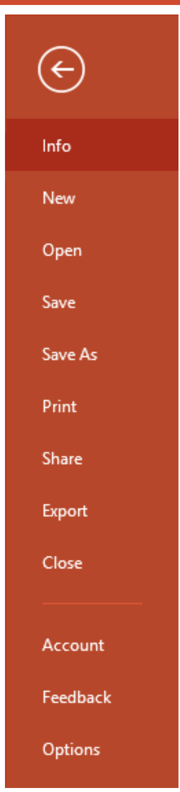
Free Cheat Sheets

Visit ref.customguide.com

The PowerPoint 2016 Program Screen



Getting Started



The File tab opens Backstage view, which contains commands for working with your files like Open, Save, New, Print, Share, and Close.

Create a New Presentation: Click the **File** tab, select **New**, and click **Blank Presentation**. Or, press **Ctrl** + **N**.

Open a Presentation: Click the **File** tab and select **Open**, or click **Ctrl** + **O**. Select a location with a file you want, then select a file and click **Open**.

Save a Presentation: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Preview and Print: Click the **File** tab, select **Print**, specify print settings, and click **Print**.

Close a Presentation: Click the **File** tab and select **Close**, or press **Ctrl** + **W**.

Close PowerPoint: Click the **Close** ✕ button in the upper-right corner.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Change Presentation Views: Click the **View** tab and select a view, or click one of the **View** buttons at the bottom of the window.

- **Normal View**
- **Outline View**
- **Slide Sorter View**
- **Reading View**

Get Help: Press **F1** to open the Help pane. Type your question and press **Enter**.

Use Zoom: Click and drag the zoom slider to the left or right.

Keyboard Shortcuts

General

Open a presentation	**Ctrl** + **O**
Create a new presentation	**Ctrl** + **N**
Save a presentation	**Ctrl** + **S**
Print a presentation	**Ctrl** + **P**
Insert a new slide	**Ctrl** + **M**
Toggle the Notes pane	**Ctrl** + **Shift** + **H**
Close a presentation	**Ctrl** + **W**
Exit PowerPoint	**Ctrl** + **Q**
Help	**F1**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Group	**Ctrl** + **G**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Select All	**Ctrl** + **A**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Align Left	**Ctrl** + **L**
Align Right	**Ctrl** + **R**
Center	**Ctrl** + **E**
Justify	**Ctrl** + **J**

Slide Show Delivery

Begin slide show	**F5**
Resume slide show	**Shift** + **F5**
End slide show	**Esc**
Go to next slide	**Page Down**
Go to previous slide	**Page Up**
Go to first slide	**Home**
Go to last slide	**End**
Jump to slide	**[Slide #]** + **Enter**
Toggle screen black	**B**
Toggle screen white	**W**
Pause show	**S**
Change arrow to pen	**Ctrl** + **P**
Change pen to arrow	**Ctrl** + **A**

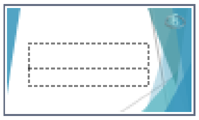
Click the topic links for free lessons!

Contact Us: sales@customguide.com

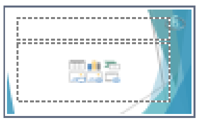
Work with Presentations

Insert a New Slide: Click the **Home** tab and click the **New Slide** button in the Slides group, or press **Ctrl** + **M**.

Change the Slide Layout: Click the **Home** tab, click the **Layout** button in the Slides group, and select a layout.

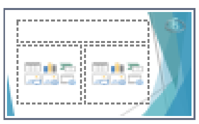


Title Slide

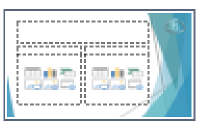


Title and Content

Section Header



Two Content



Comparison

Title Only

Blank

Add Slides from Another Presentation: Click the **New Slide** list arrow on the Home tab and select **Reuse Slides**. Click **Browse** and locate the file with slides you want to add. Click a slide in the Reuse Slides pane to add it to the current presentation.

Duplicate Slides: Select the slide you want to duplicate. Click the **New Slide** list arrow on the Home tab and select **Duplicate Selected Slides**.

Copy and Paste: Select the text you want to copy and click the **Copy** button on the Home tab. Then click where you want to paste the text and click the **Paste** button.

Cut and Paste: Select the text you want to cut and click the **Cut** button on the Home tab. Then click where you want to paste the text and click the **Paste** button.

Work with Presentations

Add Slide Notes: Click the **View** tab on the ribbon and click the **Notes** button in the Show group to turn on the Notes pane. Enter a slide note to use during the presentation or for slide handouts.

Add a Comment: Click the slide where you want to add a comment. Click the **Review** tab on the ribbon and click the **New Comment** button. Type your comment and click outside the Comments pane to save it.

Compare Two Presentations: Open the first presentation you want to compare. Click the **Review** tab on the ribbon and click the **Compare** button. Navigate to and select the second presentation you want to compare. Click the **Merge** button.

Check Spelling and Grammar: Click the **Review** tab and click the **Spelling** button.

Find Text: Click the **Find** button on the Home tab, enter the word you want to find in the Find what field, and click the **Find Next** button to locate the word in the presentation.

Replace Text: Click the **Replace** button on the **Home** tab. Enter the word you want to find in the Find what field, then enter the text that will replace it in the Replace with field. Click **Replace** or **Replace All**. Click **OK** when finished.

Edit Document Properties: Click the **File** tab and ensure **Info** is selected. The right column contains properties for the presentation such as file size, number of slides, hidden slides, and author, among others. Click in a field to edit it.

Password Protect a Presentation: Click the **File** tab. With Info selected at the left, click the **Protect Presentation** button and select **Encrypt with Password**. Enter a password to protect the presentation and click **OK**. Reenter the password and click **OK**.

Organize a Presentation

Add a Section: Select the slide where you want the section to start. Click the **Section** button on the Home tab and select **Add Section** from the menu.

Rename Sections: Click any section heading in the Thumbnails pane to select it. Click the **Section** button on the Home tab and select **Rename Section**. Type a new name for the section and click **Rename**.

Outline View: The Outline view allows you to focus on just the slide text without seeing any pictures or graphics. Click the **View** tab on the ribbon and click the **Outline View** button.

Slide Sorter View: The Slide Sorter view is the easiest way to rearrange and organize slides after a presentation is created. Click the **View** tab on the ribbon and click the **Slide Sorter** button.

Organize a Presentation

Move a Slide: While in Normal view, click a slide in the Thumbnails pane and drag it to a new location.

Hide or Unhide a Slide: Select a slide in the Thumbnails pane in Normal view. Click the **Slide Show** tab on the ribbon and click the **Hide Slide** button in the Set Up group to toggle the slide visibility.

Deliver a Slide Show

Start a Slide Show: Click the **Slide Show** tab on the ribbon and click either the **From Beginning** or **From Current Slide** button. Or, click the **Slide Show** button on the status bar, or press **F5**.

End a Slide Show: While presenting a slide show, click the **Options** button in the toolbar at the bottom left and select **End Show**. Or, press the **Esc** key.

Advance to the Next Slide: Press the **Spacebar**, click the left mouse button, or press the **Page Down** key.

Go Back to the Previous Slide: Press **Backspace** or the **Page Up** key.

Use the Laser Pointer: In Slide Show view, press and hold down the **Ctrl** key while clicking and holding the left mouse button.

Use the Pen: In Slide Show view, press **Ctrl** + **P** and then draw on the screen. Press **Ctrl** + **A** to switch back to the arrow pointer. Press **E** to erase your annotations.

Hide a Presentation Slide: In Slide Show view, temporarily hide the current slide. Press the **B** key to make the screen black or the **W** key to make it all white. Press the **Esc** key to make the slide visible once again.

Slide Zoom: In Slide Show view, click the **Zoom** button in the slide show toolbar. Click an area of the slide to zoom in. Right-click or press the **Esc** key to zoom out and view the entire slide.

Start Presenter View: While presenting, click the **Options** button in the slide show toolbar and select **Show Presenter View**.

End Presenter View: While in Presenter view, click the **Options** button in the slide show toolbar and select **Hide Presenter View**.

Create a Custom Slide Show: Click the **Slide Show** tab on the ribbon. Click the **Custom Slide Show** button and select **Custom Shows**. Click the **New** button. Select the slides you want to add to the custom show and click the **Add** button. Click **OK** to save the custom show.

Convert Presentations to Video: Click the **File** tab on the ribbon and select **Export** at the left. Click **Create a Video**. Adjust the video settings and click **Create Video**.

Contact Us: sales@customguide.com

Microsoft®

PowerPoint 2019 Intermediate

Quick Reference Guide

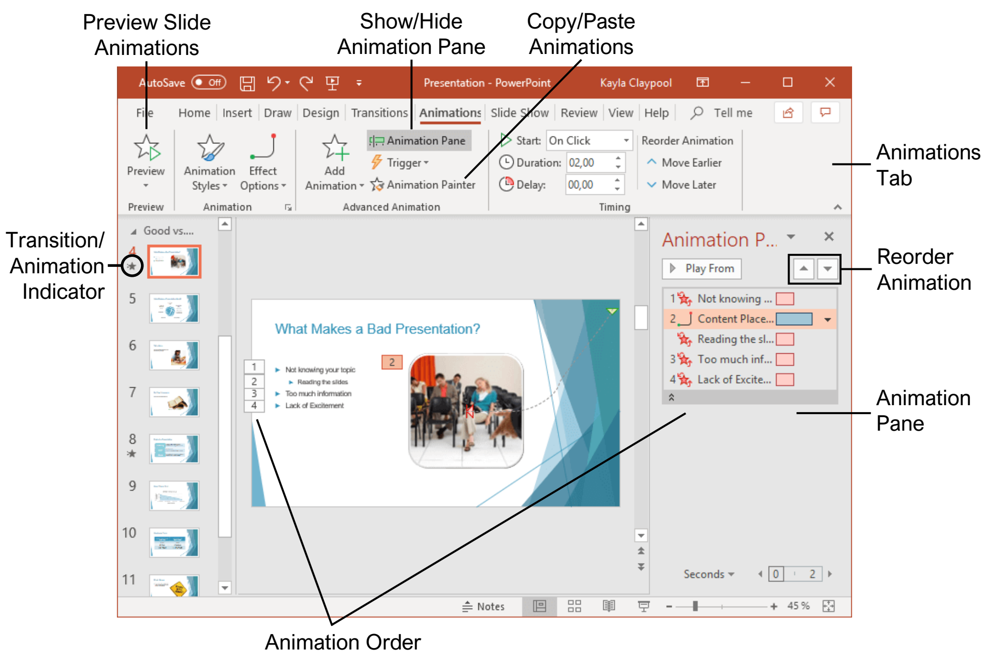
CustomGuide

your logo

Free Cheat Sheets

Visit ref.customguide.com

Animations Tab & Pane



Transitions and Animations

[Apply a Slide Transition:]() Select the slide(s) where you want to add a transition. Click the **Transitions** tab on the ribbon and click the **More** button in the Transition to This Slide group. Select the transition you want to use.

[Modify a Transition:]() Click the **Transitions** tab on the ribbon and click the **Effect Options** button. Select an effect option in the menu.

[Apply an Animation:]() Select the text or object you want to animate and click the **Animations** tab on the ribbon. Click the **Animation Styles** button and select the animation you want to use. Click the **Add Animation** button to add additional animations to the same object.

[Modify an Animation:]() Click the **Animations** tab on the ribbon and click the **Effect Options** button. Select an option for the applied animation.

[Copy Animations:]() Select an object with an animation applied. Click the **Animations** tab and click the **Animation Painter** button. Select the object you want the animation applied to.

[Display the Animation Pane:]() Click the **Animations** tab on the ribbon and click the **Animation Pane** button. View and edit the timeline for animations on the current slide.

Formatting and Themes

[Change the Font:]() Select the text you want to change, click the **Font** list arrow on the Home tab, and select a new font.

[Change the Font Size:]() Select the text you want to change, click the **Font Size** list arrow on the Home tab, and select a new font size.

[Change the Font Color:]() Select the text you want to change, click the **Font Color** list arrow, and select a new color.

[Modify the Slide Background:]() Click the **Design** tab on the ribbon and click the **Format Background** button. Make the desired changes in the Format Background pane.

[Apply a Presentation Theme:]() Click the **Design** tab on the ribbon. Click the **More** button in the Themes group and select a theme.

[Modify Theme Elements:]() Click the **Design** tab, then, in the Variants group, click **Colors**, **Fonts**, or **Effects** to expand the menu and select a new style that coordinates with the current theme.

[Change the Slide Size:]() Click the **Design** tab, click the **Slide Size** button in the Customize group, and select a slide size.

[Use a Presentation Template:]() Click the **File** tab on the ribbon and select **New**. Select a template in the list and click **Create**.

Styles

Animation Styles

Appear	Text or object appears on the slide.
Fade	Text or object fades into view.
Fly In	Text or object flies in from the specified direction.
Float In	Text or object floats in from a specified direction and becomes visible.
Split	Text or object becomes whole as its halves unite from a specified direction.
Wipe	Text or object is wiped on from a specified direction.
Shape	Text or object fills in from the edges of a specified shape and appears.
Wheel	Text or object rotates around a central hub and gradually comes into view.

Transition Styles

Fade	The previous slide fades away, revealing the current slide.
Push	The previous slide pushes the current slide into view.
Wipe	The previous slide disappears quickly as the current slide rolls over it.
Split	The previous slide divides at a center point and disappears, revealing the current slide.
Cut	The previous slide disappears almost instantly and the current slide pops into view.
Uncover	The previous slide moves out of the way quickly, revealing the current slide.
Flash	The previous slide disappears in a bright flash and the current slide eases into view.
Morph	Move things on the previous slide to their new locations on the current slide.

Click the [topic links]() for free lessons!

Contact Us: sales@customguide.com

Pictures

Insert a Picture Using Content Placeholders: Click a content slide's **Pictures** or **Online Pictures** button. Navigate to the picture you want to use and select it, then click **Insert**.

Insert from the Ribbon: Click the **Insert** tab on the ribbon. Click the **Pictures** or **Online Pictures** button. Navigate to the picture you want to use and select it, then click **Insert**.

Resize a Picture: Select a picture. Click and drag a resize handle around the outer edge to make the picture larger or smaller.

Crop a Picture: Select the picture you want to crop. Click the Picture Tools **Format** tab on the ribbon and click the **Crop** button. Click and drag the crop handles to remove any unwanted areas, then click the **Crop** button again.

Insert a Screenshot: Click the Insert tab on the ribbon and click the **Screenshot** button. Choose an open window to capture, or select Screen Clipping.

Remove a Picture's Background: Select a picture, click the Picture Tools **Format** tab on the ribbon, and click the **Remove Background** button. Resize the bounding box around what you want to keep. If needed, use the Refine group to mark specific areas to remove or keep, then click the **Keep Changes** button.

Apply Picture Adjustments: Select a picture, then click the Picture Tools Format tab on the ribbon. In the Adjust group, click the **Corrections**, **Color**, and/or **Artistic Effects** button and select an adjustment from the menu.

Reset Picture Formatting: Select a picture. Click the Picture Tools **Format** tab on the ribbon and click the **Reset Picture** button.

Apply a Picture Style: Select a picture, then click the Picture Tools **Format** tab on the ribbon. Select a style in the Picture Styles gallery.

Graphics

Insert a Text Box: Click the **Insert** tab on the ribbon and click the **Text Box** button. The cursor changes to a crosshair; click and drag to place the text box on the slide.

Insert a Shape: Click the **Insert** tab on the ribbon and click the **Shapes** button. Select the shape you want to use in the menu. Click and drag to place the shape on the slide.

Merge Shapes: Select two or more shapes to merge. Click the Drawing Tools **Format** tab on the ribbon and click the **Merge Shapes** button. Select a merge option in the menu.

Apply a Shape Style: Select a shape, then click the click Drawing Tools **Format** tab on the ribbon and select a style in the Shape Styles gallery.

Graphics

Insert WordArt: Click the **Insert** tab on the ribbon and click the **WordArt** button in the Text group. Select a WordArt style in the menu and replace the placeholder text.

Insert an Icon: Click the **Insert** tab on the ribbon and click the **Icons** button. Select an icon and click **Insert**.

Create a Drawing: Click the **Draw** tab on the ribbon and click the **Draw with Touch** button. Draw a shape using the mouse or touchscreen.

Insert SmartArt: Click the **Insert** tab on the ribbon and click the **SmartArt** button in the Illustrations group. Select a graphic in the dialog box and click **OK**.

Insert a Chart: Click the **Insert Chart** button in a slide's content placeholder, or click the **Insert** tab and click the **Insert Chart** button. Select a chart type and click **OK**.

Insert a Table: Click the **Insert Table** button in a slide's content placeholder, or click the **Insert** tab and click the **Insert Table** button. Specify the number of rows and columns for the table and click **OK**.

Self-Run Presentations

Insert a Video: Click the **Insert** tab and click the **Video** button in the Media group. Select either **Online Video** or **Video on My PC**. Locate and select the video and click the **Insert** button.

Modify Video Playback Options: Select a video and click the Video Tools **Playback** tab on the ribbon. Use the options on this tab to perform tasks such as trimming the video, adding a fade in and out, and controlling how the video behaves in a live presentation.

Insert an Audio Clip: Click the **Insert** tab and click the **Audio** button in the Media group. Select **Audio on My PC** to locate an existing audio clip, or **Record Audio** to create a custom clip right within PowerPoint.

Insert Action Buttons: Click the **Insert** tab and click the **Shapes** button. In the menu, select a button in the Action Buttons category. Click and drag the cursor on the slide to place the button in the desired location. In the dialog box that appears, leave the default settings or modify how the button behaves, then click **OK**.

Record Narration and Timing: Click the **Slide Show** tab and click the **Record Slide Show** button. Click the **Record** button. The presentation starts, recording narration and timing for each slide as you move through the presentation. Click the **Stop** button.

Set up a Slide Show: Click the **Slide Show** tab on the ribbon and click the **Set Up Slide Show** button. Modify the options in the dialog box to specify how you want the slide show to run and click **OK**.

Slide Masters

Open Slide Master View: Click the **View** tab on the ribbon and click the **Slide Master** button.

Edit a Slide Master Layout: While in Slide Master view, select the layout you want to edit in the Thumbnails pane at the left. Modify existing placeholders, or add new ones using the Master Layout group on the Slide Master tab of the ribbon.

Close Slide Master View: While in Slide Master view, click the **Slide Master** tab on the ribbon and click the **Close Master View** button.

Create a Custom Slide Layout: While in Slide Master view, click in between two existing slide layouts in the Thumbnails pane. Click the **Insert Layout** button on the Slide Master tab of the ribbon. Insert and format the desired slide placeholders.

Add a Master Footer: While in Slide Master view, select the slide layout where you want to add a footer. Click the **Insert** tab on the ribbon and click the **Header & Footer** button. Modify the footer options and click **Apply**.

Modify a Master or Layout Background: While in Slide Master view, select a slide master or layout to edit. Right-click the thumbnail and select **Format Background**. Modify the options in the Format Background pane at the right, then close the pane when you're finished making changes.

Apply a Master Theme: While in Slide Master view, select a slide master. Click the **Themes** button on the Slide Master tab and select a theme to apply to the selected master and all its layouts.

Insert an Additional Slide Master: While in Slide Master view, click the **Slide Master** tab on the ribbon and click the **Insert Slide Master** button.

Rename a Slide Master or Layout: While in Slide Master view, select a slide master or layout to rename. Click the **Rename** button on the Slide Master tab of the ribbon. Type a new name and click the **Rename** button.

Delete a Slide Master or Layout: While in Slide Master view, select a slide master or layout to delete. Right-click the thumbnail and select **Delete Master** or **Delete Layout**.

Edit the Handout Master: Click the **View** tab on the ribbon and click the **Handout Master** button. Modify the handout master using the options on the Handout Master tab of the ribbon, then click the **Close Master View** button.

Edit the Notes Master: Click the **View** tab on the ribbon and click the **Notes Master** button. Modify the notes master using the options on the Notes Master tab of the ribbon, then click the **Close Master View** button.

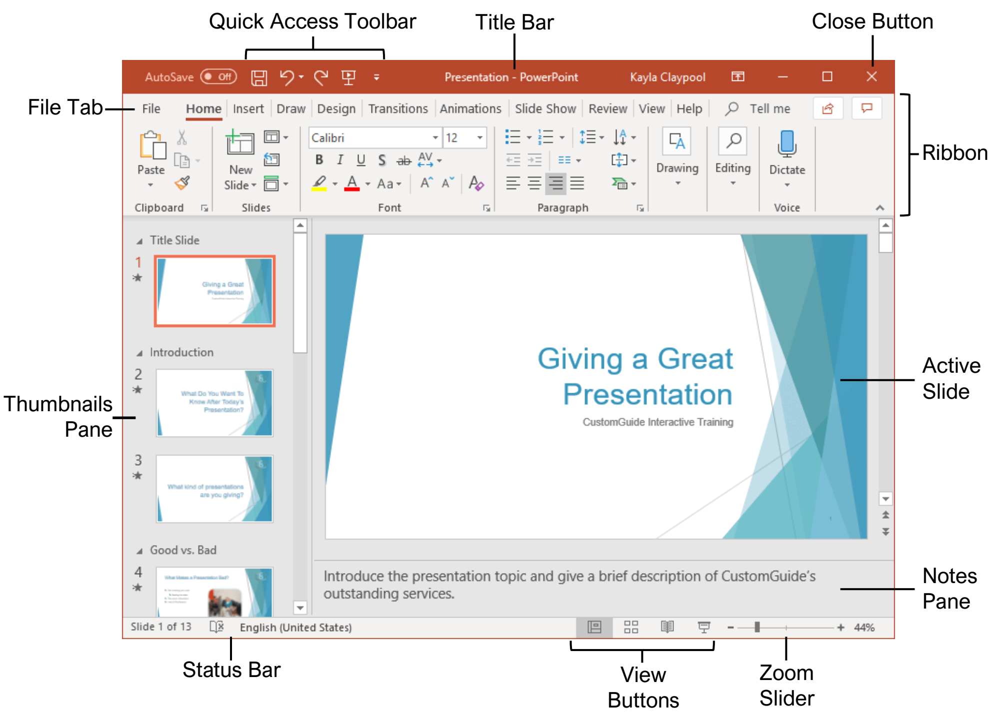
Microsoft®

PowerPoint 2019 Basic

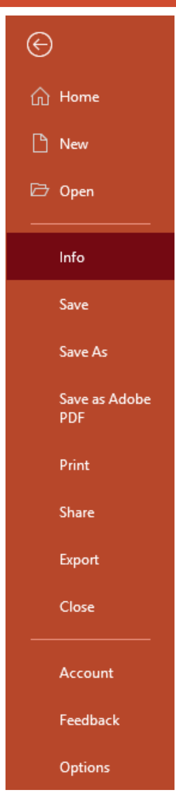
Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

The PowerPoint 2019 Program Screen



Getting Started



The File tab opens Backstage view, which contains commands for working with your files like Open, Save, New, Print, Share, and Close.

Create a New Presentation: Click the **File** tab, select **New**, and click **Blank Presentation**. Or, press **Ctrl** + **N**.

Open a Presentation: Click the **File** tab and select **Open**, or press **Ctrl** + **O**. Select a location with a file you want, then select a file and click **Open**.

Save a Presentation: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Preview and Print: Click the **File** tab, select **Print**, specify print settings, and click **Print**.

Close a Presentation: Click the **File** tab and select **Close**, or press **Ctrl** + **W**.

Close PowerPoint: Click the **Close** ✕ button in the upper-right corner.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Change Presentation Views: Click the **View** tab and select a view, or click one of the **View** buttons at the bottom of the window.

- **Normal View**
- **Outline View**
- **Slide Sorter View**
- **Reading View**

Get Help: Press **F1** to open the Help pane. Type your topic or question and press **Enter**.

Use Zoom: Click and drag the zoom slider to the left or right.

Keyboard Shortcuts

General

Open a presentation	**Ctrl** + **O**
Create a new presentation	**Ctrl** + **N**
Save a presentation	**Ctrl** + **S**
Print a presentation	**Ctrl** + **P**
Insert a new slide	**Ctrl** + **M**
Toggle the Notes pane	**Ctrl** + **Shift** + **H**
Close a presentation	**Ctrl** + **W**
Exit PowerPoint	**Ctrl** + **Q**
Help	**F1**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Group	**Ctrl** + **G**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Select All	**Ctrl** + **A**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Align Left	**Ctrl** + **L**
Align Right	**Ctrl** + **R**
Center	**Ctrl** + **E**
Justify	**Ctrl** + **J**

Slide Show Delivery

Begin slide show	**F5**
Resume slide show	**Shift** + **F5**
End slide show	**Esc**
Go to next slide	**Page Down**
Go to previous slide	**Page Up**
Go to first slide	**Home**
Go to last slide	**End**
Jump to slide	**[Slide #]** + **Enter**
Toggle screen black	**B**
Toggle screen white	**W**
Pause show	**S**
Change arrow to pen	**Ctrl** + **P**
Change pen to arrow	**Ctrl** + **A**

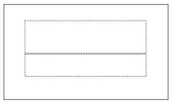
Click the topic links for free lessons!

Contact Us: sales@customguide.com

Work with Presentations

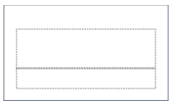
Insert a New Slide: Click the **Home** tab and click the **New Slide** button in the Slides group, or press **Ctrl** + **M**.

Change the Slide Layout: Click the **Home** tab, click the **Layout** button in the Slides group, and select a layout.



Title Slide

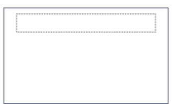
Title and Content



Section Header

Two Content

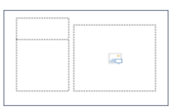
Comparison



Title Only

Blank

Content with Caption



Picture with Caption

Add Slides from Another Presentation: Click the **New Slide** list arrow on the Home tab and select **Reuse Slides**. Click **Browse** and locate the file with slides you want to add. Click a slide in the Reuse Slides pane to add it to the current presentation.

Duplicate Slides: Select the slide you want to duplicate. Click the **New Slide** list arrow on the Home tab and select **Duplicate Selected Slides**.

Copy and Paste: Select the text you want to copy and click the **Copy** button on the Home tab. Then click where you want to paste the text and click the **Paste** button.

Cut and Paste: Select the text you want to cut and click the **Cut** button on the Home tab. Then click where you want to paste the text and click the **Paste** button.

Work with Presentations

Add Slide Notes: Click the **View** tab on the ribbon and click the **Notes** button in the Show group to turn on the Notes pane. Enter a slide note to use during the presentation or for slide handouts.

Add a Comment: Click the slide where you want to add a comment. Click the **Review** tab on the ribbon and click the **New Comment** button. Type your comment and click outside the Comments pane to save it.

Compare Two Presentations: Open the first presentation you want to compare. Click the **Review** tab on the ribbon and click the **Compare** button. Navigate to and select the second presentation you want to compare. Click the **Merge** button.

Check Spelling and Grammar: Click the **Review** tab and click the **Spelling** button.

Find Text: Click the **Find** button on the Home tab, enter the word you want to find in the **Find what** field, and click the **Find Next** button to locate the word in the presentation.

Replace Text: Click the **Replace** button on the **Home** tab. Enter the word you want to find in the **Find what** field, then enter the text that will replace it in the **Replace with** field. Click **Replace** or **Replace All**. Click **OK** when finished.

Edit Document Properties: Click the **File** tab and ensure **Info** is selected. The right column contains properties for the presentation such as file size, number of slides, hidden slides, and author, among others. Click in a field to edit it.

Password Protect a Presentation: Click the **File** tab, click the **Info** tab, click the **Protect Presentation** button and select **Encrypt with Password**. Enter a password to protect the presentation and click **OK**. Reenter the password and click **OK**.

Organize a Presentation

Add a Section: Select the slide where you want the section to start. Click the **Section** button on the Home tab and select **Add Section** from the menu.

Rename Sections: Click any section heading in the Thumbnails pane to select it. Click the **Section** button on the Home tab and select **Rename Section**. Type a new name for the section and click **Rename**.

Outline View: The Outline view allows you to focus on just the slide text without seeing any pictures or graphics. Click the **View** tab on the ribbon and click the **Outline View** button.

Slide Sorter View: The Slide Sorter view is the easiest way to rearrange and organize slides after a presentation is created. Click the **View** tab on the ribbon and click the **Slide Sorter** button.

Organize a Presentation

Move a Slide: Click a slide in the Thumbnails pane and drag it to a new location.

Hide or Unhide a Slide: Select a slide in the Thumbnails pane in Normal view. Click the **Slide Show** tab on the ribbon and click the **Hide Slide** button in the Set Up group to toggle the slide visibility.

Deliver a Slide Show

Start a Slide Show: Click the **Slide Show** tab on the ribbon and click either the **From Beginning** or **From Current Slide** button. Or, click the **Slide Show** button on the status bar, or press **F5**.

End a Slide Show: While presenting a slide show, click the **Options** button in the toolbar at the bottom left and select **End Show**. Or, press the **Esc** key.

Advance to the Next Slide: Click the **Next Slide** button, press the **Spacebar**, click the left mouse button, or press the **Page Down** key.

Go Back to the Previous Slide: Click the **Previous Slide** button, press **Backspace** key, or press the **Page Up** key.

Use the Laser Pointer: In Slide Show view, press and hold down the **Ctrl** key while clicking and holding the left mouse button.

Use the Pen: In Slide Show view, press **Ctrl** + **P** and then draw on the screen. Press **Ctrl** + **A** to switch back to the arrow pointer. Press **E** to erase your annotations.

Hide a Presentation Slide: In Slide Show view, temporarily hide the current slide. Press the **B** key to make the screen black or the **W** key to make it all white. Press the **Esc** key to make the slide visible once again.

Slide Zoom: In Slide Show view, click the **Zoom** button in the slide show toolbar. Click an area of the slide to zoom in. Right-click or press the **Esc** key to zoom out and view the entire slide.

Start Presenter View: While presenting, click the **Options** button in the slide show toolbar and select **Show Presenter View**.

End Presenter View: While in Presenter view, click the **Options** button in the slide show toolbar and select **Hide Presenter View**.

Create a Custom Slide Show: Click the **Slide Show** tab on the ribbon. Click the **Custom Slide Show** button and select **Custom Shows**. Click the **New** button. Select the slides you want to add to the custom show and click the **Add** button. Click **OK** to save the custom show.

Convert Presentations to Video: Click the **File** tab on the ribbon and select **Export** at the left. Click **Create a Video**. Adjust the video settings and click **Create Video**.

Contact Us: sales@customguide.com

Microsoft®

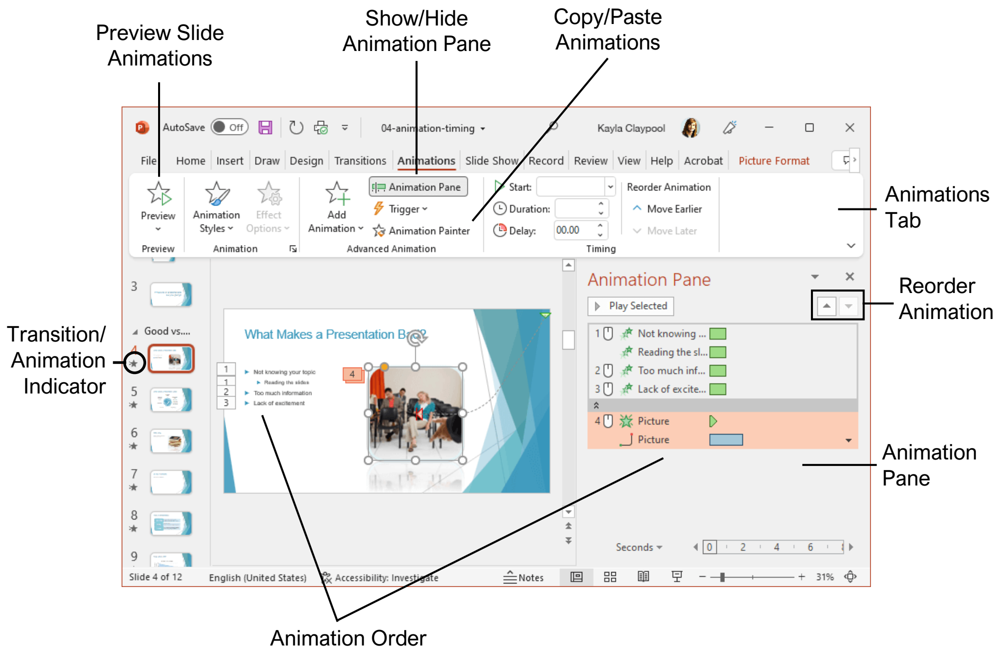
PowerPoint 2021 Intermediate

Quick Reference Guide

Free Cheat Sheets

Visit ref.customguide.com

Animations Tab & Pane



Transitions and Animations

Apply a Slide Transition: Select the slide(s) where you want to add a transition. Click the **Transitions** tab on the ribbon and click the **More** button in the Transition to This Slide group. Select the transition you want to use.

Modify a Transition: Click the **Transitions** tab on the ribbon and click the **Effect Options** button. Select an effect option in the menu.

Apply an Animation: Select the text or object you want to animate and click the **Animations** tab on the ribbon. Click the **Animation Styles** button and select the animation you want to use. Click the **Add Animation** button to add additional animations to the same object.

Modify an Animation: Click the **Animations** tab on the ribbon and click the **Effect Options** button. Select an option for the applied animation.

Copy Animations: Select an object with an animation applied. Click the **Animations** tab and click the **Animation Painter** button. Select the object you want the animation applied to.

Display the Animation Pane: Click the **Animations** tab on the ribbon and click the **Animation Pane** button. View and edit the timeline for animations on the current slide.

Formatting and Themes

Change the Font: Select the text you want to change, click the **Font** list arrow on the Home tab, and select a new font.

Change the Font Size: Select the text you want to change, click the **Font Size** list arrow on the Home tab, and select a new font size.

Change the Font Color: Select the text you want to change, click the **Font Color** list arrow, and select a new color.

Modify the Slide Background: Click the **Design** tab on the ribbon and click the **Format Background** button. Make the desired changes in the Format Background pane.

Apply a Presentation Theme: Click the **Design** tab on the ribbon. Click the **More** button in the Themes group and select a theme.

Modify Theme Elements: Click the **Design** tab, then, in the Variants group, click **Colors**, **Fonts**, or **Effects** to expand the menu and select a new style that coordinates with the current theme.

Change the Slide Size: Click the **Design** tab, click the **Slide Size** button in the Customize group, and select a slide size.

Use a Presentation Template: Click the **File** tab on the ribbon and select **New**. Select a template in the list and click **Create**.

Styles

Animation Styles

Appear	Text or object appears on the slide.
Fade	Text or object fades into view.
Fly In	Text or object flies in from the specified direction.
Float In	Text or object floats in from a specified direction and becomes visible.
Split	Text or object becomes whole as its halves unite from a specified direction.
Wipe	Text or object is wiped on from a specified direction.
Shape	Text or object fills in from the edges of a specified shape and appears.
Wheel	Text or object rotates around a central hub and gradually comes into view.

Transition Styles

Fade	The previous slide fades away, revealing the current slide.
Push	The previous slide pushes the current slide into view.
Wipe	The previous slide disappears quickly as the current slide rolls over it.
Split	The previous slide divides at a center point and disappears, revealing the current slide.
Cut	The previous slide disappears almost instantly and the current slide pops into view.
Uncover	The previous slide moves out of the way quickly, revealing the current slide.
Flash	The previous slide disappears in a bright flash and the current slide eases into view.
Morph	Move things on the previous slide to their new locations on the current slide.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Pictures

Insert a Picture Using Content Placeholders: Click a content slide's **Pictures** or **Online Pictures** button. Navigate to the picture you want to use and select it, then click **Insert**.

Insert from the Ribbon: Click the **Insert** tab on the ribbon. Click the **Pictures** or **Online Pictures** button. Navigate to the picture you want to use and select it, then click **Insert**.

Resize a Picture: Select a picture. Click and drag a resize handle around the outer edge to make the picture larger or smaller.

Crop a Picture: Select the picture you want to crop. Click the Picture Tools **Format** tab on the ribbon and click the **Crop** button. Click and drag the crop handles to remove any unwanted areas, then click the **Crop** button again.

Insert a Screenshot: Click the Insert tab on the ribbon and click the **Screenshot** button. Choose an open window to capture, or select Screen Clipping.

Remove a Picture's Background: Select a picture, click the Picture Tools **Format** tab on the ribbon, and click the **Remove Background** button. Resize the bounding box around what you want to keep. If needed, use the Refine group to mark specific areas to remove or keep, then click the **Keep Changes** button.

Apply Picture Adjustments: Select a picture, then click the Picture Tools Format tab on the ribbon. In the Adjust group, click the **Corrections**, **Color**, and/or **Artistic Effects** button and select an adjustment from the menu.

Reset Picture Formatting: Select a picture. Click the Picture Tools **Format** tab on the ribbon and click the **Reset Picture** button.

Apply a Picture Style: Select a picture, then click the Picture Tools **Format** tab on the ribbon. Select a style in the Picture Styles gallery.

Graphics

Insert a Text Box: Click the **Insert** tab on the ribbon and click the **Text Box** button. The cursor changes to a crosshair; click and drag to place the text box on the slide.

Insert a Shape: Click the **Insert** tab on the ribbon and click the **Shapes** button. Select the shape you want to use in the menu. Click and drag to place the shape on the slide.

Merge Shapes: Select two or more shapes to merge. Click the Drawing Tools **Format** tab on the ribbon and click the **Merge Shapes** button. Select a merge option in the menu.

Apply a Shape Style: Select a shape, then click the click Drawing Tools **Format** tab on the ribbon and select a style in the Shape Styles gallery.

Graphics

Insert WordArt: Click the **Insert** tab on the ribbon and click the **WordArt** button in the Text group. Select a WordArt style in the menu and replace the placeholder text.

Insert an Icon: Click the **Insert** tab on the ribbon and click the **Icons** button. Select an icon and click **Insert**.

Create a Drawing: Click the **Draw** tab on the ribbon and click the **Draw with Touch** button. Draw a shape using the mouse or touchscreen.

Insert SmartArt: Click the **Insert** tab on the ribbon and click the **SmartArt** button in the Illustrations group. Select a graphic in the dialog box and click **OK**.

Insert a Chart: Click the **Insert Chart** button in a slide's content placeholder, or click the **Insert** tab and click the **Insert Chart** button. Select a chart type and click **OK**.

Insert a Table: Click the **Insert Table** button in a slide's content placeholder, or click the **Insert** tab and click the **Insert Table** button. Specify the number of rows and columns for the table and click **OK**.

Self-Run Presentations

Insert a Video: Click the **Insert** tab and click the **Video** button in the Media group. Select either **Online Video** or **Video on My PC**. Locate and select the video and click the **Insert** button.

Modify Video Playback Options: Select a video and click the Video Tools **Playback** tab on the ribbon. Use the options on this tab to perform tasks such as trimming the video, adding a fade in and out, and controlling how the video behaves in a live presentation.

Insert an Audio Clip: Click the **Insert** tab and click the **Audio** button in the Media group. Select **Audio on My PC** to locate an existing audio clip, or **Record Audio** to create a custom clip right within PowerPoint.

Insert Action Buttons: Click the **Insert** tab and click the **Shapes** button. In the menu, select a button in the Action Buttons category. Click and drag the cursor on the slide to place the button in the desired location. In the dialog box that appears, leave the default settings or modify how the button behaves, then click **OK**.

Record Narration and Timing: Click the **Slide Show** tab and click the **Record Slide Show** button. Click the **Record** button. The presentation starts, recording narration and timing for each slide as you move through the presentation. Click the **Stop** button.

Set up a Slide Show: Click the **Slide Show** tab on the ribbon and click the **Set Up Slide Show** button. Modify the options in the dialog box to specify how you want the slide show to run and click **OK**.

Slide Masters

Open Slide Master View: Click the **View** tab on the ribbon and click the **Slide Master** button.

Edit a Slide Master Layout: While in Slide Master view, select the layout you want to edit in the Thumbnails pane at the left. Modify existing placeholders, or add new ones using the Master Layout group on the Slide Master tab of the ribbon.

Close Slide Master View: While in Slide Master view, click the **Slide Master** tab on the ribbon and click the **Close Master View** button.

Create a Custom Slide Layout: While in Slide Master view, click in between two existing slide layouts in the Thumbnails pane. Click the **Insert Layout** button on the Slide Master tab of the ribbon. Insert and format the desired slide placeholders.

Add a Master Footer: While in Slide Master view, select the slide layout where you want to add a footer. Click the **Insert** tab on the ribbon and click the **Header & Footer** button. Modify the footer options and click **Apply**.

Modify a Master or Layout Background: While in Slide Master view, select a slide master or layout to edit. Right-click the thumbnail and select **Format Background**. Modify the options in the Format Background pane at the right, then close the pane when you're finished making changes.

Apply a Master Theme: While in Slide Master view, select a slide master. Click the **Themes** button on the Slide Master tab and select a theme to apply to the selected master and all its layouts.

Insert an Additional Slide Master: While in Slide Master view, click the **Slide Master** tab on the ribbon and click the **Insert Slide Master** button.

Rename a Slide Master or Layout: While in Slide Master view, select a slide master or layout to rename. Click the **Rename** button on the Slide Master tab of the ribbon. Type a new name and click the **Rename** button.

Delete a Slide Master or Layout: While in Slide Master view, select a slide master or layout to delete. Right-click the thumbnail and select **Delete Master** or **Delete Layout**.

Edit the Handout Master: Click the **View** tab on the ribbon and click the **Handout Master** button. Modify the handout master using the options on the Handout Master tab of the ribbon, then click the **Close Master View** button.

Edit the Notes Master: Click the **View** tab on the ribbon and click the **Notes Master** button. Modify the notes master using the options on the Notes Master tab of the ribbon, then click the **Close Master View** button.

Contact Us: sales@customguide.com

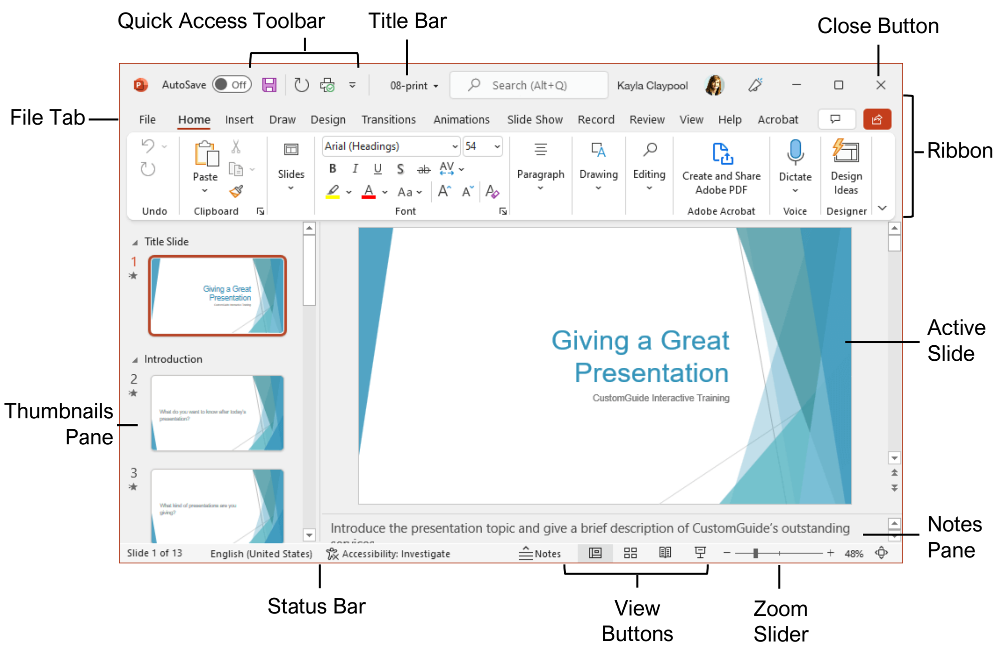
Microsoft®

PowerPoint 2021 Basic

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

The PowerPoint 2021 Program Screen



Keyboard Shortcuts

General

Open a presentation	**Ctrl** + **O**
Create a new presentation	**Ctrl** + **N**
Save a presentation	**Ctrl** + **S**
Print a presentation	**Ctrl** + **P**
Insert a new slide	**Ctrl** + **M**
Toggle the Notes pane	**Ctrl** + **Shift** + **H**
Close a presentation	**Ctrl** + **W**
Exit PowerPoint	**Ctrl** + **Q**
Help	**F1**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Group	**Ctrl** + **G**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Select All	**Ctrl** + **A**

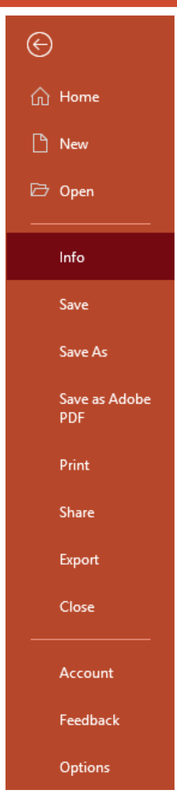
Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Align Left	**Ctrl** + **L**
Align Right	**Ctrl** + **R**
Center	**Ctrl** + **E**
Justify	**Ctrl** + **J**

Slide Show Delivery

Begin slide show	**F5**
Resume slide show	**Shift** + **F5**
End slide show	**Esc**
Go to next slide	**Page Down**
Go to previous slide	**Page Up**
Go to first slide	**Home**
Go to last slide	**End**
Jump to slide	**[Slide #]** + **Enter**
Toggle screen black	**B**
Toggle screen white	**W**
Pause show	**S**
Change arrow to pen	**Ctrl** + **P**
Change pen to arrow	**Ctrl** + **A**

Getting Started



The File tab opens Backstage view, which contains commands for working with your files like Open, Save, New, Print, Share, and Close.

Create a New Presentation: Click the **File** tab, select **New**, and click **Blank Presentation**. Or, press **Ctrl** + **N**.

Open a Presentation: Click the **File** tab and select **Open**, or press **Ctrl** + **O**. Select a location with a file you want, then select a file and click **Open**.

Save a Presentation: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Preview and Print: Click the **File** tab, select **Print**, specify print settings, and click **Print**.

Close a Presentation: Click the **File** tab and select **Close**, or press **Ctrl** + **W**.

Close PowerPoint: Click the **Close** ✕ button in the upper-right corner.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Change Presentation Views: Click the **View** tab and select a view, or click one of the **View** buttons at the bottom of the window.

Normal View

Outline View

Slide Sorter View

Reading View

Get Help: Press **F1** to open the Help pane. Type your topic or question and press **Enter**.

Use Zoom: Click and drag the zoom slider to the left or right.

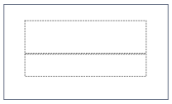
Click the topic links for free lessons!

Contact Us: sales@customguide.com

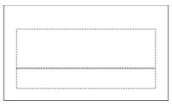
Work with Presentations

Insert a New Slide: Click the **Home** tab and click the **New Slide** button in the Slides group, or press **Ctrl** + **M**.

Change the Slide Layout: Click the **Home** tab, click the **Layout** button in the Slides group, and select a layout.

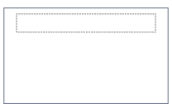

Title Slide


Title and Content

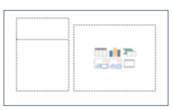

Section Header

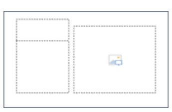

Two Content


Comparison


Title Only


Blank


Content with Caption


Picture with Caption

Add Slides from Another Presentation: Click the **New Slide** list arrow on the Home tab and select **Reuse Slides**. Click **Browse** and locate the file with slides you want to add. Click a slide in the Reuse Slides pane to add it to the current presentation.

Duplicate Slides: Select the slide you want to duplicate. Click the **New Slide** list arrow on the Home tab and select **Duplicate Selected Slides**.

Copy and Paste: Select the text you want to copy and click the **Copy** button on the Home tab. Then click where you want to paste the text and click the **Paste** button.

Cut and Paste: Select the text you want to cut and click the **Cut** button on the Home tab. Then click where you want to paste the text and click the **Paste** button.

Work with Presentations

Add Slide Notes: Click the **View** tab on the ribbon and click the **Notes** button in the Show group to turn on the Notes pane. Enter a slide note to use during the presentation or for slide handouts.

Add a Comment: Click the slide where you want to add a comment. Click the **Review** tab on the ribbon and click the **New Comment** button. Type your comment and click outside the Comments pane to save it.

Compare Two Presentations: Open the first presentation you want to compare. Click the **Review** tab on the ribbon and click the **Compare** button. Navigate to and select the second presentation you want to compare. Click the **Merge** button.

Check Spelling and Grammar: Click the **Review** tab and click the **Spelling** button.

Find Text: Click the **Find** button on the Home tab, enter the word you want to find in the **Find what** field, and click the **Find Next** button to locate the word in the presentation.

Replace Text: Click the **Replace** button on the **Home** tab. Enter the word you want to find in the **Find what** field, then enter the text that will replace it in the **Replace with** field. Click **Replace** or **Replace All**. Click **OK** when finished.

Edit Document Properties: Click the **File** tab and ensure **Info** is selected. The right column contains properties for the presentation such as file size, number of slides, hidden slides, and author, among others. Click in a field to edit it.

Password Protect a Presentation: Click the **File** tab, click the **Info** tab, click the **Protect Presentation** button and select **Encrypt with Password**. Enter a password to protect the presentation and click **OK**. Reenter the password and click **OK**.

Organize a Presentation

Add a Section: Select the slide where you want the section to start. Click the **Section** button on the Home tab and select **Add Section** from the menu.

Rename Sections: Click any section heading in the Thumbnails pane to select it. Click the **Section** button on the Home tab and select **Rename Section**. Type a new name for the section and click **Rename**.

Outline View: The Outline view allows you to focus on just the slide text without seeing any pictures or graphics. Click the **View** tab on the ribbon and click the **Outline View** button.

Slide Sorter View: The Slide Sorter view is the easiest way to rearrange and organize slides after a presentation is created. Click the **View** tab on the ribbon and click the **Slide Sorter** button.

Organize a Presentation

Move a Slide: Click a slide in the Thumbnails pane and drag it to a new location.

Hide or Unhide a Slide: Select a slide in the Thumbnails pane in Normal view. Click the **Slide Show** tab on the ribbon and click the **Hide Slide** button in the Set Up group to toggle the slide visibility.

Deliver a Slide Show

Start a Slide Show: Click the **Slide Show** tab on the ribbon and click either the **From Beginning** or **From Current Slide** button. Or, click the **Slide Show** button on the status bar, or press **F5**.

End a Slide Show: While presenting a slide show, click the **Options** button in the toolbar at the bottom left and select **End Show**. Or, press the **Esc** key.

Advance to the Next Slide: Click the **Next Slide** button, press the **Spacebar**, click the left mouse button, or press the **Page Down** key.

Go Back to the Previous Slide: Click the **Previous Slide** button, press **Backspace** key, or press the **Page Up** key.

Use the Laser Pointer: In Slide Show view, press and hold down the **Ctrl** key while clicking and holding the left mouse button.

Use the Pen: In Slide Show view, press **Ctrl** + **P** and then draw on the screen. Press **Ctrl** + **A** to switch back to the arrow pointer. Press **E** to erase your annotations.

Hide a Presentation Slide: In Slide Show view, temporarily hide the current slide. Press the **B** key to make the screen black or the **W** key to make it all white. Press the **Esc** key to make the slide visible once again.

Slide Zoom: In Slide Show view, click the **Zoom** button in the slide show toolbar. Click an area of the slide to zoom in. Right-click or press the **Esc** key to zoom out and view the entire slide.

Start Presenter View: While presenting, click the **Options** button in the slide show toolbar and select **Show Presenter View**.

End Presenter View: While in Presenter view, click the **Options** button in the slide show toolbar and select **Hide Presenter View**.

Create a Custom Slide Show: Click the **Slide Show** tab on the ribbon. Click the **Custom Slide Show** button and select **Custom Shows**. Click the **New** button. Select the slides you want to add to the custom show and click the **Add** button. Click **OK** to save the custom show.

Convert Presentations to Video: Click the **File** tab on the ribbon and select **Export** at the left. Click **Create a Video**. Adjust the video settings and click **Create Video**.

Contact Us: sales@customguide.com

Microsoft®

Outlook 2013 Intermediate

Quick Reference Guide

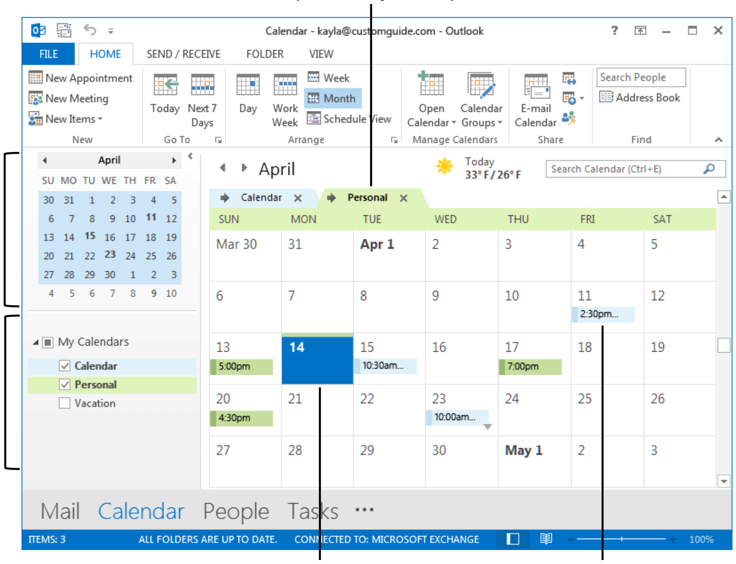
Free Cheat Sheets
Visit ref.customguide.com

Outlook 2013 Calendar View

Calendar Tab
(in overlay mode)

Mini Calendar

Folder Pane



Selected Date

Meeting / Appointment

Tasks and Notes

Flag a Message: In Mail view, select an item, click the **Follow Up** button on the Home tab, then select a flag; or, right-click a message, select **Follow Up**, and select a flag.

Change a Flag: In Mail view, select a flagged item, click the **Follow Up** button on the Home tab, then select a new flag.

Add a Reminder: In Mail view, select an item, click the **Follow Up** button on the Home tab, and select **Add Reminder**. Choose a date, time, and sound in the Reminder section of the Custom dialog box, then click **OK**.

Remove a Flag: In Mail view, select a flagged item, click the **Follow Up** button on the Home tab, and select **Clear Flag**.

Add a Task: Switch to Task view by clicking **Tasks** on the Navigation bar, then click the **New Task** button on the Home tab (or click the **New Item** button on the Home tab, then select **New Task**). Enter a subject, start date, due date, and other options, then click **Save & Close**.

Mark a Task Complete: In Task view, check a task's check box; or, select a task and click the **Mark Complete** button on the Home tab.

Tasks and Notes

View Tasks in the To-Do Bar: Click the **View** tab on the ribbon, click the **To-Do Bar** button, and select **Tasks**.

Change Task Views: In Task view, click the **Change View** button on the Home tab (or, if available, select a view from the Views gallery).

Create a Recurring Task: When creating a new task, click the **Recurrence** button on the Task tab. Specify a recurrence pattern, then set the recurrence pattern's date range. Click **OK**.

- **Daily** tasks recur every day, every set number of days, or every weekday.
- **Weekly** tasks recur on the same day of the week every week, or every certain number of weeks.
- **Monthly** tasks recur on the same day of the month (the 10th), or the same day of a specified week of the month (the third Friday).
- **Yearly** tasks recur annually on the same day of a month every year (July 8th), or the same weekday in a specified week and month (the second Tuesday of April).

Remove Recurrence: After opening a task with recurrence, click the **Recurrence** button on the Task tab and click **Remove Recurrence**.

Advanced Calendar

Schedule Meeting Rooms: In a new meeting window, click the **Rooms** button, select a meeting room from the address book, click the **Rooms** button, and click **OK**.

Use the Scheduling Assistant: Create a meeting with all invitees. Click **Scheduling Assistant** on the Meeting tab and select a time that works for all.

Forward a Calendar Item: Open a calendar item, click the **Forward** button on the Meeting tab, enter a contact in the To: field, then click **Send**.

Send Calendar Information: Click and drag a meeting or an appointment and drop it on the Mail Navigation Bar option. In the message window that opens, add a recipient in the To field and click the **Send** button.

Access a Shared Calendar: Click the **Open Calendar** button on the Home tab, select **Open Shared Calendars**, enter another user's name (or click **Name** and select a user from the address book), then click **OK**.

Send a Calendar Sharing Invitation: Click the **Share** button on the Home tab, enter a contact in the To: field, click the **Details** list arrow and select a level of detail, and click **Send**.

Send your Calendar in an Email: Click the **Email Calendar** button on the Home tab, select a calendar and date range, and click **OK**.

Add New Calendars: Click the **Open Calendar** button on the Home tab, select **Create New Blank Calendar**, give the calendar a name, and click **OK**.

View Multiple Calendars: Check or uncheck a calendar's check box in the Folder pane to toggle it on and off.

Overlay Calendars: While viewing multiple calendars, click the **Overlay** arrow on a calendar tab.

Delete a Calendar: Right-click a calendar tab (or a calendar in the Folder pane) and select **Delete Calendar**.

Configure Calendar Settings: Click the **File** tab and select **Options** at the left. In the Outlook Options dialog box that appears, select **Calendar**. Customize the calendar settings and click **OK**.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Tasks and Notes

Assign a Task: When creating a task, click the **Assign Task** button on the Task tab. Enter an email address in the To: field, then click **Send**.

Accept or Decline an Assigned Task: Select a task assignment request in your Mail inbox, then click either **Accept** or **Decline** in the message preview. Choose whether to edit the message response or not, and click **OK**.

View Notes: Click the **More (···)** button in the Navigation bar and select **Notes**. Double-click a note to open it.

Create a Note: While in Notes view, click the **New Note** button on the Home tab. Start typing within the note window, then click outside the note window to save it.

Advanced Mail

Run a Quick Step: Click a Quick Step in the Quick Steps gallery, or click the **More** button and select a Quick Step.

Add a New Quick Step: Click the **More** button in the Quick Steps gallery, then select **Create New**. Give the new Quick Step a name, then customize the actions that the Quick Step will take. Click **Finish**.

Edit a Quick Step: Click the **More** button in the Quick Steps gallery, then select **Manage Quick Steps**. Select a Quick Step, then click **Edit**. Update the Quick Step's actions, then click **Save**.

Create a Quick Part: Select the text or graphics you want to use as a Quick Part, click the **Insert** tab, click the **Quick Parts** button, and select **Save Selection to Quick Parts Gallery**. Give the Quick Part a name, category, and description, then click **OK**.

Use a Quick Part: While composing a message, click the **Insert** tab, click the **Quick Parts** button, and select a Quick Part.

Redirect Replies: While composing a message, click the **Options** tab, and click the **Direct Replies** button. Click **Select Names**, select names from the address book, and click **OK**. Click **Close**.

Recall a Message: Click the **Sent Items** folder in the Folder pane, open a message, click the **Actions** button on the Message tab, and select **Recall this Message**. Select whether to just delete the message or to replace it with a new message, then click **OK**.

Send a Poll: In a new message window, click the **Options** tab, click the **Use Voting Options** button, and select a poll option (or select **Custom**, specify your own poll options, then click **Close**).

Track Votes: Click the **Sent Items** folder, open a message with a poll, and click the **Tracking** button on the Message tab.

Advanced Mail

Create a Rule Based on an Email: Select a message, click the **Rules** button on the Home tab, and select **Create Rule**. Select the conditions for the rule, then select the actions for the rule to carry out. Click **OK**.

Create a Rule from Scratch: Click the **Rules** button on the Home tab, select **Manage Rules & Alerts**, click **New Rule**, and use the Rules Wizard to set conditions, actions, and exceptions. Give the rule a name, select how you want it to run, and click **Finish**.

Edit a Rule: Click the **Rules** button on the Home tab, select **Manage Rules & Alerts**, select a rule, click **Change Rule**, and select **Edit Rule Settings**. Use the Rules Wizard to edit the rule's conditions, actions, and exceptions, then click **Finish**.

Delete a Rule: Click the **Rules** button on the Home tab, select **Manage Rules & Alerts**, select a rule, click **Delete**, and click **Yes**.

Save an Email in Another Format: Double-click an email to open it, then click the **File** tab and select **Save As**. Select where you want to save the email, then click the **Save as type** list arrow and select a file type. Click **Save**.

Delegate Mail Folders: Click the **File** tab, click **Account Settings**, and select **Delegate Access**. Click **Add**, select a contact from the address book, click **Add**, then click **OK**. Select the permissions for the delegated user, then click **OK**. Click **OK** again.

- **Reviewer** permissions allow the user to read items and files, but not create or edit them.
- **Author** permissions allow the user to create and read items and files, and to modify and delete items they've created.
- **Editor** permissions allow the user to create, read, modify, and delete all items and files.

Access a Shared Folder: Click the **File** tab, click **Open & Export**, click **Other User's Folder**, enter another user's name (or click **Name** and select a user), then click **OK**.

Create an Email Using a Theme or Stationery: Click the **New Items** button on the Home tab, select **Email Message Using**, and select **More Stationery**. Select a theme or stationery in the dialog box, then click **OK**.

Add Additional Accounts: Click the **File** tab and click the **Add Account** button. Fill in the account information and click **Next**. Click **Finish**.

Specify Which Account Email is Sent From: While composing an email, click the **From** field list arrow and select an email account.

Manage Information

Categorize an Item: Select an item, click the **Categorize** button on the Home tab, and select a category.

Manage Information

Edit a Category: Click the **Categorize** button on the Home tab, select **All Categories**, and select a category. Click **Rename**, give the category a new name, and click **OK**. Click the **Color** list arrow and select a new color. Click **OK**.

Create a New Category: Click the **Categorize** button on the Home tab, select **All Categories**, and click **New**. Enter a name, select a color, and click **OK**.

Delete a Category: Click the **Categorize** button on the Home tab, select **All Categories**, select a category, click **Delete**, and click **OK**.

Sort Inbox by Category: Click the **sort by** list arrow above the Inbox and select **Categories**.

Create a Folder: Click the Folder tab, click the **New Folder** button, enter a name, select a type of content, select a location, and click **OK**.

Rename a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Rename Folder** button. Enter a new folder name and press **Enter**.

Move a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Move Folder** button. Select a new location, then click **OK**.

Delete a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Delete Folder** button. Click **Yes** to confirm.

Create a Search Folder: Click the **Folder** tab and click the **New Search Folder** button. Select **Create a Custom Search Folder**, click **Choose**, and select criteria for the search folder. Click **OK** in the three open dialog boxes.

Clean Up a Conversation: Select a conversation in the Inbox, click the **Clean Up** button on the Home tab, select **Clean Up Conversation**, then click **Clean Up**.

Clean Up a Folder: Select a folder, click the **Clean Up** button on the Home tab, select **Clean Up Folder**, then click **Clean Up Folder**.

Export Outlook Data: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Export to a file** and click **Next**. Select a file type and click **Next**. Select a folder to export data from and click **Next**. Specify where you want to save the exported file, and how you'd like to deal with duplicate items, and click **Finish**. Add an optional password and click **OK**.

Import Data into Outlook: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Import from another program or file** and click **Next**. Select a file type to import and click **Next**. Click **Browse** and specify a file, choose how to handle duplicate items, and click **Next**. If necessary, select a folder from the file to import, and click **Finish**.

Microsoft®

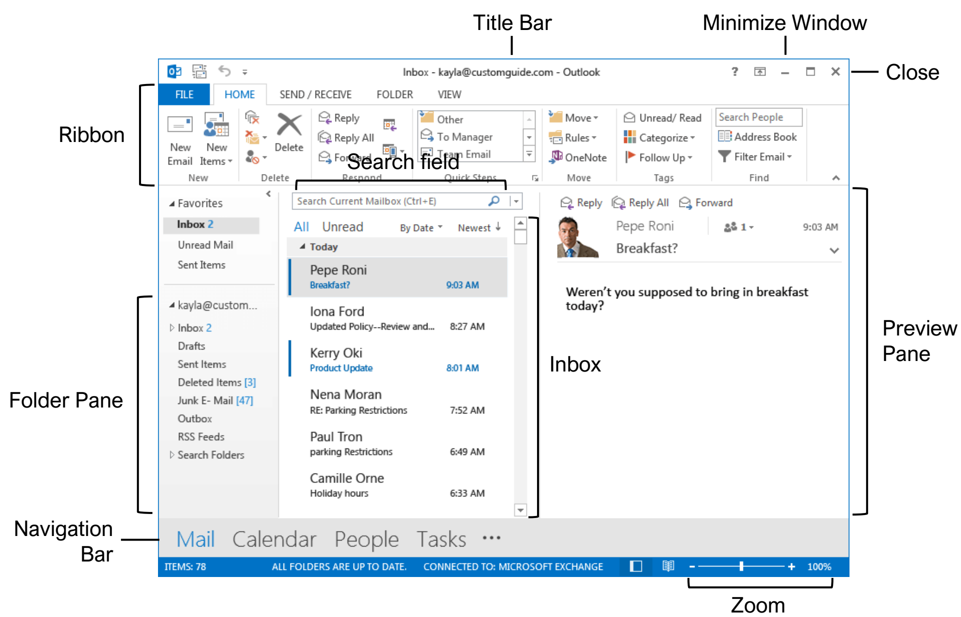
Outlook 2013 Basic

Quick Reference Guide

your logo

Free Cheat Sheets
Visit ref.customguide.com

The Outlook 2013 Program Screen



The Fundamentals

[Navigate Outlook:] Click the icon (or label) for the view you want to open.

Mail view displays your inbox and lets you browse your mail. The ribbon will display commands related to composing and managing email messages.

Calendar view displays your calendar. The ribbon will display commands that let you view, create, and edit meetings and appointments.

People view displays your contacts list. The ribbon will show commands that let you create and edit your contacts and contact groups.

Tasks view displays your task list. The ribbon will show commands that let you create and modify tasks.

[Use the Folder Pane:] Click a folder in the Folder pane to display that folder's contents.

[Delete an Item:] Select an email, contact, appointment, or task, then click the **Delete** button on the Home tab of the ribbon.

[Restore a Deleted Item:] Click the **Deleted Items** folder in the Folder pane, then click and drag an item back to its original folder.

[Change Views:] Click the View tab on the ribbon, then click the **Change View** button and select a view.

Search

[Search:] Click in the **Search** field at the top of the inbox and begin typing your search.

[Refine Search Results:] While searching, use the options in the Scope group on the Search tab.

- **Current Mailbox** searches all folders within the selected mailbox.
- **Current Folder** only searches within the current folder.
- **Subfolders** expands the search to include all the current folder's subfolders.
- **All Outlook Items** searches everything.
- **From** lets you filter messages from specific senders.
- **Subject** lets you filter by words in the subject line.
- **Has Attachments** lets you filter results by whether they have attachments.
- **Categorized** filters by categories.
- **This Week** displays only items from the current week.
- **Unread** searches only unread messages.
- **Flagged** searches only flagged items.
- **Important** only displays items set to high importance.
- **More** lets you apply advanced criteria.

Keyboard Shortcuts

General

Print	**Ctrl** + **P**
Undo	**Ctrl** + **Z**
Copy	**Ctrl** + **C**
Cut	**Ctrl** + **X**
Paste	**Ctrl** + **V**
New Item	**Ctrl** + **N**
Delete selected item	**Del**
Help	**F1**
Find an item	**F3**
Spell Check	**F7**

Navigation

Mail view	**Ctrl** + **1**
Calendar view	**Ctrl** + **2**
Contacts view	**Ctrl** + **3**
Tasks view	**Ctrl** + **4**
Notes	**Ctrl** + **5**

Mail

New Message	**Ctrl** + **Shift** + **M**
Reply	**Ctrl** + **R**
Reply All	**Ctrl** + **Shift** + **R**
Forward	**Ctrl** + **F**
Save message as a draft	**Ctrl** + **S**
Send	**Alt** + **S**
Find and replace text	**Ctrl** + **H**
Check for New Messages	**Ctrl** + **M**
Mark as Read	**Ctrl** + **Q**
Mark as Unread	**Ctrl** + **U**

Calendar

New Appointment	**Ctrl** + **Shift** + **A**
Go to Today	**Ctrl** + **T**
Go to a Date	**Ctrl** + **G**
Go to Previous Appointment	**Ctrl** + **,**
Go to Next Appointment	**Ctrl** + **.**
Day view	**Ctrl** + **Alt** + **1**
Work Week view	**Ctrl** + **Alt** + **2**
Week view	**Ctrl** + **Alt** + **3**
Month view	**Ctrl** + **Alt** + **4**

Contacts

New Contact	**Ctrl** + **Shift** + **C**
New Contact Group	**Ctrl** + **Shift** + **L**
Open the Address Book	**Ctrl** + **Shift** + **B**

Click the [topic links] for free lessons!

Contact Us: sales@customguide.com

Mail

Compose Email: Click the **New Email** button on the Home tab. Enter recipients, a subject, and a message body, then click **Send**.

Types of Recipients: When composing a new email, enter email addresses in the address fields.

- **To** contains the primary recipients, whom the message is directed to.
- **Cc (Carbon Copy)** sends a copy of the message. While not the primary audience, these recipients may want to see the information presented. The Cc field is visible to all recipients.
- **Bcc (Blind Carbon Copy)** sends a copy of the message, while keeping the Bcc field secret to other recipients.

View an Email in the Reading Pane: Select an email from the inbox to display it.

Open an Email in a New Window: Double-click an email in the inbox.

Mark an Email Read or Unread: Opening an email, or displaying it in the Reading pane, will automatically mark an unread email as read. Click the **Unread/Read** button on the Home tab to toggle an email read or unread.

Reply to an Email: Select an email in the inbox (or open an email in its own window) and click the **Reply** button on the ribbon.

Reply to All Recipients of an Email: Select an email in the inbox (or open an email in its own window) and click the **Reply All** button on the ribbon.

Forward an Email: Select an email in the inbox (or open an email in its own window) and click the **Forward** button on the ribbon.

Create a Signature: While composing an email, click the **Signature** button on the Message tab and select **Signatures**. Click the **New** button, enter a name for the signature, and click **OK**. Create the signature in the Edit signature section and click **OK**.

Insert a Signature: While composing an email, click the **Signature** button on the Message tab and select a signature.

Attach a File: While composing an email, click the **Attach File** button on the Message tab. Select a file, then click **Insert**.

Insert a Picture: While composing an email, click the **Insert** tab, click the **Pictures** button, select a picture, and click **Insert**.

Send Out-of-Office Replies: Click the **File** tab, click the **Automatic Replies** button on the Info tab, then click the **Send Automatic Replies** button. Set the start and end dates for the auto reply, enter a message, and click **OK**.

Set Message Priority: While composing an email, click the **High Importance** ! or **Low Importance** button on the Message tab.

Mail

Insert a Hyperlink: While composing an email, click the **Insert** tab, click the **Hyperlink** button, select a type of link, fill in where the link will lead, and click **OK**.

People

Add a New Contact: Click the **New Contact** button on the Home tab. Fill in the fields with the information that you have, then click the **Save & Close** button.

View the Address Book: Click the **Address Book** button on the Home tab. Double-click a contact to open it and see more information.

Add a Contact from the Address Book: Click the **Address Book** button on the Home tab, double-click a contact, click the **Add to Contacts** button, enter any additional information you have, then click the **Save & Close** button.

Edit a Contact: Double-click a contact to open it in a new window, fill in the information fields with any additional information you have, then click the **Save & Close** button.

Import Contacts: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Import from Another Program or File**, then click **Next**. Select a type of file to import, then click **Next**. Click **Browse**, select a file, click **OK**, then click **Next**. Select your **Contacts** folder, click **Next**, then click **Finish**.

Share a Single Contact: Select a contact, click the **Forward Contact** button on the Home tab, and select a sharing format. Address and compose the resulting email, then click **Send**.

Create a Contact Group: Click the **New Contact Group** button on the Home tab, give the contact group a name, and click the **Add Members** button. Select a source for a contact and double-click a contact to add it. Add as many contacts as you would like, click **OK**, then click the **Save & Close** button.

Add Members to a Contact Group: Double-click a contact group to open it, click the **Add Members** button, select a source, and double-click a contact to add it. Click **OK**, then click the **Save & Close** button.

Remove Members from a Contact Group: Double-click a contact group to open it, select a contact from the list, and click the **Remove Member** button.

Calendar

Create an Appointment: From the calendar, click the **New Appointment** button on the Home tab. Enter the appointment's details, subject, location, and start and end time, then click the **Save & Close** button.

Edit an Appointment: Double-click an appointment to open it, edit the appointment details, then click the **Save & Close** button.

Calendar

Reschedule an Appointment: Click and drag an appointment on the calendar to move it to a different day (in Month view) or time (in Day, Week, and Work Week view).

Create an All-Day Event: While creating or editing an appointment, check the **All-day event** check box.

Set a Reminder: While creating or editing an appointment, click the **Reminder** list arrow and select how long before the event you'd like to be reminded.

Change Availability: While creating or editing an appointment, click the **Show As** list arrow and select an availability:

- **Free** shows that you're available.
- **Working Elsewhere** indicates that you're working from another location.
- **Tentative** shows that you have tentative plans and may or may not be available.
- **Busy** indicates that you're busy and not available.
- **Out of Office** shows that you're out of the office and not available.

Set Priority: While creating or editing an appointment, click the **High Importance** ! button, or the **Low Importance** button, on the Appointment tab.

Create a Meeting: While viewing the calendar, click the **New Meeting** button on the Home tab. Click **To…** and double-click the contacts you want to invite to the meeting, then click **OK**. Enter the meeting subject, location, date and time, and a message, then click **Send**.

Track Meeting Responses: Select a meeting in your calendar and click the **Tracking** button on the Meeting tab.

Create a Recurring Appointment: While creating or editing an appointment, click the **Recurrence** button on the Meeting tab. Choose a recurrence pattern, set a time range for the recurrence, then click **OK**.

Edit a Recurring Appointment: Double-click a recurring appointment to open it, then choose whether to edit **Just this one** appointment or **The entire series**. Edit the appointment or the recurrence settings, then click the **Save & Close** button.

Delete a Recurring Appointment: Select a recurring appointment in the calendar, click the **Delete** button on the Home tab, and select **Delete Occurrence** (to delete a single instance of the appointment) or **Delete Series** (to delete the entire series).

Respond to an Invitation: Select an invitation in your inbox, click the **Accept** button, the **Tentative** ? button, or the **Decline** button in the preview pane. Or, select an invited event in your calendar, click the **Accept** button, the **Tentative** ? button, or the **Decline** button on the Meeting Series tab. Select whether to send a response and whether to edit it.

Contact Us: sales@customguide.com

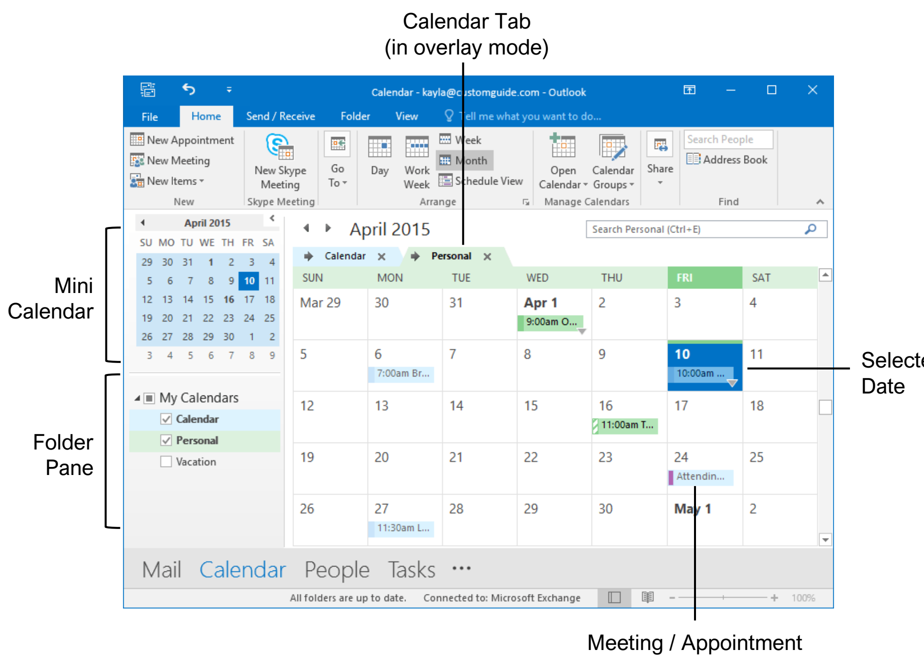
Microsoft®

Outlook 2016 Intermediate

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

Outlook 2016 Calendar View



Tasks and Notes

Flag a Message: In Mail view, select an item, click the **Follow Up** button on the Home tab, then select a flag; or, right-click a message, select **Follow Up**, and select a flag.

Change a Flag: In Mail view, select a flagged item, click the **Follow Up** button on the Home tab, then select a new flag.

Add a Reminder: In Mail view, select an item, click the **Follow Up** button on the Home tab, and select **Add Reminder**. Choose a date, time, and sound in the Reminder section of the Custom dialog box, then click **OK**.

Remove a Flag: In Mail view, select a flagged item, click the **Follow Up** button on the Home tab, and select **Clear Flag**.

Add a Task: Switch to Task view by clicking **Tasks** on the Navigation bar, then click the **New Task** button on the Home tab (or click the **New Item** button on the Home tab, then select **New Task**). Enter a subject, start date, due date, and other options, then click **Save & Close**.

Mark a Task Complete: In Task view, check a task's check box; or, select a task and click the **Mark Complete** button on the Home tab.

Tasks and Notes

View Tasks in the To-Do Bar: Click the **View** tab on the ribbon, click the **To-Do Bar** button, and select **Tasks**.

Change Task Views: In Task view, click the **Change View** button on the Home tab (or, if available, select a view from the Views gallery).

Create a Recurring Task: When creating a new task, click the **Recurrence** button on the Task tab. Specify a recurrence pattern, then set the recurrence pattern's date range. Click **OK**.

- **Daily** tasks recur every day, every set number of days, or every weekday.
- **Weekly** tasks recur on the same day of the week every week, or every certain number of weeks.
- **Monthly** tasks recur on the same day of the month (the 10th), or the same day of a specified week of the month (the third Friday).
- **Yearly** tasks recur annually on the same day of a month every year (July 8th), or the same weekday in a specified week and month (the second Tuesday of April).

Remove Recurrence: After opening a task with recurrence, click the **Recurrence** button on the Task tab and click **Remove Recurrence**.

Advanced Calendar

Schedule Meeting Rooms: In a new meeting window, click the **Rooms** button, select a meeting room from the address book, click the **Rooms** button, and click **OK**.

Use the Scheduling Assistant: Create a meeting with all invitees. Click **Scheduling Assistant** on the Home tab and select a time that works for all.

Forward a Calendar Item: Open a calendar item, click the **Forward** button on the Meeting tab, enter a contact in the To: field, then click **Send**.

Send Calendar Information: Click and drag a meeting or an appointment and drop it on the Mail Navigation Bar option. In the message window that opens, add a recipient in the To field and click the **Send** button.

Access a Shared Calendar: Click the **Open Calendar** button on the Home tab, select **Open Shared Calendars**, enter another user's name (or click **Name** and select a user from the address book), then click **OK**.

Send a Calendar Sharing Invitation: Click the **Share** button on the Home tab, enter a contact in the To: field, click the **Details** list arrow and select a level of detail, and click **Send**.

Send your Calendar in an Email: Click the **Email Calendar** button on the Home tab, select a calendar and date range, and click **OK**.

Add New Calendars: Click the **Open Calendar** button on the Home tab, select **Create New Blank Calendar**, give the calendar a name, and click **OK**.

View Multiple Calendars: Check or uncheck a calendar's check box in the Folder pane to toggle it on and off.

Overlay Calendars: While viewing multiple calendars, click the **Overlay** arrow on a calendar tab.

Delete a Calendar: Right-click a calendar tab (or a calendar in the Folder pane) and select **Delete Calendar**.

Configure Calendar Settings: Click the **File** tab and select **Options** at the left. In the Outlook Options dialog box that appears, select **Calendar**. Customize the calendar settings and click **OK**.

Contact Us: sales@customguide.com

Tasks and Notes

Assign a Task: When creating a task, click the **Assign Task** button on the Task tab. Enter an email address in the To: field, then click **Send**.

Accept or Decline an Assigned Task: Select a task assignment request in your Mail inbox, then click either **Accept** or **Decline** in the message preview. Choose whether to edit the message response or not, and click **OK**.

View Notes: Click the **More (···)** button in the Navigation bar and select **Notes**. Double-click a note to open it.

Create a Note: While in Notes view, click the **New Note** button on the Home tab. Start typing within the note window, then click outside the note window to save it.

Advanced Mail

Run a Quick Step: Click a Quick Step in the Quick Steps gallery, or click the **More** button and select a Quick Step.

Add a New Quick Step: Click the **More** button in the Quick Steps gallery, then select **Create New**. Give the new Quick Step a name, then customize the actions that the Quick Step will take. Click **Finish**.

Edit a Quick Step: Click the **More** button in the Quick Steps gallery, then select **Manage Quick Steps**. Select a Quick Step, then click **Edit**. Update the Quick Step's actions, then click **Save**.

Create a Quick Part: Select the text or graphics you want to use as a Quick Part, click the **Insert** tab, click the **Quick Parts** button, and select **Save Selection to Quick Parts Gallery**. Give the Quick Part a name, category, and description, then click **OK**.

Use a Quick Part: While composing a message, click the **Insert** tab, click the **Quick Parts** button, and select a Quick Part.

Redirect Replies: While composing a message, click the **Options** tab, and click the **Direct Replies** button. Click **Select Names**, select names from the address book, and click **OK**. Click **Close**.

Recall a Message: Click the **Sent Items** folder in the Folder pane, open a message, click the **Actions** button on the Message tab, and select **Recall this Message**. Select whether to just delete the message or to replace it with a new message, then click **OK**.

Send a Poll: In a new message window, click the **Options** tab, click the **Use Voting Options** button, and select a poll option (or select **Custom**, specify your own poll options, then click **Close**).

Track Votes: Click the **Sent Items** folder, open a message with a poll, and click the **Tracking** button on the Message tab.

Advanced Mail

Create a Rule Based on an Email: Select a message, click the **Rules** button on the Home tab, and select **Create Rule**. Select the conditions for the rule, then select the actions for the rule to carry out. Click **OK**.

Create a Rule from Scratch: Click the **Rules** button on the Home tab, select **Manage Rules & Alerts**, click **New Rule**, and use the Rules Wizard to set conditions, actions, and exceptions. Give the rule a name, select how you want it to run, and click **Finish**.

Edit a Rule: Click the **Rules** button on the Home tab, select **Manage Rules & Alerts**, select a rule, click **Change Rule**, and select **Edit Rule Settings**. Use the Rules Wizard to edit the rule's conditions, actions, and exceptions, then click **Finish**.

Delete a Rule: Click the **Rules** button on the Home tab, select **Manage Rules & Alerts**, select a rule, click **Delete**, and click **Yes**.

Save an Email in Another Format: Double-click an email to open it, then click the **File** tab and select **Save As**. Select where you want to save the email, then click the **Save as type** list arrow and select a file type. Click **Save**.

Delegate Mail Folders: Click the **File** tab, click **Account Settings**, and select **Delegate Access**. Click **Add**, select a contact from the address book, click **Add**, then click **OK**. Select the permissions for the delegated user, then click **OK**. Click **OK** again.

- **Reviewer** permissions allow the user to read items and files, but not create or edit them.
- **Author** permissions allow the user to create and read items and files, and to modify and delete items they've created.
- **Editor** permissions allow the user to create, read, modify, and delete all items and files.

Access a Shared Folder: Click the **File** tab, click **Open & Export**, click **Other User's Folder**, enter another user's name (or click **Name** and select a user), then click **OK**.

Create an Email Using a Theme or Stationery: Click the **New Items** button on the Home tab, select **Email Message Using**, and select **More Stationery**. Select a theme or stationery in the dialog box, then click **OK**.

Add Additional Accounts: Click the **File** tab and click the **Add Account** button. Fill in the account information and click **Next**. Click **Finish**.

Specify Which Account Email is Sent From: While composing an email, click the **From** field list arrow and select an email account.

Manage Information

Categorize an Item: Select an item, click the **Categorize** button on the Home tab, and select a category.

Manage Information

Edit a Category: Click the **Categorize** button on the Home tab, select **All Categories**, and select a category. Click **Rename**, give the category a new name, and click **OK**. Click the **Color** list arrow and select a new color. Click **OK**.

Create a New Category: Click the **Categorize** button on the Home tab, select **All Categories**, and click **New**. Enter a name, select a color, and click **OK**.

Delete a Category: Click the **Categorize** button on the Home tab, select **All Categories**, select a category, click **Delete**, and click **OK**.

Sort Inbox by Category: Click the **sort by** list arrow above the Inbox and select **Categories**.

Create a Folder: Click the Folder tab, click the **New Folder** button, enter a name, select a type of content, select a location, and click **OK**.

Rename a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Rename Folder** button. Enter a new folder name and press **Enter**.

Move a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Move Folder** button. Select a new location, then click **OK**.

Delete a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Delete Folder** button. Click **Yes** to confirm.

Create a Search Folder: Click the **Folder** tab and click the **New Search Folder** button. Select **Create a Custom Search Folder**, click **Choose**, and select criteria for the search folder. Click **OK** in the three open dialog boxes.

Clean Up a Conversation: Select a conversation in the Inbox, click the **Clean Up** button on the Home tab, select **Clean Up Conversation**, then click **Clean Up**.

Clean Up a Folder: Select a folder, click the **Clean Up** button on the Home tab, select **Clean Up Folder**, then click **Clean Up Folder**.

Export Outlook Data: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Export to a file** and click **Next**. Select a file type and click **Next**. Select a folder to export data from and click **Next**. Specify where you want to save the exported file, and how you'd like to deal with duplicate items, and click **Finish**. Add an optional password and click **OK**.

Import Data into Outlook: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Import from another program or file** and click **Next**. Select a file type to import and click **Next**. Click **Browse** and specify a file, choose how to handle duplicate items, and click **Next**. If necessary, select a folder from the file to import, and click **Finish**.

Contact Us: sales@customguide.com

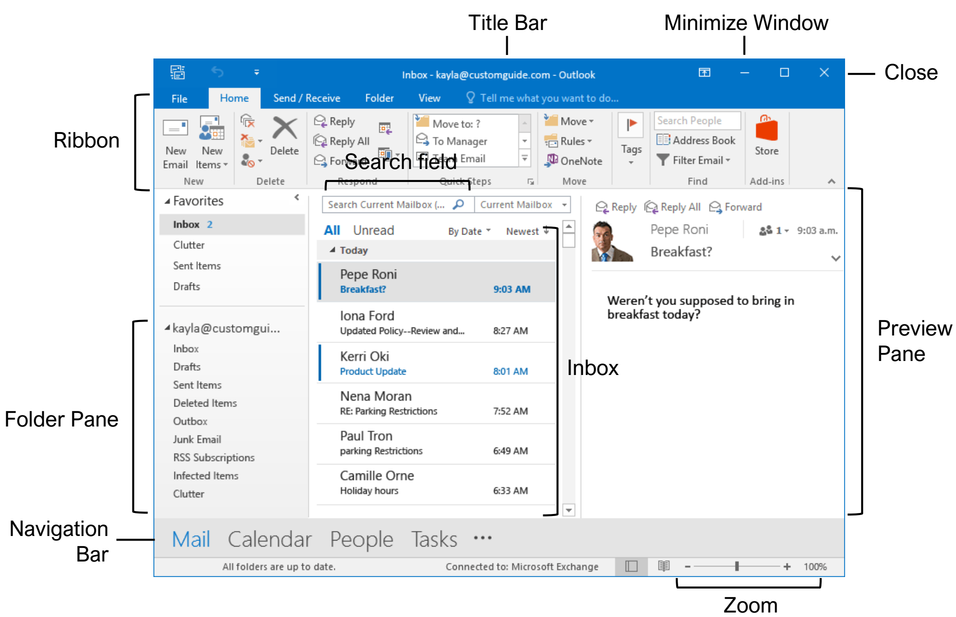
Microsoft®

Outlook 2016 Basic

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

The Outlook 2016 Program Screen



The Fundamentals

Navigate Outlook: Click the icon (or label) for the view you want to open.

- **Mail** view displays your inbox and lets you browse your mail. The ribbon will display commands related to composing and managing email messages.
- **Calendar** view displays your calendar. The ribbon will display commands that let you view, create, and edit meetings and appointments.
- **People** view displays your contacts list. The ribbon will show commands that let you create and edit your contacts and contact groups.
- **Tasks** view displays your task list. The ribbon will show commands that let you create and modify tasks.

Use the Folder Pane: Click a folder in the Folder pane to display that folder's contents.

Delete an Item: Select an email, contact, appointment, or task, then click the **Delete** button on the Home tab of the ribbon.

Restore a Deleted Item: Click the **Deleted Items** folder in the Folder pane, then click and drag an item back to its original folder.

Change Views: Click the **View** tab on the ribbon, then click the **Change View** button and select a view.

Search

Search: Click in the **Search** field at the top of the inbox and begin typing your search.

Refine Search Results: While searching, use the options in the Scope group on the Search tab.

- **Current Mailbox** searches all folders within the selected mailbox.
- **Current Folder** only searches within the current folder.
- **Subfolders** expands the search to include all the current folder's subfolders.
- **All Outlook Items** searches everything.
- **From** lets you filter messages from specific senders.
- **Subject** lets you filter by words in the subject line.
- **Has Attachments** lets you filter results by whether they have attachments.
- **Categorized** filters by categories.
- **This Week** displays only items from the current week.
- **Unread** searches only unread messages.
- **Flagged** searches only flagged items.
- **Important** only displays items set to high importance.
- **More** lets you apply advanced criteria.

Keyboard Shortcuts

General

Print	**Ctrl** + **P**
Undo	**Ctrl** + **Z**
Copy	**Ctrl** + **C**
Cut	**Ctrl** + **X**
Paste	**Ctrl** + **V**
New Item	**Ctrl** + **N**
Delete selected item	**Del**
Help	**F1**
Find an item	**F3**
Spell Check	**F7**

Navigation

Mail view	**Ctrl** + **1**
Calendar view	**Ctrl** + **2**
Contacts view	**Ctrl** + **3**
Tasks view	**Ctrl** + **4**
Notes	**Ctrl** + **5**

Mail

New Message	**Ctrl** + **Shift** + **M**
Reply	**Ctrl** + **R**
Reply All	**Ctrl** + **Shift** + **R**
Forward	**Ctrl** + **F**
Save message as a draft	**Ctrl** + **S**
Send	**Alt** + **S**
Find and replace text	**Ctrl** + **H**
Check for New Messages	**Ctrl** + **M**
Mark as Read	**Ctrl** + **Q**
Mark as Unread	**Ctrl** + **U**

Calendar

New Appointment	**Ctrl** + **Shift** + **A**
Go to Today	**Ctrl** + **T**
Go to a Date	**Ctrl** + **G**
Go to Previous Appointment	**Ctrl** + **,**
Go to Next Appointment	**Ctrl** + **.**
Day view	**Ctrl** + **Alt** + **1**
Work Week view	**Ctrl** + **Alt** + **2**
Week view	**Ctrl** + **Alt** + **3**
Month view	**Ctrl** + **Alt** + **4**

Contacts

New Contact	**Ctrl** + **Shift** + **C**
New Contact Group	**Ctrl** + **Shift** + **L**
Open the Address Book	**Ctrl** + **Shift** + **B**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Mail

Compose Email: Click the **New Email** button on the Home tab. Enter recipients, a subject, and a message body, then click **Send**.

Types of Recipients: When composing a new email, enter email addresses in the address fields.

- **To** contains the primary recipients, whom the message is directed to.
- **Cc (Carbon Copy)** sends a copy of the message. While not the primary audience, these recipients may want to see the information presented. The Cc field is visible to all recipients.
- **Bcc (Blind Carbon Copy)** sends a copy of the message, while keeping the Bcc field secret to other recipients.

View an Email in the Reading Pane: Select an email from the inbox to display it.

Open an Email in a New Window: Double-click an email in the inbox.

Mark an Email Read or Unread: Opening an email, or displaying it in the Reading pane, will automatically mark an unread email as read. Click the **Unread/Read** button on the Home tab to toggle an email read or unread.

Reply to an Email: Select an email in the inbox (or open an email in its own window) and click the **Reply** button on the ribbon.

Reply to All Recipients of an Email: Select an email in the inbox (or open an email in its own window) and click the **Reply All** button on the ribbon.

Forward an Email: Select an email in the inbox (or open an email in its own window) and click the **Forward** button on the ribbon.

Create a Signature: While composing an email, click the **Signature** button on the Message tab and select **Signatures**. Click the **New** button, enter a name for the signature, and click **OK**. Create the signature in the Edit signature section and click **OK**.

Insert a Signature: While composing an email, click the **Signature** button on the Message tab and select a signature.

Attach a File: While composing an email, click the **Attach File** button on the Message tab. Select a file, then click **Insert**.

Insert a Picture: While composing an email, click the **Insert** tab, click the **Pictures** button, select a picture, and click **Insert**.

Send Out-of-Office Replies: Click the **File** tab, click the **Automatic Replies** button on the Info tab, then click the **Send Automatic Replies** button. Set the start and end dates for the auto reply, enter a message, and click **OK**.

Set Message Priority: While composing an email, click the **High Importance** ! or **Low Importance** button on the Message tab.

Mail

Insert a Hyperlink: While composing an email, click the **Insert** tab, click the **Hyperlink** button, select a type of link, fill in where the link will lead, and click **OK**.

People

Add a New Contact: Click the **New Contact** button on the Home tab. Fill in the fields with the information that you have, then click the **Save & Close** button.

View the Address Book: Click the **Address Book** button on the Home tab. Double-click a contact to open it and see more information.

Add a Contact from the Address Book: Click the **Address Book** button on the Home tab, double-click a contact, click the **Add to Contacts** button, enter any additional information you have, then click the **Save & Close** button.

Edit a Contact: Double-click a contact to open it in a new window, fill in the information fields with any additional information you have, then click the **Save & Close** button.

Import Contacts: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Import from Another Program or File**, then click **Next**. Select a type of file to import, then click **Next**. Click **Browse**, select a file, click **OK**, then click **Next**. Select your **Contacts** folder, click **Next**, then click **Finish**.

Share a Single Contact: Select a contact, click the **Forward Contact** button on the Home tab, and select a sharing format. Address and compose the resulting email, then click **Send**.

Create a Contact Group: Click the **New Contact Group** button on the Home tab, give the contact group a name, and click the **Add Members** button. Select a source for a contact and double-click a contact to add it. Add as many contacts as you would like, click **OK**, then click the **Save & Close** button.

Add Members to a Contact Group: Double-click a contact group to open it, click the **Add Members** button, select a source, and double-click a contact to add it. Click **OK**, then click the **Save & Close** button.

Remove Members from a Contact Group: Double-click a contact group to open it, select a contact from the list, and click the **Remove Member** button.

Calendar

Create an Appointment: From the calendar view, click the **New Appointment** button on the Home tab. Enter the appointment's details, subject, location, and start and end time, then click the **Save & Close** button.

Edit an Appointment: Double-click an appointment to open it, edit the appointment details, then click the **Save & Close** button.

Calendar

Reschedule an Appointment: Click and drag an appointment on the calendar to move it to a different day (in Month view) or time (in Day, Week, and Work Week view).

Create an All-Day Event: While creating or editing an appointment, check the **All-day event** check box.

Set a Reminder: While creating or editing an appointment, click the **Reminder** list arrow and select how long before the event you'd like to be reminded.

Change Availability: While creating or editing an appointment, click the **Show As** list arrow and select an availability:

- **Free** shows that you're available.
- **Working Elsewhere** indicates that you're working from another location.
- **Tentative** shows that you have tentative plans and may or may not be available.
- **Busy** indicates that you're busy and not available.
- **Out of Office** shows that you're out of the office and not available.

Set Priority: While creating or editing an appointment, click the **High Importance** ! button, or the **Low Importance** button, on the Appointment tab.

Create a Meeting: While viewing the calendar, click the **New Meeting** button on the Home tab. Click **To…** and double-click the contacts you want to invite to the meeting, then click **OK**. Enter the meeting subject, location, date and time, and a message, then click **Send**.

Track Meeting Responses: Select a meeting in your calendar and click the **Tracking** button on the Meeting tab.

Create a Recurring Appointment: While creating or editing an appointment, click the **Recurrence** button on the Meeting tab. Choose a recurrence pattern, set a time range for the recurrence, then click **OK**.

Edit a Recurring Appointment: Double-click a recurring appointment to open it, then choose whether to edit **Just this one** appointment or **The entire series**. Edit the appointment or the recurrence settings, then click the **Save & Close** button.

Delete a Recurring Appointment: Select a recurring appointment in the calendar, click the **Delete** button on the Home tab, and select **Delete Occurrence** (to delete a single instance of the appointment) or **Delete Series** (to delete the entire series).

Respond to an Invitation: Select an invitation in your inbox, click the **Accept** button, the **Tentative** ? button, or the **Decline** button in the preview pane. Or, select an invited event in your calendar, click the **Accept** button, the **Tentative** ? button, or the **Decline** button on the Meeting Series tab. Select whether to send a response and whether to edit it.

Contact Us: sales@customguide.com

Microsoft®

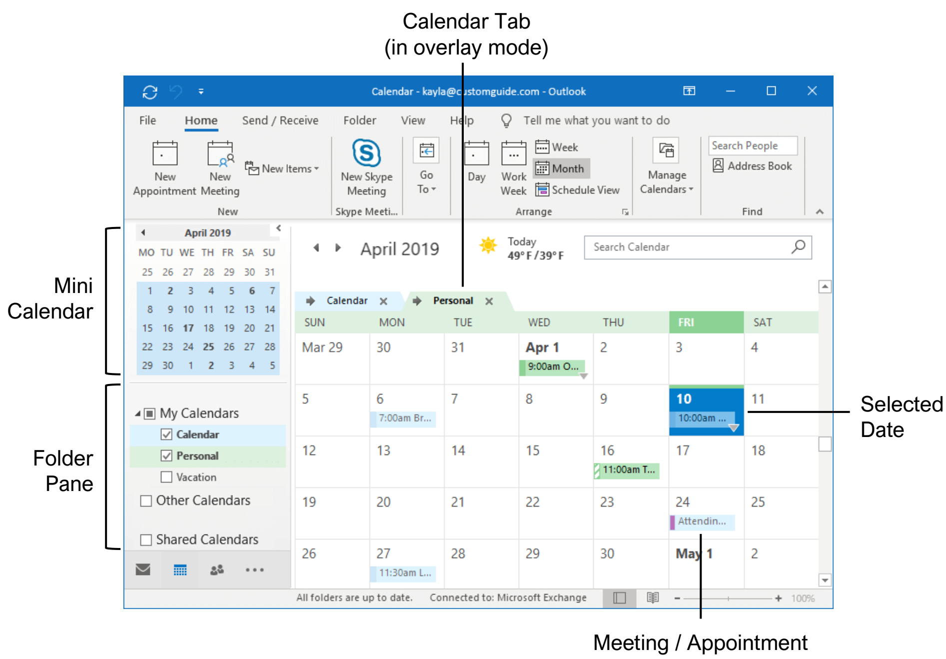
Outlook 2019 Intermediate

Quick Reference Guide

CustomGuide Interactive Training

Free Cheat Sheets
Visit ref.customguide.com

Outlook 2019 Calendar View



Tasks and Notes

Flag a Message: In Mail view, select an item, click the **Follow Up** button on the Home tab, then select a flag; or, right-click a message, select **Follow Up**, and select a flag.

Change a Flag: In Mail view, select a flagged item, click the **Follow Up** button on the Home tab, then select a new flag.

Add a Reminder: In Mail view, select an item, click the **Follow Up** button on the Home tab, and select **Add Reminder**. Choose a date, time, and sound in the Reminder section of the Custom dialog box, then click **OK**.

Remove a Flag: In Mail view, select a flagged item, click the **Follow Up** button on the Home tab, and select **Clear Flag**.

Add a Task: Switch to Task view by clicking **Tasks** on the Navigation bar, then click the **New Task** button on the Home tab (or click the **New Items** button on the Home tab, then select **New Task**). Enter a subject, start date, due date, and other options, then click **Save & Close**.

Mark a Task Complete: In Task view, check a task's check box; or, select a task and click the **Mark Complete** button on the Home tab.

View Tasks in the To-Do Bar: Click the **View** tab on the ribbon, click the **To-Do Bar** button, and select **Tasks**.

Change Task Views: In Task view, click the **Change View** button on the Home tab (or, if available, select a view from the Views gallery).

Create a Recurring Task: When creating a new task, click the **Recurrence** button on the Task tab. Specify a recurrence pattern, then set the recurrence pattern's date range. Click **OK**.

- **Daily** tasks recur every day, every set number of days, or every weekday.
- **Weekly** tasks recur on the same day of the week every week, or every certain number of weeks.
- **Monthly** tasks recur on the same day of the month (the 10th), or the same day of a specified week of the month (the third Friday).
- **Yearly** tasks recur annually on the same day of a month every year (July 8th), or the same weekday in a specified week and month (the second Tuesday of April).

Remove Recurrence: After opening a task with recurrence, click the **Recurrence** button on the Task tab and click **Remove Recurrence**.

Advanced Calendar

Schedule Meeting Rooms: In a new meeting window, click the **Rooms** button, select a meeting room from the address book, click the **Rooms** button, and click **OK**.

Forward a Calendar Item: Open a calendar item, click the **Forward** button on the Meeting tab, enter a contact in the To: field, then click **Send**.

Send Calendar Information: Click and drag a meeting or an appointment and drop it on the Mail Navigation Bar option. In the message window that opens, add a recipient in the To field and click the **Send** button.

Access a Shared Calendar: Expand the Manage Calendars group. Click the **Add Calendar** button, select **Open Shared Calendar**, enter another user's name (or click **Name** and select a user from the address book), then click **OK**.

Send a Calendar Sharing Invitation: Expand the Manage Calendars group. Click the **Share Calendar** button and select the calendar you want to share from the list. To share the calendar, click the **Add** button, select a contact, and click **OK**.

Send your Calendar in an Email: Click the **Email Calendar** button on the Home tab, select a calendar and date range, and click **OK**.

Add New Calendars: Expand the Manage Calendars group. Click the **Add Calendar** button and select **Create New Blank Calendar**, give the calendar a name, and click **OK**.

View Multiple Calendars: Check or uncheck a calendar's check box in the Folder pane to toggle it on and off.

Overlay Calendars: While viewing multiple calendars, click the **Overlay** arrow on a calendar tab.

Delete a Calendar: Right-click a calendar tab (or a calendar in the Folder pane) and select **Delete Calendar**.

Configure Calendar Settings: Click the **File** tab and select **Options** at the left. In the Outlook Options dialog box that appears, select **Calendar**. Customize the calendar settings and click **OK**.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Tasks and Notes

Assign a Task: When creating a task, click the **Assign Task** button on the Task tab. Enter an email address in the To: field, then click **Send**.

Accept or Decline an Assigned Task: Select a task assignment request in your Mail inbox, then click either **Accept** or **Decline** in the message preview. Choose whether to edit the message response or not, and click **OK**.

View Notes: Click the **More (···)** button in the Navigation bar and select **Notes**. Double-click a note to open it.

Create a Note: While in Notes view, click the **New Note** button on the Home tab. Start typing within the note window, then click outside the note window to save it.

Advanced Mail

Run a Quick Step: Click a Quick Step in the Quick Steps gallery, or click the **More** button and select a Quick Step.

Add a New Quick Step: Click the **More** button in the Quick Steps gallery, then select **Create New**. Give the new Quick Step a name, then customize the actions that the Quick Step will take. Click **Finish**.

Edit a Quick Step: Click the **More** button in the Quick Steps gallery, then select **Manage Quick Steps**. Select a Quick Step, then click **Edit**. Update the Quick Step's actions, then click **Save**.

Create a Quick Part: Select the text or graphics you want to use as a Quick Part, click the **Insert** tab, click the **Quick Parts** button, and select **Save Selection to Quick Parts Gallery**. Give the Quick Part a name, category, and description, then click **OK**.

Use a Quick Part: While composing a message, click the **Insert** tab, click the **Quick Parts** button, and select a Quick Part.

Redirect Replies: While composing a message, click the **Options** tab, and click the **Direct Replies To** button. Click **Select Names**, select names from the address book, and click **OK**. Click **Close**.

Recall a Message: Click the **Sent Items** folder in the Folder pane, open a message, click the **Actions** button on the Message tab, and select **Recall this Message**. Select whether to just delete the message or to replace it with a new message, then click **OK**.

Send a Poll: In a new message window, click the **Options** tab, click the **Use Voting Options** button, and select a poll option (or select **Custom**, specify your own poll options, then click **Close**).

Track Votes: Click the **Sent Items** folder, open a message with a poll, and click the **Tracking** button on the Message tab.

Advanced Mail

Create a Rule Based on an Email: Select a message, click the **Rules** button on the Home tab, and select **Create Rule**. Select the conditions for the rule, then select the actions for the rule to carry out. Click **OK**.

Create a Rule from Scratch: Click the **Rules** button on the Home tab and select **Manage Rules & Alerts**. Click **New Rule** and use the Rules Wizard to set conditions, actions, and exceptions. Give the rule a name, select how you want it to run, and click **Finish**.

Edit a Rule: Click the **Rules** button on the Home tab and select **Manage Rules & Alerts**. Select a rule, click **Change Rule**, and select **Edit Rule Settings**. Use the Rules Wizard to edit the rule's conditions, actions, and exceptions, then click **Finish**.

Delete a Rule: Click the **Rules** button on the Home tab, select **Manage Rules & Alerts**, select a rule, click **Delete**, and click **Yes**.

Save an Email in Another Format: Double-click an email to open it, then click the **File** tab and select **Save As**. Select where you want to save the email, then click the **Save as type** list arrow and select a file type. Click **Save**.

Delegate Mail Folders: Click the **File** tab, click **Account Settings**, and select **Delegate Access**. Click **Add**, select a contact from the address book, click **Add**, then click **OK**. Select the permissions for the delegated user, then click **OK**. Click **OK** again.

- **Reviewer** permissions allow the user to read items and files, but not create or edit them.
- **Author** permissions allow the user to create and read items and files, and to modify and delete items they've created.
- **Editor** permissions allow the user to create, read, modify, and delete all items and files.

Access a Shared Folder: Click the **File** tab, click **Open & Export**, click **Other User's Folder**, enter another user's name (or click **Name** and select a user), then click **OK**.

Create an Email Using a Theme or Stationery: Click the **New Items** button on the Home tab, select **Email Message Using**, and select **More Stationery**. Select a theme or stationery in the dialog box, then click **OK**.

Add Additional Accounts: Click the **File** tab and click the **Add Account** button. Fill in the account information and click **Connect**. Click **Done**.

Specify Which Account Email is Sent From: While composing an email, click the **From** field list arrow and select an email account.

Manage Information

Categorize an Item: Select an item, click the **Categorize** button on the Home tab, and select a category.

Manage Information

Edit a Category: Click the **Categorize** button on the Home tab, select **All Categories**, and select a category. Click **Rename**, give the category a new name, and click **OK**. Click the **Color** list arrow and select a new color. Click **OK**.

Create a New Category: Click the **Categorize** button on the Home tab, select **All Categories**, and click **New**. Enter a name, select a color, and click **OK**.

Delete a Category: Click the **Categorize** button on the Home tab, select **All Categories**, select a category, click **Delete**, and click **OK**.

Sort Inbox by Category: Click the **sort by** list arrow above the Inbox and select **Categories**.

Create a Folder: Click the Folder tab, click the **New Folder** button, enter a name, select a type of content, select a location, and click **OK**.

Rename a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Rename Folder** button. Enter a new folder name and press **Enter**.

Move a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Move Folder** button. Select a new location, then click **OK**.

Delete a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Delete Folder** button. Click **Yes** to confirm.

Create a Search Folder: Click the **Folder** tab and click the **New Search Folder** button. Select **Create a Custom Search Folder**, click **Choose**, and select criteria for the search folder. Click **OK** in the three open dialog boxes.

Clean Up a Conversation: Select a conversation in the Inbox, click the **Clean Up** button on the Home tab, select **Clean Up Conversation**, then click **Clean Up**.

Clean Up a Folder: Select a folder, click the **Clean Up** button on the Home tab, select **Clean Up Folder**, then click **Clean Up Folder**.

Export Outlook Data: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Export to a file** and click **Next**. Select a file type and click **Next**. Select a folder to export data from and click **Next**. Specify where you want to save the exported file, and how you'd like to deal with duplicate items, and click **Finish**. Add an optional password and click **OK**.

Import Data into Outlook: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Import from another program or file** and click **Next**. Select a file type to import and click **Next**. Click **Browse** and specify a file, choose how to handle duplicate items, and click **Next**. If necessary, select a folder from the file to import, and click **Finish**.

Contact Us: sales@customguide.com

Microsoft®

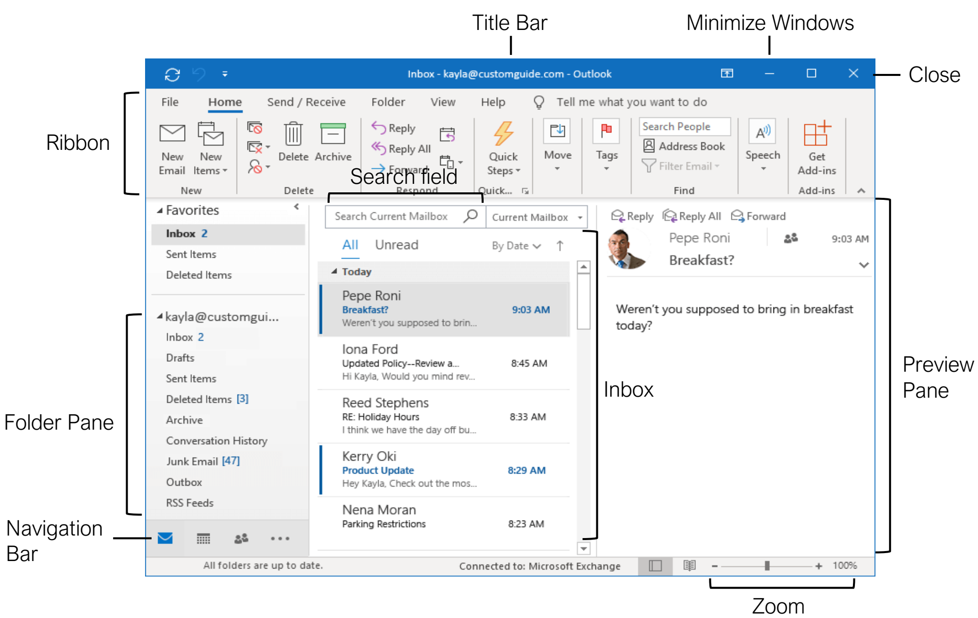
Outlook 2019 Basic

Quick Reference Guide

CustomGuide
Interactive Training

Free Cheat Sheets
Visit ref.customguide.com

The Outlook 2019 Program Screen



The Fundamentals

Navigate Outlook: Click the icon (or label) for the view you want to open.

- **Mail** view displays your inbox and lets you browse your mail. The ribbon will display commands related to composing and managing email messages.
- **Calendar** view displays your calendar. The ribbon will display commands that let you view, create, and edit meetings and appointments.
- **People** view displays your contacts list. The ribbon will show commands that let you create and edit your contacts and contact groups.
- **Tasks** view displays your task list. The ribbon will show commands that let you create and modify tasks.

Use the Folder Pane: Click a folder in the Folder pane to display that folder's contents.

Delete an Item: Select an email, contact, appointment, or task, then click the **Delete** button on the Home tab of the ribbon.

Restore a Deleted Item: Click the **Deleted Items** folder in the Folder pane, then click and drag an item back to its original folder.

Change Views: Click the **View** tab on the ribbon, then click the **Change View** button and select a view.

Search

Search: Click in the **Search** field at the top of the inbox and begin typing your search.

Refine Search Results: While searching, use the options in the Scope group on the Search tab.

- **Current Mailbox** searches all folders within the selected mailbox.
- **Current Folder** only searches within the current folder.
- **Subfolders** expands the search to include all the current folder's subfolders.
- **All Outlook Items** searches everything.
- **From** lets you filter messages from specific senders.
- **Subject** lets you filter by words in the subject line.
- **Has Attachments** lets you filter results by whether they have attachments.
- **Categorized** filters by categories.
- **This Week** displays only items from the current week.
- **Unread** searches only unread messages.
- **Flagged** searches only flagged items.
- **Important** only displays items set to high importance.
- **More** lets you apply advanced criteria.

Keyboard Shortcuts

General

Print	**Ctrl** + **P**
Undo	**Ctrl** + **Z**
Copy	**Ctrl** + **C**
Cut	**Ctrl** + **X**
Paste	**Ctrl** + **V**
New Item	**Ctrl** + **N**
Delete selected item	**Delete**
Help	**F1**
Find an item	**F3**
Spell Check	**F7**

Navigation

Mail view	**Ctrl** + **1**
Calendar view	**Ctrl** + **2**
Contacts view	**Ctrl** + **3**
Tasks view	**Ctrl** + **4**
Notes	**Ctrl** + **5**

Mail

New Message	**Ctrl** + **Shift** + **M**
Reply	**Ctrl** + **R**
Reply All	**Ctrl** + **Shift** + **R**
Forward	**Ctrl** + **F**
Save message as a draft	**Ctrl** + **S**
Send	**Alt** + **S**
Find and replace text	**Ctrl** + **H**
Check for New Messages	**Ctrl** + **M**
Mark as Read	**Ctrl** + **Q**
Mark as Unread	**Ctrl** + **U**

Calendar

New Appointment	**Ctrl** + **Shift** + **A**
Go to Today	**Ctrl** + **T**
Go to a Date	**Ctrl** + **G**
Go to Previous Appointment	**Ctrl** + **,**
Go to Next Appointment	**Ctrl** + **.**
Day view	**Ctrl** + **Alt** + **1**
Work Week view	**Ctrl** + **Alt** + **2**
Week view	**Ctrl** + **Alt** + **3**
Month view	**Ctrl** + **Alt** + **4**

Contacts

New Contact	**Ctrl** + **Shift** + **C**
New Contact Group	**Ctrl** + **Shift** + **L**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Mail

Compose Email: Click the **New Email** button on the Home tab. Enter recipients, a subject, and a message body, then click **Send**.

Types of Recipients: When composing a new email, enter email addresses in the address fields.

- **To** contains the primary recipients, whom the message is directed to.
- **Cc (Carbon Copy)** sends a copy of the message. While not the primary audience, these recipients may want to see the information presented. The Cc field is visible to all recipients.
- **Bcc (Blind Carbon Copy)** sends a copy of the message, while keeping the Bcc field secret to other recipients.

View an Email in the Reading Pane: Select an email from the inbox to display it.

Open an Email in a New Window: Double-click an email in the inbox.

Mark an Email Read or Unread: Opening an email, or displaying it in the Reading pane, will automatically mark an unread email as read. Click the **Unread/Read** button on the Home tab to toggle an email read or unread.

Reply to an Email: Select an email in the inbox (or open an email in its own window) and click the **Reply** button on the ribbon.

Reply to All Recipients of an Email: Select an email in the inbox (or open an email in its own window) and click the **Reply All** button on the ribbon.

Forward an Email: Select an email in the inbox (or open an email in its own window) and click the **Forward** button on the ribbon.

Create a Signature: While composing an email, click the **Signature** button on the Message tab and select **Signatures**. Click the **New** button, enter a name for the signature, and click **OK**. Create the signature in the Edit signature section and click **OK**.

Insert a Signature: While composing an email, click the **Signature** button on the Message tab and select a signature.

Attach a File: While composing an email, click the **Attach File** button on the Message tab. Select a file, then click **Insert**.

Insert a Picture: While composing an email, click the **Insert** tab, click the **Pictures** button, select a picture, and click **Insert**.

Send Out-of-Office Replies: Click the **File** tab, click the **Automatic Replies** button on the Info tab, then click the **Send Automatic Replies** button. Set the start and end dates for the auto reply, enter a message, and click **OK**.

Set Message Priority: While composing an email, click the **High Importance** ! or **Low Importance** button on the Message tab.

Mail

Insert a Link: While composing an email, click the **Insert** tab, click the **Link** button, select a type of link, fill in where the link will lead, and click **OK**.

People

Add a New Contact: Click the **New Contact** button on the Home tab. Fill in the fields with the information that you have, then click the **Save & Close** button.

View the Address Book: Click the **Address Book** button on the Home tab. Double-click a contact to open it and see more information.

Add a Contact from the Address Book: Click the **Address Book** button on the Home tab, double-click a contact, click the **Add to Contacts** button, enter any additional information you have, then click the **Save & Close** button.

Edit a Contact: Double-click a contact to open it in a new window, fill in the information fields with any additional information you have, then click the **Save & Close** button.

Import Contacts: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Import from Another Program or File**, then click **Next**. Select a type of file to import, then click **Next**. Click **Browse**, select a file, click **OK**, then click **Next**. Select your **Contacts** folder, click **Next**, then click **Finish**.

Share a Single Contact: Select a contact, click the **Forward Contact** button on the Home tab, and select a sharing format. Address and compose the resulting email, then click **Send**.

Create a Contact Group: Click the **New Contact Group** button on the Home tab, give the contact group a name, and click the **Add Members** button. Select a source for a contact and double-click a contact to add it. Add as many contacts as you would like, click **OK**, then click the **Save & Close** button.

Add Members to a Contact Group: Double-click a contact group to open it, click the **Add Members** button, select a source, and double-click a contact to add it. Click **OK**, then click the **Save & Close** button.

Remove Members from a Contact Group: Double-click a contact group to open it, select a contact from the list, and click the **Remove Member** button.

Calendar

Create an Appointment: From the Calendar view, click the **New Appointment** button on the Home tab. Enter the appointment's details, subject, location, and start and end time. Click the **Save & Close** button.

Edit an Appointment: Double-click an appointment to open it, edit the appointment details, then click the **Save & Close** button.

Calendar

Reschedule an Appointment: Click and drag an appointment on the calendar to move it to a different day (in Month view) or time (in Day, Week, and Work Week view).

Create an All-Day Event: While creating or editing an appointment, check the **All-day event** check box.

Set a Reminder: While creating or editing an appointment, click the **Reminder** list arrow and select how long before the event you'd like to be reminded.

Change Availability: While creating or editing an appointment, click the **Show As** list arrow and select an availability:

- **Free** shows that you're available.
- **Working Elsewhere** indicates that you're working from another location.
- **Tentative** shows that you have tentative plans and may or may not be available.
- **Busy** indicates that you're busy and not available.
- **Out of Office** shows that you're out of the office and not available.

Set Priority: While creating or editing an appointment, click the **High Importance** ! button or **Low Importance** button on the Appointment tab.

Create a Meeting: While viewing the calendar, click the **New Meeting** button on the Home tab. Click **To…** and double-click the contacts you want to invite to the meeting, then click **OK**. Enter the meeting subject, location, date and time, and a message, then click **Send**.

Track Meeting Responses: Select a meeting in your calendar and click the **Tracking** button on the Meeting tab.

Create a Recurring Appointment: While creating or editing an appointment, click the **Recurrence** button on the Meeting tab. Choose a recurrence pattern, set a time range for the recurrence, then click **OK**.

Edit a Recurring Appointment: Double-click a recurring appointment to open it, then choose whether to edit **Just this one** appointment or **The entire series**. Edit the appointment or the recurrence settings, then click the **Save & Close** button.

Delete a Recurring Appointment: Select a recurring appointment in the calendar, click the **Delete** button on the Home tab, and select **Delete Occurrence** (to delete a single instance of the appointment) or **Delete Series** (to delete the entire series).

Respond to an Invitation: Select an invitation in your inbox, click the **Accept** button, **Tentative** ? button, or **Decline** button in the preview pane. Or, select an invited event in your calendar and click the **Accept** button, **Tentative** ? button, or **Decline** button on the Meeting Series tab. Select whether to send a response and whether to edit it.

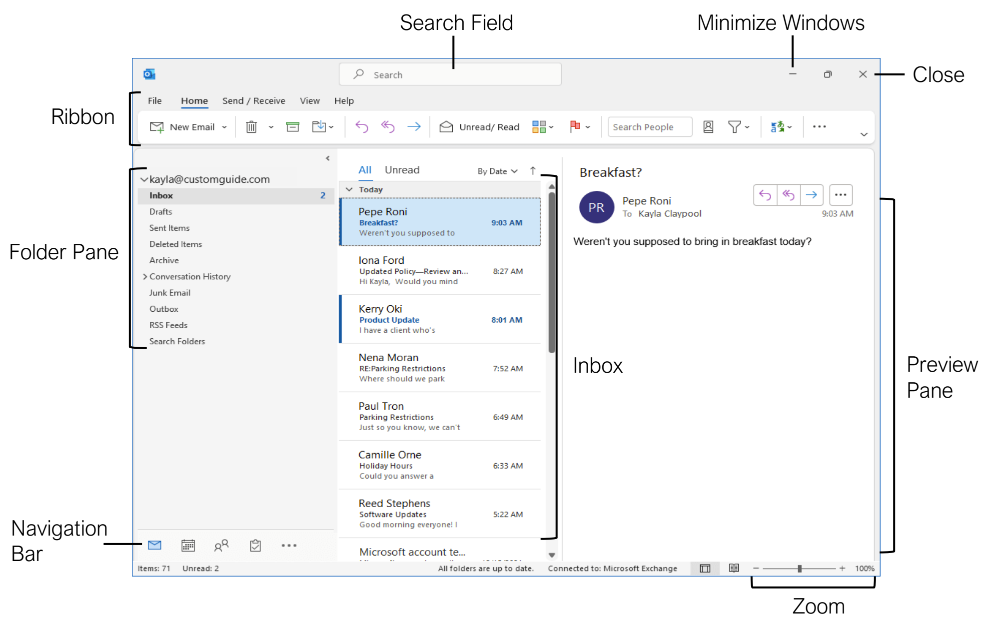
Click the topic links for free lessons!

Contact Us: sales@customguide.com

Microsoft®
Outlook 2021 Basic
Quick Reference Guide

CustomGuide
your logo
Free Cheat Sheets
Visit ref.customguide.com

The Outlook 2021 Program Screen



The Fundamentals

Navigate Outlook: Click the icon (or label) for the view you want to open.

- **Mail** view displays your inbox and lets you browse your mail. The ribbon will display commands related to composing and managing email messages.
- **Calendar** view displays your calendar. The ribbon will display commands that let you view, create, and edit meetings and appointments.
- **People** view displays your contacts list. The ribbon will show commands that let you create and edit your contacts and contact groups.
- **Tasks** view displays your task list. The ribbon will show commands that let you create and modify tasks.

Use the Folder Pane: Click a folder in the Folder pane to display that folder's contents.

Delete an Item: Select an email, contact, appointment, or task, then click the **Delete** button on the Home tab of the ribbon.

Restore a Deleted Item: Click the **Deleted Items** folder in the Folder pane, then click and drag an item back to its original folder.

Change Views: Click the **View** tab on the ribbon, then click the **Change View** button and select a view.

Search

Search: Click in the **Search** field at the top of the inbox and begin typing your search.

Refine Search Results: While searching, use the options in the Scope group on the Search tab.

- **Current Mailbox** searches all folders within the selected mailbox.
- **Current Folder** only searches within the current folder.
- **Subfolders** expands the search to include all the current folder's subfolders.
- **All Outlook Items** searches everything.
- **From** lets you filter messages from specific senders.
- **Subject** lets you filter by words in the subject line.
- **Has Attachments** lets you filter results by whether they have attachments.
- **Categorized** filters by categories.
- **This Week** displays only items from the current week.
- **Unread** searches only unread messages.
- **Flagged** searches only flagged items.
- **Important** only displays items set to high importance.
- **More** lets you apply advanced criteria.

Keyboard Shortcuts

General

Print	**Ctrl** + **P**
Undo	**Ctrl** + **Z**
Copy	**Ctrl** + **C**
Cut	**Ctrl** + **X**
Paste	**Ctrl** + **V**
New Item	**Ctrl** + **N**
Delete selected item	**Delete**
Help	**F1**
Find an item	**F3**
Spell Check	**F7**

Navigation

Mail view	**Ctrl** + **1**
Calendar view	**Ctrl** + **2**
Contacts view	**Ctrl** + **3**
Tasks view	**Ctrl** + **4**
Notes	**Ctrl** + **5**

Mail

New Message	**Ctrl** + **Shift** + **M**
Reply	**Ctrl** + **R**
Reply All	**Ctrl** + **Shift** + **R**
Forward	**Ctrl** + **F**
Save message as a draft	**Ctrl** + **S**
Send	**Alt** + **S**
Find and replace text	**Ctrl** + **H**
Check for New Messages	**Ctrl** + **M**
Mark as Read	**Ctrl** + **Q**
Mark as Unread	**Ctrl** + **U**

Calendar

New Appointment	**Ctrl** + **Shift** + **A**
Go to Today	**Ctrl** + **T**
Go to a Date	**Ctrl** + **G**
Go to Previous Appointment	**Ctrl** + **,**
Go to Next Appointment	**Ctrl** + **.**
Day view	**Ctrl** + **Alt** + **1**
Work Week view	**Ctrl** + **Alt** + **2**
Week view	**Ctrl** + **Alt** + **3**
Month view	**Ctrl** + **Alt** + **4**

Contacts

New Contact	**Ctrl** + **Shift** + **C**
New Contact Group	**Ctrl** + **Shift** + **L**
Open the Address Book	**Ctrl** + **Shift** + **B**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Mail

Compose Email: Click the **New Email** button on the Home tab. Enter recipients, a subject, and a message body, then click **Send**.

Types of Recipients: When composing a new email, enter email addresses in the address fields.

- **To** contains the primary recipients, whom the message is directed to.
- **Cc (Carbon Copy)** sends a copy of the message. While not the primary audience, these recipients may want to see the information presented. The Cc field is visible to all recipients.
- **Bcc (Blind Carbon Copy)** sends a copy of the message, while keeping the Bcc field secret to other recipients.

View an Email in the Reading Pane: Select an email from the inbox to display it.

Open an Email in a New Window: Double-click an email in the inbox.

Mark an Email Read or Unread: Opening an email, or displaying it in the Reading pane, will automatically mark an unread email as read. Click the **Unread/Read** button on the Home tab to toggle an email read or unread.

Reply to an Email: Select an email in the inbox (or open an email in its own window) and click the **Reply** button on the ribbon.

Reply to All Recipients of an Email: Select an email in the inbox (or open an email in its own window) and click the **Reply All** button on the ribbon.

Forward an Email: Select an email in the inbox (or open an email in its own window) and click the **Forward** button on the ribbon.

Create a Signature: While composing an email, click the **Signature** button on the Message tab and select **Signatures**. Click the **New** button, enter a name for the signature, and click **OK**. Create the signature in the Edit signature section and click **OK**.

Insert a Signature: While composing an email, click the **Signature** button on the Message tab and select a signature.

Attach a File: While composing an email, click the **Attach File** button on the Message tab. Select a file, then click **Insert**.

Insert a Picture: While composing an email, click the **Insert** tab, click the **Pictures** button, select a picture, and click **Insert**.

Send Out-of-Office Replies: Click the **File** tab, click the **Automatic Replies** button on the Info tab, then click the **Send Automatic Replies** button. Set the start and end dates for the auto reply, enter a message, and click **OK**.

Set Message Priority: While composing an email, click the **High Importance** ! or **Low Importance** ↓ button on the Message tab.

Mail

Insert a Link: While composing an email, click the **Insert** tab, click the **Link** button, select a type of link, fill in where the link will lead, and click **OK**.

People

Add a New Contact: Click the **New Contact** button on the Home tab. Fill in the fields with the information that you have, then click the **Save & Close** button.

View the Address Book: Click the **Address Book** button on the Home tab. Double-click a contact to open it and see more information.

Add a Contact from the Address Book: Click the **Address Book** button on the Home tab, double-click a contact, click the **Add to Contacts** button, enter any additional information you have, then click the **Save & Close** button.

Edit a Contact: Double-click a contact to open it in a new window, fill in the information fields with any additional information you have, then click the **Save & Close** button.

Import Contacts: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Import from Another Program or File**, then click **Next**. Select a type of file to import, then click **Next**. Click **Browse**, select a file, click **OK**, then click **Next**. Select your **Contacts** folder, click **Next**, then click **Finish**.

Share a Single Contact: Select a contact, click the **Forward Contact** button on the Home tab, and select a sharing format. Address and compose the resulting email, then click **Send**.

Create a Contact Group: Click the **New Contact Group** button on the Home tab, give the contact group a name, and click the **Add Members** button. Select a source for a contact and double-click a contact to add it. Add as many contacts as you would like, click **OK**, then click the **Save & Close** button.

Add Members to a Contact Group: Double-click a contact group to open it, click the **Add Members** button, select a source, and double-click a contact to add it. Click **OK**, then click the **Save & Close** button.

Remove Members from a Contact Group: Double-click a contact group to open it, select a contact from the list, and click the **Remove Member** button.

Calendar

Create an Appointment: From the Calendar view, click the **New Appointment** button on the Home tab. Enter the appointment's details, subject, location, and start and end time. Click the **Save & Close** button.

Edit an Appointment: Double-click an appointment to open it, edit the appointment details, then click the **Save & Close** button.

Calendar

Reschedule an Appointment: Click and drag an appointment on the calendar to move it to a different day (in Month view) or time (in Day, Week, and Work Week view).

Create an All-Day Event: While creating or editing an appointment, check the **All-day event** check box.

Set a Reminder: While creating or editing an appointment, click the **Reminder** list arrow and select how long before the event you'd like to be reminded.

Change Availability: While creating or editing an appointment, click the **Show As** list arrow and select an availability:

- **Free** shows that you're available.
- **Working Elsewhere** indicates that you're working from another location.
- **Tentative** shows that you have tentative plans and may or may not be available.
- **Busy** indicates that you're busy and not available.
- **Out of Office** shows that you're out of the office and not available.

Set Priority: While creating or editing an appointment, click the **High Importance** ! button or **Low Importance** ↓ button on the Appointment tab.

Create a Meeting: While viewing the calendar, click the **New Meeting** button on the Home tab. Click **To…** and double-click the contacts you want to invite to the meeting, then click **OK**. Enter the meeting subject, location, date and time, and a message, then click **Send**.

Track Meeting Responses: Select a meeting in your calendar and click the **Tracking** button on the Meeting tab.

Create a Recurring Appointment: While creating or editing an appointment, click the **Recurrence** button on the Meeting tab. Choose a recurrence pattern, set a time range for the recurrence, then click **OK**.

Edit a Recurring Appointment: Double-click a recurring appointment to open it, then choose whether to edit **Just this one** appointment or **The entire series**. Edit the appointment or the recurrence settings, then click the **Save & Close** button.

Delete a Recurring Appointment: Select a recurring appointment in the calendar, click the **Delete** button on the Home tab, and select **Delete Occurrence** (to delete a single instance of the appointment) or **Delete Series** (to delete the entire series).

Respond to an Invitation: Select an invitation in your inbox, click the **Accept** button, **Tentative** ? button, or **Decline** button in the preview pane. Or, select an invited event in your calendar and click the **Accept** button, **Tentative** ? button, or **Decline** button on the Meeting Series tab. Select whether to send a response and whether to edit it.

Microsoft®

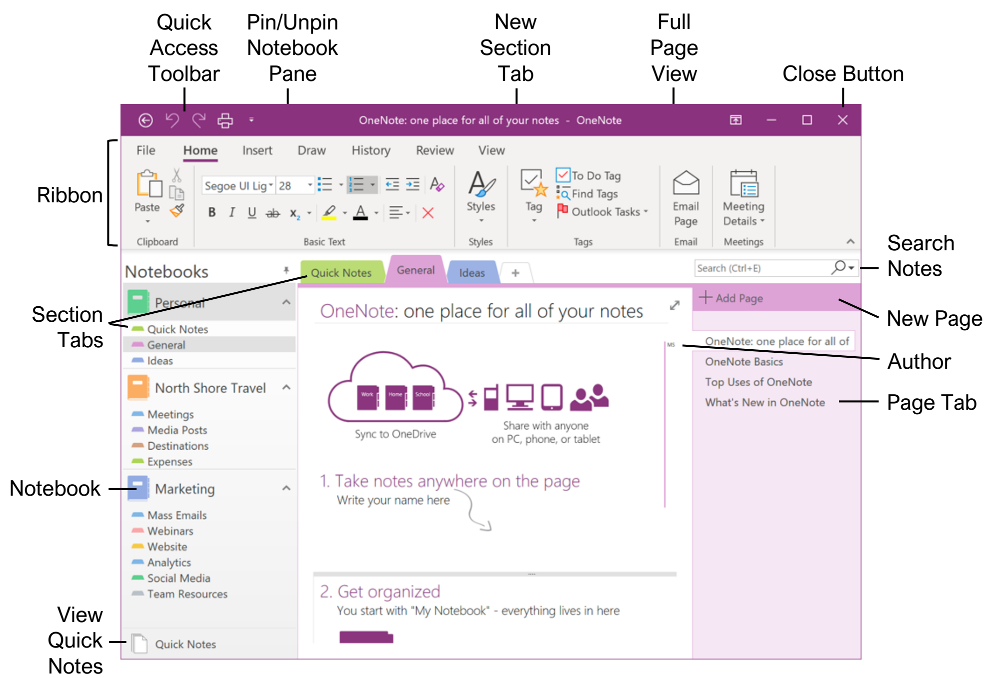
OneNote

Quick Reference Guide

your logo

Free Cheat Sheets
Visit ref.customguide.com

The OneNote Program Screen



Getting Started

Open an Existing Notebook: Click the **File** tab, click **Open**, select a save location, and click the notebook.

Create a New Notebook: Click the **File** tab, click **New**, and select a save location. Type a name in the **Notebook Name** field and click **Create**.

Close a Notebook: Click the **File** tab, click the **Settings** button next to the notebook you want to close, and select **Close**.

Add a Section: Click the **Create New Section** + button to the right of existing sections, type a section name, and click outside the tab.

Move a Section: Click a section tab and drag it to a new location.

Delete a Section: Right-click a section tab and select **Delete** ✕.

Add a Section Group: Right-click in the blank space next to the existing sections, select **New Section Group**, and type a new name for the group.

Add Sections to a Section Group: Click a section tab and drag it over the section group.

Add a Page: Click the **Add Page** + button above existing page tabs and type a page name.

Move a Page: Click a page tab and drag it to a new location.

Create a Subpage: Select one or more page tabs, right-click the selected page tab(s), and select **Make Subpage** →.

Delete a Page: Right-click a page or page tab and select **Delete** ✕.

Change a Notebook's Name: Click the **File** tab, click the **Settings** button, and select **Properties**. Click in the **Display name** field, type a name, and click **OK**.

Change a Notebook's Color: Click the **File** tab, click the **Settings** button, and select **Properties**. Click the **Color** list arrow, select a new color, and click **OK**.

Restore Deleted Items: Click the **History** tab and click the **Notebook Recycle Bin** button. Click the current notebook's list arrow and click the **Pin Notebook Pane to Side** button. Expand the notebook's sections. Click and drag deleted pages or sections to an open notebook.

Keyboard Shortcuts

General

Create an item	**Alt** + **N**
Open a section	**Ctrl** + **O**
Create new page	**Ctrl** + **N**
Create new subpage	**Ctrl** + **Shift** + **Alt** + **N**
Print page	**Ctrl** + **P**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Help	**F1**
Full page view	**F11**
Task pane	**Ctrl** + **F1**
Create an Outlook task	**Ctrl** + **Shift** + **5**
Insert a link	**Ctrl** + **K**
Email page	**Ctrl** + **Shift** + **E**
Select page	**Ctrl** + **Shift** + **A**
Sync shared notebooks	**F9**

Navigating

Next section	**Ctrl** + **Tab**
Previous section	**Ctrl** + **Shift** + **Tab**
Open new window	**Ctrl** + **M**
Open Side Note window	**Ctrl** + **Shift** + **M**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Bold	**Ctrl** + **B**
Italic	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Highlight	**Ctrl** + **Shift** + **H**
Font Task pane	**Ctrl** + **D**
Check spelling	**F7**

Tags

To Do	**Ctrl** + **1**
Important	**Ctrl** + **2**
Question	**Ctrl** + **3**
Remember for later	**Ctrl** + **4**
Definition	**Ctrl** + **5**
Remove all note tags	**Ctrl** + **0**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Add Notebook Content

Type Notes: Select the page where you want to add notes, click anywhere on the page, and type your notes.

Move Notes: Click the top bar of a note box and drag it to a new location.

Resize Notes: Click and drag the edge of a note.

Delete Notes: Select a note and click **Delete**.

Write Notes: Click the **Draw** tab and click the **Color & Thickness** button. Select a thickness, select a color, and click **OK**. Write your notes or sketch an image.

Delete Writing: Click the **Draw** tab and select the **Type** or **Lasso Select** tool. Click an item to remove and press the **Delete** key.

Convert Writing to Text: Click the **Type** or **Lasso Select** tool, select the writing you want to convert, and click **Ink to Text**.

Add a Tag: Click in the paragraph you want to tag, click the **Tag** button on the Home tab, and select a tag.

Create a Quick Note: Click the **Show hidden icons** icon on the Windows System tray, select **New quick note**, type a note, and click the Close button.

Open a Quick Note: Click the current notebook's name, click **Quick Notes**, and select a page tab.

Capture a Screen Clipping: Click the **Insert** tab, click **Screen Clipping**, and click and drag over a region of the screen.

Link to Content within OneNote: Right-click in the text you want to link to and select **Copy Link to Paragraph**. Navigate to and click where you want to place the link and click **Paste** on the Home tab.

Link to External Content: Select the text you want to link, click the **Insert** tab, and click the **Link** button. Enter the content's address in the **Address** field and click **OK**.

Insert an Image: Click the **Insert** tab, click **Pictures** or **Online Pictures**, locate an image to insert, and click **Open**.

Add a Table: Click the **Insert** tab, click the **Table** button, and select the number of rows and columns.

Format Notebooks

Apply a Style: Select the text, click the **Styles** button and select a style.

Change the Font: Select the text, click the **Font** list arrow, and select a new font.

Change the Font Size: Select the text, click the **Font Size** list arrow, and select a font size.

Change the Font Color: Select the text, click the **Font Color** list arrow, and select a new color.

Apply Bold, Italic, or an Underline: Select the text and click **Bold**, **Italic**, or **Underline** from the Home menu.

Copy Formatting with the Format Painter: Select the formatted text you want to copy. Click the **Format Painter** button on the Home tab. Then, select the text you want to apply the copied formatting to.

Create a List: Select the text you want to make into a list and click the **Numbering** or **Bullets** button.

Add a Date or Time Stamp: Click where you want the stamp, click the **Insert** tab, and click the **Date** or **Time** button.

Spell Check: Click the **Review** tab and click the **Spelling** button. For each possible error, click **Ignore**, **Add**, or **Change**. Then, click **OK**.

Templates

Use an Existing Template: Click the **Insert** tab and click the **Page Templates** button. Click a template category, select a template, and click the Templates pane's **Close** button.

Save a Custom Template: Create a notebook page with the desired text and formatting. Click the **Insert** tab and click the **Page Templates** button. Click **Save current page as a template**, type a template name, and click **Save**.

Use a Custom Template: Click the **My Templates** expansion arrow, select the custom template, and click the Templates pane's **Close** button.

Using OneNote with Office

Send Notes to Word: Navigate to the page you want to send, click the **File** tab, click **Send**, and then click **Send to Word**.

Add a File Attachment: Click the **Insert** tab, click the **File Attachment** button, select a file to attach, and click **Insert**.

Add a File Printout: Click the **Insert** tab, click the **File Printout** button, select a file, and click **Insert**.

Add Outlook Meeting Details: Click where you want to add the details, click **Meeting Details** on the Home tab, and select **Choose a Meeting from Another Day**. Click the **calendar** icon, select a date, select a meeting, and click **Insert Details**.

Create Outlook Task from a Note: Select a note, click the **Outlook Tasks** button, and select a task due date.

Using OneNote with Office

Send Notes as Attachment: Click the **File** tab, click **Send**, and select **Send as Attachment**. Add a recipient to the **To** field and click **Send**.

Embed a Spreadsheet: Click the **Insert** tab, click the **Spreadsheet** button, and select **Existing Excel Spreadsheet**. Select a file and click **Insert**.

Convert a Table to a Spreadsheet: Click the table, click the **Layout** tab, and click **Convert to Excel Spreadsheet**.

Share and Collaborate

Export a Page, Section, or Notebook: Click the **File** tab, click **Export**, and select **Page**, **Section**, or **Notebook**. Select an export format, click **Export**, select a save location, and click **Save**.

Create a New Shared Notebook: Click the **File** tab, click **New** and double-click **OneDrive**. Type a name in the **Notebook Name** field and click **Create**.

Share an Existing Notebook: Click the **File** tab, click **Share**, and select a shared location. Type a name in the **Notebook Name** field and click **Move**.

Invite People to a Shared Notebook: Click the **File** tab, click **Share**, type people's names or email addresses in the recipient field. Click in the message field, type a message, and click **Share**.

Create a Sharing Link: Click the File tab, click **Share**, and click **Get a Sharing Link**. Click **Create a view link** or **Create an edit link**.

Sync Changes: Click the **File** tab, click **View Sync Status**, click **Sync Now**, and click **Close**.

View Edits by Author: Click the **History** tab, click **Find by Author**, select a name to see their changes, and click a change to jump to it.

View Recent Edits: Click the **History** tab, click **Recent Edits**, select a date range, and select a page in the Search Results pane.

Add a Password: Click the **Review** tab, click the **Password** button, and click **Set Password**. Type a password, click in the **Confirm Password** field, retype the password, and click **OK**.

Restore a Previous Page Version: Click the **History** tab, click the **Page Versions** button, and select an earlier version. Click the yellow notification above the page and select **Restore Version**. Click the **Page Versions** button again to hide the other versions.

Contact Us: sales@customguide.com

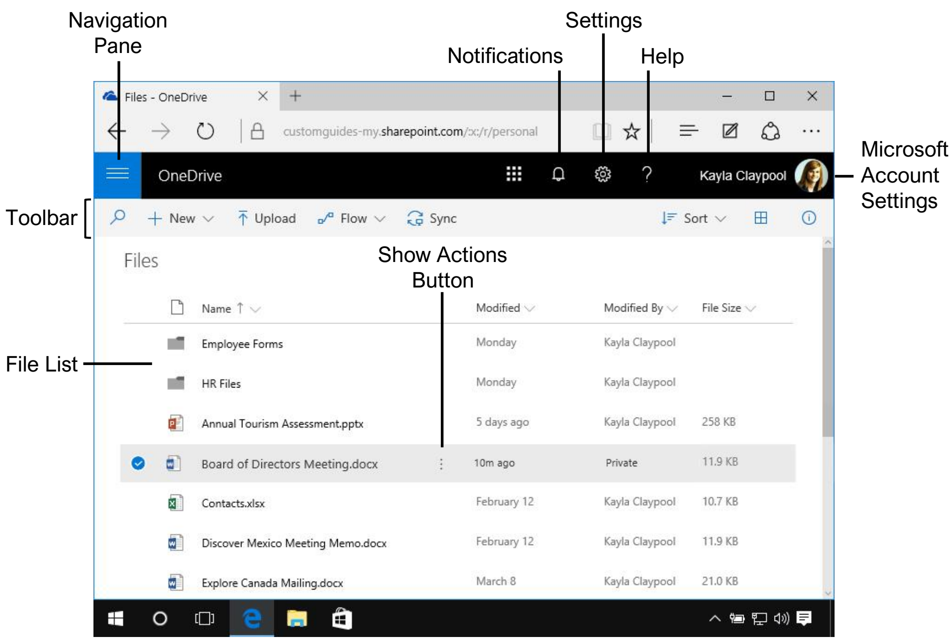
Microsoft®

OneDrive for Business

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

The OneDrive for Business Screen



Keyboard Shortcuts

Create an item	**Alt** + **N**
Upload a file	**Alt** + **U**
Expand menus	**Shift** + **Enter**
Select all	**Ctrl** + **A**
Change view	**Ctrl** + **Alt** + **1**
Create a new folder	**Ctrl** + **Shift** + **N**
Open with	**Ctrl** + **O**
View folder	**Ctrl** + **Alt** + **O**
Download an item	**Ctrl** + **S**
Copy an item	**Ctrl** + **Shift** + **V**
Move an item	**Ctrl** + **Shift** + **Y**
Rename an item	**F2**
Refresh	**F5**

OneDrive for Business Fundamentals

Sign In: In a browser window, enter your work Office 365 email address and password. Click **Sign In**, then click the **OneDrive** app.

Search the Current Location: Click in the **Search** field, type a search word or words, and select a result from the list.

Expand a Search: If you don't find what you're looking for while searching the current location, click **See more results** at the bottom of the search results menu to see additional results.

Get Help: Click the ? **Help** button in the upper-right corner. Click in the **Search** field, type a help topic, and select a topic from the list.

Upload a File: Click the **Upload** button in the toolbar, navigate to and select the file(s) to upload, then click **Open**. Or, drag files from the File Explorer window into the browser window.

Preview a File: Click the file's ⋮ **Show actions** button and select **Preview**. Use the navigation ‹ › buttons at the bottom of the screen to preview the file.

Open a File in Office Online: Click the file's ⋮ **Show actions** button and select **Open in [Word, Excel, PowerPoint, etc.] Online**.

Download a Copy of a File: Select a file in the OneDrive for Business library and click the **Download** button on the toolbar. Click **Save** in the notification at the bottom of the window, then click **Open**.

Connect OneDrive to Office: From a desktop Office application, click the **File** tab, click **Open** or **Save As**, and select **Add a Place**. Select the OneDrive option and log in with your OneDrive for Business account information.

Save a File from Office: From a desktop Office application, click the **File** tab, click **Save As**, and select the **OneDrive for Business** location. Select the folder you want to save to, give the file a name, and click the **Save** button.

Delete a File: Select the file you want to delete and click the **Delete** button on the toolbar. Click **Delete** in the confirmation dialog box.

Restore or Permanently Delete an Item: Click **Recycle bin** in the Navigation pane, then select the check box for the item you want to permanently delete or restore. Click **Restore** or **Delete** in the toolbar, and then click **OK**.

Create a New File: Click the + **New** button in the toolbar and select a file type.

Symbols

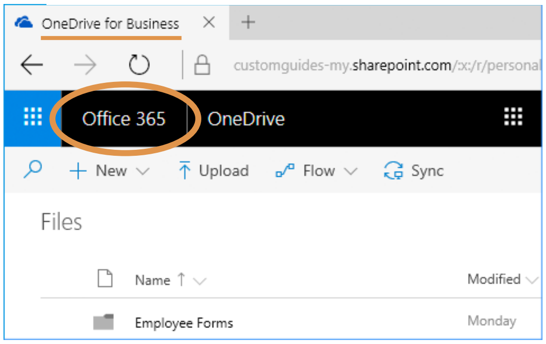
PDF File	Image
Word File	Excel File
PowerPoint File	OneNote File
Folder	Shared File
New File	Private File
Online Only File	Locally Available File
Always Available File	File Not Synced
File Syncing	Application Sync Error

Click the topic links for free lessons!

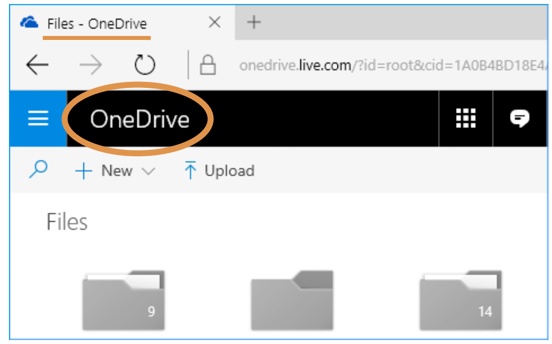
Contact Us: sales@customguide.com

What's the Difference?

OneDrive for Business VS OneDrive



- Store work-related files in a secure 1 TB space online
- Advanced versioning and document history
- Tied to SharePoint and accessed with work email
- Easily share with coworkers
- Auditing, reporting, and advanced administration tools



- Store personal files in a secure, private 5 GB space online
- Simple versioning and document history
- Accessed with a personal email
- Basic access is free, but upgrades are available for purchase

Manage Files

Create a Folder: Click the + **New** button on the toolbar and select **New Folder**. Enter a name for the folder, then click **Create**.

Move Files to a Folder: Click and drag the files into the folder.

Upload Files to a Folder: Open the folder, click the **Upload** button, then navigate to and select a file. Click **Open**.

View File Properties: Select a file, click the file's **Show actions** button, then select **Details**. From here, you can see who has access to the file and view recent activity. Click **More details** to see additional file information.

Check Version History: Select a file, click the file's **Show actions** button, then select **Version history**. Use the Version History pane to open, restore, or delete a version.

Sort and Filter Files: Click a column header and select a sort order, or select a filter criteria.

Change Views: Click the **View options** button in the toolbar and select a view option.

Set Up PC Sync: Click the **Sync** button on the toolbar, then click **Yes** to switch to the OneDrive app. Select the folder(s) you want to sync to your PC and click **Start sync**. Click the **OneDrive for Business** icon in your computer's system tray to view the folders synced to your PC.

Pause Syncing: Right-click the **OneDrive for Business** icon in the system tray at the bottom of your screen, select **Pause syncing**, then select how long you wish to pause the sync. To resume syncing, right-click the icon again and select **Resume syncing**.

Stop Syncing: Right-click the **OneDrive for Business** icon in the system tray at the bottom of your screen, then select **Settings**. In the Account tab, click **Unlink this PC**, then click the **Unlink Account** button. The folder will permanently stop syncing; locally available files will remain on your computer while online only files will be removed.

Work Offline: If you've synced your OneDrive for Business with your PC, you can easily access files while not online. Double-click the **OneDrive for Business** icon in the system tray to view and open the files. Once an internet connection is restored, the files will sync to the online location.

Share Files

Share a Folder: Select a folder, then click the **Share** button in the toolbar. Set a permission level for the folder, enter the names or email addresses of the people you'd like to share with, and add a message (optional). When you're done, click **Send**.

Open the Shared with Everyone Folder: Click **Files** in the Navigation pane, then click the **Shared with Everyone** folder. Everything in this folder will automatically be shared with everyone in your organization. Click and drag files and folders into this folder to quickly share them with everyone.

View Only Shared Files: Click **Shared** in the Navigation pane. At the top of the page, click **Shared with me** to see the files that have been shared with you by others in your organization. Click **Shared by me** to see all the files you have shared with others.

Share a File: Select a file, then click the **Share** button in the toolbar. Set a permission level for the file, enter the names or email addresses of the people you'd like to share with, and add a message (optional). When you're done, click **Send**.

See Who a File is Shared With: Click a file's **Show actions** button, then select **Details**. See who the file is shared with under the Has Access heading.

Email a Link: Click a file's **Show actions** button, then select **Share**. Click **Outlook** to create a new email in Outlook that's populated with a link to the file.

Copy a Link to the File: Select a file and click the **Copy Link** button in the toolbar. Click the **Copy** button. Paste the link into any application, email message, or instant message, etc. to share it with others.

Co-Author a File: Open a file at the same time as another person. Any users in the file are listed at the top-right corner. Click a user's name to see what they are currently editing. Any updates are saved and synced automatically.

Access OneDrive for Business Settings: Click the **Settings** icon at the upper-right corner of the window. The Settings pane displays a Search field, a link to site settings, theme and notification settings, in addition to other OneDrive for Business settings.

Contact Us: sales@customguide.com

Microsoft®

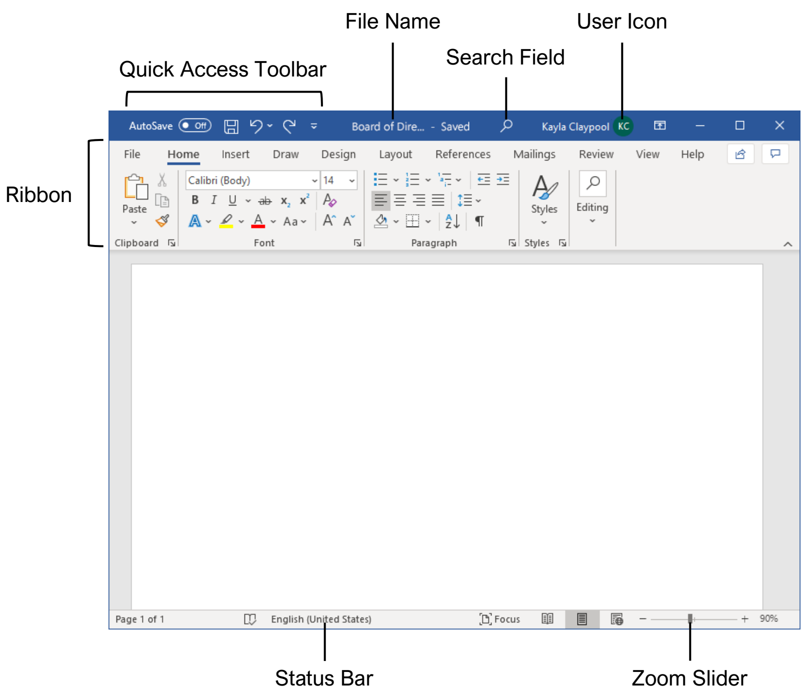
Office 365 Essentials

Quick Reference Guide

your logo

Free Cheat Sheets
Visit ref.customguide.com

An Office 365 Program Screen



Keyboard Shortcuts

General

Open a file	**Ctrl** + **O**
Create a new file	**Ctrl** + **N**
Save a file	**Ctrl** + **S**
Print a file	**Ctrl** + **P**
Close a file	**Ctrl** + **W**
Help	**F1**
Tell Me / Search field	**Alt** + **Q**
File tab	**Alt** + **F**
Home tab	**Alt** + **H**
Insert tab	**Alt** + **N**
Review tab	**Alt** + **R**
View tab	**Alt** + **W**
Show or hide the ribbon	**Ctrl** + **F1**

Navigation

Move the text cursor	↑, ↓, ←, →
Up one screen or slide	**Page Up**
Down one screen or slide	**Page Down**
Beginning of a line	**Home**
End of a line	**End**

Office Fundamentals

Create a Blank File: Click the **File** tab, select **New**, and click the **Blank** template; or, press **Ctrl** + **N**.

Create a File from a Template: Click the **File** tab, select **New**, search for a template category or select a search suggestion, select a template, then click **Create**.

Open a File: Click the **File** tab and select **Open**, or press **Ctrl** + **O**. Select a location with a file you want, then select a file and click **Open**.

Save a File: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. If it's the first time you're saving the file, choose a location where you want to save the file, give it a name, and then click **Save**.

Save a Copy of a File: Click the **File** tab, then select **Save As** or **Save a Copy**. Choose a location where you want to save the file, give it a name, and then click **Save**.

Print: Click the **File** tab, select **Print**, view the print preview, set up your print settings, and then click **Print**.

Get Help: Click the **Help** tab on the ribbon, then click the **Help** button to open the Help pane. Search for a topic in the Search field, then select a topic from the results.

Editing

Select Text: Click and drag across the text you want to select; or, click at the beginning of a text block, hold down the **Shift** key, and click at the end of a text block.

Edit Text: Select the text you want to replace and type new text.

Cut, Copy and Paste: Select the text or object you want to cut or copy and click the **Cut** or **Copy** button on the Home tab. Click where you want to paste, and click the **Paste** button.

Add a Comment: Select the text or object you want to comment on, click the **Review** tab, then click the **New Comment** button. Type a comment, then click outside of the comment bubble.

Formatting Text

Change the Font: Select the text you want to change, click the **Font** menu arrow, and select a font.

Change the Font Size: Select the text you want to change, click the **Font Size** menu arrow, and select a font size.

Apply Bold, Italic, or an Underline: Click the **Bold B**, **Italic *I***, or **Underline U** button in the Font group on the Home tab.

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Select all	**Ctrl** + **A**
Check spelling	**F7**
Open thesaurus	**Shift** + **F7**
Insert hyperlink	**Ctrl** + **K**
Group selected objects	**Ctrl** + **G**
Duplicate an object	**Ctrl** + **D**
Repeat the last command	**F4**

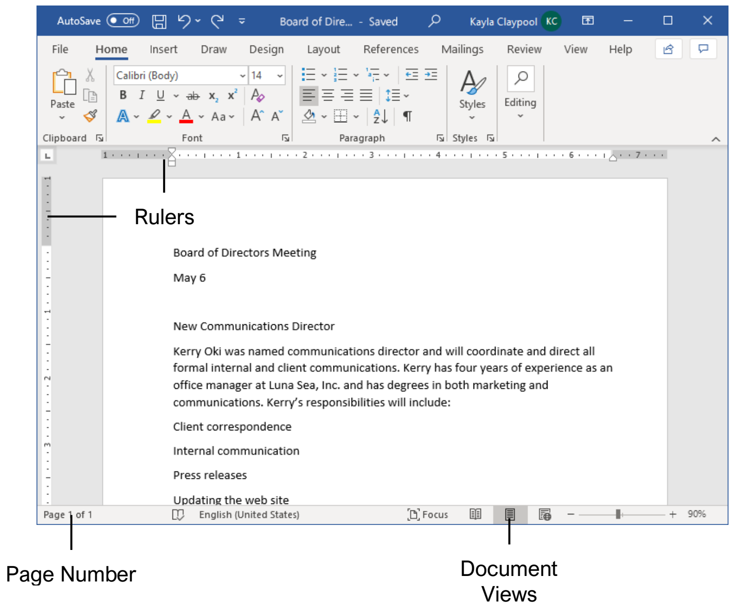
Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Align Left	**Ctrl** + **L**
Align Center	**Ctrl** + **E**
Align Right	**Ctrl** + **R**
Display the Font dialog box	**Ctrl** + **Shift** + **F**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

The Word Program Screen



Word Fundamentals

Change Line Spacing: Select the paragraph you want to adjust, click the **Line Spacing** button, and select a spacing option.

Change Paragraph Spacing: Click the Paragraph group's dialog box launcher, change the values in the **Before** or **After** spacing fields, and click **OK**.

Indent Paragraphs: Click anywhere in the paragraph you want to indent and click the **Increase Indent** or **Decrease Indent** button on the Home tab.

Set Custom Indents: Click anywhere in the paragraph you want to indent and click the Paragraph group's dialog box launcher. Adjust the values in the **Left** and **Right** fields, then click **OK**.

Choose a Margin Size: Click the **Layout** tab, click the **Margins** button, and select a common margin setting. Or, click and drag the **Adjust Left**, **Adjust Right**, **Adjust Top**, or **Adjust Bottom** line on the Ruler.

Use a Header or Footer: Click the **Insert** tab, click either the **Header** or **Footer** button, and select an option.

Add Page Numbers: Click the **Insert** tab, click the **Page Number** button, select a part of the page, and select a page number style.

Insert Page Breaks: Place your cursor where you want to start a new page, click the **Insert** tab, and click the **Page Break** button.

Insert a Table: Click the **Insert** tab, click the **Table** button, and select the number of rows and columns that you want.

Add a Row or Column: Click in a cell next to where you want to add a row or column. Click the Table Tools **Layout** tab, then click **Insert Above**, **Insert Below**, **Insert Left**, or **Insert Right**, depending on where you want the row or column to be added.

Delete a Row or Column: Click in a cell in the row or column you want to delete, click the Table Tools **Layout** tab, click the **Delete** button, then select **Delete Row** or **Delete Column**.

Position an Object on the Page: Select an object, click the **Format** tab, click the **Position** button, and select a position.

Wrap Text Around an Object: Select an object, click the **Format** tab, click the **Wrap Text** button, and select a text wrapping style.

Apply a Style: Place the text cursor in a paragraph and select a style from the Styles gallery on the Home tab. Click the gallery's **More** button to see additional styles.

Display the Styles Pane: Click the dialog box launcher in the **Styles** group on the Home tab.

Change Style Sets: Click the **Design** tab, click the Style Set gallery's **More** button, then select a style set.

Use Outline View: Click the **View** tab and click the **Outline** button. Click the **Close Outline View** button to return to the previous view.

Demote or Promote Items: While in Outline view, click the item you want to demote or promote and click the **Demote** or **Promote** button (or the **Demote to Body Text** or **Promote to Heading 1** button).

Keyboard Shortcuts

Formatting

Align justified	**Ctrl** + **J**
Indent a paragraph	**Ctrl** + **M**
Remove an indent	**Ctrl** + **Shift** + **M**
Create a hanging indent	**Ctrl** + **T**
Remove a hanging indent	**Ctrl** + **Shift** + **T**
Increase font size	**Ctrl** + **Shift** + **>**
Decrease font size	**Ctrl** + **Shift** + **<**
Increase font size 1pt	**Ctrl** + **]**
Decrease font size 1pt	**Ctrl** + **[**
Copy formatting	**Ctrl** + **Shift** + **C**
Paste formatting	**Ctrl** + **Shift** + **V**
Remove formatting	**Ctrl** + **Q**
Apply single line spacing	**Ctrl** + **1**
Apply double line spacing	**Ctrl** + **2**
Apply 1.5-line spacing	**Ctrl** + **5**
Show/hide formatting marks	**Ctrl** + **Shift** + *****

Styles

Apply Normal style	**Ctrl** + **Shift** + **N**
Apply Heading 1 style	**Ctrl** + **Alt** + **1**
Apply Heading 2 style	**Ctrl** + **Alt** + **2**
Apply Heading 3 style	**Ctrl** + **Alt** + **3**
Toggle the Styles pane	**Ctrl** + **Alt** + **Shift** + **S**

Cursor Navigation

One word to the left	**Ctrl** + ←
One word to the right	**Ctrl** + →
Up one paragraph	**Ctrl** + ↑
Down one paragraph	**Ctrl** + ↓
Beginning of the document	**Ctrl** + **Home**
End of the document	**Ctrl** + **End**
Top of the next page	**Ctrl** + **Page Down**
Top of previous page	**Ctrl** + **Page Up**

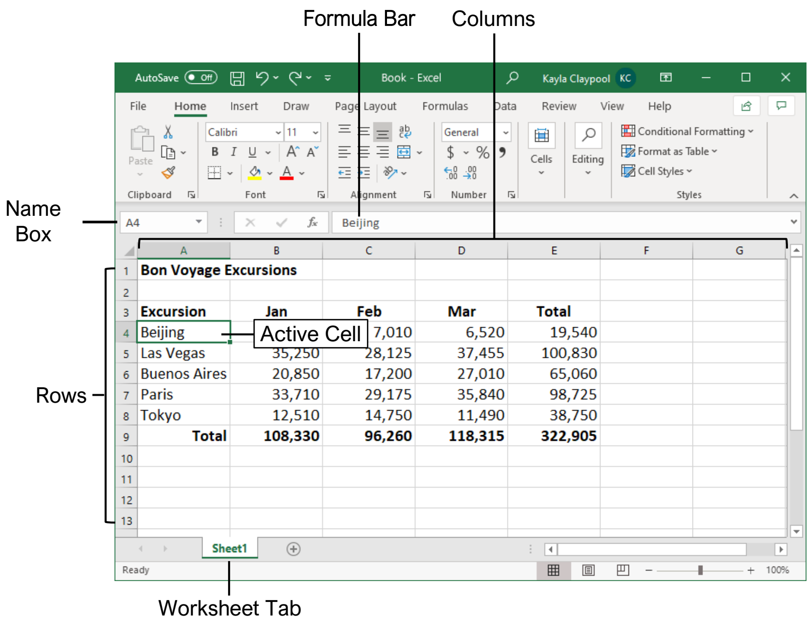
Insert Special Characters

Line break	**Shift** + **Enter**
Page break	**Ctrl** + **Enter**
Column break	**Ctrl** + **Shift** + **Enter**
Copyright (©)	**Ctrl** + **Alt** + **C**
Registered trademark ®	**Ctrl** + **Alt** + **R**
Trademark ™	**Ctrl** + **Alt** + **T**
Ellipsis (…)	**Ctrl** + **Alt** + **.**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

The Excel Program Screen



Keyboard Shortcuts

Navigating a Spreadsheet

Move between cells .... ↑, ↓, ←, →
Select entire row.................. **Shift** + **Space**
Select entire column .... **Ctrl** + **Space**
Hide selected rows .... **Ctrl** + **9**
Hide selected columns......... **Ctrl** + **0**
Next worksheet .... **Ctrl** + **Page Down**
Previous worksheet .... **Ctrl** + **Page Up**

Functions and Formulas

Insert a function................... **Shift** + **F3**
Edit the active cell................ **F2**
Switch between cell values and formulas .... **Ctrl** + **`**
Expand or collapse the formula bar......................... **Ctrl** + **Shift** + **U**
Calculate all worksheets **F9**
Calculate active worksheet .. **Shift** + **F9**

Excel Fundamentals

Select a Cell: Click a cell or use the keyboard arrow keys to select it.

Select a Cell Range: Click and drag to select a range of cells. Or, press and hold down the **Shift** key while using the arrow keys to move the selection to the last cell of the range.

Select an Entire Worksheet: Click the **Select All** button where the column and row headings meet.

Select Non-Adjacent Cells: Click the first cell or cell range, hold down the **Ctrl** key, and select any non-adjacent cell or cell range.

Edit Cell Data: Select a cell and click in the Formula Bar or double-click the cell. Edit the cell's contents and press **Enter**.

Clear Cell Data: Select the cell(s) and press the **Delete** key. Or, click the **Clear** button on the Home tab and select **Clear Contents**.

Insert Cells: Select the cell(s) where you want to insert cell(s), click the **Insert** button menu arrow on the Home tab, select **Insert Cells**, select how you want to move existing cells, then click **OK**.

Insert a Column or Row: Right-click to the right of the column or below the row you want to insert. Select **Insert** in the menu, or click the **Insert** button on the Home tab.

Move or Copy Cells Using Drag and Drop: Select the cell(s) you want to move or copy, position the pointer over any border of the selected cell(s), then drag to the destination cells. To copy, hold down the **Ctrl** key before starting to drag.

Delete Cells: Select the cell(s) you want to delete, click the **Delete** button menu arrow on the Home tab, select **Delete Cells**, select how you want to move cells to fill the deleted area, then click **OK**.

Delete a Column or Row: Select the row or column heading(s) you want to remove. Right-click and select **Delete** from the contextual menu, or click the **Delete** button in the Cells group on the Home tab.

Adjust Column Width or Row Height: Click and drag the right border of the column header or the bottom border of the row header. Double-click the border to AutoFit the column or row according to its contents.

Set a Fixed Column Width or Row Height: Select a cell in the column or row you want to adjust, click the **Format** button on the Home tab, select **Column Width** or **Row Height**, enter a column width or row height value, then click **OK**.

Freeze Panes: Select a cell in the row below and the column to the right of where you want to freeze the window, click the **View** tab on the ribbon, click the **Freeze Panes** button in the Window group, and select **Freeze Panes**.

Freeze the First Row or Column: Click the **View** tab on the ribbon, click the **Freeze Panes** button in the Window group, and select **Freeze Top Row** or **Freeze First Column**.

Unfreeze Panes: Click the **View** tab on the ribbon, click the **Freeze Panes** button in the Window group, and select **Unfreeze Panes**.

Enter a Formula: Select the cell where you want to insert the formula. Type **=** and enter the formula using values, cell references, operators, and functions. Press **Enter**.

Complete a Series Using AutoFill: Select the cells that define the pattern, i.e. a series of months or years. Click and drag the fill handle to adjacent blank cells to complete the series.

SUM Function: Click the cell where you want to insert the total and click the **Sum** Σ button in the Editing group on the Home tab. Enter the cells you want to total, and press **Enter**.

AVERAGE Function**:** Click the cell where you want to insert the average, click the **Sum** Σ button's menu arrow, and select **Average**. Enter the cells you want to average, and press **Enter**.

Format Numbers and Dates: Select the cell(s) with the numbers or dates you want to format, click the **Number Format** menu arrow on the Home tab, and select a number or date format.

Insert a New Worksheet: Click the **Insert Worksheet** button next to the sheet tabs below the active sheet. Or, press **Shift** + **F11**.

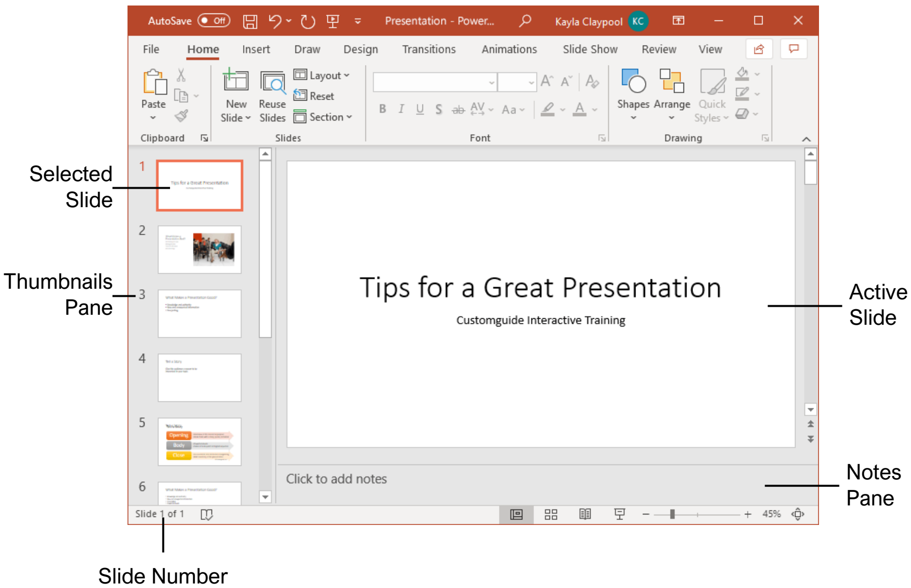
Rename a Worksheet: Double-click the sheet tab, enter a new name for the worksheet, and press **Enter**.

Change a Worksheet's Tab Color: Right-click the sheet tab, select **Tab Color**, and choose the color you want to apply.

Delete a Worksheet: Right-click the sheet tab and select **Delete** from the menu.

Contact Us: sales@customguide.com

The PowerPoint Program Screen



Keyboard Shortcuts

Present a Slide Show

Begin slide show	**F5**
Resume slide show	**Shift** + **F5**
Start in Presenter View	**Alt** + **F5**
End slide show	**Esc**
Go to next slide	**Enter**, **N**, **Spacebar**, or →
Go to previous slide	**Backspace**, **P**, or ←
Go to first slide	**Home**
Go to last slide	**End**
Jump to slide	**[Slide #]** + **Enter**
Hide pointer and navigation	**Ctrl** + **H**
Blank black slide	**B**
Black white slide	**W**
Start laser pointer	**Ctrl** + **L**
Change arrow to pen	**Ctrl** + **P**
Change pen to arrow	**Ctrl** + **A**

PowerPoint Fundamentals

Insert a New Slide: Click the **Home** tab and click the **New Slide** button in the Slides group, or press **Ctrl** + **M**.

Change the Slide Layout: Click the **Home** tab, click the **Layout** button in the Slides group, and select a layout.

Insert a Text Box: Click the **Insert** tab on the ribbon and click the **Text Box** button. The cursor changes to a crosshair; click and drag to place the text box on the slide.

Hide or Unhide a Slide: Select a slide in the Thumbnails pane in Normal view. Click the **Slide Show** tab on the ribbon and click the **Hide Slide** button in the Set Up group to toggle the slide visibility.

Delete a Slide: Select a slide in the Thumbnails pane (or in Slide Sorter view) and press the **Delete** key, or right-click a slide in the Thumbnails pane (or in Slide Sorter view) and select **Delete**.

Add Slide Notes: Click the **View** tab on the ribbon and click the **Notes** button in the Show group to turn on the Notes pane. Enter a slide note to use during the presentation or for slide handouts.

Apply a Presentation Theme: Click the **Design** tab on the ribbon. Click the **More** button in the Themes group and select a theme.

Modify Theme Elements: Click the **Design** tab, then, in the Variants group, click **Colors**, **Fonts**, or **Effects** to expand the menu and select a new style that coordinates with the current theme.

Apply Picture Adjustments: Select a picture, then click the **Picture Format** tab on the ribbon. In the Adjust group, click the **Corrections**, **Color**, and/or **Artistic Effects** button and select an adjustment from the menu.

Apply a Picture Style: Select a picture, then click the **Picture Format** tab on the ribbon. Select a style in the Picture Styles gallery.

Crop a Picture: Select the picture you want to crop. Click the **Picture Format** tab on the ribbon and click the **Crop** button. Click and drag the crop handles to remove any unwanted areas, then click the **Crop** button again.

Insert a Shape: Click the **Insert** tab on the ribbon and click the **Shapes** button. Select the shape you want to use in the menu. Click and drag to place the shape on the slide.

Change a Shape: Select a shape, click the **Shape Format** tab on the ribbon, click the **Edit Shape** button, and select **Change Shape**. Select a new shape from the menu.

Move an Object Forward or Backward: Select an object, click the **Shape** (or **Picture**) **Format** tab on the ribbon, and click **Bring Forward** or **Send Backward**.

Move an Object to the Front or Back: Select an object, click the **Shape** (or **Picture**) **Format** tab on the ribbon, click either the **Bring Forward** or **Send Backward** button menu arrow and select **Bring to Front** or **Send to Back**.

Rotate an Object: Select an object, then click and drag it's rotate handle to rotate it.

Flip an Object: Select an object, click the **Shape** (or **Picture**) **Format** tab on the ribbon, click the **Rotate** button, and select **Flip Vertical** or **Flip Horizontal**.

Apply a Slide Transition: Select the slide(s) where you want to add a transition. Click the **Transitions** tab on the ribbon and click the **More** button in the Transition to This Slide group. Select the transition you want to use.

Modify a Transition: Click the **Transitions** tab on the ribbon and click the **Effect Options** button. Select an effect option in the menu.

Apply a Transition to All Slides: While viewing a slide with a transition, click the **Apply to All** button on the Transitions tab.

Apply an Animation: Select the text or object you want to animate and click the **Animations** tab on the ribbon. Click the **Animation Styles** button and select the animation you want to use. Click the **Add Animation** button to add additional animations to the same object.

Start a Slide Show: Click the **Slide Show** tab on the ribbon and click either the **From Beginning** or **From Current Slide** button. Or, click the **Slide Show** button on the status bar, or press **F5**.

End a Slide Show: While presenting a slide show, click the **Options** button in the toolbar at the bottom left and select **End Show**. Or, press the **Esc** key.

Advance to the Next Slide: Click the **Next Slide** button, press the **Spacebar**, click the right mouse button, or press the **Page Down** key.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Microsoft®

Excel 2013 Advanced

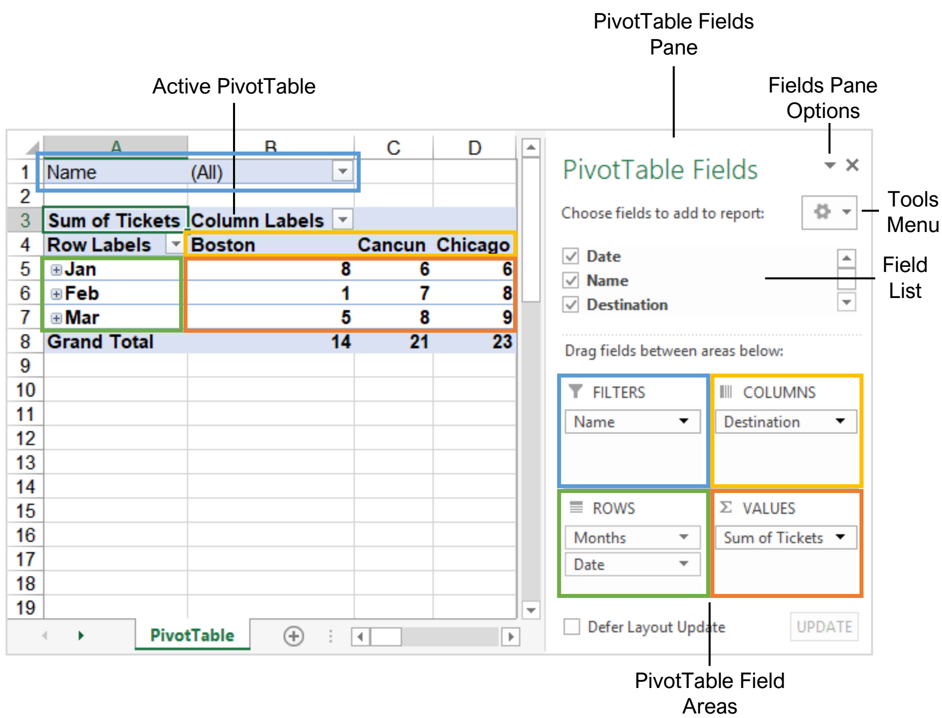
Quick Reference Guide

CustomGuide

your logo

Free Cheat Sheets
Visit ref.customguide.com

PivotTable Elements



PivotTables

Create a PivotTable: Select the data range to be used by the PivotTable. Click the **Insert** tab on the ribbon and click the **PivotTable** button in the Tables group. Verify the range and then click **OK**.

Add Multiple PivotTable Fields: Click a field in the field list and drag it to one of the four PivotTable areas that contains one or more fields.

Filter PivotTables: Click and drag a field from the field list into the Filters area. Click the field's list arrow above the PivotTable and select the value(s) you want to filter.

Group PivotTable Values: Select a cell in the PivotTable that contains a value you want to group by. Click the **Analyze** tab on the ribbon and click the **Group Field** button. Specify how the PivotTable should be grouped and then click **OK**.

Refresh a PivotTable: With the PivotTable selected, click the **Analyze** tab on the ribbon. Click the **Refresh** button in the Data group.

Format a PivotTable: With the PivotTable selected, click the **Design** tab. Then, select the desired formatting options from the PivotTable Options group and the PivotTable Styles group.

PivotCharts

Create a PivotChart: Click any cell in a PivotTable and click the **Analyze** tab on the ribbon. Click the **PivotChart** button in the Tools group. Select a PivotChart type and click **OK**.

Modify PivotChart Data: Drag fields into and out of the field areas in the task pane.

Refresh a PivotChart: With the PivotChart selected, click the **Analyze** tab on the ribbon. Click the **Refresh** button in the Data group.

Modify PivotChart Elements: With the PivotChart selected, click the **Design** tab on the ribbon. Click the **Add Chart Element** button in the Chart Elements group and select the item(s) you want to add to the chart.

Apply a PivotChart Style: Select the PivotChart and click the **Design** tab on the ribbon. Select a style from the gallery in the Chart Styles group.

Update the Chart Type: With the PivotChart selected, click the **Design** tab on the ribbon. Click the **Change Chart Type** button in the Type group. Select a new chart type and click **OK**.

Enable PivotChart Drill Down: Click the **Analyze** tab. Click the **Field Buttons** list arrow in the Show/Hide group and select **Show Expand/Collapse Entire Field Buttons**.

PivotTable Layout

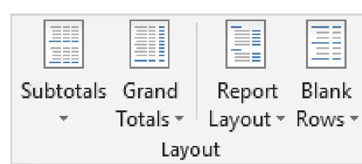
PivotTable Fields Pane

The PivotTable Fields pane controls how data is represented in the PivotTable. Click anywhere in the PivotTable to activate the pane. It includes a Search field, a scrolling list of fields (these are the column headings in the data range used to create the PivotTable), and four areas in which fields are placed. These four areas include:

- **Filters:** If a field is placed in the Filters area, a menu appears above the PivotTable. Each unique value from the field is an item in the menu, which can be used to filter PivotTable data.
- **Column Labels:** The unique values for the fields placed in the Columns area appear as column headings along the top of the PivotTable.
- **Row Labels:** The unique values for the fields placed in the Rows area appear as row headings along the left side of the PivotTable.
- **Values:** The values are the "meat" of the PivotTable, or the actual data that's calculated for the fields placed in the rows and/or columns area. Values are most often numeric calculations.

Not all PivotTables will have a field in each area, and sometimes there will be multiple fields in a single area.

The Layout Group



Subtotals: Show or hide subtotals and specify their location in the PivotTable.

Grand Totals: Add or remove grand total rows for columns and/or rows.

Report Layout: Adjust the report layout to show in compact, outline, or tabular form.

Blank Rows: Emphasize groups of data by manually adding blank rows between grouped items.

Contact Us: sales@customguide.com

Macros

Enable the Developer Tab: Click the **File** tab and select **Options**. Select **Customize Ribbon** at the left. Check the **Developer** check box and click **OK**.

Record a Macro: Click the **Developer** tab on the ribbon and click the **Record Macro** button. Type a name, description and specify where to save it. Click **OK**. Complete the steps to be recorded. Click the **Stop Recording** button on the Developer tab.

Run a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select the macro and click **Run**.

Edit a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select a macro and click the **Edit** button. Make the necessary changes to the Visual Basic code and click the **Save** button.

Delete a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select a macro and click the **Delete** button.

Macro Security: Click the **Developer** tab on the ribbon and click the **Macro Security** button. Select a security level and click **OK.**

Troubleshoot Formulas

Common Formula Errors:

- **####### -** The column isn't wide enough to display all cell data.
- **#NAME? -** The text in the formula isn't recognized.
- **#VALUE! -** There is an error with one or more formula arguments.
- **#DIV/0 -** The formula is trying to divide a value by 0.
- **#REF! -** The formula references a cell that no longer exists.

Trace Precedents: Click the cell containing the value you want to trace and click the **Formulas** tab on the ribbon. Click the **Trace Precedents** button to see which cells affect the value in the selected cell.

Jan	Feb	Total
6,010	7,010	13,020

Error Checking: Select a cell containing an error. Click the **Formulas** tab on the ribbon and click the **Error Checking** button in the Formula Auditing group. Use the dialog to locate and fix the error.

The Watch Window: Select the cell you want to watch. Click the **Formulas** tab on the ribbon and click the **Watch Window** button. Click the **Add Watch** button. Ensure the correct cell is identified and click **Add**.

Evaluate a Formula: Select a cell with a formula. Click the **Formulas** tab on the ribbon and click the **Evaluate Formula** button.

Advanced Formatting

Customize Conditional Formatting: Click the **Conditional Formatting** button on the Home tab and select **New Rule**. Select a rule type and edit the styles and values. Click **OK**.

Edit a Conditional Formatting Rule: Click the **Conditional Formatting** button on the Home tab and select **Manage Rules**. Select the rule you want to edit and click **Edit Rule**. Make your changes to the rule. Click **OK**.

Change the Order of Conditional Formatting Rules: Click the **Conditional Formatting** button on the Home tab and select **Manage Rules**. Select the rule you want to re-sequence. Click the **Move Up** or **Move Down** arrow until the rule is positioned correctly. Click **OK**.

Analyze Data

Goal Seek: Click the **Data** tab on the ribbon. Click the **What-If Analysis** button and select **Goal Seek**. Specify the desired value for the given cell and which cell can be changed to reach the desired result. Click **OK**.

Advanced Formulas

Nested Functions: A nested function is when one function is tucked inside another function as one of its arguments, like this:

`=IF(D2>AVERAGE(B2:B10),1,0)`

Initial Function | **Nested Function**

IF: Performs a logical test to return one value for a true result, and another for a false result.

`=IF(B2>69,"True","False")`

logical_test that can be evaluated as true or false | **value_if_true** value to return when the test is true | **value_if_false** value to return when the test is false

AND, OR, NOT: Often used with IF to support multiple conditions.

- **AND** requires multiple conditions.
- **OR** accepts several different conditions.
- **NOT** returns the opposite of the condition.

`=OR(B5="MN",B5="WI")`

logical1 the first condition to evaluate | **logical2** the second condition to evaluate

SUMIF and AVERAGEIF: Calculates cells that meet a condition.

- **SUMIF** finds the total.
- **AVERAGEIF** finds the average.

`=SUMIF(C6:C10,"MN",D6:D10)`

range of cells you want to apply criteria against | **criteria** used to determine what cells to sum or average | **calc_range** to calculate, if different than the range

Advanced Formulas

VLOOKUP: Looks for and retrieves data from a specific column in a table.

	A	B	C	D	E
1				Agent Sales	
2				5	7367
3					
4	Agent ID	First	Last	Packages	Sales
5	1	Joel	Nelson	6	6,602
6	2	Louis	Hay	7	8,246
7	3	Anton	Baril	11	13,683
8	4	Caroline	Jolie	12	14,108
9	5	Daniel	Ruiz	5	7,367

`=VLOOKUP(D2,A4:E10,5)`

value to look for in the first column of the table | **table** from which to retrieve a value | **col_index** the column number in the table from which to retrieve a value

HLOOKUP: Looks for and retrieves data from a specific row in a table.

`=HLOOKUP(B5,B2:I3,3)`

value to look for in the first row of the table | **table** from which to retrieve a value | **row_index** the row number in the table from which to retrieve a value

UPPER, LOWER, and PROPER: Changes how text is capitalized.

UPPER Case | lower case | Proper Case

`=UPPER(B4)`

text to change case or capitalization

LEFT and RIGHT: Extracts a given number of characters from the left or right.

`=LEFT(B5,3)`

text from which to extract characters | **num_chars** to extract from the left or right side of the text

MID: Extracts a given number of characters from the middle of text; the example below would return "day".

`=MID("Sunday",4,3)`

text from which to extract characters | **start_num** location of the first character to extract | **num_chars** the number of characters to extract

MATCH: Locates the position of a lookup value in a row or column.

`=MATCH("Dog",B2:B10)`

lookup_value to match in the lookup_array | **lookup_array** range of cells

INDEX: Returns a value or the reference to a value from within a range.

`=INDEX(A1:B5,2,2)`

array a range of cells | **row_num** the row position | **col_num** the column position (optional)

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Microsoft®

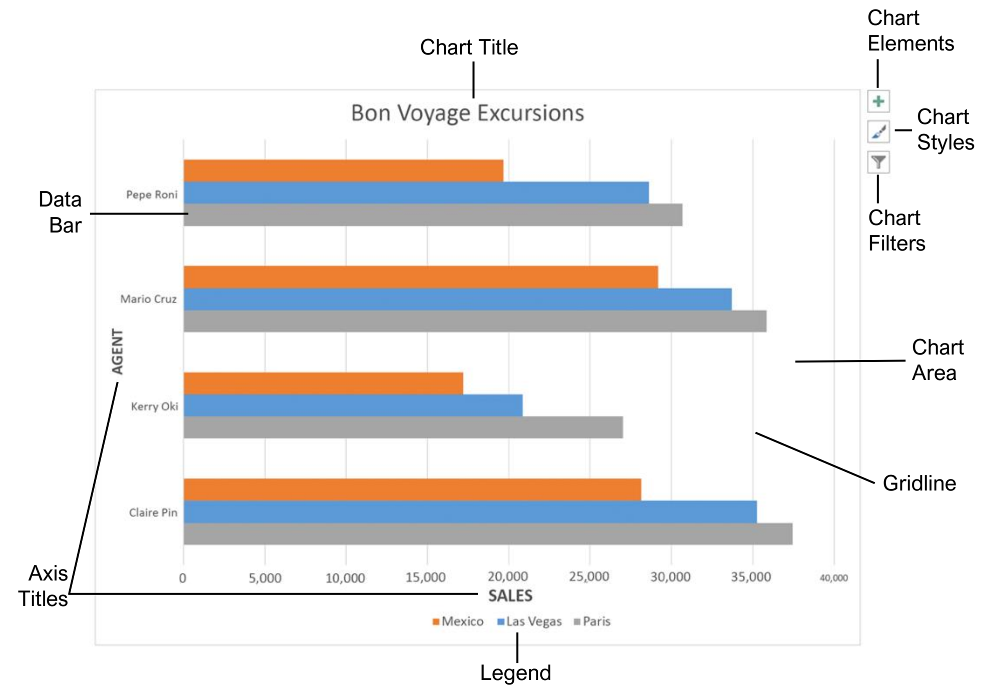
Excel 2013 Intermediate

Quick Reference Guide

your logo

Free Cheat Sheets
Visit ref.customguide.com

Chart Elements



Charts

Create a Chart: Select the cell range that contains the data you want to chart. Click the **Insert** tab on the ribbon. Click a chart type button in the Charts group and select the chart you want to insert.

Move or Resize a Chart: Select the chart. Place the cursor over the chart's border and, with the 4-headed arrow showing, click and drag to move it. Or, click and drag a sizing handle to resize it.

Change the Chart Type: Select the chart and click the **Design** tab. Click the **Change Chart Type** button and select a different chart.

Filter a Chart: With the chart you want to filter selected, click the **Filter** button next to it. Deselect the items you want to hide from the chart view and click the **Apply** button.

Position a Chart's Legend: Select the chart, click the **Chart Elements** button, click the **Legend** button, and select a position for the legend.

Show or Hide Chart Elements: Select the chart and click the **Chart Elements** button. Then, use the check boxes to show or hide each element.

Insert a Trendline: Select the chart where you want to add a trendline. Click the **Design** tab on the ribbon and click the **Add Chart Element** button. Select **Trendline** from the menu.

Charts

Insert a Sparkline: Select the cells you want to summarize. Click the **Insert** tab and select the sparkline you want to insert. In the Location Range field, enter the cell or cell range to place the sparkline and click **OK**.

Create a Dual Axis Chart: Select the cell range you want to chart, click the **Insert** tab, click the **Combo** button, and select a combo chart type.

Print and Distribute

Set the Page Size: Click the **Page Layout** tab. Click the **Size** button and select a page size.

Set the Print Area: Select the cell range you want to print. Click the **Page Layout** tab, click the **Print Area** button, and select **Set Print Area**.

Print Titles, Gridlines, and Headings: Click the **Page Layout** tab. Click the **Print Titles** button and set which items you wish to print.

Add a Header or Footer: Click the **Insert** tab and click the **Header & Footer** button. Complete the header and footer fields.

Adjust Margins and Orientation: Click the **Page Layout** tab. Click the **Margins** button to select from a list of common page margins. Click the **Orientation** button to choose Portrait or Landscape orientation.

Chart Options

Chart Types

Column: Used to compare different values vertically side-by-side. Each value is represented in the chart by a vertical bar.

Line: Used to illustrate trends over time (days, months, years). Each value is plotted as a point on the chart and values are connected by a line.

Pie: Useful for showing values as a percentage of a whole when all the values add up to 100%. The values for each item are represented by different colors.

Bar: Similar to column charts, except they display information in horizontal bars rather than in vertical columns.

Area: Similar to line charts, except the areas beneath the lines are filled with color.

XY (Scatter): Used to plot clusters of values using single points. Multiple items can be plotted by using different colored points or different point symbols.

Stock: Effective for reporting the fluctuation of stock prices, such as the high, low, and closing points for a certain day.

Surface: Useful for finding optimum combinations between two sets of data. Colors and patterns indicate values that are in the same range.

Additional Chart Elements

Data Labels: Display values from the cells of the worksheet on the plot area of the chart.

Data Table: A table added next to the chart that shows the worksheet data the chart is illustrating.

Error Bars: Help you quickly identify standard deviations and error margins.

Trendline: Identifies the trend of the current data, not actual values. Can also identify forecasts for future data.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Intermediate Formulas

Absolute References: Absolute references always refer to the same cell, even if the formula is moved. In the formula bar, add dollar signs ($) to the reference you want to remain absolute (for example, **$A$1** makes the column and row remain constant).

Name a Cell or Range: Select the cell(s), click the Name box in the Formula bar, type a name for the cell or range, and press **Enter**. Names can be used in formulas instead of cell addresses, for example: **=B4*Rate**.

Reference Other Worksheets: To reference another worksheet in a formula, add an exclamation point '!' after the sheet name in the formula, for example: **=FebruarySales!B4**.

Reference Other Workbooks: To reference another workbook in a formula, add brackets '[ ]' around the file name in the formula, for example:
=[FebruarySales.xlsx]Sheet1!$B$4.

Order of Operations: When calculating a formula, Excel performs operations in the following order: Parentheses, Exponents, Multiplication and Division, and finally Addition and Subtraction (as they appear left to right). Use this mnemonic device to remember them:

Please	Parentheses
Excuse	Exponents
My	Multiplication
Dear	Division
Aunt	Addition
Sally	Subtraction

Concatenate Text: Use the CONCAT function **=CONCAT(text1,text2,…)** to join the text from multiple cells into a single cell. Use the arguments within the function to define the text you want to combine as well as any spaces or punctuation.

Payment Function: Use the PMT function **=PMT(rate,nper,pv,…)** to calculate a loan amount. Use the arguments within the function to define the loan rate, number of periods, and present value and Excel calculates the payment amount.

Date Functions: Date functions are used to add a specific date to a cell. Some common date functions in Excel include:

Date	=DATE(year,month,day)
Today	=TODAY()
Now	=NOW()

Display Worksheet Formulas: Click the **Formulas** tab on the ribbon and then click the **Show Formulas** button. Click the **Show Formulas** button again to turn off the formula view.

Manage Data

Export Data: Click the **File** tab. At the left, select **Export** and click **Change File Type**. Select the file type you want to export the data to and click **Save As**.

Import Data: Click the **Data** tab on the ribbon and click the **Get Data** button. Select the category and data type, and then the file you want to import. Click **Import**, verify the preview, and then click the **Load** button.

Use the Quick Analysis Tools: Select the cell range you want to summarize. Click the **Quick Analysis** button that appears. Select the analysis tool you want to use. Choose from formatting, charts, totals, tables, or sparklines.

Outline and Subtotal: Click the **Data** tab on the ribbon and click the **Subtotal** button. Use the dialog box to define which column you want to subtotal and the calculation you want to use. Click **OK**.

Use Flash Fill: Click in the cell to the right of the cell(s) where you want to extract or combine data. Start typing the data in the column. When a pattern is recognized, Excel predicts the remaining values for the column. Press **Enter** to accept the Flash Fill values.

Create a Data Validation Rule: Select the cells you want to validate. Click the **Data** tab and click the **Data Validation** button. Click the **Allow** list arrow and select the data you want to allow. Set additional validation criteria options and click **OK**.

Tables

Format a Cell Range as a Table: Select the cells you want to apply table formatting to. Click the **Format as Table** button in the Styles group of the Home tab and select a table format from the gallery.

	A	B	C	D
1	Excursion	Jan	Feb	Mar
2	Beijing	6,010	7,010	6,520
3	Las Vegas	35,250	28,125	37,455
4	México DF	20,850	17,200	27,010
5	Paris	33,710	29,175	35,840
6	Tokyo	12,510	14,750	11,490
7	Total	108,330	96,260	118,315

Sort Data: Select a cell in the column you want to sort. Click the **Sort & Filter** button on the Home tab. Select a sort order or select **Custom Sort** to define specific sort criteria.

Filter Data: Click the filter arrow for the column you want to filter. Uncheck the boxes for any data you want to hide. Click **OK**.

Add Table Rows or Columns: Select a cell in the row or column next to where you want to add blank cells. Click the **Insert** button list arrow on the Home tab. Select either **Insert Table Rows Above** or **Insert Table Columns to the Left**.

Tables

Remove Duplicate Values: Click any cell in the table and click the **Data** tab on the ribbon. Click the **Remove Duplicates** button. Select which columns you want to check for duplicates and click **OK**.

Insert a Slicer: With any cell in the table selected, click the **Design** tab on the ribbon. Click the **Insert Slicer** button. Select the columns you want to use as slicers and click **OK**.

Table Style Options: Click any cell in the table. Click the **Design** tab on the ribbon and select an option in the Table Style Options group.

Intermediate Formatting

Apply Conditional Formatting: Select the cells you want to format. On the **Home** tab, click the **Conditional Formatting** button. Select a conditional formatting category and then the rule you want to use. Specify the format to apply and click **OK**.

Apply Cell Styles: Select the cell(s) you want to format. On the Home tab, click the **Cell Styles** button and select a style from the menu. You can also select **New Cell Style** to define a custom style.

Apply a Workbook Theme: Click the **Page Layout** tab on the ribbon. Click the **Themes** button and select a theme from the menu.

Collaborate with Excel

Add a Cell Comment: Click the cell where you want to add a comment. Click the **Review** tab on the ribbon and click the **New Comment** button. Type your comment and then click outside of it to save the text.

Share a Workbook: Click the **Review** tab on the ribbon. Click the **Share Workbook** button and, in the dialog box, check the **Allow changes by more than one user** check box. Click **OK** and then click **OK** again to save the workbook.

Co-author Workbooks: When another user opens the workbook, click the user's picture or initials on the ribbon, to see what they are editing. Cells being edited by others appear with a colored border or shading.

Protect a Worksheet: Before protecting a worksheet, you need to unlock any cells you want to remain editable after the protection is applied. Then, click the **Review** tab on the ribbon and click the **Protect Sheet** button. Select what you want to remain editable after the sheet is protected.

Add a Workbook Password: Click the **File** tab and select **Save As**. Click **Browse** to select a save location. Click the **Tools** button in the dialog box and select **General Options**. Set a password to open and/or modify the workbook. Click **OK**.

Contact Us: sales@customguide.com

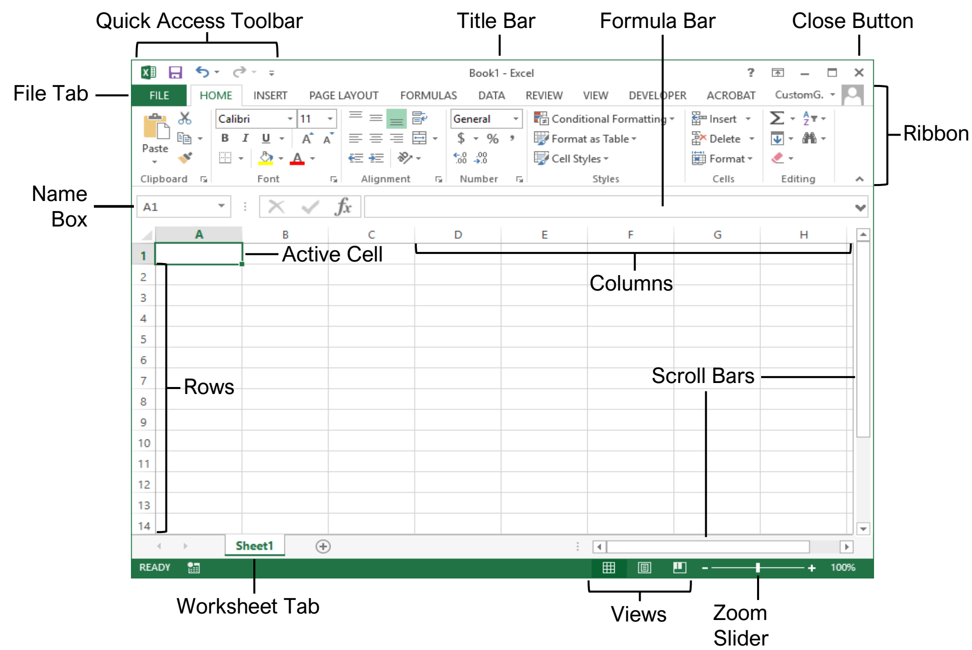
Microsoft®

Excel 2013 Basic

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

The Excel 2013 Program Screen



Getting Started

Create a Workbook: Click the **File** tab and select **New** or press **Ctrl** + **N**. Double-click a workbook.

Open a Workbook: Click the **File** tab and select **Open** or press **Ctrl** + **O**. Select a recent file or navigate to the location where the file is saved.

Preview and Print a Workbook: Click the **File** tab and select **Print**.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Use Zoom: Click and drag the zoom slider to the left or right.

Select a Cell: Click a cell or use the keyboard arrow keys to select it.

Select a Cell Range: Click and drag to select a range of cells. Or, press and hold down the **Shift** key while using the arrow keys to move the selection to the last cell of the range.

Select an Entire Worksheet: Click the **Select All** button where the column and row headings meet.

Select Non-Adjacent Cells: Click the first cell or cell range, hold down the **Ctrl** key, and select any non-adjacent cell or cell range.

Cell Address: Cells are referenced by an address made from their column letter and row number, such as cell A1, B2, etc.

Jump to a Cell: Click in the **Name Box**, type the cell address you want to go to, and press **Enter**.

Change Views: Click a **View** button in the status bar. Or, click the **View** tab and select a view.

Recover an Unsaved Workbook: Restart Excel. If a workbook can be recovered, it will appear in the Document Recovery pane. Or, click the **File** tab, click **Recover unsaved workbooks** to open the pane, and select a workbook from the pane.

Keyboard Shortcuts

General

Open a workbook	**Ctrl** + **O**
Create a new workbook	**Ctrl** + **N**
Save a workbook	**Ctrl** + **S**
Print a workbook	**Ctrl** + **P**
Close a workbook	**Ctrl** + **W**
Help	**F1**
Spell check	**F7**
Calculate worksheets	**F9**
Create absolute reference	**F4**

Navigation

Move between cells	↑, ↓, ←, →
Right one cell	**Tab**
Left one cell	**Shift** + **Tab**
Down one cell	**Enter**
Up one cell	**Shift** + **Enter**
Down one screen	**Page Down**
To first cell of active row	**Home**
Enable End mode	**End**
To cell A1	**Ctrl** + **Home**
To last cell	**Ctrl** + **End**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Edit active cell	**F2**
Clear cell contents	**Delete**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Open Format Cells dialog box	**Ctrl** + **Shift** + **F**
Select All	**Ctrl** + **A**
Select entire row	**Shift** + **Space**
Select entire column	**Ctrl** + **Space**
Hide selected rows	**Ctrl** + **9**
Hide selected columns	**Ctrl** + **0**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Edit a Workbook

Edit a Cell's Contents: Select a cell and click in the Formula Bar, or double-click the cell. Edit the cell's contents and press **Enter**.

Clear a Cell's Contents: Select the cell(s) and press the **Delete** key. Or, click the **Clear** button on the Home tab and select **Clear Contents**.

Cut or Copy Data: Select cell(s) and click the **Cut** or **Copy** button on the Home tab.

Paste Data: Select the cell where you want to paste the data and click the **Paste** button in the Clipboard group on the Home tab.

Preview an Item Before Pasting: Place the insertion point where you want to paste, click the **Paste** button list arrow in the Clipboard group on the Home tab, and hold the mouse over a paste option to preview.

Paste Special: Select the destination cell(s), click the **Paste** button list arrow in the Clipboard group on the Home tab, and select **Paste Special**. Select an option and click **OK**.

Move or Copy Cells Using Drag and Drop: Select the cell(s) you want to move or copy, position the pointer over any border of the selected cell(s), then drag to the destination cells. To copy, hold down the **Ctrl** key before starting to drag.

Find and Replace Text: Click the **Find & Select** button, select **Replace**. Type the text you want to find in the Find what box. Type the replacement text in the Replace with box. Click the **Replace All** or **Replace** button.

Check Spelling: Click the **Review** tab and click the **Spelling** button. For each result, select a suggestion and click the **Change**/**Change All** button. Or, click the **Ignore**/**Ignore All** button.

Insert a Column or Row: Right-click to the right of the column or below the row you want to insert. Select **Insert** in the menu, or click the **Insert** button on the Home tab.

Delete a Column or Row: Select the row or column heading(s) you want to remove. Right-click and select **Delete** from the contextual menu, or click the **Delete** button in the Cells group on the Home tab.

Hide Rows or Columns: Select the rows or columns you want to hide, click the **Format** button on the Home tab, select **Hide & Unhide**, and select **Hide Rows** or **Hide Columns**.

Basic Formatting

Change Cell Alignment: Select the cell(s) you want to align and click a vertical alignment , , button or a horizontal alignment , , button in the Alignment group on the Home tab.

Basic Formatting

Format Text: Use the commands in the Font group on the Home tab, or click the dialog box launcher in the Font group to open the dialog box.

Format Values: Use the commands in the Number group on the Home tab, or click the dialog box launcher in the Number group to open the Format Cells dialog box.

Wrap Text in a Cell: Select the cell(s) that contain text you want to wrap and click the **Wrap Text** button on the Home tab.

Merge Cells: Select the cells you want to merge. Click the **Merge & Center** button list arrow on the Home tab and select a merge option.

Cell Borders and Shading: Select the cell(s) you want to format. Click the **Borders** button and/or the **Fill Color** button and select an option to apply to the selected cell.

Copy Formatting with the Format Painter: Select the cell(s) with the formatting you want to copy. Click the **Format Painter** button in the Clipboard group on the Home tab. Then, select the cell(s) you want to apply the copied formatting to.

Adjust Column Width or Row Height: Click and drag the right border of the column header or the bottom border of the row header. Double-click the border to AutoFit the column or row according to its contents.

Basic Formulas

Enter a Formula: Select the cell where you want to insert the formula. Type **=** and enter the formula using values, cell references, operators, and functions. Press **Enter**.

Insert a Function: Select the cell where you want to enter the function and click the **Insert Function** f_x button next to the formula bar.

Reference a Cell in a Formula: Type the cell reference (for example, B5) in the formula or click the cell you want to reference.

SUM Function: Click the cell where you want to insert the total and click the **Sum** Σ button in the Editing group on the Home tab. Enter the cells you want to total, and press **Enter**.

MIN and MAX Functions: Click the cell where you want to place a minimum or maximum value for a given range. Click the **Sum** Σ button list arrow on the Home tab and select either **Min** or **Max**. Enter the cell range you want to reference, and press **Enter**.

COUNT Function: Click the cell where you want to place a count of the number of cells in a range that contain numbers. Click the **Sum** Σ button list arrow on the Home tab and select **Count Numbers**. Enter the cell range you want to reference, and press **Enter**.

Insert Objects

Complete a Series Using AutoFill: Select the cells that define the pattern, i.e. a series of months or years. Click and drag the fill handle to adjacent blank cells to complete the series.

Insert an Image: Click the **Insert** tab on the ribbon, click either the **Pictures** or **Online Pictures** button in the Illustrations group, select the image you want to insert, and click **Insert**.

Insert a Shape: Click the **Insert** tab on the ribbon, click the **Shapes** button in the Illustrations group, and select the shape you wish to insert.

Hyperlink Text or Images: Select the text or graphic you want to use as a hyperlink. Click the **Insert** tab, then click the **Link** button. Choose a type of hyperlink in the left pane of the Insert Hyperlink dialog box. Fill in the necessary informational fields in the right pane, then click **OK**.

Modify Object Properties and Alternative Text: Right-click an object. Select **Size and Properties** in the menu, and make the necessary modifications under the Properties and Alt Text headings.

View and Manage Worksheets

Insert a New Worksheet: Click the **Insert Worksheet** button next to the sheet tabs below the active sheet. Or, press **Shift** + **F11**.

Delete a Worksheet: Right-click the sheet tab and select **Delete** from the menu.

Rename a Worksheet: Double-click the sheet tab, enter a new name for the worksheet, and press **Enter**.

Change a Worksheet's Tab Color: Right-click the sheet tab, select **Tab Color**, and choose the color you want to apply.

Move or Copy a Worksheet: Click and drag a worksheet tab left or right to move it to a new location. Hold down the **Ctrl** key while clicking and dragging to copy the worksheet.

Freeze Panes: Activate the cell where you want to freeze the window, click the **View** tab on the ribbon, click the **Freeze Panes** button in the Window group, and select an option from the list.

Select a Print Area: Select the cell range you want to print, click the **Page Layout** tab on the ribbon, click the **Print Area** button, and select **Set Print Area**.

Adjust Page Margins, Orientation, Size, and Breaks: Click the **Page Layout** tab on the ribbon and use the commands in the Page Setup group, or click the dialog box launcher in the Page Setup group to open the Page Setup dialog box.

Contact Us: sales@customguide.com

Microsoft®

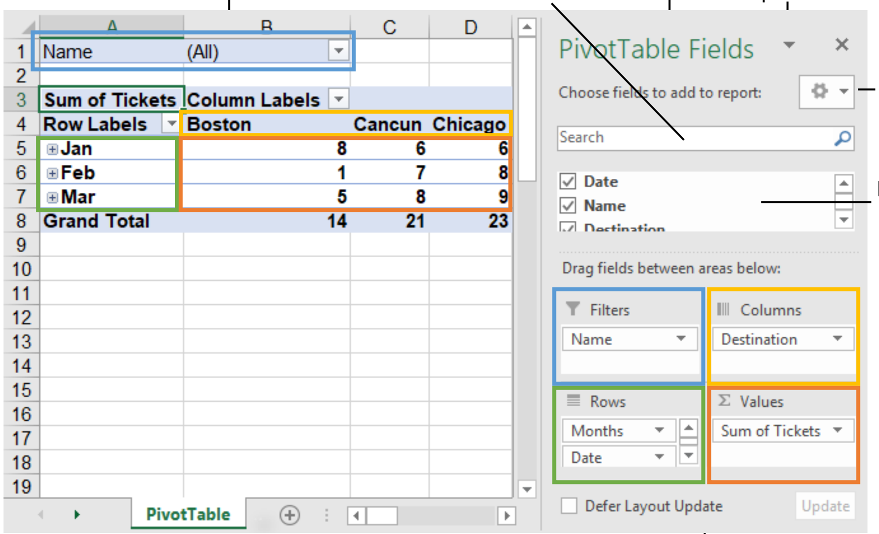
Excel 2016 Advanced

Quick Reference Guide

CustomGuide
Interactive Training

Free Cheat Sheets
Visit ref.customguide.com

PivotTable Elements



PivotTables

Create a PivotTable: Select the data range to be used by the PivotTable. Click the **Insert** tab on the ribbon and click the **PivotTable** button in the Tables group. Verify the range and then click **OK**.

Add Multiple PivotTable Fields: Click a field in the field list and drag it to one of the four PivotTable areas that contains one or more fields.

Filter PivotTables: Click and drag a field from the field list into the Filters area. Click the field's list arrow above the PivotTable and select the value(s) you want to filter.

Group PivotTable Values: Select a cell in the PivotTable that contains a value you want to group by. Click the **Analyze** tab on the ribbon and click the **Group Field** button. Specify how the PivotTable should be grouped and then click **OK**.

Refresh a PivotTable: With the PivotTable selected, click the **Analyze** tab on the ribbon. Click the **Refresh** button in the Data group.

Format a PivotTable: With the PivotTable selected, click the **Design** tab. Then, select the desired formatting options from the PivotTable Options group and the PivotTable Styles group.

PivotCharts

Create a PivotChart: Click any cell in a PivotTable and click the **Analyze** tab on the ribbon. Click the **PivotChart** button in the Tools group. Select a PivotChart type and click **OK**.

Modify PivotChart Data: Drag fields into and out of the field areas in the task pane.

Refresh a PivotChart: With the PivotChart selected, click the **Analyze** tab on the ribbon. Click the **Refresh** button in the Data group.

Modify PivotChart Elements: With the PivotChart selected, click the **Design** tab on the ribbon. Click the **Add Chart Element** button in the Chart Elements group and select the item(s) you want to add to the chart.

Apply a PivotChart Style: Select the PivotChart and click the **Design** tab on the ribbon. Select a style from the gallery in the Chart Styles group.

Update Chart Type: With the PivotChart selected, click the **Design** tab on the ribbon. Click the **Change Chart Type** button in the Type group. Select a new chart type and click **OK**.

Enable PivotChart Drill Down: Click the **Analyze** tab. Click the **Field Buttons** list arrow in the Show/Hide group and select **Show Expand/Collapse Entire Field Buttons**.

PivotTable Layout

PivotTable Fields Pane

The PivotTable Fields pane controls how data is represented in the PivotTable. Click anywhere in the PivotTable to activate the pane. It includes a Search field, a scrolling list of fields (these are the column headings in the data range used to create the PivotTable), and four areas in which fields are placed. These four areas include:

Filters: If a field is placed in the Filters area, a menu appears above the PivotTable. Each unique value from the field is an item in the menu, which can be used to filter PivotTable data.

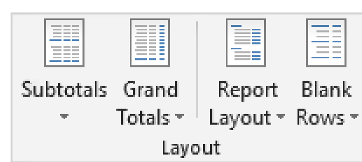
Column Labels: The unique values for the fields placed in the Columns area appear as column headings along the top of the PivotTable.

Row Labels: The unique values for the fields placed in the Rows area appear as row headings along the left side of the PivotTable.

Values: The values are the "meat" of the PivotTable, or the actual data that's calculated for the fields placed in the rows and/or columns area. Values are most often numeric calculations.

Not all PivotTables will have a field in each area, and sometimes there will be multiple fields in a single area.

The Layout Group



Subtotals: Show or hide subtotals and specify their location in the PivotTable.

Grand Totals: Add or remove grand total rows for columns and/or rows.

Report Layout: Adjust the report layout to show in compact, outline, or tabular form.

Blank Rows: Emphasize groups of data by manually adding blank rows between grouped items.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Macros

Enable the Developer Tab: Click the **File** tab and select **Options**. Select **Customize Ribbon** at the left. Check the **Developer** check box and click **OK**.

Record a Macro: Click the **Developer** tab on the ribbon and click the **Record Macro** button. Type a name, description and specify where to save it. Click **OK**. Complete the steps to be recorded. Click the **Stop Recording** button on the Developer tab.

Run a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select the macro and click **Run**.

Edit a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select a macro and click the **Edit** button. Make the necessary changes to the Visual Basic code and click the **Save** button.

Delete a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select a macro and click the **Delete** button.

Macro Security: Click the **Developer** tab on the ribbon and click the **Macro Security** button. Select a security level and click **OK.**

Troubleshoot Formulas

Common Formula Errors:

- **####### -** The column isn't wide enough to display all cell data.
- **#NAME? -** The text in the formula isn't recognized.
- **#VALUE! -** There is an error with one or more formula arguments.
- **#DIV/0 -** The formula is trying to divide a value by 0.
- **#REF! -** The formula references a cell that no longer exists.

Trace Precedents: Click the cell containing the value you want to trace and click the **Formulas** tab on the ribbon. Click the **Trace Precedents** button to see which cells affect the value in the selected cell.

Jan	Feb	Total
6,010	7,010	13,020

Error Checking: Select a cell containing an error. Click the **Formulas** tab on the ribbon and click the **Error Checking** button in the Formula Auditing group. Use the dialog to locate and fix the error.

The Watch Window: Select the cell you want to watch. Click the **Formulas** tab on the ribbon and click the **Watch Window** button. Click the **Add Watch** button. Ensure the correct cell is identified and click **Add**.

Evaluate a Formula: Select a cell with a formula. Click the **Formulas** tab on the ribbon and click the **Evaluate Formula** button.

Advanced Formatting

Customize Conditional Formatting: Click the **Conditional Formatting** button on the Home tab and select **New Rule**. Select a rule type and then edit the styles and values. Click **OK**.

Edit a Conditional Formatting Rule: Click the **Conditional Formatting** button on the Home tab and select **Manage Rules**. Select the rule you want to edit and click **Edit Rule**. Make your changes to the rule. Click **OK**.

Change the Order of Conditional Formatting Rules: Click the **Conditional Formatting** button on the Home tab and select **Manage Rules**. Select the rule you want to re-sequence. Click the **Move Up** or **Move Down** arrow until the rule is positioned correctly. Click **OK**.

Analyze Data

Goal Seek: Click the **Data** tab on the ribbon. Click the **What-If Analysis** button and select **Goal Seek**. Specify the desired value for the given cell and which cell can be changed to reach the desired result. Click **OK**.

Advanced Formulas

Nested Functions: A nested function is when one function is tucked inside another function as one of its arguments, like this:

`=IF(D2>AVERAGE(B2:B10),1,0)`

Initial Function | **Nested Function**

IF: Performs a logical test to return one value for a true result, and another for a false result.

`=IF(B2>69,"True","False")`

logical_test that can be evaluated as true or false | **value_if_true** value to return when the test is true | **value_if_false** value to return when the test is false

AND, OR, NOT: Often used with IF to support multiple conditions.

- **AND** requires multiple conditions.
- **OR** accepts several different conditions.
- **NOT** returns the opposite of the condition.

`=OR(B5="MN",B5="WI")`

logical1 the first condition to evaluate | **logical2** the second condition to evaluate

SUMIF and AVERAGEIF: Calculates cells that meet a condition.

- **SUMIF** finds the total.
- **AVERAGEIF** finds the average.

`=SUMIF(C6:C10,"MN",D6:D10)`

range of cells you want to apply criteria against | **criteria** used to determine what cells to sum or average | **calc_range** to calculate, if different than the range

Advanced Formulas

VLOOKUP: Looks for and retrieves data from a specific column in a table.

	A	B	C	D	E
1				Agent Sales	
2				5	7367
3					
4	Agent ID	First	Last	Packages	Sales
5	1	Joel	Nelson	6	6,602
6	2	Louis	Hay	7	8,246
7	3	Anton	Baril	11	13,683
8	4	Caroline	Jolie	12	14,108
9	5	Daniel	Ruiz	6	7,367

`=VLOOKUP(D2,A4:E10,5)`

value to look for in the first column of the table | **table** from which to retrieve a value | **col_index** the column number in the table from which to retrieve a value

HLOOKUP: Looks for and retrieves data from a specific row in a table.

`=HLOOKUP(B5,B2:I3,3)`

value to look for in the first row of the table | **table** from which to retrieve a value | **row_index** the row number in the table from which to retrieve a value

UPPER, LOWER, and PROPER: Changes how text is capitalized.

UPPER Case | lower case | Proper Case

`=UPPER(B4)`

text to change case or capitalization

LEFT and RIGHT: Extracts a given number of characters from the left or right.

`=LEFT(B5,3)`

text from which to extract characters | **num_chars** to extract from the left or right side of the text

MID: Extracts a given number of characters from the middle of text; the example below would return "day".

`=MID("Sunday",4,3)`

text from which to extract characters | **start_num** location of the first character to extract | **num_chars** the number of characters to extract

MATCH: Locates the position of a lookup value in a row or column.

`=MATCH("Dog",B2:B10)`

lookup_value to match in the lookup_array | **lookup_array** range of cells

INDEX: Returns a value or the reference to a value from within a range.

`=INDEX(A1:B5,2,2)`

array a range of cells | **row_num** the row position | **col_num** the column position (optional)

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Microsoft®

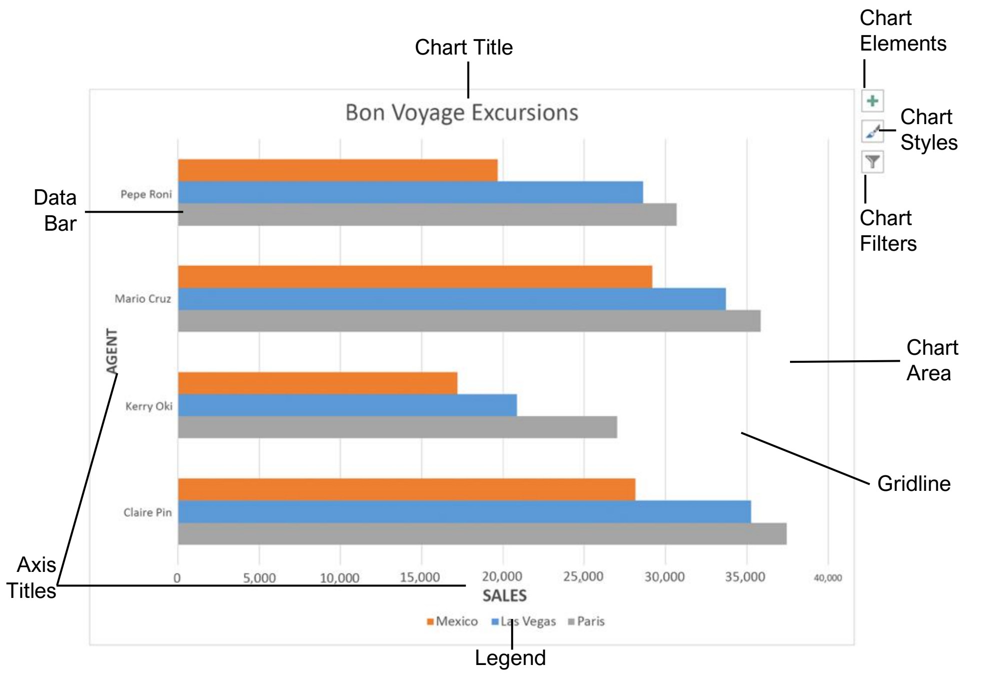
Excel 2016 Intermediate

Quick Reference Guide

CustomGuide
Interactive Training

Free Cheat Sheets
Visit ref.customguide.com

Chart Elements



Charts

[Create a Chart:](#) Select the cell range that contains the data you want to chart. Click the **Insert** tab on the ribbon. Click a chart type button in the Charts group and select the chart you want to insert.

[Move or Resize a Chart:](#) Select the chart. Place the cursor over the chart's border and, with the 4-headed arrow showing, click and drag to move it. Or, click and drag a sizing handle to resize it.

[Change the Chart Type:](#) Select the chart and click the **Design** tab. Click the **Change Chart Type** button and select a different chart.

[Filter a Chart:](#) With the chart you want to filter selected, click the **Filter** button next to it. Deselect the items you want to hide from the chart view and click the **Apply** button.

[Position a Chart's Legend:](#) Select the chart, click the **Chart Elements** button, click the **Legend** button, and select a position for the legend.

[Show or Hide Chart Elements:](#) Select the chart and click the **Chart Elements** button. Then, use the check boxes to show or hide each element.

[Insert a Trendline:](#) Select the chart where you want to add a trendline. Click the **Design** tab on the ribbon and click the **Add Chart Element** button. Select **Trendline** from the menu.

Charts

[Insert a Sparkline:](#) Select the cells you want to summarize. Click the **Insert** tab and select the sparkline you want to insert. In the Location Range field, enter the cell or cell range to place the sparkline and click **OK**.

[Create a Dual Axis Chart:](#) Select the cell range you want to chart, click the **Insert** tab, click the **Combo** button, and select a combo chart type.

Print and Distribute

[Set the Page Size:](#) Click the **Page Layout** tab. Click the **Size** button and select a page size.

[Set the Print Area:](#) Select the cell range you want to print. Click the **Page Layout** tab, click the **Print Area** button, and select **Set Print Area**.

[Print Titles, Gridlines, and Headings:](#) Click the **Page Layout** tab. Click the **Print Titles** button and set which items you wish to print.

[Add a Header or Footer:](#) Click the **Insert** tab and click the **Header & Footer** button. Complete the header and footer fields.

[Adjust Margins and Orientation:](#) Click the **Page Layout** tab. Click the **Margins** button to select from a list of common page margins. Click the **Orientation** button to choose Portrait or Landscape orientation.

Chart Options

Chart Types

Column: Used to compare different values vertically side-by-side. Each value is represented in the chart by a vertical bar.

Line: Used to illustrate trends over time (days, months, years). Each value is plotted as a point on the chart and values are connected by a line.

Pie: Useful for showing values as a percentage of a whole when all the values add up to 100%. The values for each item are represented by different colors.

Bar: Similar to column charts, except they display information in horizontal bars rather than in vertical columns.

Area: Similar to line charts, except the areas beneath the lines are filled with color.

XY (Scatter): Used to plot clusters of values using single points. Multiple items can be plotted by using different colored points or different point symbols.

Stock: Effective for reporting the fluctuation of stock prices, such as the high, low, and closing points for a certain day.

Surface: Useful for finding optimum combinations between two sets of data. Colors and patterns indicate values that are in the same range.

Additional Chart Elements

Data Labels: Display values from the cells of the worksheet on the plot area of the chart.

Data Table: A table added next to the chart that shows the worksheet data the chart is illustrating.

Error Bars: Help you quickly identify standard deviations and error margins.

Trendline: Identifies the trend of the current data, not actual values. Can also identify forecasts for future data.

Intermediate Formulas

Absolute References: Absolute references always refer to the same cell, even if the formula is moved. In the formula bar, add dollar signs ($) to the reference you want to remain absolute (for example, **$A$1** makes the column and row remain constant).

Name a Cell or Range: Select the cell(s), click the Name box in the Formula bar, type a name for the cell or range, and press **Enter**. Names can be used in formulas instead of cell addresses, for example: **=B4*Rate**.

Reference Other Worksheets: To reference another worksheet in a formula, add an exclamation point '!' after the sheet name in the formula, for example: **=FebruarySales!B4**.

Reference Other Workbooks: To reference another workbook in a formula, add brackets '[ ]' around the file name in the formula, for example: **=[FebruarySales.xlsx]Sheet1!$B$4**.

Order of Operations: When calculating a formula, Excel performs operations in the following order: Parentheses, Exponents, Multiplication and Division, and finally Addition and Subtraction (as they appear left to right). Use this mnemonic device to remember them:

Please	Parentheses
Excuse	Exponents
My	Multiplication
Dear	Division
Aunt	Addition
Sally	Subtraction

Concatenate Text: Use the CONCAT function **=CONCAT(text1,text2,…)** to join the text from multiple cells into a single cell. Use the arguments within the function to define the text you want to combine as well as any spaces or punctuation.

Payment Function: Use the PMT function **=PMT(rate,nper,pv,…)** to calculate a loan amount. Use the arguments within the function to define the loan rate, number of periods, and present value and Excel calculates the payment amount.

Date Functions: Date functions are used to add a specific date to a cell. Some common date functions in Excel include:

Date	=DATE(year,month,day)
Today	=TODAY()
Now	=NOW()

Display Worksheet Formulas: Click the **Formulas** tab on the ribbon and then click the **Show Formulas** button. Click the **Show Formulas** button again to turn off the formula view.

Manage Data

Export Data: Click the **File** tab. At the left, select **Export** and click **Change File Type**. Select the file type you want to export the data to and click **Save As**.

Import Data: Click the **Data** tab on the ribbon and click the **Get Data** button. Select the category and data type, and then the file you want to import. Click **Import**, verify the preview, and then click the **Load** button.

Use the Quick Analysis Tools: Select the cell range you want to summarize. Click the **Quick Analysis** button that appears. Select the analysis tool you want to use. Choose from formatting, charts, totals, tables, or sparklines.

Outline and Subtotal: Click the **Data** tab on the ribbon and click the **Subtotal** button. Use the dialog box to define which column you want to subtotal and the calculation you want to use. Click **OK**.

Use Flash Fill: Click in the cell to the right of the cell(s) where you want to extract or combine data. Start typing the data in the column. When a pattern is recognized, Excel predicts the remaining values for the column. Press **Enter** to accept the Flash Fill values.

Create a Data Validation Rule: Select the cells you want to validate. Click the **Data** tab and click the **Data Validation** button. Click the **Allow** list arrow and select the data you want to allow. Set additional validation criteria options and click **OK**.

Tables

Format a Cell Range as a Table: Select the cells you want to apply table formatting to. Click the **Format as Table** button in the Styles group of the Home tab and select a table format from the gallery.

	A	B	C	D
1	Excursion	Jan	Feb	Mar
2	Beijing	6,010	7,010	6,520
3	Las Vegas	35,250	28,125	37,455
4	México DF	20,850	17,200	27,010
5	Paris	33,710	29,175	35,840
6	Tokyo	12,510	14,750	11,490
7	Total	108,330	96,260	118,315

Sort Data: Select a cell in the column you want to sort. Click the **Sort & Filter** button on the Home tab. Select a sort order or select **Custom Sort** to define specific sort criteria.

Filter Data: Click the filter arrow for the column you want to filter. Uncheck the boxes for any data you want to hide. Click **OK**.

Add Table Rows or Columns: Select a cell in the row or column next to where you want to add blank cells. Click the **Insert** button list arrow on the Home tab. Select either **Insert Table Rows Above** or **Insert Table Columns to the Left**.

Tables

Remove Duplicate Values: Click any cell in the table and click the **Data** tab on the ribbon. Click the **Remove Duplicates** button. Select which columns you want to check for duplicates and click **OK**.

Insert a Slicer: With any cell in the table selected, click the **Design** tab on the ribbon. Click the **Insert Slicer** button. Select the columns you want to use as slicers and click **OK**.

Table Style Options: Click any cell in the table. Click the **Design** tab on the ribbon and select an option in the Table Style Options group.

Intermediate Formatting

Apply Conditional Formatting: Select the cells you want to format. On the **Home** tab, click the **Conditional Formatting** button. Select a conditional formatting category and then the rule you want to use. Specify the format to apply and click **OK**.

Apply Cell Styles: Select the cell(s) you want to format. On the Home tab, click the **Cell Styles** button and select a style from the menu. You can also select **New Cell Style** to define a custom style.

Apply a Workbook Theme: Click the **Page Layout** tab on the ribbon. Click the **Themes** button and select a theme from the menu.

Collaborate with Excel

Add a Cell Comment: Click the cell where you want to add a comment. Click the **Review** tab on the ribbon and click the **New Comment** button. Type your comment and then click outside of it to save the text.

Share a Workbook: Click the **Review** tab on the ribbon. Click the **Share Workbook** button and, in the dialog box, check the **Allow changes by more than one user** check box. Click **OK** and then click **OK** again to save the workbook.

Co-author Workbooks: When another user opens the workbook, click the user's picture or initials on the ribbon, to see what they are editing. Cells being edited by others appear with a colored border or shading.

Protect a Worksheet: Before protecting a worksheet, you need to unlock any cells you want to remain editable after the protection is applied. Then, click the **Review** tab on the ribbon and click the **Protect Sheet** button. Select what you want to remain editable after the sheet is protected.

Add a Workbook Password: Click the **File** tab and select **Save As**. Click **Browse** to select a save location. Click the **Tools** button in the dialog box and select **General Options**. Set a password to open and/or modify the workbook. Click **OK**.

Microsoft®

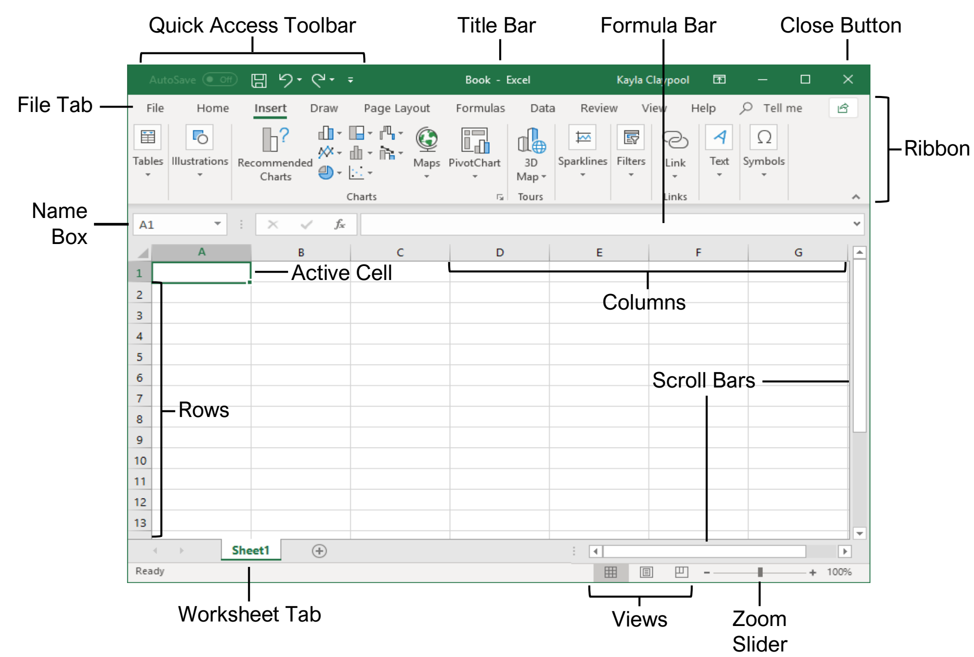
Excel 2016 Basic

Quick Reference Guide

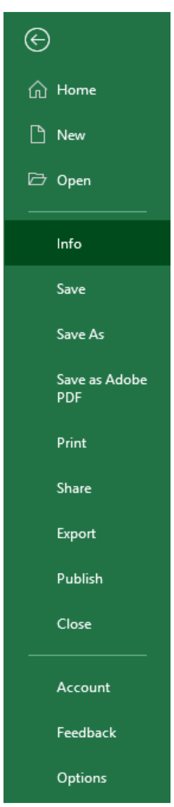
CustomGuide
Interactive Training

Free Cheat Sheets
Visit ref.customguide.com

The Excel 2016 Program Screen



Getting Started



Create a Workbook: Click the **File** tab and select **New** or press **Ctrl** + **N**. Double-click a workbook.

Open a Workbook: Click the **File** tab and select **Open** or press **Ctrl** + **O**. Select a recent file or navigate to the location where the file is saved.

Preview and Print a Workbook: Click the **File** tab and select **Print**.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Use Zoom: Click and drag the zoom slider to the left or right.

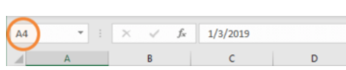
Select a Cell: Click a cell or use the keyboard arrow keys to select it.

Select a Cell Range: Click and drag to select a range of cells. Or, press and hold down the **Shift** key while using the arrow keys to move the selection to the last cell of the range.

Select an Entire Worksheet: Click the **Select All** button where the column and row headings meet.

Select Non-Adjacent Cells: Click the first cell or cell range, hold down the **Ctrl** key, and select any non-adjacent cell or cell range.

Cell Address: Cells are referenced by the coordinates made from their column letter and row number, such as cell A1, B2, etc.



Jump to a Cell: Click in the **Name Box**, type the cell address you want to go to, and press **Enter**.

Change Views: Click a **View** button in the status bar. Or, click the **View** tab and select a view.

Recover an Unsaved Workbook: Restart Excel. If a workbook can be recovered, it will appear in the Document Recovery pane. Or, click the **File** tab, click **Recover unsaved workbooks** to open the pane, and select a workbook from the pane.

Keyboard Shortcuts

General

Open a workbook	**Ctrl** + **O**
Create a new workbook	**Ctrl** + **N**
Save a workbook	**Ctrl** + **S**
Print a workbook	**Ctrl** + **P**
Close a workbook	**Ctrl** + **W**
Help	**F1**
Activate Tell Me field	**Alt** + **Q**
Spell check	**F7**
Calculate worksheets	**F9**
Create absolute reference	**F4**

Navigation

Move between cells	↑, ↓, ←, →
Right one cell	**Tab**
Left one cell	**Shift** + **Tab**
Down one cell	**Enter**
Up one cell	**Shift** + **Enter**
Down one screen	**Page Down**
To first cell of active row	**Home**
Enable End mode	**End**
To cell A1	**Ctrl** + **Home**
To last cell	**Ctrl** + **End**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Edit active cell	**F2**
Clear cell contents	**Delete**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Open Format Cells dialog box	**Ctrl** + **Shift** + **F**
Select All	**Ctrl** + **A**
Select entire row	**Shift** + **Space**
Select entire column	**Ctrl** + **Space**
Hide selected rows	**Ctrl** + **9**
Hide selected columns	**Ctrl** + **0**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Edit a Workbook

Edit a Cell's Contents: Select a cell and click in the Formula Bar or double-click the cell. Edit the cell's contents and press **Enter**.

Clear a Cell's Contents: Select the cell(s) and press the **Delete** key. Or, click the **Clear** button on the Home tab and select **Clear Contents**.

Cut or Copy Data: Select cell(s) and click the **Cut** or **Copy** button on the Home tab.

Paste Data: Select the cell where you want to paste the data and click the **Paste** button in the Clipboard group on the Home tab.

Preview an Item Before Pasting: Place the insertion point where you want to paste, click the **Paste** button list arrow in the Clipboard group on the Home tab, and hold the mouse over a paste option to preview.

Paste Special: Select the destination cell(s), click the **Paste** button list arrow in the Clipboard group on the Home tab, and select **Paste Special**. Select an option and click **OK**.

Move or Copy Cells Using Drag and Drop: Select the cell(s) you want to move or copy, position the pointer over any border of the selected cell(s), then drag to the destination cells. To copy, hold down the **Ctrl** key before starting to drag.

Find and Replace Text: Click the **Find & Select** button, select **Replace**. Type the text you want to find in the Find what box. Type the replacement text in the Replace with box. Click the **Replace All** or **Replace** button.

Check Spelling: Click the **Review** tab and click the **Spelling** button. For each result, select a suggestion and click the **Change**/**Change All** button. Or, click the **Ignore**/**Ignore All** button.

Insert a Column or Row: Right-click to the right of the column or below the row you want to insert. Select **Insert** in the menu, or click the **Insert** button on the Home tab.

Delete a Column or Row: Select the row or column heading(s) you want to remove. Right-click and select **Delete** from the contextual menu, or click the **Delete** button in the Cells group on the Home tab.

Hide Rows or Columns: Select the rows or columns you want to hide, click the **Format** button on the Home tab, select **Hide & Unhide**, and select **Hide Rows** or **Hide Columns**.

Basic Formatting

Change Cell Alignment: Select the cell(s) you want to align and click a vertical alignment button or a horizontal alignment button in the Alignment group on the Home tab.

Basic Formatting

Format Text: Use the commands in the Font group on the Home tab or click the dialog box launcher in the Font group to open the dialog box.

Format Values: Use the commands in the Number group on the Home tab or click the dialog box launcher in the Number group to open the Format Cells dialog box.

Wrap Text in a Cell: Select the cell(s) that contain text you want to wrap and click the **Wrap Text** button on the Home tab.

Merge Cells: Select the cells you want to merge. Click the **Merge & Center** button list arrow on the Home tab and select a merge option.

Cell Borders and Shading: Select the cell(s) you want to format. Click the **Borders** button and/or the **Fill Color** button and select an option to apply to the selected cell.

Copy Formatting with the Format Painter: Select the cell(s) with the formatting you want to copy. Click the **Format Painter** button in the Clipboard group on the Home tab. Then, select the cell(s) you want to apply the copied formatting to.

Adjust Column Width or Row Height: Click and drag the right border of the column header or the bottom border of the row header. Double-click the border to AutoFit the column or row according to its contents.

Basic Formulas

Enter a Formula: Select the cell where you want to insert the formula. Type **=** and enter the formula using values, cell references, operators, and functions. Press **Enter**.

Insert a Function: Select the cell where you want to enter the function and click the **Insert Function** button next to the formula bar.

Reference a Cell in a Formula: Type the cell reference (for example, B5) in the formula or click the cell you want to reference.

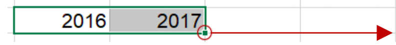
SUM Function: Click the cell where you want to insert the total and click the **Sum** button in the Editing group on the Home tab. Enter the cells you want to total, and press **Enter**.

MIN and MAX Functions: Click the cell where you want to place a minimum or maximum value for a given range. Click the **Sum** button list arrow on the Home tab and select either **Min** or **Max**. Enter the cell range you want to reference, and press **Enter**.

COUNT Function: Click the cell where you want to place a count of the number of cells in a range that contain numbers. Click the **Sum** button list arrow on the Home tab and select **Count Numbers**. Enter the cell range you want to reference, and press **Enter**.

Insert Objects

Complete a Series Using AutoFill: Select the cells that define the pattern, i.e. a series of months or years. Click and drag the fill handle to adjacent blank cells to complete the series.



Insert an Image: Click the **Insert** tab on the ribbon, click either the **Pictures** or **Online Pictures** button in the Illustrations group, select the image you want to insert, and click **Insert**.

Insert a Shape: Click the **Insert** tab on the ribbon, click the **Shapes** button in the Illustrations group, and select the shape you wish to insert.

Hyperlink Text or Images: Select the text or graphic you want to use as a hyperlink. Click the **Insert** tab, then click the **Link** button. Choose a type of hyperlink in the left pane of the Insert Hyperlink dialog box. Fill in the necessary informational fields in the right pane, then click **OK**.

Modify Object Properties and Alternative Text: Right-click an object. Select **Edit Alt Text** in the menu and make the necessary modifications under the Properties and Alt Text headings.

View and Manage Worksheets

Insert a New Worksheet: Click the **Insert Worksheet** button next to the sheet tabs below the active sheet. Or, press **Shift** + **F11**.

Delete a Worksheet: Right-click the sheet tab and select **Delete** from the menu.

Hide a Worksheet: Right-click the sheet tab and select **Hide** from the menu.

Rename a Worksheet: Double-click the sheet tab, enter a new name for the worksheet, and press **Enter**.

Change a Worksheet's Tab Color: Right-click the sheet tab, select **Tab Color**, and choose the color you want to apply.

Move or Copy a Worksheet: Click and drag a worksheet tab left or right to move it to a new location. Hold down the **Ctrl** key while clicking and dragging to copy the worksheet.

Freeze Panes: Activate the cell where you want to freeze the window, click the **View** tab, click the **Freeze Panes** button in the Window group, and select an option from the list.

Select a Print Area: Select the cell range you want to print, click the **Page Layout** tab on the ribbon, click the **Print Area** button, and select **Set Print Area**.

Adjust Page Margins, Orientation, Size, and Breaks: Click the **Page Layout** tab and use the commands in the Page Setup group, or click the dialog box launcher in the Page Setup group to open the Page Setup dialog box.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Microsoft®

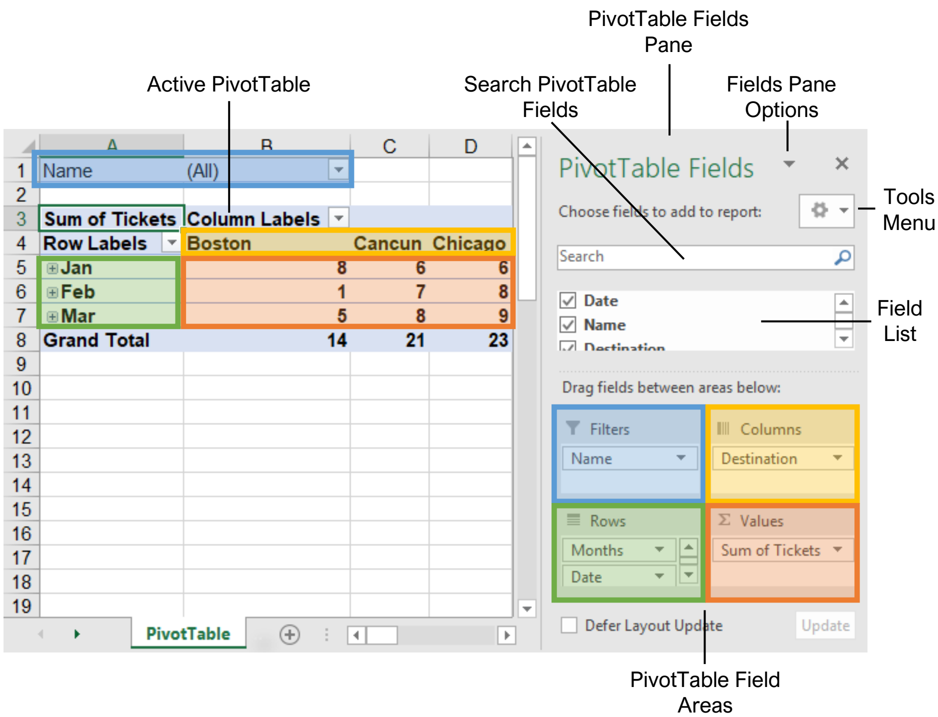
Excel 2019 Advanced

Quick Reference Guide

CustomGuide
Interactive Training

Free Cheat Sheets
Visit ref.customguide.com

PivotTable Elements



PivotTables

Create a PivotTable: Select the data range to be used by the PivotTable. Click the **Insert** tab on the ribbon and click the **PivotTable** button in the Tables group. Verify the range and then click **OK**.

Add Multiple PivotTable Fields: Click a field in the field list and drag it to one of the four PivotTable areas that contains one or more fields.

Filter PivotTables: Click and drag a field from the field list into the Filters area. Click the field's list arrow above the PivotTable and select the value(s) you want to filter.

Group PivotTable Values: Select a cell in the PivotTable that contains a value you want to group by. Click the **Analyze** tab on the ribbon and click the **Group Field** button. Specify how the PivotTable should be grouped and then click **OK**.

Refresh a PivotTable: With the PivotTable selected, click the **Analyze** tab on the ribbon. Click the **Refresh** button in the Data group.

Format a PivotTable: With the PivotTable selected, click the **Design** tab. Then, select the desired formatting options from the PivotTable Options group and the PivotTable Styles group.

PivotCharts

Create a PivotChart: Click any cell in a PivotTable and click the **Analyze** tab on the ribbon. Click the **PivotChart** button in the Tools group. Select a PivotChart type and click **OK**.

Modify PivotChart Data: Drag fields into and out of the field areas in the task pane.

Refresh a PivotChart: With the PivotChart selected, click the **Analyze** tab on the ribbon. Click the **Refresh** button in the Data group.

Modify PivotChart Elements: With the PivotChart selected, click the **Design** tab on the ribbon. Click the **Add Chart Element** button in the Chart Elements group and select the item(s) you want to add to the chart.

Apply a PivotChart Style: Select the PivotChart and click the **Design** tab on the ribbon. Select a style from the gallery in the Chart Styles group.

Update Chart Type: With the PivotChart selected, click the **Design** tab on the ribbon. Click the **Change Chart Type** button in the Type group. Select a new chart type and click **OK**.

Enable PivotChart Drill Down: Click the **Analyze** tab. Click the **Field Buttons** list arrow in the Show/Hide group and select **Show Expand/Collapse Entire Field Buttons**.

PivotTable Layout

PivotTable Fields Pane

The PivotTable Fields pane controls how data is represented in the PivotTable. Click anywhere in the PivotTable to activate the pane. It includes a Search field, a scrolling list of fields (these are the column headings in the data range used to create the PivotTable), and four areas in which fields are placed. These four areas include:

Filters: If a field is placed in the Filters area, a menu appears above the PivotTable. Each unique value from the field is an item in the menu, which can be used to filter PivotTable data.

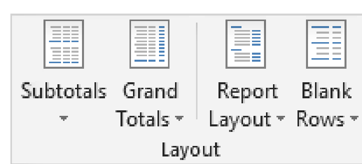
Column Labels: The unique values for the fields placed in the Columns area appear as column headings along the top of the PivotTable.

Row Labels: The unique values for the fields placed in the Rows area appear as row headings along the left side of the PivotTable.

Values: The values are the "meat" of the PivotTable, or the actual data that's calculated for the fields placed in the rows and/or columns area. Values are most often numeric calculations.

Not all PivotTables will have a field in each area, and sometimes there will be multiple fields in a single area.

The Layout Group



Subtotals: Show or hide subtotals and specify their location in the PivotTable.

Grand Totals: Add or remove grand total rows for columns and/or rows.

Report Layout: Adjust the report layout to show in compact, outline, or tabular form.

Blank Rows: Emphasize groups of data by manually adding blank rows between grouped items.

Contact Us: sales@customguide.com

Macros

Enable the Developer Tab: Click the **File** tab and select **Options**. Select **Customize Ribbon** at the left. Check the **Developer** check box and click **OK**.

Record a Macro: Click the **Developer** tab on the ribbon and click the **Record Macro** button. Type a name and description then specify where to save it. Click **OK**. Complete the steps to be recorded. Click the **Stop Recording** button on the Developer tab.

Run a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select the macro and click **Run**.

Edit a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select a macro and click the **Edit** button. Make the necessary changes to the Visual Basic code and click the **Save** button.

Delete a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select a macro and click the **Delete** button.

Macro Security: Click the **Developer** tab on the ribbon and click the **Macro Security** button. Select a security level and click **OK.**

Troubleshoot Formulas

Common Formula Errors:

- **####### -** The column isn't wide enough to display all cell data.
- **#NAME? -** The text in the formula isn't recognized.
- **#VALUE! -** There is an error with one or more formula arguments.
- **#DIV/0 -** The formula is trying to divide a value by 0.
- **#REF! -** The formula references a cell that no longer exists.

Trace Precedents: Click the cell containing the value you want to trace and click the **Formulas** tab on the ribbon. Click the **Trace Precedents** button to see which cells affect the value in the selected cell.

Jan	Feb	Total
6,010	7,010	13,020

Error Checking: Select a cell containing an error. Click the **Formulas** tab on the ribbon and click the **Error Checking** button in the Formula Auditing group. Use the dialog to locate and fix the error.

The Watch Window: Select the cell you want to watch. Click the **Formulas** tab on the ribbon and click the **Watch Window** button. Click the **Add Watch** button. Ensure the correct cell is identified and click **Add**.

Evaluate a Formula: Select a cell with a formula. Click the **Formulas** tab on the ribbon and click the **Evaluate Formula** button.

Advanced Formatting

Customize Conditional Formatting: Click the **Conditional Formatting** button on the Home tab and select **New Rule**. Select a rule type, then edit the styles and values. Click **OK**.

Edit a Conditional Formatting Rule: Click the **Conditional Formatting** button on the Home tab and select **Manage Rules**. Select the rule you want to edit and click **Edit Rule**. Make your changes to the rule. Click **OK**.

Change the Order of Conditional Formatting Rules: Click the **Conditional Formatting** button on the Home tab and select **Manage Rules**. Select the rule you want to re-sequence. Click the **Move Up** or **Move Down** arrow until the rule is positioned correctly. Click **OK**.

Analyze Data

Goal Seek: Click the **Data** tab on the ribbon. Click the **What-If Analysis** button and select **Goal Seek**. Specify the desired value for the given cell and which cell can be changed to reach the desired result. Click **OK**.

Advanced Formulas

Nested Functions: A nested function is when one function is tucked inside another function as one of its arguments, like this:

=IF(D2>AVERAGE(B2:B10),1,0)

Initial Function | **Nested Function**

IF: Performs a logical test to return one value for a true result, and another for a false result.

=IF(B2>69,"True","False")

logical_test that can be evaluated as true or false | **value_if_true** value to return when the test is true | **value_if_false** value to return when the test is false

AND, OR, NOT: Often used with IF to support multiple conditions.

- **AND** requires multiple conditions.
- **OR** accepts several different conditions.
- **NOT** returns the opposite of the condition.

=OR(B5="MN",B5="WI")

logical1 the first condition to evaluate | **logical2** the second condition to evaluate

SUMIF and AVERAGEIF: Calculates cells that meet a condition.

- **SUMIF** finds the total.
- **AVERAGEIF** finds the average.

=SUMIF(C6:C10,"MN",D6:D10)

range of cells you want to apply criteria against | **criteria** used to determine what cells to sum or average | **calc_range** to calculate, if different than the range

Advanced Formulas

VLOOKUP: Looks for and retrieves data from a specific column in a table.

	A	B	C	D	E
1				Agent Sales	
2				5	7367
3					
4	Agent ID	First	Last	Packages	Sales
5	1	Joel	Nelson	6	6,602
6	2	Louis	Hay	7	8,246
7	3	Anton	Baril	11	13,683
8	4	Caroline	Jolie	12	14,108
9	5	Daniel	Ruiz	6	7,367

=VLOOKUP(D2,A4:E10,5)

value to look for in the first column of the table | **table** from which to retrieve a value | **col_index** the column number in the table from which to retrieve a value

HLOOKUP: Looks for and retrieves data from a specific row in a table.

=HLOOKUP(B5,B2:I3,3)

value to look for in the first row of the table | **table** from which to retrieve a value | **row_index** the row number in the table from which to retrieve a value

UPPER, LOWER, and PROPER: Changes how text is capitalized.

UPPER Case | lower case | Proper Case

=UPPER(B4)

text to change case or capitalization

LEFT and RIGHT: Extracts a given number of characters from the left or right.

=LEFT(B5,3)

text from which to extract characters | **num_chars** to extract from the left or right side of the text

MID: Extracts a given number of characters from the middle of text; the example below would return "day".

=MID("Sunday",4,3)

text from which to extract characters | **start_num** location of the first character to extract | **num_chars** the number of characters to extract

MATCH: Locates the position of a lookup value in a row or column.

=MATCH("Dog",B2:B10)

lookup_value to match in the lookup_array | **lookup_array** range of cells

INDEX: Returns a value or the reference to a value from within a range.

=INDEX(A1:B5,2,2)

array a range of cells | **row_num** the row position | **col_num** the column position (optional)

Microsoft®

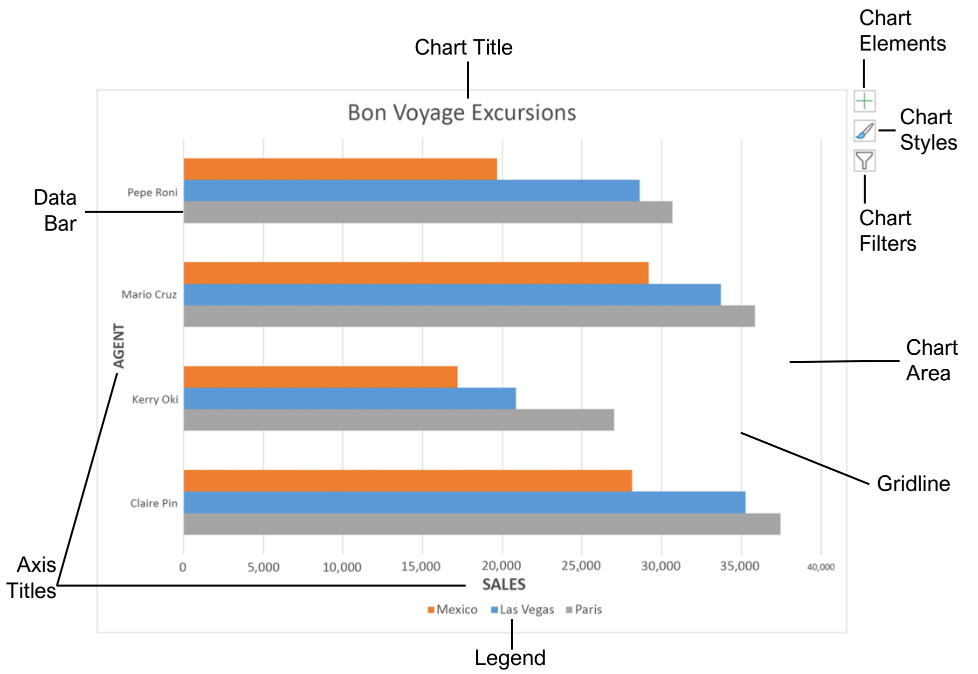
Excel 2019 Intermediate

Quick Reference Guide

CustomGuide
Interactive Training

Free Cheat Sheets
Visit ref.customguide.com

Chart Elements



Charts

Create a Chart: Select the cell range that contains the data you want to chart. Click the **Insert** tab on the ribbon. Click a chart type button in the Charts group and select the chart you want to insert.

Move or Resize a Chart: Select the chart. Place the cursor over the chart's border and, with the 4-headed arrow showing, click and drag to move it. Or, click and drag a sizing handle to resize it.

Change the Chart Type: Select the chart and click the **Design** tab. Click the **Change Chart Type** button and select a different chart.

Filter a Chart: With the chart you want to filter selected, click the **Filter** button next to it. Deselect the items you want to hide from the chart view and click the **Apply** button.

Position a Chart's Legend: Select the chart, click the **Chart Elements** button, click the **Legend** button, and select a position for the legend.

Show or Hide Chart Elements: Select the chart and click the **Chart Elements** button. Then, use the check boxes to show or hide each element.

Insert a Trendline: Select the chart where you want to add a trendline. Click the **Design** tab on the ribbon and click the **Add Chart Element** button. Select **Trendline** from the menu.

Charts

Insert a Sparkline: Select the cells you want to summarize. Click the **Insert** tab and select the sparkline you want to insert. In the Location Range field, enter the cell or cell range to place the sparkline and click **OK**.

Create a Dual Axis Chart: Select the cell range you want to chart, click the **Insert** tab, click the **Combo** button, and select a combo chart type.

Print and Distribute

Set the Page Size: Click the **Page Layout** tab. Click the **Size** button and select a page size.

Set the Print Area: Select the cell range you want to print. Click the **Page Layout** tab, click the **Print Area** button, and select **Set Print Area**.

Print Titles, Gridlines, and Headings: Click the **Page Layout** tab. Click the **Print Titles** button and set which items you wish to print.

Add a Header or Footer: Click the **Insert** tab and click the **Header & Footer** button. Complete the header and footer fields.

Adjust Margins and Orientation: Click the **Page Layout** tab. Click the **Margins** button to select from a list of common page margins. Click the **Orientation** button to choose Portrait or Landscape orientation.

Chart Options

Chart Types

Column: Used to compare different values vertically side-by-side. Each value is represented in the chart by a vertical bar.

Line: Used to illustrate trends over time (days, months, years). Each value is plotted as a point on the chart and values are connected by a line.

Pie: Useful for showing values as a percentage of a whole when all the values add up to 100%. The values for each item are represented by different colors.

Bar: Similar to column charts, except they display information in horizontal bars rather than in vertical columns.

Area: Similar to line charts, except the areas beneath the lines are filled with color.

XY (Scatter): Used to plot clusters of values using single points. Multiple items can be plotted by using different colored points or different point symbols.

Stock: Effective for reporting the fluctuation of stock prices, such as the high, low, and closing points for a certain day.

Surface: Useful for finding optimum combinations between two sets of data. Colors and patterns indicate values that are in the same range.

Additional Chart Elements

Data Labels: Display values from the cells of the worksheet on the plot area of the chart.

Data Table: A table added next to the chart that shows the worksheet data the chart is illustrating.

Error Bars: Help you quickly identify standard deviations and error margins.

Trendline: Identifies the trend of the current data, not actual values. Can also identify forecasts for future data.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Intermediate Formulas

Absolute References: Absolute references always refer to the same cell, even if the formula is moved. In the formula bar, add dollar signs ($) to the reference you want to remain absolute (for example, **$A$1** makes the column and row remain constant).

Name a Cell or Range: Select the cell(s), click the Name box in the Formula bar, type a name for the cell or range, and press **Enter**. Names can be used in formulas instead of cell addresses, for example: **=B4*Rate**.

Reference Other Worksheets: To reference another worksheet in a formula, add an exclamation point '!' after the sheet name in the formula, for example: **=FebruarySales!B4**.

Reference Other Workbooks: To reference another workbook in a formula, add brackets '[ ]' around the file name in the formula, for example: **=[FebruarySales.xlsx]Sheet1!$B$4**.

Order of Operations: When calculating a formula, Excel performs operations in the following order: Parentheses, Exponents, Multiplication and Division, and finally Addition and Subtraction (as they appear left to right). Use this mnemonic device to remember them:

Please	Parentheses
Excuse	Exponents
My	Multiplication
Dear	Division
Aunt	Addition
Sally	Subtraction

Concatenate Text: Use the CONCAT function **=CONCAT(text1,text2,…)** to join the text from multiple cells into a single cell. Use the arguments within the function to define the text you want to combine as well as any spaces or punctuation.

Payment Function: Use the PMT function **=PMT(rate,nper,pv,…)** to calculate a loan amount. Use the arguments within the function to define the loan rate, number of periods, and present value and Excel calculates the payment amount.

Date Functions: Date functions are used to add a specific date to a cell. Some common date functions in Excel include:

Date	=DATE(year,month,day)
Today	=TODAY()
Now	=NOW()

Display Worksheet Formulas: Click the **Formulas** tab on the ribbon and then click the **Show Formulas** button. Click the **Show Formulas** button again to turn off the formula view.

Manage Data

Export Data: Click the **File** tab. At the left, select **Export** and click **Change File Type**. Select the file type you want to export the data to and click **Save As**.

Import Data: Click the **Data** tab on the ribbon and click the **Get Data** button. Select the category and data type, and then the file you want to import. Click **Import**, verify the preview, and then click the **Load** button.

Use the Quick Analysis Tools: Select the cell range you want to summarize. Click the **Quick Analysis** button that appears. Select the analysis tool you want to use. Choose from formatting, charts, totals, tables, or sparklines.

Outline and Subtotal: Click the **Data** tab on the ribbon and click the **Subtotal** button. Use the dialog box to define which column you want to subtotal and the calculation you want to use. Click **OK**.

Use Flash Fill: Click in the cell to the right of the cell(s) where you want to extract or combine data. Start typing the data in the column. When a pattern is recognized, Excel predicts the remaining values for the column. Press **Enter** to accept the Flash Fill values.

Create a Data Validation Rule: Select the cells you want to validate. Click the **Data** tab and click the **Data Validation** button. Click the **Allow** list arrow and select the data you want to allow. Set additional validation criteria options and click **OK**.

Tables

Format a Cell Range as a Table: Select the cells you want to apply table formatting to. Click the **Format as Table** button in the Styles group of the Home tab and select a table format from the gallery.

	A	B	C	D
1	Excursion	Jan	Feb	Mar
2	Beijing	6,010	7,010	6,520
3	Las Vegas	35,250	28,125	37,455
4	México DF	20,850	17,200	27,010
5	Paris	33,710	29,175	35,840
6	Tokyo	12,510	14,750	11,490
7	Total	108,330	96,260	118,315

Sort Data: Select a cell in the column you want to sort. Click the **Sort & Filter** button on the Home tab. Select a sort order or select **Custom Sort** to define specific sort criteria.

Filter Data: Click the filter arrow for the column you want to filter. Uncheck the boxes for any data you want to hide. Click **OK**.

Add Table Rows or Columns: Select a cell in the row or column next to where you want to add blank cells. Click the **Insert** button list arrow on the Home tab. Select either **Insert Table Rows Above** or **Insert Table Columns to the Left**.

Tables

Remove Duplicate Values: Click any cell in the table and click the **Data** tab on the ribbon. Click the **Remove Duplicates** button. Select which columns you want to check for duplicates and click **OK**.

Insert a Slicer: With any cell in the table selected, click the **Design** tab on the ribbon. Click the **Insert Slicer** button. Select the columns you want to use as slicers and click **OK**.

Table Style Options: Click any cell in the table. Click the **Design** tab on the ribbon and select an option in the Table Style Options group.

Intermediate Formatting

Apply Conditional Formatting: Select the cells you want to format. On the **Home** tab, click the **Conditional Formatting** button. Select a conditional formatting category and then the rule you want to use. Specify the format to apply and click **OK**.

Apply Cell Styles: Select the cell(s) you want to format. On the Home tab, click the **Cell Styles** button and select a style from the menu. You can also select **New Cell Style** to define a custom style.

Apply a Workbook Theme: Click the **Page Layout** tab on the ribbon. Click the **Themes** button and select a theme from the menu.

Collaborate with Excel

Add a Cell Comment: Click the cell where you want to add a comment. Click the **Review** tab on the ribbon and click the **New Comment** button. Type your comment and then click outside of it to save the text.

Invite People to Collaborate: Click the **Share** button on the ribbon. Enter the email addresses of people you want to share the workbook with. Click the permissions button, select a permission level, and click **Apply**. Type a short message and click **Send**.

Co-author Workbooks: When another user opens the workbook, click the user's picture or initials on the ribbon, to see what they are editing. Cells being edited by others appear with a colored border or shading.

Protect a Worksheet: Before protecting a worksheet, you need to unlock any cells you want to remain editable after the protection is applied. Then, click the **Review** tab on the ribbon and click the **Protect Sheet** button. Select what you want to remain editable after the sheet is protected.

Add a Workbook Password: Click the **File** tab and select **Save As**. Click **Browse** to select a save location. Click the **Tools** button in the dialog box and select **General Options**. Set a password to open and/or modify the workbook. Click **OK**.

Contact Us: sales@customguide.com

Microsoft®

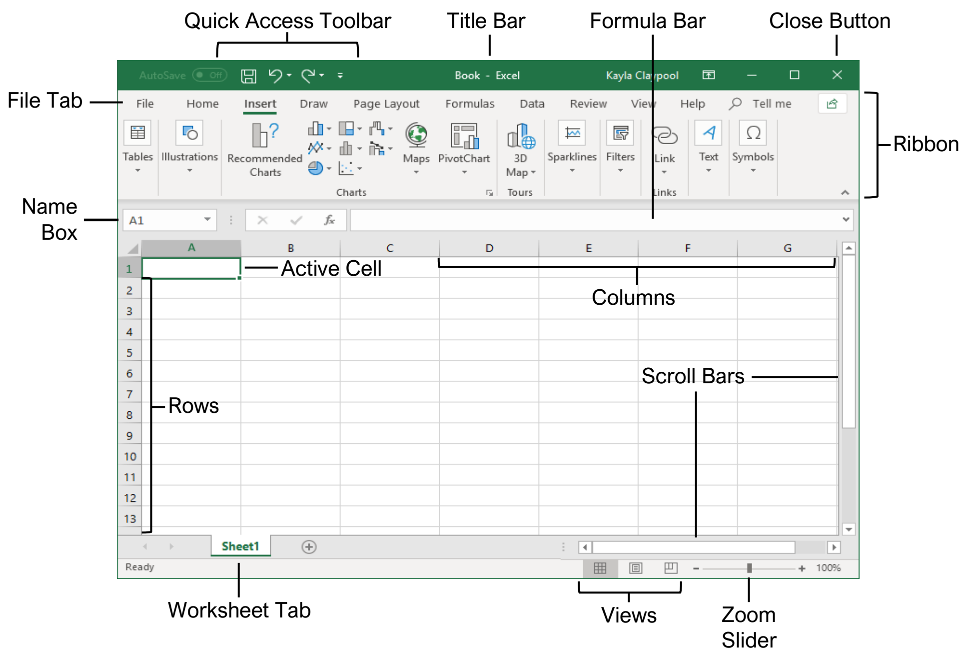
Excel 2019 Basic

Quick Reference Guide

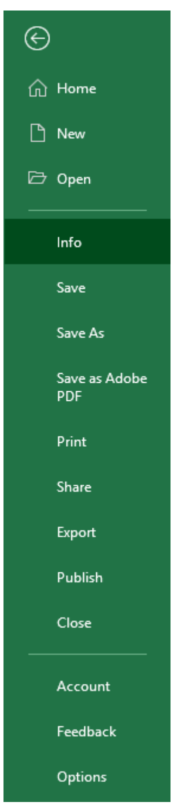
CustomGuide
Interactive Training

Free Cheat Sheets
Visit ref.customguide.com

The Excel 2019 Program Screen



Getting Started



Create a Workbook: Click the **File** tab and select **New** or press **Ctrl** + **N**. Double-click a workbook.

Open a Workbook: Click the **File** tab and select **Open** or press **Ctrl** + **O**. Select a recent file or navigate to the location where the file is saved.

Preview and Print a Workbook: Click the **File** tab and select **Print**.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Use Zoom: Click and drag the zoom slider to the left or right.

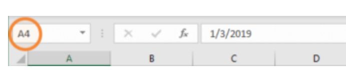
Select a Cell: Click a cell or use the keyboard arrow keys to select it.

Select a Cell Range: Click and drag to select a range of cells. Or, press and hold down the **Shift** key while using the arrow keys to move the selection to the last cell of the range.

Select an Entire Worksheet: Click the **Select All** button where the column and row headings meet.

Select Non-Adjacent Cells: Click the first cell or cell range, hold down the **Ctrl** key, and select any non-adjacent cell or cell range.

Cell Address: Cells are referenced by the coordinates made from their column letter and row number, such as cell A1, B2, etc.



Jump to a Cell: Click in the **Name Box**, type the cell address you want to go to, and press **Enter**.

Change Views: Click a **View** button in the status bar. Or, click the **View** tab and select a view.

Recover an Unsaved Workbook: Restart Excel. If a workbook can be recovered, it will appear in the Document Recovery pane. Or, click the **File** tab, click **Recover unsaved workbooks** to open the pane, and select a workbook from the pane.

Keyboard Shortcuts

General

Open a workbook	**Ctrl** + **O**
Create a new workbook	**Ctrl** + **N**
Save a workbook	**Ctrl** + **S**
Print a workbook	**Ctrl** + **P**
Close a workbook	**Ctrl** + **W**
Help	**F1**
Activate Tell Me field	**Alt** + **Q**
Spell check	**F7**
Calculate worksheets	**F9**
Create absolute reference	**F4**

Navigation

Move between cells	↑, ↓, ←, →
Right one cell	**Tab**
Left one cell	**Shift** + **Tab**
Down one cell	**Enter**
Up one cell	**Shift** + **Enter**
Down one screen	**Page Down**
To first cell of active row	**Home**
Enable End mode	**End**
To cell A1	**Ctrl** + **Home**
To last cell	**Ctrl** + **End**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Edit active cell	**F2**
Clear cell contents	**Delete**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Open Format Cells dialog box	**Ctrl** + **Shift** + **F**
Select All	**Ctrl** + **A**
Select entire row	**Shift** + **Space**
Select entire column	**Ctrl** + **Space**
Hide selected rows	**Ctrl** + **9**
Hide selected columns	**Ctrl** + **0**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Edit a Workbook

Edit a Cell's Contents: Select a cell and click in the Formula Bar or double-click the cell. Edit the cell's contents and press **Enter**.

Clear a Cell's Contents: Select the cell(s) and press the **Delete** key. Or, click the **Clear** button on the Home tab and select **Clear Contents**.

Cut or Copy Data: Select cell(s) and click the **Cut** or **Copy** button on the Home tab.

Paste Data: Select the cell where you want to paste the data and click the **Paste** button in the Clipboard group on the Home tab.

Preview an Item Before Pasting: Place the insertion point where you want to paste, click the **Paste** button list arrow in the Clipboard group on the Home tab, and hold the mouse over a paste option to preview.

Paste Special: Select the destination cell(s), click the **Paste** button list arrow in the Clipboard group on the Home tab, and select **Paste Special**. Select an option and click **OK**.

Move or Copy Cells Using Drag and Drop: Select the cell(s) you want to move or copy, position the pointer over any border of the selected cell(s), then drag to the destination cells. To copy, hold down the **Ctrl** key before starting to drag.

Find and Replace Text: Click the **Find & Select** button, select **Replace**. Type the text you want to find in the Find what box. Type the replacement text in the Replace with box. Click the **Replace All** or **Replace** button.

Check Spelling: Click the **Review** tab and click the **Spelling** button. For each result, select a suggestion and click the **Change**/**Change All** button. Or, click the **Ignore**/**Ignore All** button.

Insert a Column or Row: Right-click to the right of the column or below the row you want to insert. Select **Insert** in the menu, or click the **Insert** button on the Home tab.

Delete a Column or Row: Select the row or column heading(s) you want to remove. Right-click and select **Delete** from the contextual menu, or click the **Delete** button in the Cells group on the Home tab.

Hide Rows or Columns: Select the rows or columns you want to hide, click the **Format** button on the Home tab, select **Hide & Unhide**, and select **Hide Rows** or **Hide Columns**.

Basic Formatting

Change Cell Alignment: Select the cell(s) you want to align and click a vertical alignment , , button or a horizontal alignment , , button in the Alignment group on the Home tab.

Basic Formatting

Format Text: Use the commands in the Font group on the Home tab, or click the dialog box launcher in the Font group to open the dialog box.

Format Values: Use the commands in the Number group on the Home tab, or click the dialog box launcher in the Number group to open the Format Cells dialog box.

Wrap Text in a Cell: Select the cell(s) that contain text you want to wrap and click the **Wrap Text** button on the Home tab.

Merge Cells: Select the cells you want to merge. Click the **Merge & Center** button list arrow on the Home tab and select a merge option.

Cell Borders and Shading: Select the cell(s) you want to format. Click the **Borders** button and/or the **Fill Color** button and select an option to apply to the selected cell.

Copy Formatting with the Format Painter: Select the cell(s) with the formatting you want to copy. Click the **Format Painter** button in the Clipboard group on the Home tab. Then, select the cell(s) you want to apply the copied formatting to.

Adjust Column Width or Row Height: Click and drag the right border of the column header or the bottom border of the row header. Double-click the border to AutoFit the column or row according to its contents.

Basic Formulas

Enter a Formula: Select the cell where you want to insert the formula. Type **=** and enter the formula using values, cell references, operators, and functions. Press **Enter**.

Insert a Function: Select the cell where you want to enter the function and click the **Insert Function** *fx* button next to the formula bar.

Reference a Cell in a Formula: Type the cell reference (for example, B5) in the formula or click the cell you want to reference.

SUM Function: Click the cell where you want to insert the total and click the **Sum** Σ button in the Editing group on the Home tab. Enter the cells you want to total, and press **Enter**.

MIN and MAX Functions: Click the cell where you want to place a minimum or maximum value for a given range. Click the **Sum** Σ button list arrow on the Home tab and select either **Min** or **Max**. Enter the cell range you want to reference, and press **Enter**.

COUNT Function: Click the cell where you want to place a count of the number of cells in a range that contain numbers. Click the **Sum** Σ button list arrow on the Home tab and select **Count Numbers**. Enter the cell range you want to reference, and press **Enter**.

Insert Objects

Complete a Series Using AutoFill: Select the cells that define the pattern, i.e. a series of months or years. Click and drag the fill handle to adjacent blank cells to complete the series.

Insert an Image: Click the **Insert** tab on the ribbon, click either the **Pictures** or **Online Pictures** button in the Illustrations group, select the image you want to insert, and click **Insert**.

Insert a Shape: Click the **Insert** tab on the ribbon, click the **Shapes** button in the Illustrations group, and select the shape you wish to insert.

Hyperlink Text or Images: Select the text or graphic you want to use as a hyperlink. Click the **Insert** tab, then click the **Link** button. Choose a type of hyperlink in the left pane of the Insert Hyperlink dialog box. Fill in the necessary informational fields in the right pane, then click **OK**.

Modify Object Properties and Alternative Text: Right-click an object. Select **Edit Alt Text** in the menu and make the necessary modifications under the Properties and Alt Text headings.

View and Manage Worksheets

Insert a New Worksheet: Click the **Insert Worksheet** button next to the sheet tabs below the active sheet. Or, press **Shift** + **F11**.

Delete a Worksheet: Right-click the sheet tab and select **Delete** from the menu.

Hide a Worksheet: Right-click the sheet tab and select **Hide** from the menu.

Rename a Worksheet: Double-click the sheet tab, enter a new name for the worksheet, and press **Enter**.

Change a Worksheet's Tab Color: Right-click the sheet tab, select **Tab Color**, and choose the color you want to apply.

Move or Copy a Worksheet: Click and drag a worksheet tab left or right to move it to a new location. Hold down the **Ctrl** key while clicking and dragging to copy the worksheet.

Switch Between Excel Windows: Click the **View** tab, click the **Switch Windows** button, and select the window you want to make active.

Freeze Panes: Activate the cell where you want to freeze the window, click the **View** tab on the ribbon, click the **Freeze Panes** button in the Window group, and select an option from the list.

Select a Print Area: Select the cell range you want to print, click the **Page Layout** tab on the ribbon, click the **Print Area** button, and select **Set Print Area**.

Contact Us: sales@customguide.com

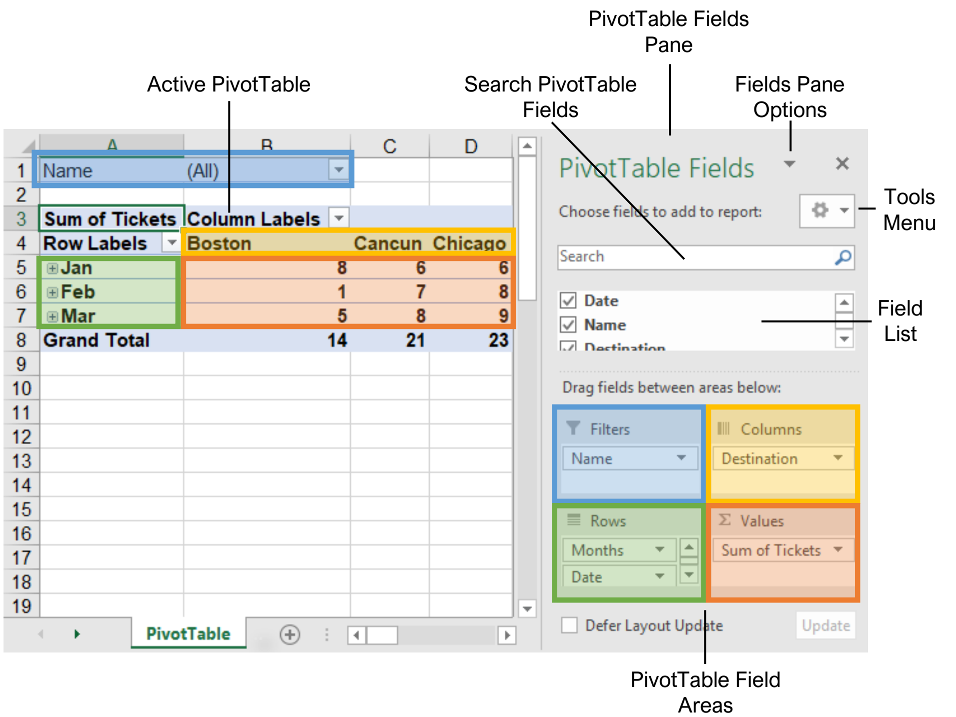
Microsoft®

Excel 2021 Advanced

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

PivotTable Elements



PivotTables

Create a PivotTable: Select the data range to be used by the PivotTable. Click the **Insert** tab on the ribbon and click the **PivotTable** button in the Tables group. Verify the range and then click **OK**.

Add Multiple PivotTable Fields: Click a field in the field list and drag it to one of the four PivotTable areas that contains one or more fields.

Filter PivotTables: Click and drag a field from the field list into the Filters area. Click the field's list arrow above the PivotTable and select the value(s) you want to filter.

Group PivotTable Values: Select a cell in the PivotTable that contains a value you want to group by. Click the **Analyze** tab on the ribbon and click the **Group Field** button. Specify how the PivotTable should be grouped and then click **OK**.

Refresh a PivotTable: With the PivotTable selected, click the **Analyze** tab on the ribbon. Click the **Refresh** button in the Data group.

Format a PivotTable: With the PivotTable selected, click the **Design** tab. Then, select the desired formatting options from the PivotTable Options group and the PivotTable Styles group.

PivotCharts

Create a PivotChart: Click any cell in a PivotTable and click the **Analyze** tab on the ribbon. Click the **PivotChart** button in the Tools group. Select a PivotChart type and click **OK**.

Modify PivotChart Data: Drag fields into and out of the field areas in the task pane.

Refresh a PivotChart: With the PivotChart selected, click the **Analyze** tab on the ribbon. Click the **Refresh** button in the Data group.

Modify PivotChart Elements: With the PivotChart selected, click the **Design** tab on the ribbon. Click the **Add Chart Element** button in the Chart Elements group and select the item(s) you want to add to the chart.

Apply a PivotChart Style: Select the PivotChart and click the **Design** tab on the ribbon. Select a style from the gallery in the Chart Styles group.

Update Chart Type: With the PivotChart selected, click the **Design** tab on the ribbon. Click the **Change Chart Type** button in the Type group. Select a new chart type and click **OK**.

Enable PivotChart Drill Down: Click the **Analyze** tab. Click the **Field Buttons** list arrow in the Show/Hide group and select **Show Expand/Collapse Entire Field Buttons**.

PivotTable Layout

PivotTable Fields Pane

The PivotTable Fields pane controls how data is represented in the PivotTable. Click anywhere in the PivotTable to activate the pane. It includes a Search field, a scrolling list of fields (these are the column headings in the data range used to create the PivotTable), and four areas in which fields are placed. These four areas include:

Filters: If a field is placed in the Filters area, a menu appears above the PivotTable. Each unique value from the field is an item in the menu, which can be used to filter PivotTable data.

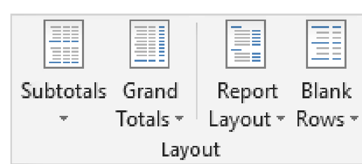
Column Labels: The unique values for the fields placed in the Columns area appear as column headings along the top of the PivotTable.

Row Labels: The unique values for the fields placed in the Rows area appear as row headings along the left side of the PivotTable.

Values: The values are the "meat" of the PivotTable, or the actual data that's calculated for the fields placed in the rows and/or columns area. Values are most often numeric calculations.

Not all PivotTables will have a field in each area, and sometimes there will be multiple fields in a single area.

The Layout Group



Subtotals: Show or hide subtotals and specify their location in the PivotTable.

Grand Totals: Add or remove grand total rows for columns and/or rows.

Report Layout: Adjust the report layout to show in compact, outline, or tabular form.

Blank Rows: Emphasize groups of data by manually adding blank rows between grouped items.

Contact Us: sales@customguide.com

Macros

Enable the Developer Tab: Click the **File** tab and select **Options**. Select **Customize Ribbon** at the left. Check the **Developer** check box and click **OK**.

Record a Macro: Click the **Developer** tab on the ribbon and click the **Record Macro** button. Type a name and description then specify where to save it. Click **OK**. Complete the steps to be recorded. Click the **Stop Recording** button on the Developer tab.

Run a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select the macro and click **Run**.

Edit a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select a macro and click the **Edit** button. Make the necessary changes to the Visual Basic code and click the **Save** button.

Delete a Macro: Click the **Developer** tab on the ribbon and click the **Macros** button. Select a macro and click the **Delete** button.

Macro Security: Click the **Developer** tab on the ribbon and click the **Macro Security** button. Select a security level and click **OK.**

Troubleshoot Formulas

Common Formula Errors:

- **####### -** The column isn't wide enough to display all cell data.
- **#NAME? -** The text in the formula isn't recognized.
- **#VALUE! -** There is an error with one or more formula arguments.
- **#DIV/0 -** The formula is trying to divide a value by 0.
- **#REF! -** The formula references a cell that no longer exists.

Trace Precedents: Click the cell containing the value you want to trace and click the **Formulas** tab on the ribbon. Click the **Trace Precedents** button to see which cells affect the value in the selected cell.

Jan	Feb	Total
6,010	7,010	13,020

Error Checking: Select a cell containing an error. Click the **Formulas** tab on the ribbon and click the **Error Checking** button in the Formula Auditing group. Use the dialog to locate and fix the error.

The Watch Window: Select the cell you want to watch. Click the **Formulas** tab on the ribbon and click the **Watch Window** button. Click the **Add Watch** button. Ensure the correct cell is identified and click **Add**.

Evaluate a Formula: Select a cell with a formula. Click the **Formulas** tab on the ribbon and click the **Evaluate Formula** button.

Advanced Formatting

Customize Conditional Formatting: Click the **Conditional Formatting** button on the Home tab and select **New Rule**. Select a rule type, then edit the styles and values. Click **OK**.

Edit a Conditional Formatting Rule: Click the **Conditional Formatting** button on the Home tab and select **Manage Rules**. Select the rule you want to edit and click **Edit Rule**. Make your changes to the rule. Click **OK**.

Change the Order of Conditional Formatting Rules: Click the **Conditional Formatting** button on the Home tab and select **Manage Rules**. Select the rule you want to re-sequence. Click the **Move Up** or **Move Down** arrow until the rule is positioned correctly. Click **OK**.

Analyze Data

Goal Seek: Click the **Data** tab on the ribbon. Click the **What-If Analysis** button and select **Goal Seek**. Specify the desired value for the given cell and which cell can be changed to reach the desired result. Click **OK**.

Advanced Formulas

Nested Functions: A nested function is when one function is tucked inside another function as one of its arguments, like this:

`=IF(D2>AVERAGE(B2:B10),1,0)`

Initial Function | **Nested Function**

IF: Performs a logical test to return one value for a true result, and another for a false result.

`=IF(B2>69,"True","False")`

logical_test that can be evaluated as true or false | **value_if_true** value to return when the test is true | **value_if_false** value to return when the test is false

AND, OR, NOT: Often used with IF to support multiple conditions.

- **AND** requires multiple conditions.
- **OR** accepts several different conditions.
- **NOT** returns the opposite of the condition.

`=OR(B5="MN",B5="WI")`

logical1 the first condition to evaluate | **logical2** the second condition to evaluate

SUMIF and AVERAGEIF: Calculates cells that meet a condition.

- **SUMIF** finds the total.
- **AVERAGEIF** finds the average.

`=SUMIF(C6:C10,"MN",D6:D10)`

range of cells you want to apply criteria against | **criteria** used to determine what cells to sum or average | **calc_range** to calculate, if different than the range

Advanced Formulas

VLOOKUP: Looks for and retrieves data from a specific column in a table.

	A	B	C	D	E
1				Agent Sales	
2				5	7367
3					
4	Agent ID	First	Last	Packages	Sales
5	1	Joel	Nelson	6	6,602
6	2	Louis	Hay	7	8,246
7	3	Anton	Baril	11	13,683
8	4	Caroline	Jolie	12	14,108
9	5	Daniel	Ruiz	6	7,367

`=VLOOKUP(D2,A4:E10,5)`

value to look for in the first column of the table | **table** from which to retrieve a value | **col_index** the column number in the table from which to retrieve a value

HLOOKUP: Looks for and retrieves data from a specific row in a table.

`=HLOOKUP(B5,B2:I3,3)`

value to look for in the first row of the table | **table** from which to retrieve a value | **row_index** the row number in the table from which to retrieve a value

UPPER, LOWER, and PROPER: Changes how text is capitalized.

UPPER Case | lower case | Proper Case

`=UPPER(B4)`

text to change case or capitalization

LEFT and RIGHT: Extracts a given number of characters from the left or right.

`=LEFT(B5,3)`

text from which to extract characters | **num_chars** to extract from the left or right side of the text

MID: Extracts a given number of characters from the middle of text; the example below would return "day".

`=MID("Sunday",4,3)`

text from which to extract characters | **start_num** location of the first character to extract | **num_chars** the number of characters to extract

MATCH: Locates the position of a lookup value in a row or column.

`=MATCH("Dog",B2:B10)`

lookup_value to match in the lookup_array | **lookup_array** range of cells

INDEX: Returns a value or the reference to a value from within a range.

`=INDEX(A1:B5,2,2)`

array a range of cells | **row_num** the row position | **col_num** the column position (optional)

Click the topic links for free lessons!

Contact Us: sales@customguide.com

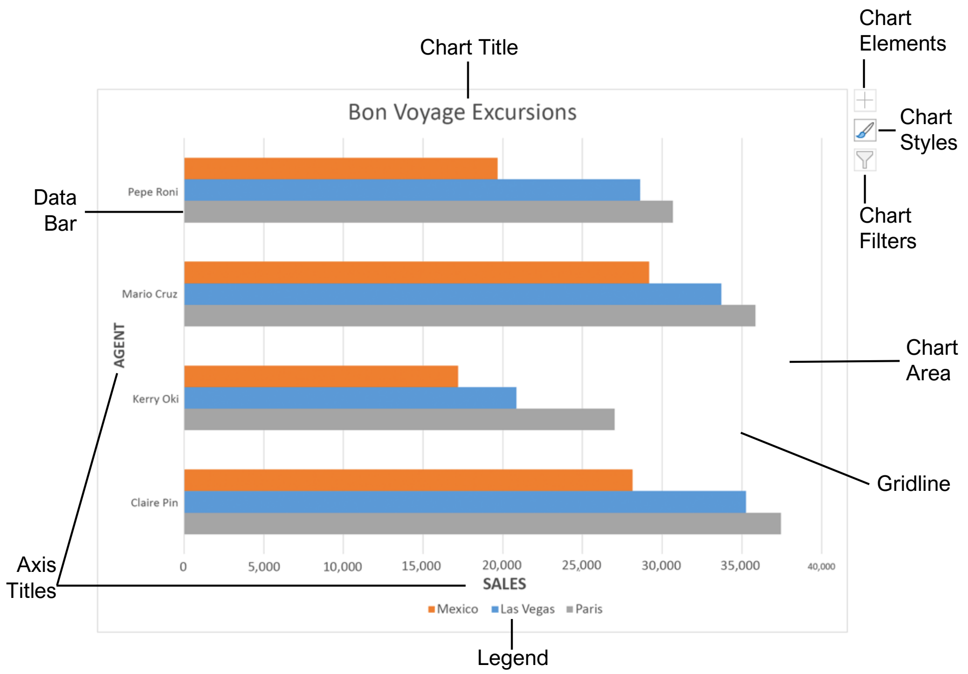
Microsoft®

Excel 2021 Intermediate

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

Chart Elements



Charts

Create a Chart: Select the cell range that contains the data you want to chart. Click the **Insert** tab on the ribbon. Click a chart type button in the Charts group and select the chart you want to insert.

Move or Resize a Chart: Select the chart. Place the cursor over the chart's border and, with the 4-headed arrow showing, click and drag to move it. Or, click and drag a sizing handle to resize it.

Change the Chart Type: Select the chart and click the **Design** tab. Click the **Change Chart Type** button and select a different chart.

Filter a Chart: With the chart you want to filter selected, click the **Filter** button next to it. Deselect the items you want to hide from the chart view and click the **Apply** button.

Position a Chart's Legend: Select the chart, click the **Chart Elements** button, click the **Legend** button, and select a position for the legend.

Show or Hide Chart Elements: Select the chart and click the **Chart Elements** button. Then, use the check boxes to show or hide each element.

Insert a Trendline: Select the chart where you want to add a trendline. Click the **Design** tab on the ribbon and click the **Add Chart Element** button. Select **Trendline** from the menu.

Charts

Insert a Sparkline: Select the cells you want to summarize. Click the **Insert** tab and select the sparkline you want to insert. In the Location Range field, enter the cell or cell range to place the sparkline and click **OK**.

Create a Dual Axis Chart: Select the cell range you want to chart, click the **Insert** tab, click the **Combo** button, and select a combo chart type.

Print and Distribute

Set the Page Size: Click the **Page Layout** tab. Click the **Size** button and select a page size.

Set the Print Area: Select the cell range you want to print. Click the **Page Layout** tab, click the **Print Area** button, and select **Set Print Area**.

Print Titles, Gridlines, and Headings: Click the **Page Layout** tab. Click the **Print Titles** button and set which items you wish to print.

Add a Header or Footer: Click the **Insert** tab and click the **Header & Footer** button. Complete the header and footer fields.

Adjust Margins and Orientation: Click the **Page Layout** tab. Click the **Margins** button to select from a list of common page margins. Click the **Orientation** button to choose Portrait or Landscape orientation.

Chart Options

Chart Types

Column: Used to compare different values vertically side-by-side. Each value is represented in the chart by a vertical bar.

Line: Used to illustrate trends over time (days, months, years). Each value is plotted as a point on the chart and values are connected by a line.

Pie: Useful for showing values as a percentage of a whole when all the values add up to 100%. The values for each item are represented by different colors.

Bar: Similar to column charts, except they display information in horizontal bars rather than in vertical columns.

Area: Similar to line charts, except the areas beneath the lines are filled with color.

XY (Scatter): Used to plot clusters of values using single points. Multiple items can be plotted by using different colored points or different point symbols.

Stock: Effective for reporting the fluctuation of stock prices, such as the high, low, and closing points for a certain day.

Surface: Useful for finding optimum combinations between two sets of data. Colors and patterns indicate values that are in the same range.

Additional Chart Elements

Data Labels: Display values from the cells of the worksheet on the plot area of the chart.

Data Table: A table added next to the chart that shows the worksheet data the chart is illustrating.

Error Bars: Help you quickly identify standard deviations and error margins.

Trendline: Identifies the trend of the current data, not actual values. Can also identify forecasts for future data.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Intermediate Formulas

Absolute References: Absolute references always refer to the same cell, even if the formula is moved. In the formula bar, add dollar signs ($) to the reference you want to remain absolute (for example, **$A$1** makes the column and row remain constant).

Name a Cell or Range: Select the cell(s), click the Name box in the Formula bar, type a name for the cell or range, and press **Enter**. Names can be used in formulas instead of cell addresses, for example: **=B4*Rate**.

Reference Other Worksheets: To reference another worksheet in a formula, add an exclamation point '!' after the sheet name in the formula, for example: **=FebruarySales!B4**.

Reference Other Workbooks: To reference another workbook in a formula, add brackets '[ ]' around the file name in the formula, for example: **=[FebruarySales.xlsx]Sheet1!$B$4**.

Order of Operations: When calculating a formula, Excel performs operations in the following order: Parentheses, Exponents, Multiplication and Division, and finally Addition and Subtraction (as they appear left to right). Use this mnemonic device to remember them:

Please	Parentheses
Excuse	Exponents
My	Multiplication
Dear	Division
Aunt	Addition
Sally	Subtraction

Concatenate Text: Use the CONCAT function **=CONCAT(text1,text2,…)** to join the text from multiple cells into a single cell. Use the arguments within the function to define the text you want to combine as well as any spaces or punctuation.

Payment Function: Use the PMT function **=PMT(rate,nper,pv,…)** to calculate a loan amount. Use the arguments within the function to define the loan rate, number of periods, and present value and Excel calculates the payment amount.

Date Functions: Date functions are used to add a specific date to a cell. Some common date functions in Excel include:

Date	=DATE(year,month,day)
Today	=TODAY()
Now	=NOW()

Display Worksheet Formulas: Click the **Formulas** tab on the ribbon and then click the **Show Formulas** button. Click the **Show Formulas** button again to turn off the formula view.

Manage Data

Export Data: Click the **File** tab. At the left, select **Export** and click **Change File Type**. Select the file type you want to export the data to and click **Save As**.

Import Data: Click the **Data** tab on the ribbon and click the **Get Data** button. Select the category and data type, and then the file you want to import. Click **Import**, verify the preview, and then click the **Load** button.

Use the Quick Analysis Tools: Select the cell range you want to summarize. Click the **Quick Analysis** button that appears. Select the analysis tool you want to use. Choose from formatting, charts, totals, tables, or sparklines.

Outline and Subtotal: Click the **Data** tab on the ribbon and click the **Subtotal** button. Use the dialog box to define which column you want to subtotal and the calculation you want to use. Click **OK**.

Use Flash Fill: Click in the cell to the right of the cell(s) where you want to extract or combine data. Start typing the data in the column. When a pattern is recognized, Excel predicts the remaining values for the column. Press **Enter** to accept the Flash Fill values.

Create a Data Validation Rule: Select the cells you want to validate. Click the **Data** tab and click the **Data Validation** button. Click the **Allow** list arrow and select the data you want to allow. Set additional validation criteria options and click **OK**.

Tables

Format a Cell Range as a Table: Select the cells you want to apply table formatting to. Click the **Format as Table** button in the Styles group of the Home tab and select a table format from the gallery.

	A	B	C	D
1	Excursion	Jan	Feb	Mar
2	Beijing	6,010	7,010	6,520
3	Las Vegas	35,250	28,125	37,455
4	México DF	20,850	17,200	27,010
5	Paris	33,710	29,175	35,840
6	Tokyo	12,510	14,750	11,490
7	Total	108,330	96,260	118,315

Sort Data: Select a cell in the column you want to sort. Click the **Sort & Filter** button on the Home tab. Select a sort order or select **Custom Sort** to define specific sort criteria.

Filter Data: Click the filter arrow for the column you want to filter. Uncheck the boxes for any data you want to hide. Click **OK**.

Add Table Rows or Columns: Select a cell in the row or column next to where you want to add blank cells. Click the **Insert** button list arrow on the Home tab. Select either **Insert Table Rows Above** or **Insert Table Columns to the Left**.

Tables

Remove Duplicate Values: Click any cell in the table and click the **Data** tab on the ribbon. Click the **Remove Duplicates** button. Select which columns you want to check for duplicates and click **OK**.

Insert a Slicer: With any cell in the table selected, click the **Design** tab on the ribbon. Click the **Insert Slicer** button. Select the columns you want to use as slicers and click **OK**.

Table Style Options: Click any cell in the table. Click the **Design** tab on the ribbon and select an option in the Table Style Options group.

Intermediate Formatting

Apply Conditional Formatting: Select the cells you want to format. On the **Home** tab, click the **Conditional Formatting** button. Select a conditional formatting category and then the rule you want to use. Specify the format to apply and click **OK**.

Apply Cell Styles: Select the cell(s) you want to format. On the Home tab, click the **Cell Styles** button and select a style from the menu. You can also select **New Cell Style** to define a custom style.

Apply a Workbook Theme: Click the **Page Layout** tab on the ribbon. Click the **Themes** button and select a theme from the menu.

Collaborate with Excel

Add a Cell Comment: Click the cell where you want to add a comment. Click the **Review** tab on the ribbon and click the **New Comment** button. Type your comment and then click outside of it to save the text.

Invite People to Collaborate: Click the **Share** button on the ribbon. Enter the email addresses of people you want to share the workbook with. Click the permissions button, select a permission level, and click **Apply**. Type a short message and click **Send**.

Co-author Workbooks: When another user opens the workbook, click the user's picture or initials on the ribbon, to see what they are editing. Cells being edited by others appear with a colored border or shading.

Protect a Worksheet: Before protecting a worksheet, you need to unlock any cells you want to remain editable after the protection is applied. Then, click the **Review** tab on the ribbon and click the **Protect Sheet** button. Select what you want to remain editable after the sheet is protected.

Add a Workbook Password: Click the **File** tab and select **Save As**. Click **Browse** to select a save location. Click the **Tools** button in the dialog box and select **General Options**. Set a password to open and/or modify the workbook. Click **OK**.

Contact Us: sales@customguide.com

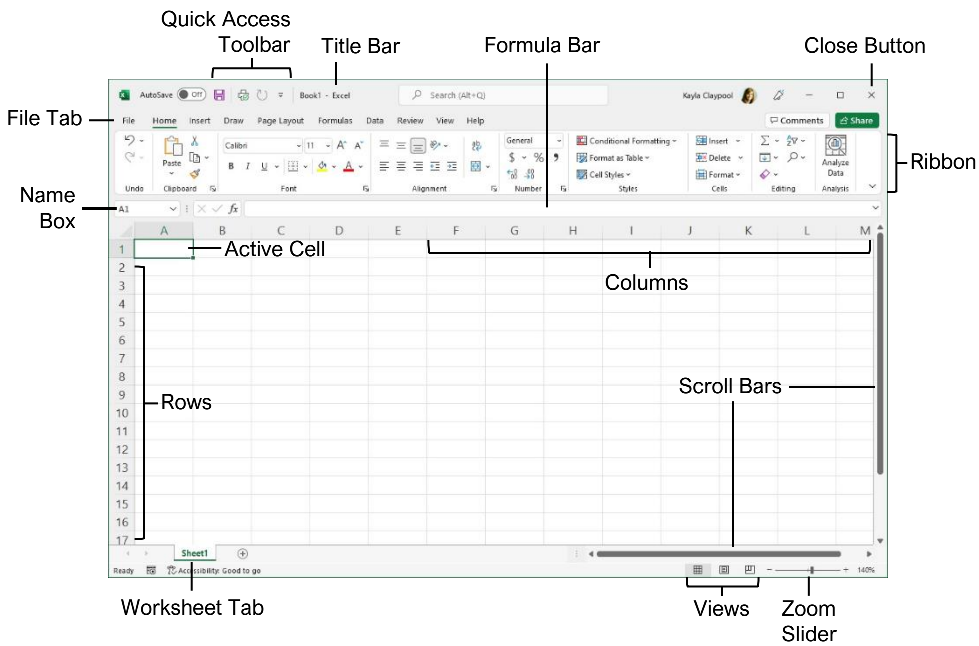
Microsoft®
Excel 2021 Basic
Quick Reference Guide

your logo

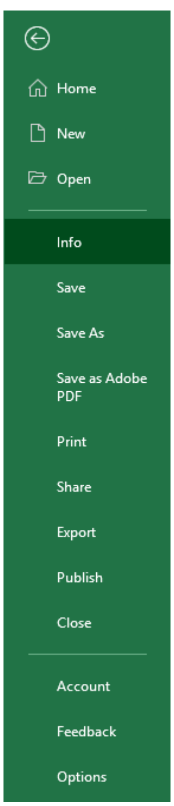
CustomGuide

Free Cheat Sheets
Visit ref.customguide.com

The Excel 2021 Program Screen



Getting Started



Create a Workbook: Click the **File** tab and select **New** or press **Ctrl** + **N**. Double-click a workbook.

Open a Workbook: Click the **File** tab and select **Open** or press **Ctrl** + **O**. Select a recent file or navigate to the location where the file is saved.

Preview and Print a Workbook: Click the **File** tab and select **Print**.

Undo: Click the **Undo** button on the Quick Access Toolbar.

Redo or Repeat: Click the **Redo** button on the Quick Access Toolbar. The button turns to Repeat once everything has been re-done.

Use Zoom: Click and drag the zoom slider to the left or right.

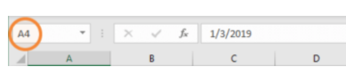
Select a Cell: Click a cell or use the keyboard arrow keys to select it.

Select a Cell Range: Click and drag to select a range of cells. Or, press and hold down the **Shift** key while using the arrow keys to move the selection to the last cell of the range.

Select an Entire Worksheet: Click the **Select All** button where the column and row headings meet.

Select Non-Adjacent Cells: Click the first cell or cell range, hold down the **Ctrl** key, and select any non-adjacent cell or cell range.

Cell Address: Cells are referenced by the coordinates made from their column letter and row number, such as cell A1, B2, etc.



Jump to a Cell: Click in the **Name Box**, type the cell address you want to go to, and press **Enter**.

Change Views: Click a **View** button in the status bar. Or, click the **View** tab and select a view.

Recover an Unsaved Workbook: Restart Excel. If a workbook can be recovered, it will appear in the Document Recovery pane. Or, click the **File** tab, click **Recover unsaved workbooks** to open the pane, and select a workbook from the pane.

Keyboard Shortcuts

General

Open a workbook	**Ctrl** + **O**
Create a new workbook	**Ctrl** + **N**
Save a workbook	**Ctrl** + **S**
Print a workbook	**Ctrl** + **P**
Close a workbook	**Ctrl** + **W**
Help	**F1**
Activate Tell Me field	**Alt** + **Q**
Spell check	**F7**
Calculate worksheets	**F9**
Create absolute reference	**F4**

Navigation

Move between cells	↑, ↓, ←, →
Right one cell	**Tab**
Left one cell	**Shift** + **Tab**
Down one cell	**Enter**
Up one cell	**Shift** + **Enter**
Down one screen	**Page Down**
To first cell of active row	**Home**
Enable End mode	**End**
To cell A1	**Ctrl** + **Home**
To last cell	**Ctrl** + **End**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**
Edit active cell	**F2**
Clear cell contents	**Delete**

Formatting

Bold	**Ctrl** + **B**
Italics	**Ctrl** + **I**
Underline	**Ctrl** + **U**
Open Format Cells dialog box	**Ctrl** + **Shift** + **F**
Select All	**Ctrl** + **A**
Select entire row	**Shift** + **Space**
Select entire column	**Ctrl** + **Space**
Hide selected rows	**Ctrl** + **9**
Hide selected columns	**Ctrl** + **0**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Edit a Workbook

Edit a Cell's Contents: Select a cell and click in the Formula Bar or double-click the cell. Edit the cell's contents and press **Enter**.

Clear a Cell's Contents: Select the cell(s) and press the **Delete** key. Or, click the **Clear** button on the Home tab and select **Clear Contents**.

Cut or Copy Data: Select cell(s) and click the **Cut** or **Copy** button on the Home tab.

Paste Data: Select the cell where you want to paste the data and click the **Paste** button in the Clipboard group on the Home tab.

Preview an Item Before Pasting: Place the insertion point where you want to paste, click the **Paste** button list arrow in the Clipboard group on the Home tab, and hold the mouse over a paste option to preview.

Paste Special: Select the destination cell(s), click the **Paste** button list arrow in the Clipboard group on the Home tab, and select **Paste Special**. Select an option and click **OK**.

Move or Copy Cells Using Drag and Drop: Select the cell(s) you want to move or copy, position the pointer over any border of the selected cell(s), then drag to the destination cells. To copy, hold down the **Ctrl** key before starting to drag.

Find and Replace Text: Click the **Find & Select** button, select **Replace**. Type the text you want to find in the Find what box. Type the replacement text in the Replace with box. Click the **Replace All** or **Replace** button.

Check Spelling: Click the **Review** tab and click the **Spelling** button. For each result, select a suggestion and click the **Change**/**Change All** button. Or, click the **Ignore**/**Ignore All** button.

Insert a Column or Row: Right-click to the right of the column or below the row you want to insert. Select **Insert** in the menu, or click the **Insert** button on the Home tab.

Delete a Column or Row: Select the row or column heading(s) you want to remove. Right-click and select **Delete** from the contextual menu, or click the **Delete** button in the Cells group on the Home tab.

Hide Rows or Columns: Select the rows or columns you want to hide, click the **Format** button on the Home tab, select **Hide & Unhide**, and select **Hide Rows** or **Hide Columns**.

Basic Formatting

Change Cell Alignment: Select the cell(s) you want to align and click a vertical alignment , , button or a horizontal alignment , , button in the Alignment group on the Home tab.

Basic Formatting

Format Text: Use the commands in the Font group on the Home tab, or click the dialog box launcher in the Font group to open the dialog box.

Format Values: Use the commands in the Number group on the Home tab, or click the dialog box launcher in the Number group to open the Format Cells dialog box.

Wrap Text in a Cell: Select the cell(s) that contain text you want to wrap and click the **Wrap Text** button on the Home tab.

Merge Cells: Select the cells you want to merge. Click the **Merge & Center** button list arrow on the Home tab and select a merge option.

Cell Borders and Shading: Select the cell(s) you want to format. Click the **Borders** button and/or the **Fill Color** button and select an option to apply to the selected cell.

Copy Formatting with the Format Painter: Select the cell(s) with the formatting you want to copy. Click the **Format Painter** button in the Clipboard group on the Home tab. Then, select the cell(s) you want to apply the copied formatting to.

Adjust Column Width or Row Height: Click and drag the right border of the column header or the bottom border of the row header. Double-click the border to AutoFit the column or row according to its contents.

Basic Formulas

Enter a Formula: Select the cell where you want to insert the formula. Type **=** and enter the formula using values, cell references, operators, and functions. Press **Enter**.

Insert a Function: Select the cell where you want to enter the function and click the **Insert Function** f_x button next to the formula bar.

Reference a Cell in a Formula: Type the cell reference (for example, B5) in the formula or click the cell you want to reference.

SUM Function: Click the cell where you want to insert the total and click the **Sum** Σ button in the Editing group on the Home tab. Enter the cells you want to total, and press **Enter**.

MIN and MAX Functions: Click the cell where you want to place a minimum or maximum value for a given range. Click the **Sum** Σ button list arrow on the Home tab and select either **Min** or **Max**. Enter the cell range you want to reference, and press **Enter**.

COUNT Function: Click the cell where you want to place a count of the number of cells in a range that contain numbers. Click the **Sum** Σ button list arrow on the Home tab and select **Count Numbers**. Enter the cell range you want to reference, and press **Enter**.

Insert Objects

Complete a Series Using AutoFill: Select the cells that define the pattern, i.e. a series of months or years. Click and drag the fill handle to adjacent blank cells to complete the series.

Insert an Image: Click the **Insert** tab on the ribbon, click either the **Pictures** or **Online Pictures** button in the Illustrations group, select the image you want to insert, and click **Insert**.

Insert a Shape: Click the **Insert** tab on the ribbon, click the **Shapes** button in the Illustrations group, and select the shape you wish to insert.

Hyperlink Text or Images: Select the text or graphic you want to use as a hyperlink. Click the **Insert** tab, then click the **Link** button. Choose a type of hyperlink in the left pane of the Insert Hyperlink dialog box. Fill in the necessary informational fields in the right pane, then click **OK**.

Modify Object Properties and Alternative Text: Right-click an object. Select **Edit Alt Text** in the menu and make the necessary modifications under the Properties and Alt Text headings.

View and Manage Worksheets

Insert a New Worksheet: Click the **Insert Worksheet** button next to the sheet tabs below the active sheet. Or, press **Shift** + **F11**.

Delete a Worksheet: Right-click the sheet tab and select **Delete** from the menu.

Hide a Worksheet: Right-click the sheet tab and select **Hide** from the menu.

Rename a Worksheet: Double-click the sheet tab, enter a new name for the worksheet, and press **Enter**.

Change a Worksheet's Tab Color: Right-click the sheet tab, select **Tab Color**, and choose the color you want to apply.

Move or Copy a Worksheet: Click and drag a worksheet tab left or right to move it to a new location. Hold down the **Ctrl** key while clicking and dragging to copy the worksheet.

Switch Between Excel Windows: Click the **View** tab, click the **Switch Windows** button, and select the window you want to make active.

Freeze Panes: Activate the cell where you want to freeze the window, click the **View** tab on the ribbon, click the **Freeze Panes** button in the Window group, and select an option from the list.

Select a Print Area: Select the cell range you want to print, click the **Page Layout** tab on the ribbon, click the **Print Area** button, and select **Set Print Area**.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

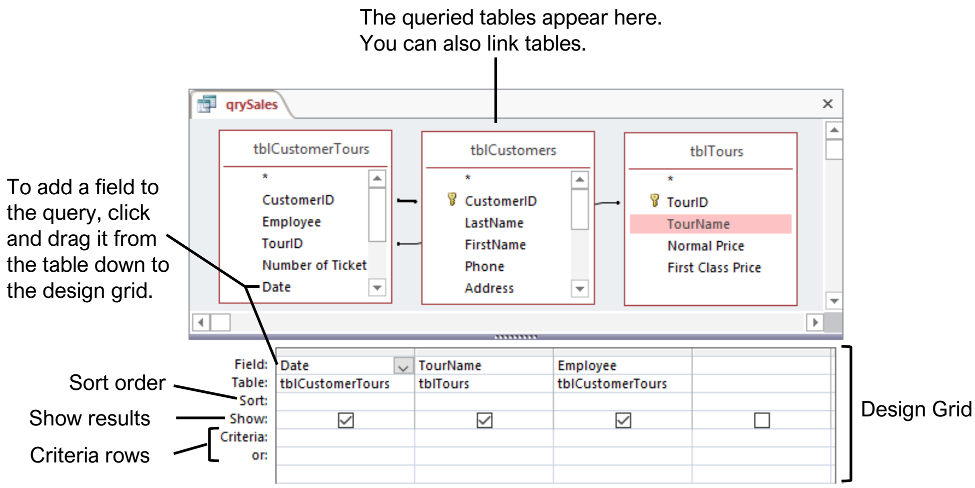
Microsoft®

Access 2013 Intermediate

Quick Reference Card

Free Quick References
Visit ref.customguide.com

Overview of Queries



Queries

Create a Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the table(s) you want to add to the query, click the **Add** button, and close the dialog box. Double-click each field you want to include in the query. Click the **Save** button on the Quick Access Toolbar, type a name for the query, and click **OK**.

Run a Query: Double-click a query in the Navigation Pane.

Hide Fields from Queries: Clear the **Show** check box in the design grid for the field(s) you want to hide.

Sort Fields: Click in the **Sort** field for the field you want to sort, click the list arrow for the field, and select a sort order.

Create a Multiple Table Query: Click the **Create** tab on the ribbon, click the **Query Design** button, double-click the tables you want to add to the query, and click **Close**. Double-click each field you want to include in the query, and save the query.

Work with the Expressions Builder: In Design view, click in the **Field** row of a blank column in the design grid, and click the **Builder** button on the Design tab. Select a field to use in the calculation, select an operation for the calculation, click or type any other fields or values you want to use, and click **OK**.

Find Unmatched Records: Click the **Create** tab on the ribbon and click the **Query Wizard** button. Select **Find Unmatched Query Wizard** and click **OK**. Use the wizard to complete the find unmatched query, enter a name for the query in the final step of the wizard, and click **Finish**.

Crosstab Queries: Click the **Create** tab on the ribbon and click the **Query Wizard** button. Select **Crosstab Query Wizard** and click **OK**. Use the wizard to complete the crosstab query, enter a name for the query in the final step of the wizard, and click **Finish**.

Create a Delete Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the tables and queries you want to add, click **Add**, and close the dialog box. Connect any unrelated tables and click the **Delete** button on the Design tab. Double-click the **asterisk** (*) in the table field list for the table containing information you want to delete. Drag the field you want to use as the limiting criteria onto the design grid. Then, click in the field's **Criteria** row and type the specific data you want to delete.

Create an Append Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the tables and queries you want to add, click **Add**, and close the dialog box. Click the **Append** button on the Design tab, specify the append settings, and click **OK**. Double-click any of the fields you want to append.

Query Examples

Expression	Result
"London"	Displays records where the field equals "London."
"London" Or "New York"	Displays records where the field equals "London" or "New York."
Between 1/1/00 And 12/31/00	Displays records where the date is between 1/1/00 and 12/31/00.
Year([Order Date])=2018	Displays records where the OrderDate field equals 2018.
Is Null	Displays records where the field is null.
Is Not Null	Displays records where the field is not null.
Not "USA" Or ""	Displays records where the field does not contain the text "USA" and is not blank.
Like "S*"	Displays records where the field text starts with an "S."
Not Like "S*"	Displays records where the field text does not start with an "S."
>="S"	Displays records where the field text starts with letters "S" through "Z."
>100	Displays records whose field value is greater than 100.
=Sum([Sales])	Displays the sum of the values in the Sales field.
=Avg([Sales])	Displays the average of the values in the Sales field.
=Count([Sales])	Displays the number of records in the Sales field.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Relational Databases

Database Types: There are two basic types of databases.

- **Flat File Database:** Stores all of its information in the same place, such as a single table or list.
- **Relational Database:** Stores information in multiple tables that are related through matching fields. Access is a relational database.

Relationship Types: There are three different types of relationships used when linking tables together.

- **One to One:** Each record in a table relates to one record in another table.
- **One to Many:** Each record in a table relates to one or more records in another table.
- **Many to Many:** One or more records in a table relate to one or more records in another table.

Create Relationship Between Tables: Click the **Database Tools** tab on the ribbon and click the **Relationships** button. Click the **Show Table** button on the Design tab, double-click the table(s) you want to add, and close the dialog box. Click the related field in the first table and drag it to the related field in the second table, select the **Enforce Referential Integrity** check box (optional), and click **Create**.

Print the Relationship Window: Click the **Database Tools** tab on the ribbon, click the **Relationships** button, and click the **Relationships Report** button on the Design tab. Click the **Print** button on the Print Preview tab, select the desired print settings, and click **OK**.

Forms

Create a Form with AutoForm: In the Navigation Pane, click the table or query that contains the data you want the new form to use, click the **Create** tab on the ribbon, and click the **Form** button.

Create a Form with the Form Wizard: Click the **Create** tab on the ribbon and click the **Form Wizard** button. Click the **Tables/Queries** list arrow and select the table or query you want to use to create your form. Under Available Fields, double-click the fields you want to appear in the form. Use the wizard to complete the form setup, enter a name for the form in the final step of the wizard, and click **Finish**.

Change Form Views: Click the **View** list arrow on the Home tab and select a view.

Move a Control: Click the control and drag it to a new location on the form.

Delete a Control: Select the control you want to delete, press the **Delete** key or click the **Delete** button on the Home tab.

Forms

Add a Field: Click the **Add Existing Fields** button on the Design tab and double-click the fields you want to add in the Field List pane at the right.

Add a Control to a Form: In Design view, click the control button you want to add in the Controls group of the Design tab. Click a spot on the form to place the control. If the control you added opens a wizard, navigate through it and specify the desired settings.

Work with Control Properties: In Design view, select the control you want to edit and click the **Property Sheet** button on the Design tab. Click the appropriate property field in the Property Sheet pane and make the necessary changes.

Change a Control's Data Source: Display the form in Design view or Layout view with the Property Sheet displayed. Select the desired control, click the **Data** tab in the Property Sheet pane, click in the Control Source field, and edit the source as desired.

Create a Subform: In Design view, resize the form to make room for the subform. Click the **Controls** button on the Design tab and click the **Subform/Subreport** button. Click and drag where you want the subform to appear. Use the wizard to complete the subform setup, enter a name for the subform in the final step of the wizard, and click **Finish**.

Reports

Create and Save a Report: Select the table or query you want to base the report on in the Navigation Pane, click the **Create** tab on the ribbon, and click the **Report** button. Click the **Save** button on the Quick Access Toolbar, give the report a name, and click **OK**.

Create a Report with the Report Wizard: Click the **Create** tab on the ribbon and click the **Report Wizard** button. Click the **Tables/Queries** list arrow and select the table or query you want to use to create your report. Under Available Fields, double-click the fields you want to appear in the report. Use the wizard to complete the report setup, enter a name for the report in the final step of the wizard, and click **Finish**.

Use the Label Wizard: Open the table or query that contains the data for your labels. Click the **Create** tab on the ribbon and click the **Labels** button. Use the wizard to complete the label setup, enter a name for the report in the final step of the wizard, and click **Finish**.

Work with Report Layouts: Open the report in Layout view, click the **Arrange** tab on the ribbon, and click a command in the Position group.

Move a Column: Click and drag a column's heading to a new location to move a column, or simply click and drag a control to a new location.

Reports

Delete a Column: Select a column or control and press the **Delete** key.

Insert a Logo: In Layout view, click the **Design** tab on the ribbon, and click the **Logo** button. Locate the file, select it, and click **OK**.

Adjust Page Margins: In Layout view or Design view, click the **Page Setup** tab on the ribbon, click the **Margins** button, and select a margin option.

Adjust Page Orientation: In Layout view or Design view, click the **Page Setup** tab on the ribbon and click the **Landscape** or **Portrait** button.

Advanced Topics

Import Data: Click the **External Data** tab on the ribbon and click the **New Data Source** button. Select the type of data you want to import and select the file type. Browse for the file you want to import and click **OK**. Complete the steps in the import dialog box.

Export Access Objects: Select the database object you want to export in the Navigation Pane. Click the **External Data** tab, and click the button for the type of file to which you want to export in the Export group. Select the desired export options and click **OK**.

Save a Database to Other Formats: Click the **File** tab on the ribbon and select **Save As**. Select the file format to which you want to save your database and click the **Save As** button. Enter a name for the database in the File name field and click **Save**.

Apply Conditional Formatting: In Design view or Layout view, click the field you want to format. Click the **Format** tab on the ribbon and click the **Conditional Formatting** button. Click **New Rule**, select a rule type, and specify the rule details. Click **OK**, then click **OK** again to save the rule.

Compact and Repair a Database: Click the **Database Tools** tab on the ribbon, and click the **Compact and Repair Database** button.

Password Protect a Database: Click the **File** tab on the ribbon and click the **Encrypt with Password** button in the Info section. Type a password in the Password field, enter it again in the Verify field, and click **OK**.

Back Up a Database: Open the database that you want to back up. Click the **File** tab on the ribbon and select **Save As**. Select **Back Up Database** and click the **Save As** button. Specify the save location and type a name for the file, then click **Save**.

Restore a Database: Open File Explorer and navigate to the location of the last known backup of the database. Copy the database backup file. Navigate to the location of the damaged or missing database and paste the database backup file.

Contact Us: sales@customguide.com

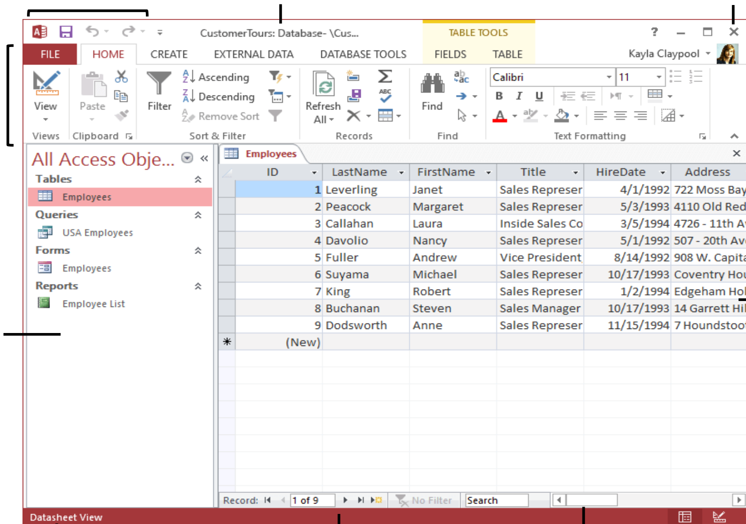
Microsoft®

Access 2013 Basic

Quick Reference Card

Free Quick References
Visit ref.customguide.com

The Access 2013 Program Screen



Access Basics

Open a Database: Click the **File** tab and select **Open**, or press **Ctrl** + **O**.

Save a Database: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Use the Navigation Pane: Click the **All Access Objects** button at the top of the Navigation Pane and select the type of object(s) you want to display.

Open a Database Object: Double-click an object in the Navigation Pane.

Modify a Database Object in Design View: Click the **View** button list arrow and select **Design View**.

Switch Object Tabs: If you have multiple objects open, click the tab for the object you want to display.

Rename a Database Object: In the Navigation Pane, right-click the object **you** want to rename and select **Rename**. Type a new name, and press **Enter**.

Delete a Database Object: Select the object you want to delete in the Navigation Pane, press the **Delete** key, and click **Yes**.

Get Help: Press **F1** to open the Help pane. Type your question in the Search field and press **Enter**.

Close a Database Object: Click the object's **Close** button in the upper-right corner of the window.

Close a Database: Click the **File** tab and select **Close**.

Database Objects

Tables store a database's data in rows (records) and columns (fields).

Queries ask a question of data stored in a table.

Forms are custom screens that provide an easy way to enter and view data in a table or query.

Reports present data from a table or query in a printed format.

Macros automate several tasks into a single command.

Modules automate commands using Visual Basic. Modules are similar to macros, but are more complex.

Keyboard Shortcuts

General

Create a new database	**Ctrl** + **N**
Open a database	**Ctrl** + **O**
Close a database	**Ctrl** + **W**
Close Access	**Alt** + **F4**
Print current view	**Ctrl** + **P**
Help	**F1**
Delete record	**Ctrl** + **-**
Cancel changes	**Esc**
Insert date	**Ctrl** + **;**
Insert time	**Shift** + **Ctrl** + **;**
Insert value from same field in previous position	**Ctrl** + **'**
Spell check	**F7**
Switch applications	**Alt** + **Tab**

Navigation

Move between query or table rows	↑, ↓
Move between query or table columns	←, →
Next field	**Tab**
Previous field	**Shift** + **Tab**
Next screen	**Page Down**
Previous screen	**Page Up**
First record	**Ctrl** + ↑
Last record	**Ctrl** + ↓
Go to a specific record	**F5**
Toggle Navigation Pane	**F11**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**

Design View

View properties	**Alt** + **Enter**
Open object in Design view	**Ctrl** + **Enter**
Save object	**Ctrl** + **S**
Switch to Form view	**F5**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Databases

Determine the Purpose of a Database: Planning a database is an important step in the creation process. Consider:

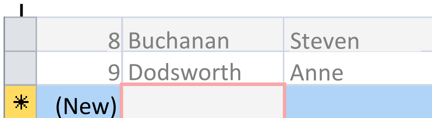
- Fields you need
- Tables you need
- The primary key
- Relationships between fields

Create a Database from a Template: Click the **File** tab and select **New**. Type a word/phrase that describes the database you want to create in the Search for online templates field and click **Search**. Select the template you want to use, name the new database, and click **Create**.

Create a New Blank Database: Click the **File** tab, select **New**, and click the **Blank database** button. Type a name for the new database, and click **Create**.

Add a Record: In Datasheet view, click the **New Record** button on the record navigation bar. Or, begin adding data in the blank bottom row of the table.

Record selector



Start adding a new record here

Select a Record: Click the **record selector** (gray box to the left of the record) for the record you want to select.

Edit a Record: Click the field you want to edit and make the necessary change. Press **Enter** to commit the change.

Delete a Record: Click the **record selector** next to the record you want to delete, click the **Delete** button on the ribbon, and click **Yes**.

Select Multiple Records: Click the **record selector** for the first record you want to select and drag to the last record you want to select.

Select a Field: Click the field (column) header for the field you want to select.

Copy and Paste: Select the data you want to copy, click the **Copy** button on the Home tab, then click where you want to paste the data, and click the **Paste** button.

Check Spelling: Click the **Home** tab and click the **Spelling** button, or press **F7**.

Print Preview a Database Object: Display the object you want to preview. Click the **File** tab, select **Print**, and click **Print Preview**.

Print a Database Object: Display the object you want to print. Click the **File** tab, select **Print**, and click **Print**.

Find and Filter Data

Find Data: Select the column header or click in any cell in the field you want to search, and click the **Find** button on the Home tab. Type the text you want to find in the Find What field, and click the **Find Next** button.

Replace Data: Select the column header or click in any cell in the field where you want to replace text, and click the **Replace** button on the Home tab. Enter the word you want to find in the Find What field, then enter the text that will replace it in the Replace With field. Click **Replace** or **Replace All**.

Sort Records: Click anywhere in the column you want to sort and click either the **Ascending** or **Descending** button on the Home tab of the ribbon.

Remove a Sort: Click the **Clear All Sorts** button on the Home tab.

Apply a Filter: Click anywhere in the column you want to filter and click the **Filter** button on the Home tab. Uncheck the boxes for any data you want to hide and click **OK**.

Filter by Selection: Click in the column you want to filter, click the **Selection** button on the Home tab, and select an option from the menu.

Filter by Form: Click the **Advanced Filter Options** button on the Home tab and select **Filter by Form**. Click the empty cell below the field you want to filter, then click the list arrow and select the value you want to use to filter the records. Repeat this to filter by any additional fields, and click the **Apply Filter** button on the Home tab to filter the records.

Clear Filters: Click the **Advanced Filter Options** button on the Home tab of the ribbon and select **Clear All Filters**.

Adjust Column Width: Click and drag the column header's right border to the left or right. Or, double-click a header's right border to auto-size the column.

Adjust Row Height: Click and drag the row header's bottom border up or down.

Freeze a Column: Click the header for the column you want to freeze, click the **More** button on the Home tab, and select **Freeze Fields**.

Unfreeze a Column: Click the header for the column you want to unfreeze, click the **More** button on the Home tab, and select **Unfreeze All Fields.**

Hide a Column: Click the header for the column you want to hide, click the **More** button on the Home tab, and select **Hide Fields**.

Unhide a Column: Click any column header, click the **More** button on the Home tab of the ribbon, and select **Unhide Fields**.

Tables

Create a New Blank Table: Click the **Create** tab on the ribbon and click the **Table** button. Click the **Click to Add** field heading, select a field type, type a name for the field, and enter the data for the new field. Click the next **Click to Add** field heading to add another field.

Create a Table in Design View: Click the **Create** tab on the ribbon and click the **Table Design** button. Enter a name in the **Field Name** column and click in the first Data Type field. Click the **Data Type** list arrow, and select a data type for the field.

Insert a Field: In Design view, click the **record selector** for the field that will be below the new field, and click the **Insert Rows** button on the Table Tools Design tab. Enter a field name for the new field, press **Tab**, click the **Data Type** list arrow, and select a data type.

Reorder a Field: In Design view, click the **record selector** for the field you want to move, then click and drag the selected row up or down to the desired location.

Delete a Field: In Design view, click the **record selector** for the field you want to delete, and click the **Delete Rows** button on the Table Tools Design tab.

Change a Field Type: Open the table whose field(s) you want to modify in Design view, click in the field's **Data Type** box, click the **Data Type** list arrow, and select a data type.

Add a Primary Key: In Design view, select the field you want to use as your primary key, and click the **Primary Key** button on the Table Tools Design tab.

Change a Field's Properties: In Design view, select the field that you want to change the properties for, click in the property field you want to change, and enter the new settings.

Change the Field Size: In Design view, select the field whose size you want to change. Click in the **Field Size** field and type or select the field size.

Index a Field: In Design view, select the field you want to index, click in the **Indexed** property field, click its list arrow, and select an indexing option.

Add a Description to a Field: In Design view, click in the field's **Description** box and type the description.

Add a Caption to a Field: In Design view, select the field you want to add a caption to, click in the **Caption** property field, and type a caption.

Add a Total Row: In Datasheet view, click the **Totals** button on the Home tab. Click the cell in the **Total** row for the column you want to display the total for, and select the function you want to perform on the field.

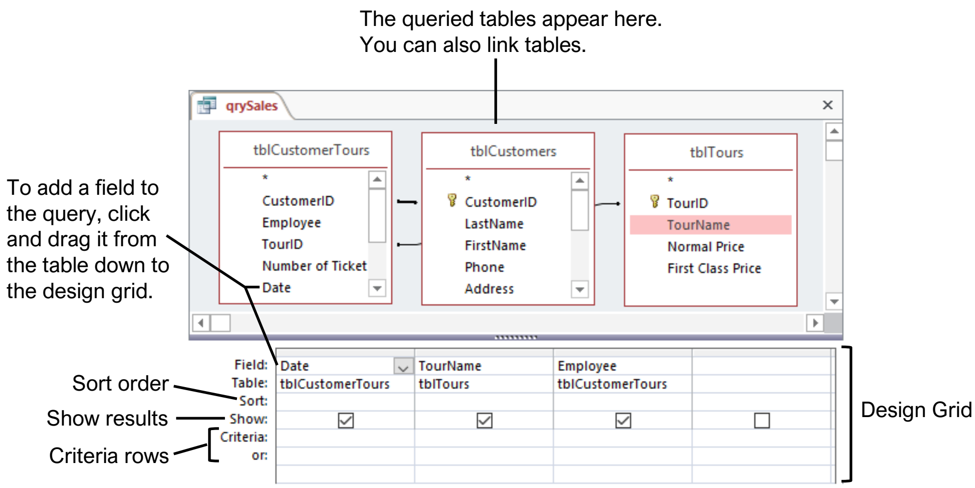
Microsoft®

Access 2016 Intermediate

Quick Reference Card

Free Quick References
Visit ref.customguide.com

Overview of Queries



Queries

Create a Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the table(s) you want to add to the query, click the **Add** button, and close the dialog box. Double-click each field you want to include in the query. Click the **Save** button on the Quick Access Toolbar, type a name for the query, and click **OK**.

Run a Query: Double-click a query in the Navigation Pane.

Hide Fields from Queries: Clear the **Show** check box in the design grid for the field(s) you want to hide.

Sort Fields: Click in the **Sort** field for the field you want to sort, click the list arrow for the field, and select a sort order.

Create a Multiple Table Query: Click the **Create** tab on the ribbon, click the **Query Design** button, double-click the tables you want to add to the query, and click **Close**. Double-click each field you want to include in the query, and save the query.

Work with the Expressions Builder: In Design view, click in the **Field** row of a blank column in the design grid, and click the **Builder** button on the Design tab. Select a field to use in the calculation, select an operation for the calculation, click or type any other fields or values you want to use, and click **OK**.

Find Unmatched Records: Click the **Create** tab on the ribbon and click the **Query Wizard** button. Select **Find Unmatched Query Wizard** and click **OK**. Use the wizard to complete the find unmatched query, enter a name for the query in the final step of the wizard, and click **Finish**.

Crosstab Queries: Click the **Create** tab on the ribbon and click the **Query Wizard** button. Select **Crosstab Query Wizard** and click **OK**. Use the wizard to complete the crosstab query, enter a name for the query in the final step of the wizard, and click **Finish**.

Create a Delete Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the tables and queries you want to add, click **Add**, and close the dialog box. Connect any unrelated tables and click the **Delete** button on the Design tab. Double-click the **asterisk** (*) in the table field list for the table containing information you want to delete. Drag the field you want to use as the limiting criteria onto the design grid. Then, click in the field's **Criteria** row and type the specific data you want to delete.

Create an Append Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the tables and queries you want to add, click **Add**, and close the dialog box. Click the **Append** button on the Design tab, specify the append settings, and click **OK**. Double-click any of the fields you want to append.

Query Examples

Expression	Result
"London"	Displays records where the field equals "London."
"London" Or "New York"	Displays records where the field equals "London" or "New York."
Between 1/1/00 And 12/31/00	Displays records where the date is between 1/1/00 and 12/31/00.
Year([Order Date])=2018	Displays records where the OrderDate field equals 2018.
Is Null	Displays records where the field is null.
Is Not Null	Displays records where the field is not null.
Not "USA" Or ""	Displays records where the field does not contain the text "USA" and is not blank.
Like "S*"	Displays records where the field text starts with an "S."
Not Like "S*"	Displays records where the field text does not start with an "S."
>="S"	Displays records where the field text starts with letters "S" through "Z."
>100	Displays records whose field value is greater than 100.
=Sum([Sales])	Displays the sum of the values in the Sales field.
=Avg([Sales])	Displays the average of the values in the Sales field.
=Count([Sales])	Displays the number of records in the Sales field.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Relational Databases

Database Types: There are two basic types of databases.

- **Flat File Database:** Stores all of its information in the same place, such as a single table or list.
- **Relational Database:** Stores information in multiple tables that are related through matching fields. Access is a relational database.

Relationship Types: There are three different types of relationships used when linking tables together.

- **One to One:** Each record in a table relates to one record in another table.
- **One to Many:** Each record in a table relates to one or more records in another table.
- **Many to Many:** One or more records in a table relate to one or more records in another table.

Create Relationship Between Tables: Click the **Database Tools** tab on the ribbon and click the **Relationships** button. Click the **Show Table** button on the Design tab, double-click the table(s) you want to add, and close the dialog box. Click the related field in the first table and drag it to the related field in the second table, select the **Enforce Referential Integrity** check box (optional), and click **Create**.

Print the Relationship Window: Click the **Database Tools** tab on the ribbon, click the **Relationships** button, and click the **Relationships Report** button on the Design tab. Click the **Print** button on the Print Preview tab, select the desired print settings, and click **OK**.

Forms

Create a Form with AutoForm: In the Navigation Pane, click the table or query that contains the data you want the new form to use, click the **Create** tab on the ribbon, and click the **Form** button.

Create a Form with the Form Wizard: Click the **Create** tab on the ribbon and click the **Form Wizard** button. Click the **Tables/Queries** list arrow and select the table or query you want to use to create your form. Under Available Fields, double-click the fields you want to appear in the form. Use the wizard to complete the form setup, enter a name for the form in the final step of the wizard, and click **Finish**.

Change Form Views: Click the **View** list arrow on the Home tab and select a view.

Move a Control: Click the control and drag it to a new location on the form.

Delete a Control: Select the control you want to delete, press the **Delete** key or click the **Delete** button on the Home tab.

Forms

Add a Field: Click the **Add Existing Fields** button on the Design tab and double-click the fields you want to add in the Field List pane at the right.

Add a Control to a Form: In Design view, click the control button you want to add in the Controls group of the Design tab. Click a spot on the form to place the control. If the control you added opens a wizard, navigate through it and specify the desired settings.

Work with Control Properties: In Design view, select the control you want to edit and click the **Property Sheet** button on the Design tab. Click the appropriate property field in the Property Sheet pane and make the necessary changes.

Change a Control's Data Source: Display the form in Design view or Layout view with the Property Sheet displayed. Select the desired control, click the **Data** tab in the Property Sheet pane, click in the Control Source field, and edit the source as desired.

Create a Subform: In Design view, resize the form to make room for the subform. Click the **Controls** button on the Design tab and click the **Subform/Subreport** button. Click and drag where you want the subform to appear. Use the wizard to complete the subform setup, enter a name for the subform in the final step of the wizard, and click **Finish**.

Reports

Create and Save a Report: Select the table or query you want to base the report on in the Navigation Pane, click the **Create** tab on the ribbon, and click the **Report** button. Click the **Save** button on the Quick Access Toolbar, give the report a name, and click **OK**.

Create a Report with the Report Wizard: Click the **Create** tab on the ribbon and click the **Report Wizard** button. Click the **Tables/Queries** list arrow and select the table or query you want to use to create your report. Under Available Fields, double-click the fields you want to appear in the report. Use the wizard to complete the report setup, enter a name for the report in the final step of the wizard, and click **Finish**.

Use the Label Wizard: Open the table or query that contains the data for your labels. Click the **Create** tab on the ribbon and click the **Labels** button. Use the wizard to complete the label setup, enter a name for the report in the final step of the wizard, and click **Finish**.

Work with Report Layouts: Open the report in Layout view, click the **Arrange** tab on the ribbon, and click a command in the Position group.

Move a Column: Click and drag a column's heading to a new location to move a column, or simply click and drag a control to a new location.

Reports

Delete a Column: Select a column or control and press the **Delete** key.

Insert a Logo: In Layout view, click the **Design** tab on the ribbon, and click the **Logo** button. Locate the file, select it, and click **OK**.

Adjust Page Margins: In Layout view or Design view, click the **Page Setup** tab on the ribbon, click the **Margins** button, and select a margin option.

Adjust Page Orientation: In Layout view or Design view, click the **Page Setup** tab on the ribbon and click the **Landscape** or **Portrait** button.

Advanced Topics

Import Data: Click the **External Data** tab on the ribbon and click the **New Data Source** button. Select the type of data you want to import and select the file type. Browse for the file you want to import and click **OK**. Complete the steps in the import dialog box.

Export Access Objects: Select the database object you want to export in the Navigation Pane. Click the **External Data** tab, and click the button for the type of file to which you want to export in the Export group. Select the desired export options and click **OK**.

Save a Database to Other Formats: Click the **File** tab on the ribbon and select **Save As**. Select the file format to which you want to save your database and click the **Save As** button. Enter a name for the database in the File name field and click **Save**.

Apply Conditional Formatting: In Design view or Layout view, click the field you want to format. Click the **Format** tab on the ribbon and click the **Conditional Formatting** button. Click **New Rule**, select a rule type, and specify the rule details. Click **OK**, then click **OK** again to save the rule.

Compact and Repair a Database: Click the **Database Tools** tab on the ribbon, and click the **Compact and Repair Database** button.

Password Protect a Database: Click the **File** tab on the ribbon and click the **Encrypt with Password** button in the Info section. Type a password in the Password field, enter it again in the Verify field, and click **OK**.

Back Up a Database: Open the database that you want to back up. Click the **File** tab on the ribbon and select **Save As**. Select **Back Up Database** and click the **Save As** button. Specify the save location and type a name for the file, then click **Save**.

Restore a Database: Open File Explorer and navigate to the location of the last known backup of the database. Copy the database backup file. Navigate to the location of the damaged or missing database and paste the database backup file.

Contact Us: sales@customguide.com

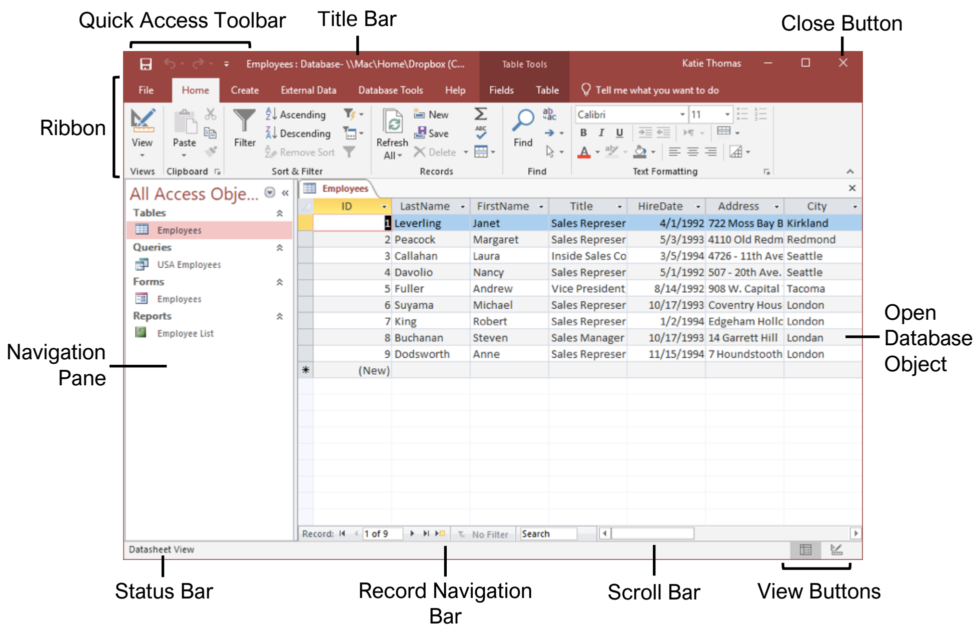
Microsoft®

Access 2016 Basic

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

The Access 2016 Program Screen



Access Basics

[Open a Database:](#) Click the **File** tab and select **Open**, or press **Ctrl** + **O**.

[Save a Database:](#) Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

[Use the Navigation Pane:](#) Click the **All Access Objects** button at the top of the Navigation Pane and select the type of object(s) you want to display.

[Open a Database Object:](#) Double-click an object in the Navigation Pane.

[Modify a Database Object in Design View:](#) Click the **View** button list arrow and select **Design View**.

[Switch Object Tabs:](#) If you have multiple objects open, click the tab for the object you want to display.

[Rename a Database Object:](#) In the Navigation Pane, right-click the object **you** want to rename and select **Rename**. Type a new name, and press **Enter**.

[Delete a Database Object:](#) Select the object you want to delete in the Navigation Pane, press the **Delete** key, and click **Yes**.

Get Help: Press **F1** to open the Help pane. Type your question in the Search field and press **Enter**.

[Close a Database Object:](#) Click the object's **Close** ✕ button in the upper-right corner of the window.

[Close a Database:](#) Click the **File** tab and select **Close**.

Database Objects

Tables store a database's data in rows (records) and columns (fields).

Queries ask a question of data stored in a table.

Forms are custom screens that provide an easy way to enter and view data in a table or query.

Reports present data from a table or query in a printed format.

Macros automate several tasks into a single command.

Modules automate commands using Visual Basic. Modules are similar to macros, but are more complex.

Keyboard Shortcuts

General

Create a new database	**Ctrl** + **N**
Open a database	**Ctrl** + **O**
Close a database	**Ctrl** + **W**
Close Access	**Alt** + **F4**
Print current view	**Ctrl** + **P**
Help	**F1**
Delete record	**Ctrl** + **-**
Cancel changes	**Esc**
Insert date	**Ctrl** + **;**
Insert time	**Shift** + **Ctrl** + **;**
Insert value from same field in previous position	**Ctrl** + **'**
Spell check	**F7**
Switch applications	**Alt** + **Tab**

Navigation

Move between query or table rows	↑, ↓
Move between query or table columns	←, →
Next field	**Tab**
Previous field	**Shift** + **Tab**
Next screen	**Page Down**
Previous screen	**Page Up**
First record	**Ctrl** + ↑
Last record	**Ctrl** + ↓
Go to a specific record	**F5**
Toggle Navigation Pane	**F11**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**

Design View

View properties	**Alt** + **Enter**
Open object in Design view	**Ctrl** + **Enter**
Save object	**Ctrl** + **S**
Switch to Form view	**F5**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Databases

Determine the Purpose of a Database: Planning a database is an important step in the creation process. Consider:

- Fields you need
- Tables you need
- The primary key
- Relationships between fields

Create a Database from a Template: Click the **File** tab and select **New**. Type a word/phrase that describes the database you want to create in the Search for online templates field and click **Search**. Select the template you want to use, name the new database, and click **Create**.

Create a New Blank Database: Click the **File** tab, select **New**, and click the **Blank database** button. Type a name for the new database, and click **Create**.

Add a Record: In Datasheet view, click the **New Record** button on the record navigation bar. Or, begin adding data in the blank bottom row of the table.

Record selector

	8	Buchanan	Steven
	9	Dodsworth	Anne
*	(New)		

Start adding a new record here

Select a Record: Click the **record selector** (gray box to the left of the record) for the record you want to select.

Edit a Record: Click the field you want to edit and make the necessary change. Press **Enter** to commit the change.

Delete a Record: Click the **record selector** next to the record you want to delete, click the **Delete** button on the ribbon, and click **Yes**.

Select Multiple Records: Click the **record selector** for the first record you want to select and drag to the last record you want to select.

Select a Field: Click the field (column) header for the field you want to select.

Copy and Paste: Select the data you want to copy, click the **Copy** button on the Home tab, then click where you want to paste the data, and click the **Paste** button.

Check Spelling: Click the **Home** tab and click the **Spelling** button, or press **F7**.

Print Preview a Database Object: Display the object you want to preview. Click the **File** tab, select **Print**, and click **Print Preview**.

Print a Database Object: Display the object you want to print. Click the **File** tab, select **Print**, and click **Print**.

Find and Filter Data

Find Data: Select the column header or click in any cell in the field you want to search, and click the **Find** button on the Home tab. Type the text you want to find in the Find What field, and click the **Find Next** button.

Replace Data: Select the column header or click in any cell in the field where you want to replace text, and click the **Replace** button on the Home tab. Enter the word you want to find in the Find What field, then enter the text that will replace it in the Replace With field. Click **Replace** or **Replace All**.

Sort Records: Click anywhere in the column you want to sort and click either the **Ascending** or **Descending** button on the Home tab of the ribbon.

Remove a Sort: Click the **Clear All Sorts** button on the Home tab.

Apply a Filter: Click anywhere in the column you want to filter and click the **Filter** button on the Home tab. Uncheck the boxes for any data you want to hide and click **OK**.

Filter by Selection: Click in the column you want to filter, click the **Selection** button on the Home tab, and select an option from the menu.

Filter by Form: Click the **Advanced Filter Options** button on the Home tab and select **Filter by Form**. Click the empty cell below the field you want to filter, then click the list arrow and select the value you want to use to filter the records. Repeat this to filter by any additional fields, and click the **Apply Filter** button on the Home tab to filter the records.

Clear Filters: Click the **Advanced Filter Options** button on the Home tab of the ribbon and select **Clear All Filters**.

Adjust Column Width: Click and drag the column header's right border to the left or right. Or, double-click a header's right border to auto-size the column.

Adjust Row Height: Click and drag the row header's bottom border up or down.

Freeze a Column: Click the header for the column you want to freeze, click the **More** button on the Home tab, and select **Freeze Fields**.

Unfreeze a Column: Click the header for the column you want to unfreeze, click the **More** button on the Home tab, and select **Unfreeze All Fields.**

Hide a Column: Click the header for the column you want to hide, click the **More** button on the Home tab, and select **Hide Fields**.

Unhide a Column: Click any column header, click the **More** button on the Home tab of the ribbon, and select **Unhide Fields**.

Tables

Create a New Blank Table: Click the **Create** tab on the ribbon and click the **Table** button. Click the **Click to Add** field heading, select a field type, type a name for the field, and enter the data for the new field. Click the next **Click to Add** field heading to add another field.

Create a Table in Design View: Click the **Create** tab on the ribbon and click the **Table Design** button. Enter a name in the **Field Name** column and click in the first Data Type field. Click the **Data Type** list arrow, and select a data type for the field.

Insert a Field: In Design view, click the **record selector** for the field that will be below the new field, and click the **Insert Rows** button on the Table Tools Design tab. Enter a field name for the new field, press **Tab**, click the **Data Type** list arrow, and select a data type.

Reorder a Field: In Design view, click the **record selector** for the field you want to move, then click and drag the selected row up or down to the desired location.

Delete a Field: In Design view, click the **record selector** for the field you want to delete, and click the **Delete Rows** button on the Table Tools Design tab.

Change a Field Type: Open the table whose field(s) you want to modify in Design view, click in the field's **Data Type** box, click the **Data Type** list arrow, and select a data type.

Add a Primary Key: In Design view, select the field you want to use as your primary key, and click the **Primary Key** button on the Table Tools Design tab.

Change a Field's Properties: In Design view, select the field that you want to change the properties for, click in the property field you want to change, and enter the new settings.

Change the Field Size: In Design view, select the field whose size you want to change. Click in the **Field Size** field and type or select the field size.

Index a Field: In Design view, select the field you want to index, click in the **Indexed** property field, click its list arrow, and select an indexing option.

Add a Description to a Field: In Design view, click in the field's **Description** box and type the description.

Add a Caption to a Field: In Design view, select the field you want to add a caption to, click in the **Caption** property field, and type a caption.

Add a Total Row: In Datasheet view, click the **Totals** button on the Home tab. Click the cell in the **Total** row for the column you want to display the total for, and select the function you want to perform on the field.

Contact Us: sales@customguide.com

Microsoft®

Access 2019 Intermediate

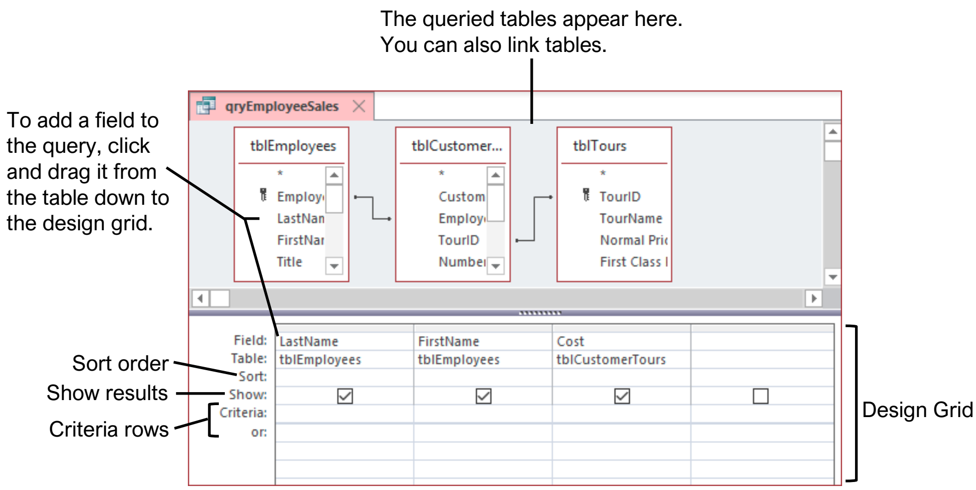
Quick Reference Guide

CustomGuide

your logo

Free Cheat Sheets
Visit ref.customguide.com

Overview of Queries



Queries

Create a Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the table(s) you want to add to the query, click the **Add** button, and close the dialog box. Double-click each field you want to include in the query. Click the **Save** button on the Quick Access Toolbar, type a name for the query, and click **OK**.

Run a Query: Double-click a query in the Navigation Pane.

Hide Fields from Queries: Clear the **Show** check box in the design grid for the field(s) you want to hide.

Sort Fields: Click in the **Sort** field for the field you want to sort, click the list arrow for the field, and select a sort order.

Create a Multiple Table Query: Click the **Create** tab on the ribbon, click the **Query Design** button, double-click the tables you want to add to the query, and click **Close**. Double-click each field you want to include in the query and save the query.

Work with the Expressions Builder: In Design view, click in the **Field** row of a blank column in the design grid, and click the **Builder** button on the Design tab. Select a field to use in the calculation, select an operation for the calculation, click or type any other fields or values you want to use, and click **OK**.

Find Unmatched Records: Click the **Create** tab on the ribbon and click the **Query Wizard** button. Select **Find Unmatched Query Wizard** and click **OK**. Use the wizard to complete the find unmatched query, enter a name for the query in the final step of the wizard, and click **Finish**.

Crosstab Queries: Click the **Create** tab on the ribbon and click the **Query Wizard** button. Select **Crosstab Query Wizard** and click **OK**. Use the wizard to complete the crosstab query, enter a name for the query in the final step of the wizard, and click **Finish**.

Create a Delete Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the tables and queries you want to add, click **Add**, and close the dialog box. Connect any unrelated tables and click the **Delete** button on the Design tab. Double-click the **asterisk** (*) in the table field list for the table containing information you want to delete. Drag the field you want to use as the limiting criteria onto the design grid. Then, click in the field's **Criteria** row and type the specific data you want to delete.

Create an Append Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the tables and queries you want to add, click **Add**, and close the dialog box. Click the **Append** button on the Design tab, specify the append settings, and click **OK**. Double-click any of the fields you want to append.

Query Examples

Expression	Result
"London"	Displays records where the field equals "London."
"London" Or "New York"	Displays records where the field equals "London" or "New York."
Between 1/1/00 And 12/31/00	Displays records where the date is between 1/1/00 and 12/31/00.
Year([Order Date])=2018	Displays records where the OrderDate field equals 2018.
Is Null	Displays records where the field is null.
Is Not Null	Displays records where the field is not null.
Not "USA" Or ""	Displays records where the field does not contain the text "USA" and is not blank.
Like "S*"	Displays records where the field text starts with an "S."
Not Like "S*"	Displays records where the field text does not start with an "S."
>="S"	Displays records where the field text starts with letters "S" through "Z."
>100	Displays records whose field value is greater than 100.
=Sum([Sales])	Displays the sum of the values in the Sales field.
=Avg([Sales])	Displays the average of the values in the Sales field.
=Count([Sales])	Displays the number of records in the Sales field.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Relational Databases

Database Types: There are two basic types of databases.

- **Flat File Database:** Stores all of its information in the same place, such as a single table or list.
- **Relational Database:** Stores information in multiple tables that are related through matching fields. Access is a relational database.

Relationship Types: There are three different types of relationships used when linking tables together.

- **One to One:** Each record in a table relates to one record in another table.
- **One to Many:** Each record in a table relates to one or more records in another table.
- **Many to Many:** One or more records in a table relate to one or more records in another table.

Create Relationship Between Tables: Click the **Database Tools** tab on the ribbon and click the **Relationships** button. Click the **Show Table** button on the Design tab, double-click the table(s) you want to add, and close the dialog box. Click the related field in the first table and drag it to the related field in the second table, select the **Enforce Referential Integrity** check box (optional), and click **Create**.

Print the Relationship Window: Click the **Database Tools** tab on the ribbon, click the **Relationships** button, and click the **Relationships Report** button on the Design tab. Click the **Print** button on the Print Preview tab, select the desired print settings, and click **OK**.

Forms

Create a Form with AutoForm: In the Navigation Pane, click the table or query that contains the data you want the new form to use, click the **Create** tab on the ribbon, and click the **Form** button.

Create a Form with the Form Wizard: Click the **Create** tab on the ribbon and click the **Form Wizard** button. Click the **Tables/Queries** list arrow and select the table or query you want to use to create your form. Under Available Fields, double-click the fields you want to appear in the form. Use the wizard to complete the form setup, enter a name for the form in the final step of the wizard, and click **Finish**.

Change Form Views: Click the **View** list arrow on the Home tab and select a view.

Move a Control: Click the control and drag it to a new location on the form.

Delete a Control: Select the control you want to delete, press the **Delete** key or click the **Delete** button on the Home tab.

Forms

Add a Field: Click the **Add Existing Fields** button on the Design tab and double-click the fields you want to add in the Field List pane at the right.

Add a Control to a Form: In Design view, click the control button you want to add in the Controls group of the Design tab. Click a spot on the form to place the control. If the control you added opens a wizard, navigate through it and specify the desired settings.

Work with Control Properties: In Design view, select the control you want to edit and click the **Property Sheet** button on the Design tab. Click the appropriate property field in the Property Sheet pane and make the necessary changes.

Change a Control's Data Source: Display the form in Design view or Layout view with the Property Sheet displayed. Select the desired control, click the **Data** tab in the Property Sheet pane, click in the Control Source field, and edit the source as desired.

Create a Subform: In Design view, resize the form to make room for the subform. Click the **Controls** button on the Design tab and click the **Subform/Subreport** button. Click and drag where you want the subform to appear. Use the wizard to complete the subform setup, enter a name for the subform in the final step of the wizard, and click **Finish**.

Reports

Create and Save a Report: Select the table or query you want to base the report on in the Navigation Pane, click the **Create** tab on the ribbon, and click the **Report** button. Click the **Save** button on the Quick Access Toolbar, give the report a name, and click **OK**.

Create a Report with the Report Wizard: Click the **Create** tab on the ribbon and click the **Report Wizard** button. Click the **Tables/Queries** list arrow and select the table or query you want to use to create your report. Under Available Fields, double-click the fields you want to appear in the report. Use the wizard to complete the report setup, enter a name for the report in the final step of the wizard, and click **Finish**.

Use the Label Wizard: Open the table or query that contains the data for your labels. Click the **Create** tab on the ribbon and click the **Labels** button. Use the wizard to complete the label setup, enter a name for the report in the final step of the wizard, and click **Finish**.

Work with Report Layouts: Open the report in Layout view, click the **Arrange** tab on the ribbon, and click a command in the Position group.

Move a Column: Click and drag a column's heading to a new location to move a column, or simply click and drag a control to a new location.

Reports

Delete a Column: Select a column or control and press the **Delete** key.

Insert a Logo: In Layout view, click the **Design** tab on the ribbon, and click the **Logo** button. Locate the file, select it, and click **OK**.

Adjust Page Margins: In Layout view or Design view, click the **Page Setup** tab on the ribbon, click the **Margins** button, and select a margin option.

Adjust Page Orientation: In Layout view or Design view, click the **Page Setup** tab on the ribbon and click the **Landscape** or **Portrait** button.

Advanced Topics

Import Data: Click the **External Data** tab on the ribbon and click the **New Data Source** button. Select the type of data you want to import and select the file type. Browse for the file you want to import and click **OK**. Complete the steps in the import dialog box.

Export Access Objects: Select the database object you want to export in the Navigation Pane. Click the **External Data** tab and click the button for the type of file to which you want to export in the Export group. Select the desired export options and click **OK**.

Save a Database to Other Formats: Click the **File** tab on the ribbon and select **Save As**. Select the file format to which you want to save your database and click the **Save As** button. Enter a name for the database in the File name field and click **Save**.

Apply Conditional Formatting: In Design view or Layout view, click the field you want to format. Click the **Format** tab on the ribbon and click the **Conditional Formatting** button. Click **New Rule**, select a rule type, and specify the rule details. Click **OK**, then click **OK** again to save the rule.

Compact and Repair a Database: Click the **Database Tools** tab on the ribbon and click the **Compact and Repair Database** button.

Password Protect a Database: Click the **File** tab on the ribbon and click the **Encrypt with Password** button in the Info section. Type a password in the Password field, enter it again in the Verify field, and click **OK**.

Back Up a Database: Open the database that you want to back up. Click the **File** tab on the ribbon and select **Save As**. Select **Back Up Database** and click the **Save As** button. Specify the save location and type a name for the file, then click **Save**.

Restore a Database: Open File Explorer and navigate to the location of the last known backup of the database. Copy the database backup file. Navigate to the location of the damaged or missing database and paste the database backup file.

Contact Us: sales@customguide.com

Microsoft®

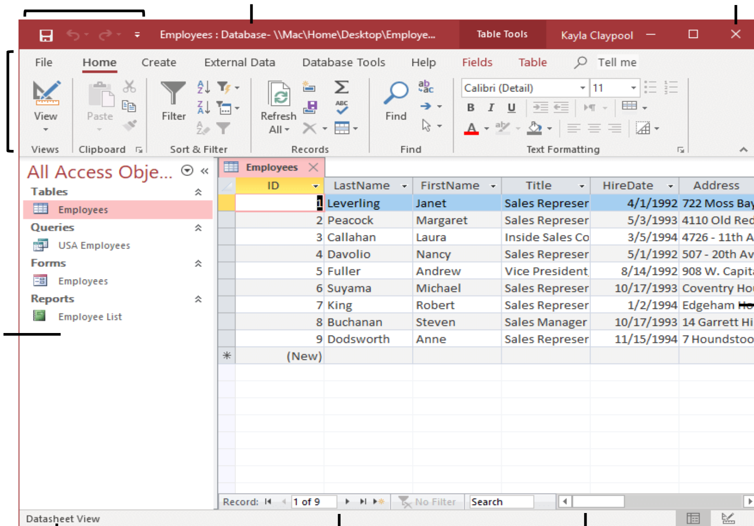
Access 2019 Basic

Quick Reference Guide

your logo

Free Cheat Sheets
Visit ref.customguide.com

The Access 2019 Program Screen



Access Basics

Open a Database: Click the **File** tab and select **Open**, or press **Ctrl** + **O**.

Save a Database: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Use the Navigation Pane: Click the **All Access Objects** button at the top of the Navigation Pane and select the type of object(s) you want to display.

Open a Database Object: Double-click an object in the Navigation Pane.

Modify a Database Object in Design View: Click the **View** button list arrow and select **Design View**.

Switch Object Tabs: If you have multiple objects open, click the tab for the object you want to display.

Rename a Database Object: In the Navigation Pane, right-click the object **you** want to rename and select **Rename**. Type a new name, and press **Enter**.

Delete a Database Object: Select the object you want to delete in the Navigation Pane, press the **Delete** key, and click **Yes**.

Get Help: Press **F1** to open the Help pane. Type your question in the Search field and press **Enter**.

Close a Database Object: Click the object's **Close** ✕ button in the upper-right corner of the window.

Close a Database: Click the **File** tab and select **Close**.

Database Objects

Tables store a database's data in rows (records) and columns (fields).

Queries ask a question of data stored in a table.

Forms are custom screens that provide an easy way to enter and view data in a table or query.

Reports present data from a table or query in a printed format.

Macros automate several tasks into a single command.

Modules automate commands using Visual Basic. Modules are similar to macros, but are more complex.

Keyboard Shortcuts

General

Create a new database	**Ctrl** + **N**
Open a database	**Ctrl** + **O**
Close a database	**Ctrl** + **W**
Close Access	**Alt** + **F4**
Print current view	**Ctrl** + **P**
Help	**F1**
Delete record	**Ctrl** + **-**
Cancel changes	**Esc**
Insert date	**Ctrl** + **;**
Insert time	**Shift** + **Ctrl** + **;**
Insert value from same field in previous position	**Ctrl** + **'**
Spell check	**F7**
Switch applications	**Alt** + **Tab**

Navigation

Move between query or table rows	↑, ↓
Move between query or table columns	←, →
Next field	**Tab**
Previous field	**Shift** + **Tab**
Next screen	**Page Down**
Previous screen	**Page Up**
First record	**Ctrl** + ↑
Last record	**Ctrl** + ↓
Go to a specific record	**F5**
Toggle Navigation Pane	**F11**

Editing

Cut	**Ctrl** + **X**
Copy	**Ctrl** + **C**
Paste	**Ctrl** + **V**
Undo	**Ctrl** + **Z**
Redo	**Ctrl** + **Y**
Find	**Ctrl** + **F**
Replace	**Ctrl** + **H**

Design View

View properties	**Alt** + **Enter**
Open object in Design view	**Ctrl** + **Enter**
Save object	**Ctrl** + **S**
Switch to Form view	**F5**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Databases

Determine the Purpose of a Database: Planning a database is an important step in the creation process. Consider:

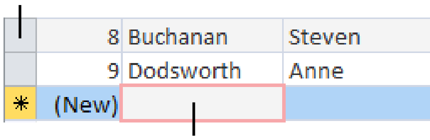
- Fields you need
- Tables you need
- The primary key
- Relationships between fields

Create a Database from a Template: Click the **File** tab and select **New**. Type a word/phrase that describes the database you want to create in the Search for online templates field and click **Search**. Select the template you want to use, name the new database, and click **Create**.

Create a New Blank Database: Click the **File** tab, select **New**, and click the **Blank database** button. Type a name for the new database, and click **Create**.

Add a Record: In Datasheet view, click the **New Record** button on the record navigation bar. Or, begin adding data in the blank bottom row of the table.

Record selector



Start adding a new record here

Select a Record: Click the **record selector** (gray box to the left of the record) for the record you want to select.

Edit a Record: Click the field you want to edit and make the necessary change. Press **Enter** to commit the change.

Delete a Record: Click the **record selector** next to the record you want to delete, click the **Delete** button on the ribbon, and click **Yes**.

Select Multiple Records: Click the **record selector** for the first record you want to select and drag to the last record you want to select.

Select a Field: Click the field (column) header for the field you want to select.

Copy and Paste: Select the data you want to copy, click the **Copy** button on the Home tab, then click where you want to paste the data, and click the **Paste** button.

Check Spelling: Click the **Home** tab and click the **Spelling** button, or press **F7**.

Print Preview a Database Object: Display the object you want to preview. Click the **File** tab, select **Print**, and click **Print Preview**.

Print a Database Object: Display the object you want to print. Click the **File** tab, select **Print**, and click **Print**.

Work with Data

Find Data: Select the column header or click in any cell in the field you want to search, and click the **Find** button on the Home tab. Type the text you want to find in the Find What field, and click the **Find Next** button.

Replace Data: Select the column header or click in any cell in the field where you want to replace text, and click the **Replace** button on the Home tab. Enter the word you want to find in the Find What field, then enter the text that will replace it in the Replace With field. Click **Replace** or **Replace All**.

Sort Records: Click anywhere in the column you want to sort and click either the **Ascending** or **Descending** button on the Home tab of the ribbon.

Remove a Sort: Click the **Remove Sort** button on the Home tab.

Apply a Filter: Click anywhere in the column you want to filter and click the **Filter** button on the Home tab. Uncheck the boxes for any data you want to hide and click **OK**.

Filter by Selection: Click in the column you want to filter, click the **Selection** button on the Home tab, and select an option from the menu.

Filter by Form: Click the **Advanced Filter Options** button on the Home tab and select **Filter by Form**. Click the empty cell below the field you want to filter, then click the list arrow and select the value you want to use to filter the records. Repeat this to filter by any additional fields, and click the **Apply Filter** button on the Home tab to filter the records.

Clear Filters: Click the **Advanced Filter Options** button on the Home tab of the ribbon and select **Clear All Filters**.

Adjust Column Width: Click and drag the column header's right border to the left or right. Or, double-click a header's right border to auto-size the column.

Adjust Row Height: Click and drag the row header's bottom border up or down.

Freeze a Column: Click the header for the column you want to freeze, click the **More** button on the Home tab, and select **Freeze Fields**.

Unfreeze a Column: Click the header for the column you want to unfreeze, click the **More** button on the Home tab, and select **Unfreeze All Fields**.

Hide a Column: Click the header for the column you want to hide, click the **More** button on the Home tab, and select **Hide Fields**.

Unhide a Column: Click any column header, click the **More** button on the Home tab of the ribbon, and select **Unhide Fields**.

Tables

Create a New Blank Table: Click the **Create** tab on the ribbon and click the **Table** button. Click the **Click to Add** field heading, select a field type, type a name for the field, and enter the data for the new field. Click the next **Click to Add** field heading to add another field.

Create a Table in Design View: Click the **Create** tab on the ribbon and click the **Table Design** button. Enter a name in the **Field Name** column and click in the first Data Type field. Click the **Data Type** list arrow, and select a data type for the field.

Insert a Field: In Design view, click the **record selector** for the field that will be below the new field, and click the **Insert Rows** button on the Table Tools Design tab. Enter a field name for the new field, press **Tab**, click the **Data Type** list arrow, and select a data type.

Reorder a Field: In Design view, click the **record selector** for the field you want to move, then click and drag the selected row up or down to the desired location.

Delete a Field: In Design view, click the **record selector** for the field you want to delete, and click the **Delete Rows** button on the Table Tools Design tab.

Change a Field Type: Open the table whose field(s) you want to modify in Design view, click in the field's **Data Type** box, click the **Data Type** list arrow, and select a data type.

Add a Primary Key: In Design view, select the field you want to use as your primary key, and click the **Primary Key** button on the Table Tools Design tab.

Change a Field's Properties: In Design view, select the field that you want to change the properties for, click in the property field you want to change, and enter the new settings.

Change the Field Size: In Design view, select the field whose size you want to change. Click in the **Field Size** field and type or select the field size.

Index a Field: In Design view, select the field you want to index, click in the **Indexed** property field, click its list arrow, and select an indexing option.

Add a Description to a Field: In Design view, click in the field's **Description** box and type the description.

Add a Caption to a Field: In Design view, select the field you want to add a caption to, click in the **Caption** property field, and type a caption.

Add a Total Row: In Datasheet view, click the **Totals** button on the Home tab. Click the cell in the **Total** row for the column you want to display the total for, and select the function you want to perform on the field.

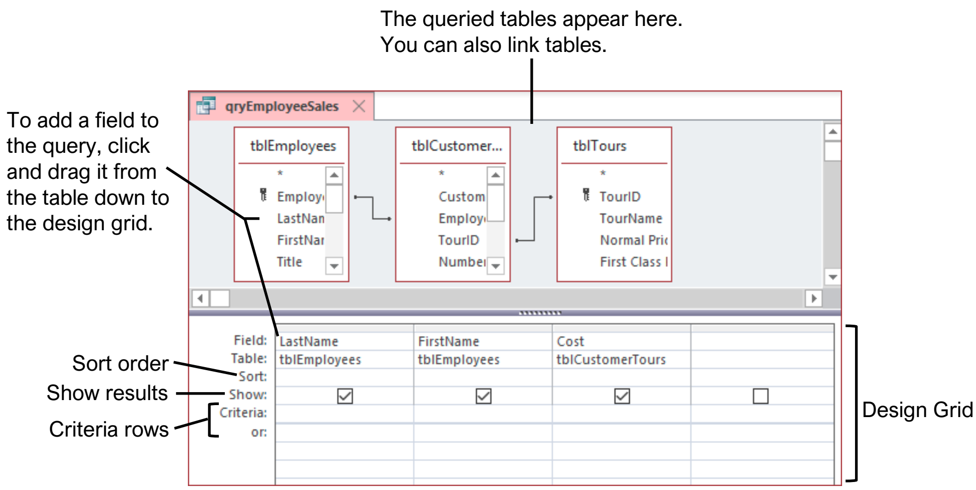
Microsoft®

Access 2021 Intermediate

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

Overview of Queries



Queries

Create a Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the table(s) you want to add to the query, click the **Add** button, and close the dialog box. Double-click each field you want to include in the query. Click the **Save** button on the Quick Access Toolbar, type a name for the query, and click **OK**.

Run a Query: Double-click a query in the Navigation Pane.

Hide Fields from Queries: Clear the **Show** check box in the design grid for the field(s) you want to hide.

Sort Fields: Click in the **Sort** field for the field you want to sort, click the list arrow for the field, and select a sort order.

Create a Multiple Table Query: Click the **Create** tab on the ribbon, click the **Query Design** button, double-click the tables you want to add to the query, and click **Close**. Double-click each field you want to include in the query and save the query.

Work with the Expressions Builder: In Design view, click in the **Field** row of a blank column in the design grid, and click the **Builder** button on the Design tab. Select a field to use in the calculation, select an operation for the calculation, click or type any other fields or values you want to use, and click **OK**.

Find Unmatched Records: Click the **Create** tab on the ribbon and click the **Query Wizard** button. Select **Find Unmatched Query Wizard** and click **OK**. Use the wizard to complete the find unmatched query, enter a name for the query in the final step of the wizard, and click **Finish**.

Crosstab Queries: Click the **Create** tab on the ribbon and click the **Query Wizard** button. Select **Crosstab Query Wizard** and click **OK**. Use the wizard to complete the crosstab query, enter a name for the query in the final step of the wizard, and click **Finish**.

Create a Delete Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the tables and queries you want to add, click **Add**, and close the dialog box. Connect any unrelated tables and click the **Delete** button on the Design tab. Double-click the **asterisk** (*) in the table field list for the table containing information you want to delete. Drag the field you want to use as the limiting criteria onto the design grid. Then, click in the field's **Criteria** row and type the specific data you want to delete.

Create an Append Query: Click the **Create** tab on the ribbon and click the **Query Design** button. Select the tables and queries you want to add, click **Add**, and close the dialog box. Click the **Append** button on the Design tab, specify the append settings, and click **OK**. Double-click any of the fields you want to append.

Query Examples

Expression	Result
"London"	Displays records where the field equals "London."
"London" Or "New York"	Displays records where the field equals "London" or "New York."
Between 1/1/00 And 12/31/00	Displays records where the date is between 1/1/00 and 12/31/00.
Year([Order Date])=2018	Displays records where the OrderDate field equals 2018.
Is Null	Displays records where the field is null.
Is Not Null	Displays records where the field is not null.
Not "USA" Or ""	Displays records where the field does not contain the text "USA" and is not blank.
Like "S*"	Displays records where the field text starts with an "S."
Not Like "S*"	Displays records where the field text does not start with an "S."
>="S"	Displays records where the field text starts with letters "S" through "Z."
>100	Displays records whose field value is greater than 100.
=Sum([Sales])	Displays the sum of the values in the Sales field.
=Avg([Sales])	Displays the average of the values in the Sales field.
=Count([Sales])	Displays the number of records in the Sales field.

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Relational Databases

Database Types: There are two basic types of databases.

- **Flat File Database:** Stores all of its information in the same place, such as a single table or list.
- **Relational Database:** Stores information in multiple tables that are related through matching fields. Access is a relational database.

Relationship Types: There are three different types of relationships used when linking tables together.

- **One to One:** Each record in a table relates to one record in another table.
- **One to Many:** Each record in a table relates to one or more records in another table.
- **Many to Many:** One or more records in a table relate to one or more records in another table.

Create Relationship Between Tables: Click the **Database Tools** tab on the ribbon and click the **Relationships** button. Click the **Show Table** button on the Design tab, double-click the table(s) you want to add, and close the dialog box. Click the related field in the first table and drag it to the related field in the second table, select the **Enforce Referential Integrity** check box (optional), and click **Create**.

Print the Relationship Window: Click the **Database Tools** tab on the ribbon, click the **Relationships** button, and click the **Relationships Report** button on the Design tab. Click the **Print** button on the Print Preview tab, select the desired print settings, and click **OK**.

Forms

Create a Form with AutoForm: In the Navigation Pane, click the table or query that contains the data you want the new form to use, click the **Create** tab on the ribbon, and click the **Form** button.

Create a Form with the Form Wizard: Click the **Create** tab on the ribbon and click the **Form Wizard** button. Click the **Tables/Queries** list arrow and select the table or query you want to use to create your form. Under Available Fields, double-click the fields you want to appear in the form. Use the wizard to complete the form setup, enter a name for the form in the final step of the wizard, and click **Finish**.

Change Form Views: Click the **View** list arrow on the Home tab and select a view.

Move a Control: Click the control and drag it to a new location on the form.

Delete a Control: Select the control you want to delete, press the **Delete** key or click the **Delete** button on the Home tab.

Forms

Add a Field: Click the **Add Existing Fields** button on the Design tab and double-click the fields you want to add in the Field List pane at the right.

Add a Control to a Form: In Design view, click the control button you want to add in the Controls group of the Design tab. Click a spot on the form to place the control. If the control you added opens a wizard, navigate through it and specify the desired settings.

Work with Control Properties: In Design view, select the control you want to edit and click the **Property Sheet** button on the Design tab. Click the appropriate property field in the Property Sheet pane and make the necessary changes.

Change a Control's Data Source: Display the form in Design view or Layout view with the Property Sheet displayed. Select the desired control, click the **Data** tab in the Property Sheet pane, click in the Control Source field, and edit the source as desired.

Create a Subform: In Design view, resize the form to make room for the subform. Click the **Controls** button on the Design tab and click the **Subform/Subreport** button. Click and drag where you want the subform to appear. Use the wizard to complete the subform setup, enter a name for the subform in the final step of the wizard, and click **Finish**.

Reports

Create and Save a Report: Select the table or query you want to base the report on in the Navigation Pane, click the **Create** tab on the ribbon, and click the **Report** button. Click the **Save** button on the Quick Access Toolbar, give the report a name, and click **OK**.

Create a Report with the Report Wizard: Click the **Create** tab on the ribbon and click the **Report Wizard** button. Click the **Tables/Queries** list arrow and select the table or query you want to use to create your report. Under Available Fields, double-click the fields you want to appear in the report. Use the wizard to complete the report setup, enter a name for the report in the final step of the wizard, and click **Finish**.

Use the Label Wizard: Open the table or query that contains the data for your labels. Click the **Create** tab on the ribbon and click the **Labels** button. Use the wizard to complete the label setup, enter a name for the report in the final step of the wizard, and click **Finish**.

Work with Report Layouts: Open the report in Layout view, click the **Arrange** tab on the ribbon, and click a command in the Position group.

Move a Column: Click and drag a column's heading to a new location to move a column, or simply click and drag a control to a new location.

Reports

Delete a Column: Select a column or control and press the **Delete** key.

Insert a Logo: In Layout view, click the **Design** tab on the ribbon, and click the **Logo** button. Locate the file, select it, and click **OK**.

Adjust Page Margins: In Layout view or Design view, click the **Page Setup** tab on the ribbon, click the **Margins** button, and select a margin option.

Adjust Page Orientation: In Layout view or Design view, click the **Page Setup** tab on the ribbon and click the **Landscape** or **Portrait** button.

Advanced Topics

Import Data: Click the **External Data** tab on the ribbon and click the **New Data Source** button. Select the type of data you want to import and select the file type. Browse for the file you want to import and click **OK**. Complete the steps in the import dialog box.

Export Access Objects: Select the database object you want to export in the Navigation Pane. Click the **External Data** tab and click the button for the type of file to which you want to export in the Export group. Select the desired export options and click **OK**.

Save a Database to Other Formats: Click the **File** tab on the ribbon and select **Save As**. Select the file format to which you want to save your database and click the **Save As** button. Enter a name for the database in the File name field and click **Save**.

Apply Conditional Formatting: In Design view or Layout view, click the field you want to format. Click the **Format** tab on the ribbon and click the **Conditional Formatting** button. Click **New Rule**, select a rule type, and specify the rule details. Click **OK**, then click **OK** again to save the rule.

Compact and Repair a Database: Click the **Database Tools** tab on the ribbon and click the **Compact and Repair Database** button.

Password Protect a Database: Click the **File** tab on the ribbon and click the **Encrypt with Password** button in the Info section. Type a password in the Password field, enter it again in the Verify field, and click **OK**.

Back Up a Database: Open the database that you want to back up. Click the **File** tab on the ribbon and select **Save As**. Select **Back Up Database** and click the **Save As** button. Specify the save location and type a name for the file, then click **Save**.

Restore a Database: Open File Explorer and navigate to the location of the last known backup of the database. Copy the database backup file. Navigate to the location of the damaged or missing database and paste the database backup file.

Contact Us: sales@customguide.com

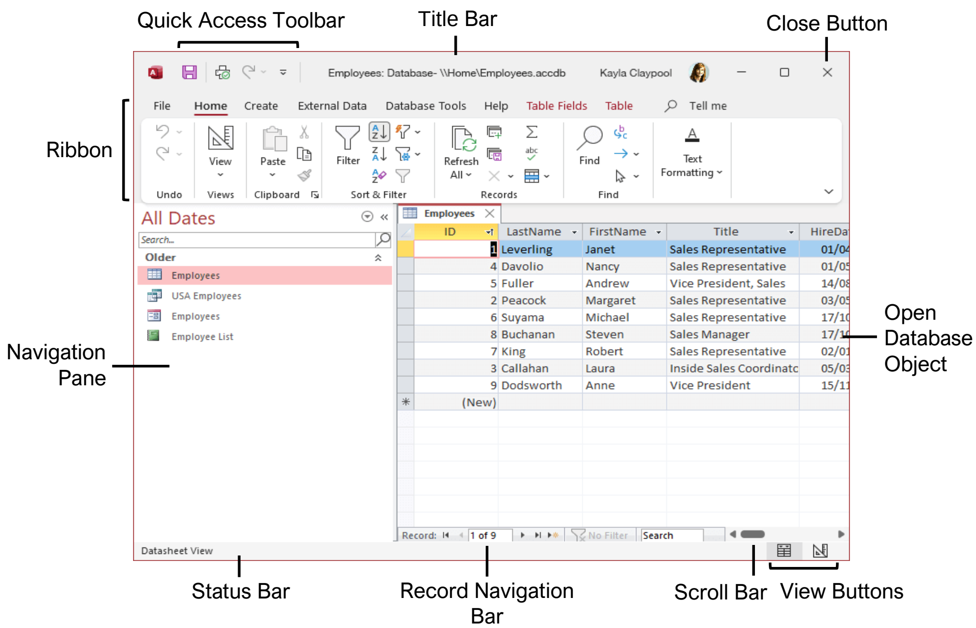
Microsoft®

Access 2021 Basic

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

The Access 2021 Program Screen



Access Basics

Open a Database: Click the **File** tab and select **Open**, or press **Ctrl** + **O**.

Save a Database: Click the **Save** button on the Quick Access Toolbar, or press **Ctrl** + **S**. Choose a location where you want to save the file. Give the file a name, then click **Save**.

Use the Navigation Pane: Click the **All Access Objects** button at the top of the Navigation Pane and select the type of object(s) you want to display.

Open a Database Object: Double-click an object in the Navigation Pane.

Modify a Database Object in Design View: Click the **View** button list arrow and select **Design View**.

Switch Object Tabs: If you have multiple objects open, click the tab for the object you want to display.

Rename a Database Object: In the Navigation Pane, right-click the object **you** want to rename and select **Rename**. Type a new name, and press **Enter**.

Delete a Database Object: Select the object you want to delete in the Navigation Pane, press the **Delete** key, and click **Yes**.

Get Help: Press **F1** to open the Help pane. Type your question in the Search field and press **Enter**.

Close a Database Object: Click the object's **Close** ✕ button in the upper-right corner of the window.

Close a Database: Click the **File** tab and select **Close**.

Database Objects

Tables store a database's data in rows (records) and columns (fields).

Queries ask a question of data stored in a table.

Forms are custom screens that provide an easy way to enter and view data in a table or query.

Reports present data from a table or query in a printed format.

Macros automate several tasks into a single command.

Modules automate commands using Visual Basic. Modules are similar to macros, but are more complex.

Keyboard Shortcuts

General

- Create a new database........ **Ctrl** + **N**
- Open a database................ **Ctrl** + **O**
- Close a database .... **Ctrl** + **W**
- Close Access .... **Alt** + **F4**
- Print current view .... **Ctrl** + **P**
- Help.................................. **F1**
- Delete record .... **Ctrl** + **-**
- Cancel changes .... **Esc**
- Insert date.......................... **Ctrl** + **;**
- Insert time.......................... **Shift** + **Ctrl** + **;**
- Insert value from same field in previous position....... **Ctrl** + **'**
- Spell check **F7**
- Switch applications............. **Alt** + **Tab**

Navigation

- Move between query or table rows .... ↑, ↓
- Move between query or table columns..................... ←, →
- Next field............................ **Tab**
- Previous field...................... **Shift** + **Tab**
- Next screen .... **Page Down**
- Previous screen .... **Page Up**
- First record .... **Ctrl** + ↑
- Last record .... **Ctrl** + ↓
- Go to a specific record **F5**
- Toggle Navigation Pane....... **F11**

Editing

- Cut .... **Ctrl** + **X**
- Copy................................... **Ctrl** + **C**
- Paste .... **Ctrl** + **V**
- Undo .... **Ctrl** + **Z**
- Redo.................................. **Ctrl** + **Y**
- Find .... **Ctrl** + **F**
- Replace .... **Ctrl** + **H**

Design View

- View properties .... **Alt** + **Enter**
- Open object in Design view.................................. **Ctrl** + **Enter**
- Save object......................... **Ctrl** + **S**
- Switch to Form view **F5**

Click the topic links for free lessons!

Contact Us: sales@customguide.com

Databases

Determine the Purpose of a Database: Planning a database is an important step in the creation process. Consider:

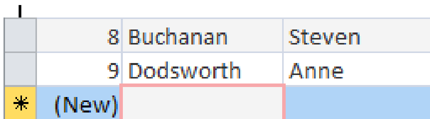
- Fields you need
- Tables you need
- The primary key
- Relationships between fields

Create a Database from a Template: Click the **File** tab and select **New**. Type a word/phrase that describes the database you want to create in the Search for online templates field and click **Search**. Select the template you want to use, name the new database, and click **Create**.

Create a New Blank Database: Click the **File** tab, select **New**, and click the **Blank database** button. Type a name for the new database, and click **Create**.

Add a Record: In Datasheet view, click the **New Record** button on the record navigation bar. Or, begin adding data in the blank bottom row of the table.

Record selector



Start adding a new record here

Select a Record: Click the **record selector** (gray box to the left of the record) for the record you want to select.

Edit a Record: Click the field you want to edit and make the necessary change. Press **Enter** to commit the change.

Delete a Record: Click the **record selector** next to the record you want to delete, click the **Delete** button on the ribbon, and click **Yes**.

Select Multiple Records: Click the **record selector** for the first record you want to select and drag to the last record you want to select.

Select a Field: Click the field (column) header for the field you want to select.

Copy and Paste: Select the data you want to copy, click the **Copy** button on the Home tab, then click where you want to paste the data, and click the **Paste** button.

Check Spelling: Click the **Home** tab and click the **Spelling** button, or press **F7**.

Print Preview a Database Object: Display the object you want to preview. Click the **File** tab, select **Print**, and click **Print Preview**.

Print a Database Object: Display the object you want to print. Click the **File** tab, select **Print**, and click **Print**.

Work with Data

Find Data: Select the column header or click in any cell in the field you want to search, and click the **Find** button on the Home tab. Type the text you want to find in the Find What field, and click the **Find Next** button.

Replace Data: Select the column header or click in any cell in the field where you want to replace text, and click the **Replace** button on the Home tab. Enter the word you want to find in the Find What field, then enter the text that will replace it in the Replace With field. Click **Replace** or **Replace All**.

Sort Records: Click anywhere in the column you want to sort and click either the **Ascending** or **Descending** button on the Home tab of the ribbon.

Remove a Sort: Click the **Remove Sort** button on the Home tab.

Apply a Filter: Click anywhere in the column you want to filter and click the **Filter** button on the Home tab. Uncheck the boxes for any data you want to hide and click **OK**.

Filter by Selection: Click in the column you want to filter, click the **Selection** button on the Home tab, and select an option from the menu.

Filter by Form: Click the **Advanced Filter Options** button on the Home tab and select **Filter by Form**. Click the empty cell below the field you want to filter, then click the list arrow and select the value you want to use to filter the records. Repeat this to filter by any additional fields, and click the **Apply Filter** button on the Home tab to filter the records.

Clear Filters: Click the **Advanced Filter Options** button on the Home tab of the ribbon and select **Clear All Filters**.

Adjust Column Width: Click and drag the column header's right border to the left or right. Or, double-click a header's right border to auto-size the column.

Adjust Row Height: Click and drag the row header's bottom border up or down.

Freeze a Column: Click the header for the column you want to freeze, click the **More** button on the Home tab, and select **Freeze Fields**.

Unfreeze a Column: Click the header for the column you want to unfreeze, click the **More** button on the Home tab, and select **Unfreeze All Fields**.

Hide a Column: Click the header for the column you want to hide, click the **More** button on the Home tab, and select **Hide Fields**.

Unhide a Column: Click any column header, click the **More** button on the Home tab of the ribbon, and select **Unhide Fields**.

Tables

Create a New Blank Table: Click the **Create** tab on the ribbon and click the **Table** button. Click the **Click to Add** field heading, select a field type, type a name for the field, and enter the data for the new field. Click the next **Click to Add** field heading to add another field.

Create a Table in Design View: Click the **Create** tab on the ribbon and click the **Table Design** button. Enter a name in the **Field Name** column and click in the first Data Type field. Click the **Data Type** list arrow, and select a data type for the field.

Insert a Field: In Design view, click the **record selector** for the field that will be below the new field, and click the **Insert Rows** button on the Table Tools Design tab. Enter a field name for the new field, press **Tab**, click the **Data Type** list arrow, and select a data type.

Reorder a Field: In Design view, click the **record selector** for the field you want to move, then click and drag the selected row up or down to the desired location.

Delete a Field: In Design view, click the **record selector** for the field you want to delete, and click the **Delete Rows** button on the Table Tools Design tab.

Change a Field Type: Open the table whose field(s) you want to modify in Design view, click in the field's **Data Type** box, click the **Data Type** list arrow, and select a data type.

Add a Primary Key: In Design view, select the field you want to use as your primary key, and click the **Primary Key** button on the Table Tools Design tab.

Change a Field's Properties: In Design view, select the field that you want to change the properties for, click in the property field you want to change, and enter the new settings.

Change the Field Size: In Design view, select the field whose size you want to change. Click in the **Field Size** field and type or select the field size.

Index a Field: In Design view, select the field you want to index, click in the **Indexed** property field, click its list arrow, and select an indexing option.

Add a Description to a Field: In Design view, click in the field's **Description** box and type the description.

Add a Caption to a Field: In Design view, select the field you want to add a caption to, click in the **Caption** property field, and type a caption.

Add a Total Row: In Datasheet view, click the **Totals** button on the Home tab. Click the cell in the **Total** row for the column you want to display the total for, and select the function you want to perform on the field.

Contact Us: sales@customguide.com

Time Management
Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

Goals of Time Management

Time management is learning to plan out your available time and control the amount of time you spend on specific tasks in order to work more efficiently. Time is the most valuable resource you have. Once it's gone, it's gone forever, so learning to manage it is a critical skill.

Managing your time well allows you to:

Increase Productivity: Identifying tasks that are unimportant or can be delegated allows more time to focus on what's essential.

Enjoy More Free Time: Eliminating tasks that waste time and aren't critical creates more time for things that are enjoyable.

Reduce Stress: When tasks are prioritized, you can focus on what needs to be done, know how much time is available to complete them, and put your mind at ease.

Restore Work / Life Balance: When necessary tasks can be completed during the workday, work doesn't have to be brought home.

The Four Quadrants

Former president Dwight Eisenhower realized most urgent things in life aren't important. He developed the 4-quadrant matrix to illustrate where we spend our time.

Quadrant 1: Tasks that are important and urgent, things like putting out fire fires and completing a report on time.

Quadrant 2: Tasks that are important but not urgent. These tasks require commitment to complete over time.

Quadrant 3: Tasks that are urgent but not important, like unimportant phone calls or unnecessary meetings.

Quadrant 4: Tasks that aren't important or urgent, things like working on an unnecessary report or watching TV.

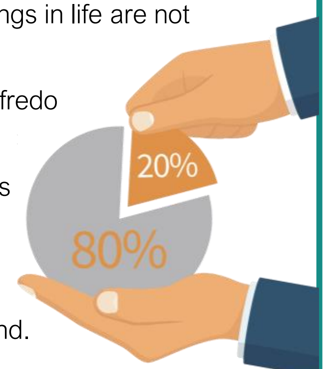
Aim to spend as much time as possible in Quadrant 2.

The 80/20 Rule

The 80/20 rule, also known as the Pareto principle, is the observation that most things in life are not evenly distributed.

In 1895, Italian economist Vilfredo Pareto noticed:

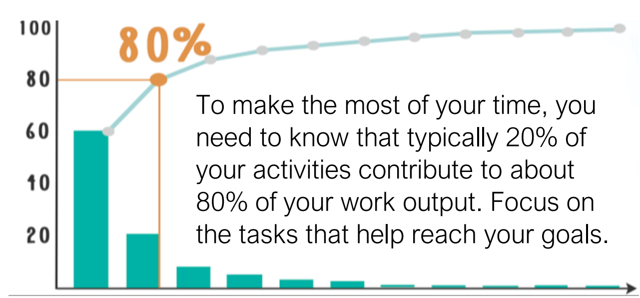
- 20% of the pea pods in his garden produced 80% of the peas.
- 20% of the population in Italy owned 80% of the land.



The theory, although not an exact science, appears everywhere. In the workplace:

- 20% of the workers produce 80% of the results.
- 20% of the customers create 80% of the revenue.

How Does It Apply to Time Management?



To make the most of your time, you need to know that typically 20% of your activities contribute to about 80% of your work output. Focus on the tasks that help reach your goals.

Minimize Time Wasters

Procrastinating

Fact: 20% of people identify themselves as chronic procrastinators.

Fixes:

- Set an effective schedule.
- Prioritize your work.
- Take breaks.
- Learn to say no.

Meetings

Fact: Executives spend an average of 23 hours a week in meetings.

Fixes:

- Only attend meetings where your attendance is needed.
- Get permission to leave early if a meeting only partially applies to you.

Interruptions

Fact: It takes an average of 23 minutes to get back on track after you've been interrupted.

Fixes:

- Don't check your phone every time you get a notification.
- Schedule time throughout the day to check your phone and email.
- Designate "busy" time on your calendar.
- Work somewhere other than your desk.

Multitasking

Fact: It takes 20-40% more time to complete a list of tasks while multitasking than if completing tasks sequentially.

Fixes:

- Make a task list and prioritize work.
- Complete one task before starting the next.

Not Saying No

Fact: Many people falsely believe saying “no” implies they are rude, selfish, or unkind.

Fixes:

- Be assertive, but courteous.
- Decline without a long explanation—it’s not needed.
- Offer a realistic alternative.

Time-Saving Techniques

Use the 4 D’s of Time Management

The four D's of time management are a way to determine if a task is worth your time. They help you decide if a task is something you should do now yourself, defer until later, delegate to someone else, or delete from your schedule and never do.

Do — **Do** the tasks that only take a few minutes to complete, like answering an email.

Defer — **Defer** anything that doesn't need to be done immediately, like a request from a colleague. Do it when it fits your schedule.

Delegate — If you have an essential task that can be completed by someone with extra availability, **delegate** the task.

Delete — If the task isn’t needed, **delete** it. Don't waste time on things that don't need to be done, such as attending unnecessary meetings.

Take Control of Your Email

- Designate time for email throughout the day.
- When it’s time for email, take immediate action.
    1. Delete junk.
    2. Read and delete items that don't require a response.
    3. Respond to the remaining emails.
- Organize your inbox with folders and labels.
- Unsubscribe from promotional emails.

Use Tasks and Notes

- **Write everything down.** Get everything out of your head, then organize and prioritize later.
- **Prioritize tasks.** Start with time-sensitive items and those that will reduce your workload the most.
- **Keep everything in one place.** Store tasks and notes in an app that’s accessible anywhere.
- **Dedicate time to keeping task lists and notes.** It saves a lot of time in the long run.

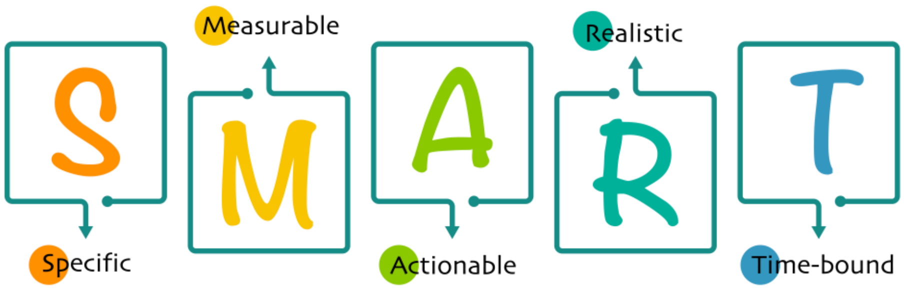
SMART Goals

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

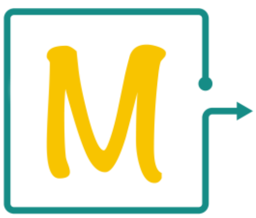
What are SMART Goals?

Setting goals involves creating a plan to motivate and guide individuals to the desired end result. The SMART methodology is a goal-setting tool used make aspirations more achievable. The acronym stands for:



Specific

Goals that are specific are much easier to accomplish. General goals feel overwhelming and make it hard to get started. If your goal answers the 5 W's – Who? What? When? Where? Why? – then it's probably fairly specific. For example, the goal "get healthy" isn't specific enough. But if you break it down to "I want to lose 15 pounds in 3 months by going to the gym 3 days a week," it's both specific and more attainable.



Measurable

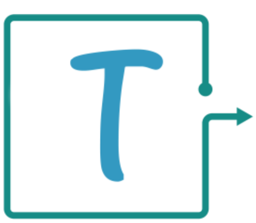
A goal that is measurable allows you to track progress along the way. It answers the questions "how much?" or "how many?". Break your broad goal into smaller chunks with mini deadlines to ensure you stay on track. For example, if you want to lose 15 pounds in 3 months, set a monthly goal to lose 5 pounds. The small victories build excitement and help you maintain motivation.

Actionable

Actionable goals are those that you yourself have the ability to complete with available resources. Ensure when planning your goal that it contains an action verb explaining how the goal will be accomplished. For the weight loss example, specifying you will go to the gym 3 days a week makes it actionable. It defines *how* the goal will be accomplished.

Realistic

If a goal isn't realistic, it's unlikely to be achieved. It should challenge you but still be something you can commit to based on the other things currently going on in your life. For example, a goal to lose 40 pounds in a month isn't realistic.



Time-bound

Goals that are time-bound give a sense of urgency for completion. You need to define both a start and end date. It's not always feasible to start on a goal immediately. For example, if you have a vacation coming up in 2 weeks, you probably don't want to start a diet today.

Managing Meetings
Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

Should a Meeting be Held?

Before scheduling a meeting, it's important to decide if a meeting is truly necessary. Ask yourself:

Why am I scheduling this meeting?

Think about everything you want to cover and how much time it will take.

What do I want to accomplish?

If you can't answer this question, you're not ready for a meeting. Write down a list of goals to be accomplished in the meeting and get the answers you're looking for.

What will be shared or decided?

Determine what will be decided on in the meeting and think about how you'll get the information from attendees. Do you want to have an open discussion, do a show of hands, or have people respond in an email?

Who will be attending?

Think about the key decision makers that need to attend. Don't include anyone who's not needed in the conversation; it will be a waste of their time.

Types of Meetings

When you first start planning a meeting, you'll need to identify what kind of meeting it is.

Report or Information Related

Includes things like presentations, debates, keynotes, or lectures where the main goal is to share information.

Decision-making or Problem-solving

The most common kind of meeting. Includes things like information gathering and sharing, brainstorming, assessing options, and coming to a common agreement.

Training and Skill Building

This could be for training a new employee, or to train existing employees about a new procedure or job role.

One-On-One

Between you and one other person. They help managers oversee employee productivity and development.

Did You Know?

37% of employee time is spent in meetings

$37 billion a year is spent on unnecessary meetings

39% of participants admit to dozing off during a meeting

47% consider too many meetings the biggest waste of time

Source: www.meetingking.com

Remote Meetings

Once you decide to hold a meeting, determine if any or all of the participants will be joining remotely.

When planning a remote meeting you need to:

- Ensure you have the necessary software installed on your computer.
- Get familiar with the meeting software before the call.
- Have a microphone and web cam available and have them properly configured.

When leading a remote meeting…

1. Be early.
2. Record the meeting for those unable to attend.
3. Welcome each person as they join.
4. Ask questions to promote engagement.
5. Have attendees mute their mic when not speaking.

Preparing for a Meeting

Some of the most important work is completed before the meeting even begins. A well-developed plan sets you up for success. In the planning stage, you'll determine 3 important items.

The Meeting Objective

A clear objective should:

- Allow potential attendees to determine if they should attend the meeting.
- Define the meeting purpose so people in charge of presenting know what material to prepare.
- Be a way to measure if the meeting was successful.

The Meeting Agenda

Items to consider in an agenda:

- **Priorities** - What absolutely must be covered in the meeting?
- **Results** - What needs to be accomplished when the meeting is over?
- **Sequence** - Does the sequence you cover the topics in matter?
- **Timing** - How long should the meeting last and how long do you have to talk about each topic?

The Meeting Time

When determining a time:

- Pick a time that works for all required attendees.
- Avoid scheduling meetings early in the morning or around lunch time.
- Account for attendees joining from different time zones.
- Keep the meeting length as short as possible.

During a Meeting

Delegate Responsibilities

To ensure the meeting tasks are accomplished, assign specific tasks to specific people. When delegating:

- Address each individual.
- Set clear objectives and timelines.
- Make yourself available for input after the meeting.
- Keep track of progress.

Maintain Effectiveness

It's critical to keep the meeting on track so no one's time is wasted. Common problems include:

- **Interruptions** - Remind people to stick to the agenda. Suggest they discuss any concerns with you after the meeting.
- **Conversation dominators** - Thank them for the input but ask that they email additional thoughts after the meeting.
- **Tangents** - Write outside topics in a parking lot. Cover them at the end if there's time. If not, address them in an email or separate meeting.

Take Notes

Note taking is important to a successful meeting. You need to know what happened, know who's responsible for what, and have follow-up information to send out afterwards.

Closing a Meeting

The actions taken as the meeting ends and afterward determine the meeting's success.

When closing the meeting…

- Open up the floor to give everyone a chance to add their comments and questions.
- Don't let it drag on. Answer any last important questions, tell attendees to email any additional questions, and end on time.
- Be nice and mean it! After concluding, casual conversation that's not meeting-related and a sincere thank you goes a long way.

After the meeting ends…

- Send out meeting notes to attendees and those who missed the meeting.
- Store meeting documents in a central location where attendees can find them later.
- Check up on action items to make sure tasks are completed. Give a gentle nudge if someone needs a reminder about a task.

Email Etiquette
Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

Email Etiquette 101

Addressing Emails

- The subject should be concise and match the message of the email
- The email should only be addressed to necessary recipients

Did you know?

47% of emails are opened based on the subject line

69% of email is marked as spam based on the subject

46% of emails are opened on mobile first

"Quick!"

Email subjects that create urgency are opened **22%** more

Source: https://www.invespcro.com

Know Your Audience

Is the reader a friend? Your boss? A stranger?

Is the tone friendly? Formal?

What kind of impression are you trying to make?

All these things should be considered before including humor, acronyms, emoticons, or slang in your email message.

Message Content

An Email Message Should…

Get to the Point

The reader should immediately know the objective of your email. Your message will be lost if the action isn't identified in the first paragraph.

Be Personalized

Personal emails build direct connections with the recipient. This can be as simple as addressing the person by name.

Have Space Between Paragraphs

The white space between paragraphs increases readability and indicates a transition between topics.

Use Headers, Bullets, and Numbering

Summarizing large paragraphs into smaller sections with concise lists makes the email easier to process. Long emails are less likely to be read.

Not Include Confidential Information

Emails should never include confidential information such as social security numbers or banking information.

Formatting and Proofing

Once an email is ready to send, it's important to proof it and check for formatting issues. Check not only the message body, but the subject and recipients too.

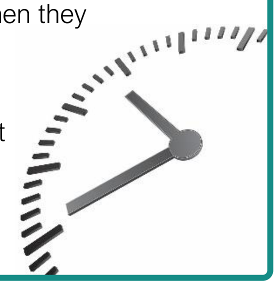
DO'S	DONT'S
Re-read the message	Use poor grammar in your writing
Run your email client's spelling and grammar check	Overuse different fonts, font colors, or highlighting
Double-check the recipients	Use all capital letters
Keep formatting simple and easy to read	Overuse exclamation points

Response Time

Always respond to email as quickly as possible. Customers and co-workers need a response within 24 hours.

If you need more time to gather information, let the person know when they can expect a reply.

Use an out of office message if you'll be out for an extended period of time. Include how long you'll be out.



When Not to Send an Email

Email is not the only tool for communication, and in some cases it's a bad one. For messages that are full of emotion or conflict, or could be misinterpreted, choose a different form of communication.

A phone call should be used instead of email if you want to apologize, you anticipate a lot of questions, you need to give a long explanation, or there's a sense of urgency.

A face-to-face conversation should be used instead of email if the matter is personal, you want to strengthen a bond, seeing emotion is important, or there are complex details to discuss.

Never hide behind an email to express anger. Either write the message, then come back to it once you've settled down, or cool off and then have a conversation.

Attachments and Hyperlinks

You can share additional information in an email by including attachments and links.

Attachments

- Limit file size—large files may be blocked
- Mention the included attachment
- Only include related and necessary files

Hyperlinks

- Should be clearly labeled and easy to identify
- Must go where they say they are going
- Should allow the reader to save time reading an email

Signatures

Lasting impressions are important, so wrap up your emails with a simple and professional signature. A good signature is informative and visually appealing but shouldn't include so much information that the reader is overwhelmed. You should also:

- Limit the number of fonts and colors used
- Keep graphic elements simple
- Use linked social media icons to drive traffic
- Make it mobile-friendly

Effective Presentations

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

Types of Presentations

Before you start building a presentation, you need to identify the type of presentation you'll be giving.

Your presentation will fall into 1 of these 4 categories:

Informational

Used to inform the audience about an event, product, or project

Persuasive

Used to convince the audience to accept an idea or proposal

Decision-Making

Used to present the audience with options in order to come to a collaborative decision

Instructional

Used to teach the audience a new skill or present key information on a new topic

Audience and Research

In order for your presentation to be effective, you need to first identify your audience. Then, conduct proper research to provide the audience with accurate and concise details.

Know Your Audience

Give the audience the most value for their time. Think:

- What's in it for them?
- What do they already know or not know?
- What's the best way for you to communicate?

Do Your Research

You have a set amount time to present your information. In order to make it valuable:

- Do your research upfront
- Use facts, not generalities
- Only present information from credible sources
- Decide what's important and leave out the rest

Parts of a Presentation

Introduction

Your audience will quickly decide if you are worth listening to. Start by briefly introducing yourself and the presentation subject, then engage the audience and grab their attention. Start with a story, humor, a fascinating fact, or a quote that will quickly convince the audience you are worth their time.

Middle

This is where you make your main points. Keep your content organized into key points that are easy to follow. If you go on long tangents, you will lose your audience. Keep your visual aids interesting and ensure the content is personal to retain engagement.

Conclusion

When you are ready to wrap up, start giving clues the conclusion is coming to pique the interest of your audience. This is where you summarize and restate your main point, announce any call to action, and finally, end on a polished note to leave the audience with a favorable impression.

Presentation Design

The design of your presentation will make or break your success. Presentation attendees commonly agree the biggest annoyances include presenters reading slides, too much text on slides, and using a font size that's too small.

Follow these simple rules to take your presentations to the next level.

Avoid slides full of bullet points. Aim for 1 main point per slide.

No paragraphs of text. Use just a key word or phrase to remember what to say.

Use high-resolution images that elicit emotion.

Use sans-serif fonts that are large enough for everyone to read.

Use fonts that complement each other in colors that contrast with the background.

If using animations, keep them simple and subtle.

Preparation

Dress Appropriately

The first impression is critical. Dressing appropriately for the audience sets the tone for the entire presentation.

Use Your Computer

Your machine is most familiar to you. It also ensures you present with the software version you're used to using.

Check the Equipment

Ensure the projector is properly connected. If your presentation includes audio, and/or needs the internet, be sure you have access.

Have Slides Prepared

Make sure slides are in an accessible location (an external drive, the desktop, a shared drive) no matter what environment you're in.

Arrive Early

Make sure everything is working before others start to arrive. Run through the presentation once on your own.

Delivery

Focus on the Audience

The audience should always be your number one focus.

Maintain comfortable eye contact with the audience throughout the presentation.

Look to the slide briefly as a cue, but you should rehearse enough to know what to say.

Body Language and Tone

Having excitement and rhythm in your voice keeps the audience interested.

Casually gesture with your hands, move naturally around the front of the room, and of course, smile.

Speak clearly and project to the back of the room.

Time Management

Rehearse the presentation to ensure you can stick to the allotted time, leaving time for questions at the end.

If you are coming up short, have some extra topics or questions prepared. When you get behind, know what info can be left out.

Business Writing

Quick Reference Guide

Free Cheat Sheets
Visit ref.customguide.com

Before You Write

Before you start writing, it's important to understand what business writing is and identify the objective of your message.

What is business writing?

The primary purpose of business writing is to provide information so the reader can learn something or do something. It could be supplemental information for a meeting, a report, or a request.

How do you determine the objective?

The message needs to have a clear objective to be effective. Identify who the reader is and what they need to know or do. Consider:

The purpose is to __________ so that readers will __________.

Organize Your Thoughts

Organizing your thoughts before writing helps to craft a more direct and effective message. Following the 5 W's is one method used to gather information for business writing.

Who — Who is the message about or who is involved?

What — What is the objective to be communicated?

When — When is it taking place?

Where — Where is it taking place?

Why — Why is it happening?

Write Your Message

Being an effective writer is an essential business skill. Those who perfect their writing skills are better at advancing their career, build confidence in others, and gain the ability to direct, persuade, and inform.

Follow these simple rules when writing your message:

1. **Be Concise:** Use only the words necessary to convey your message.
2. **Be Clear:** Be specific instead of general, be definite instead of vague.
3. **Be Positive:** Make definite statements and avoid noncommittal language.
4. **Be Active:** The active voice is direct, and it sounds energetic and confident.
5. **Be Professional:** Act in a way that meets the standards of your profession.

Anatomy of Communication

Just like other forms of writing, business writing has 3 basic parts: A greeting, a body, and a closing. Keep this in mind as you write.

Dear Howie,

Congratulations on your promotion!

Rayna Oden told me the good news last week. I understand you were chosen from a large pool of candidates; what a great testament to your skills and talents as a programmer.

I look forward to working with you more in the near future.

Sincerely,
Reed Stephens
Project Manager

Greeting
Kicks off your message and sets the tone.

Body
Where the bulk of the communication takes place.

Closing
Wraps up your writing and allows you to leave a lasting impression.

When writing, people naturally want to start with background info, then details of the issue, and finally the call to action. However, many people don't take the time to read an entire message. Instead, start with the call to action. That way the objective will be addressed, even if the reader doesn't thoroughly read the entire message.

Editing

Revising your work is essential in writing; rarely will you get the message right in the first draft. Read through your work and revise it until it says exactly what you want it to say.

Step away before you dig in
If time allows, give yourself some time away from the document.

Get feedback from others
Sharing your writing with others ensures your document reads the way you want it to.

Print the document
No matter how good you are at reading and writing on-screen, it is still easier to read from paper.

Read the document aloud
Hearing your message will give you a better idea of how it will sound to others as they read it.

Document Design

Just as important as what you write in a message is the design and layout of the document. A reader can glance at the design and decide if the document is worth reading. It's extremely important to consider the length of the document, the font size, and the amount of white space on the page.

Marketing Meeting

Recent economic changes have presented us an opportunity to increase business. We'll discuss how to take advantage of this on **Thursday, November 19th** at 9:30am in the conference room.

We will discuss:

- How to gain the attention of customers in the right markets
- Which branding initiatives to focus on

Attendance

Everyone on the team is required to attend

Questions?

Contact Alan with questions prior to the meeting.

Keep paragraphs short—no more than 5 to 7 sentences

Add extra space between paragraphs

Use at least 1" margins for printed documents

Bold key information and headings

Use lists over paragraphs whenever possible

Serif fonts (AaBbCc) are best for printing

Sans-serif fonts (AaBbCc) are best for on-screen reading