CHAPTER 1

INFOCUS

THE OFFICE 2013 INTERFACE

The Office interface refers to the way the Office programs look and work. If you're upgrading from *Office 2010* you'll notice a few differences in the way *Office 2013* looks and works over previous versions you've used. For a start the interface has been modernised in keeping with *Windows 8* and has also been modified to allow for users with touch screens. If you're upgrading from *Office 2007*, you will also need to become acquainted with the *Backstage view* that was introduced in *Office 2010* as a replacement of the *Office 2007 Control* button.

In this session we'll explore some of the new interface features as well as explore how existing ones have changed and morphed in *Office 2013*.

In this session you will:

✓ gain an understanding of the *Office 2013* user interface (changed in *2013*)

✓ learn how to start an *Office 2013* application (changed in *2013*)

✓ gain an understanding of the *Microsoft Office 2013 Start* screen (new in *2013*)

✓ learn how to customise the ribbon with the *Display Options* tool (new in *2013*)

✓ gain an understanding of *Backstage View*

✓ learn how to access the *Backstage View*

✓ gain an understanding how *Office* integrates with the cloud (changed in *2013*)

✓ gain an understanding of *Touch Mode* (new in *2013*).

UNDERSTANDING THE OFFICE 2013 INTERFACE

If you're upgrading from **Microsoft Office 2010** or **Microsoft Office 2007**, you'll be pleasantly surprised by the changes in Office 2013. You'll immediately notice the interface has been modernised, but what you can't see immediately is that Office 2013 has been rebuilt to ensure it works successfully on touchscreen devices. Microsoft is betting heavily that tablets are the future of PCs.

Modern Style Interface

In keeping with the bold modern-style interface seen in Windows 8, Office 2013 has been given a new, sleek look that uses white backgrounds pretty much everywhere. Gone are the multiple shades of colour that decorated the older interfaces, as well as the shadows and shading that were used to make the windows appear three dimensional. Instead, Microsoft has opted for a stark, flat, minimalist appearance with only the subtlest touches of colour.

Each Office 2013 desktop application is colour-coded based on the colour of its corresponding tile on the Windows 8 Start screen. For instance, the PowerPoint 2013 tile is orange on the Start screen and when you open PowerPoint, you'll see orange is used in the status bar and in other areas like the **FILE** tab, the active tab name and the active slide thumbnail.

The idea behind this new uncluttered look is that it will help you focus on your work rather than being distracted by the colourful decorations seen in previous versions.

The Ribbon And Backstage View

The Office 2013 user interface is a ribbon interface similar to that seen in Office 2010 and Office 2007. The **ribbon** comprises a series of tabs across the top of the window which, when clicked, display groups of commands and tools. The ribbon changes depending upon what you are doing in your document, and it also shrinks and expands depending upon the size of the application window. There's been only minor changes to the ribbon in Office 2013. For instance, Microsoft now provides more detailed tooltips for some commands to help users find the commands they're looking for. (Tooltips appear when a user points to the command.) And with the new flat look of Office 2013, it's actually harder to see which tab is open in the ribbon.

Backstage view was introduced in Office 2010 as a replacement for the Office 2007 **Control** button. The backstage, which opens in full screen, displays information about your document content and provides access to all **out** features (such as printing, sharing and saving a document) in the one, easy to find location. The backstage in Office 2013 has changed in appearance and has been rearranged but all the familiar features are still there.

Touchscreen Use

The Office 2013 interface has been designed for use on different devices with different capabilities. Whereas previously the interface really only allowed for users with a traditional mouse and keyboard, the 2013 interface also allows for users who work on touchscreen devices like tablets and smart phones. To make it easier to tap commands on the ribbon, Microsoft has introduced the new **Touch mode** (as opposed to **Mouse mode**) which increases the size of the commands on the ribbon and spaces them further apart.

Office Start Screens

In previous versions when you launched Microsoft Word, Microsoft Excel or Microsoft PowerPoint, you were presented with a blank page. Now, with Office 2013, a landing screen known as the **Start screen** will display when you launch these applications. The colour-coded Start screens (blue for Word, green for Excel, orange for PowerPoint, etc) offer a range of options for creating or launching a document. Although creating a new blank document is the default option, you can open an existing document from the **Recent documents** list, or if the required file isn't listed, click on the **Open Other Documents** link to search for a document on disk or in a SkyDrive folder. Alternatively, the Start screen lets you create a new document based on a template (either choose one from one of the displayed templates or search online for an appropriate template).

These Start screens help new users find their way around more easily, and experienced users will appreciate having all options in the one place at start-up.

Animation

Microsoft has introduced touches of screen animation in the Office 2013 interface. This is most obvious and useful in Excel where cell changes 'flip over' rather than just change. Animations appear elsewhere in subtle ways, such as in Word where the Navigation pane quickly slides in from the left when it first appears and then slides out to the left when it closes.

STARTING AN OFFICE 2013 APPLICATION

To see some of the main features of the *Office 2013* user interface, you will need to open an Office 2013 desktop application. Starting an application is determined largely by the operating system (like *Windows 8* or *Windows 7*) that your computer uses rather than by Office 2013. In this topic we'll open *Excel 2013* assuming you're using a Windows 8 computer.

## Try This Yourself:

Before you begin, ensure your computer is switched on and the Windows 8 Start screen is displayed…

1 Click on the *Excel 2013* tile on the *Start* screen to open the program

Let's look at another quick method for opening the application. This next method is ideal if the application's tile isn't pinned to the Start screen…

2 Press the *Windows* key (it is usually located to the left of the spacebar) to return to the *Start* screen

3 Begin typing the text **excel**

The Search pane will display on the right side of the screen and Excel 2013 will appear under Results…

4 Click on *Excel 2013* to open the program with the Excel Start screen displayed

Leave this application open
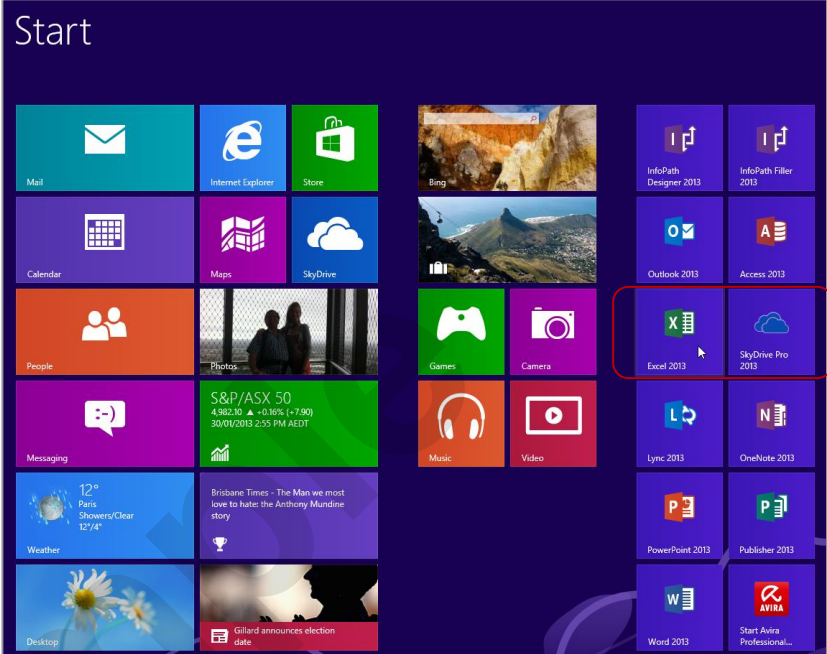
1 *Tip: When you install a new application on your computer, a tile will be pinned to the Windows 8 Start screen by default. But, if the application that you wish to open doesn't have a tile on the Windows 8 Start screen, it is very easy to pin one there. To do this, right-click on the Windows 8 Start screen to display the **App bar**. Click on **All apps** in the App bar to display the Apps screen. Right-click on the desired application and click on **Pin to Start** in the **App bar**.*
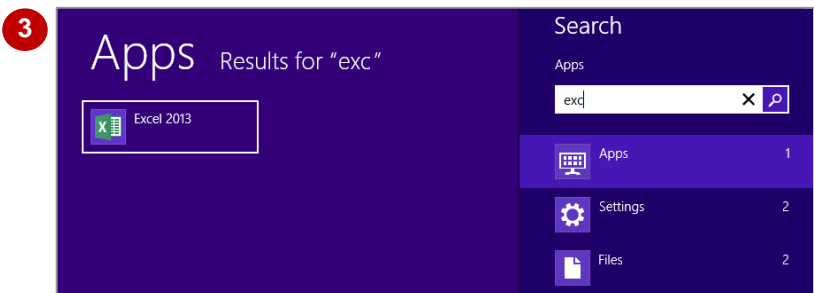
For Your Reference…

To *start* an *Office 2013 application* from the *Windows 8 Start screen*:

- Click on the application's tile, or
- Type the application's name and click on it under *Results*, or
- Press `Ctrl` + `Tab` to display the *All apps* screen and click on the application

Handy to Know…

- If your computer uses *Windows 7*, you have to use a different method to start an Office application as Windows 7 doesn't have a *Start* screen. Instead, click on the Windows *Start* button (it has the *Windows* logo on it), click on **All Programs**, click on **Microsoft Office** then click on the desired application.

UNDERSTANDING THE START SCREEN

The first change you'll see with Microsoft Office 2013 is when you launch Word, Excel, Access, PowerPoint or Publisher. Rather than being presented with a blank document, Microsoft now displays the *start* screen. From this initial screen, you can view your most recently accessed files, create a new document using the available templates, open existing documents, and more.

Microsoft Office 2013 Start Screen

The Microsoft Office 2013 start screens are very helpful for those people who want to quickly access the files they've worked on recently or create a new document based on one of the available templates (including the default Blank document template).

All start screens, regardless of the application in which they display, comprise the same structure. See below for an example of the Excel 2013 start screen.

A list of recent files displays below *Recent* in the coloured pane to the left of the screen, as well as a link that lets you open an existing file from a folder on your computer or in SkyDrive. The main pane of the start screen displays a gallery of available templates that you can use to create a new document and a search box that you use to search the internet for additional templates. In the top right corner of the screen you'll see information about the account you've used to sign in to Windows as well as the familiar *close*, *restore down*, *minimise* and *help* tools.
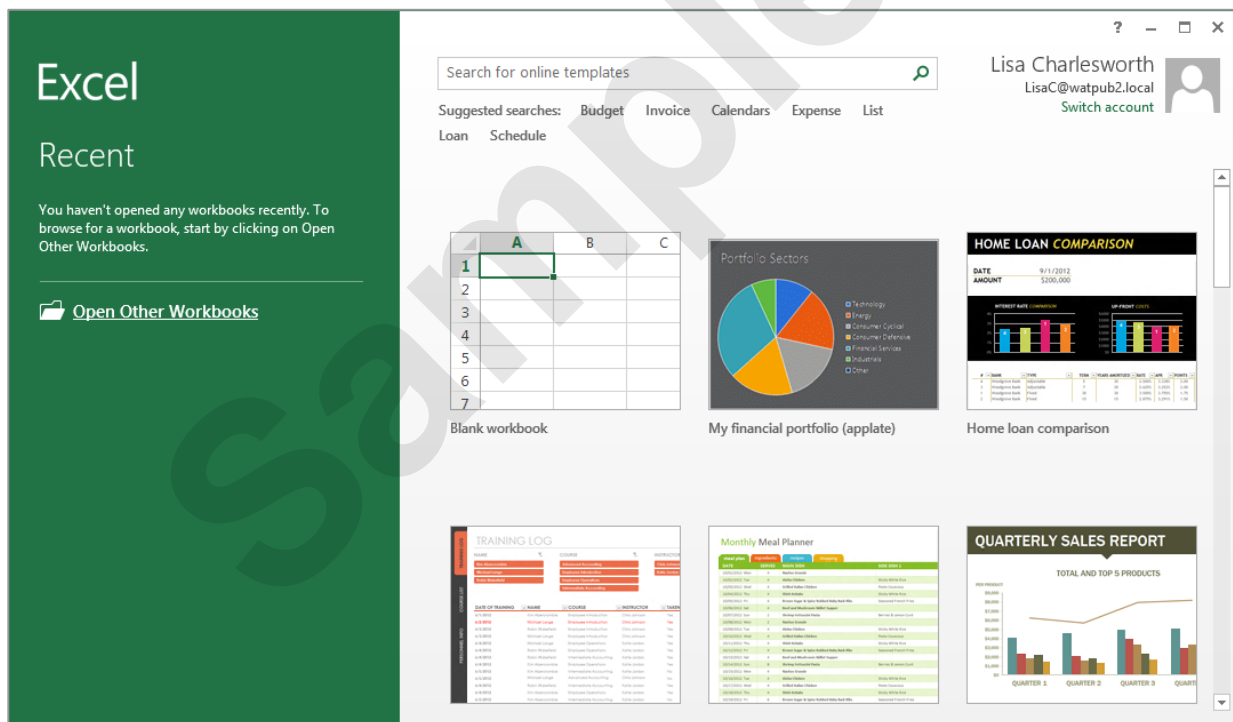
The start screen will only display when you launch the Office 2013 application directly – that is, by clicking on the tile on the Windows 8 *Start* screen, clicking on the application on the *Apps* screen or under search results, or clicking on the taskbar icon if the application has been pinned to the desktop Taskbar. The start screen will not display if you open a file (and hence the application) directly from File Explorer.

Disabling The Microsoft Office 2013 Start Screen

As handy as the start screen will be for most people, there will always be some individuals who don't like it. Microsoft has thought of those users and has provided the option to quickly disable it in each Office 2013 application.

To disable the start screen for a specific Office 2013 application, open the application and display the *Options* dialog box (select **FILE** > **Options**). In the *General* settings, click on *Show the Start screen when this application starts* under *Start up options* to deselect the option. If you change your mind at a later time, simply reverse this procedure.

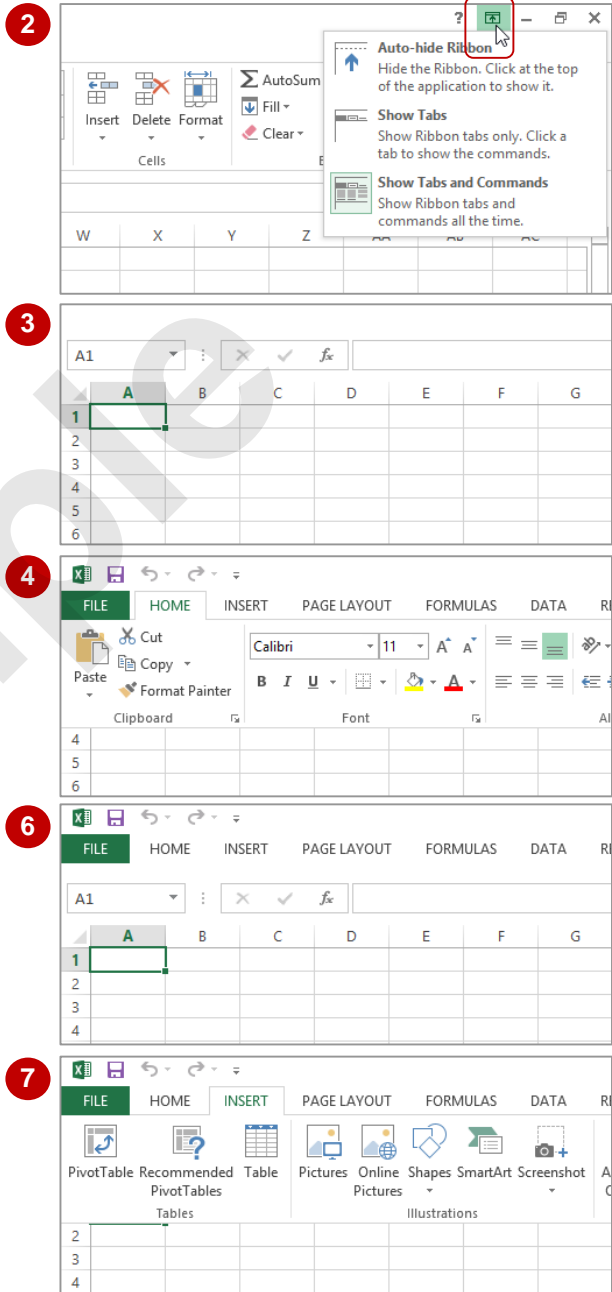# CUSTOMISING THE RIBBON WITH DISPLAY OPTIONS

By default, the ribbon displays both tabs and commands. Since the ribbon takes up space, you have the choice of two other display options. You can maximise the working area by hiding the ribbon (which also hides the QAT, title bar and status bar) or gain some extra room by showing only the tabs. You can then temporarily display the commands as needed and then hide them again.

Try This Yourself:

Before starting ensure Excel has started and the start screen is displayed…

1 Click on **Blank workbook** to create a new empty workbook

2 Click on **Ribbon Display Options** in the top right corner of the window to display a menu of options

Notice Show Tabs and Commands is selected. Let's hide the ribbon…

3 Select **Auto-hide Ribbon**

The application will change to full screen – the ribbon, QAT, title bar and status bar will all disappear…

4 Point to the top of the screen (a green bar will appear), then click on the bar

The ribbon will open temporarily (notice the top of the workbook is hidden under the ribbon)…

5 Click in the workbook to hide the ribbon

Now let's display just the tabs…

6 Repeat step **4**, then steps **2** and **3** to select **Show Tabs**

7 Click on the **INSERT** tab to open this tab temporarily, then click in the workbook to hide it again

This is a good compromise as it provides more space, access to the QAT, and quicker access to commands – you only have to click once to open a tab, not twice as you do with Auto-hide Ribbon mode…

8 Repeat the above steps **2** and **3** to select **Show Tabs and Commands** again

For Your Reference…

To **customise** the **ribbon** with **display options**:

1. Click on **Ribbon Display Options** in the top right corner of the window
2. Select the desired mode

Handy to Know…

- If you wish to quickly collapse the ribbon to display only the tab names, press `Ctrl` + `F1` or click on **Collapse the Ribbon** (located at the bottom right corner of the ribbon). You can quickly expand it again by pressing `Ctrl` + `F1` or double-clicking on a tab.

UNDERSTANDING THE BACKSTAGE VIEW

The *ribbon* lets you work *on the content* in a document so that you can add more content, format it, insert pictures into it, copy it, and much more. The *Backstage view*, which is accessed using the

File tab, lets you *do something with* the content you create. You can save it for later use, print it on paper, send it via email, and more by using the options found in the *Backstage*.
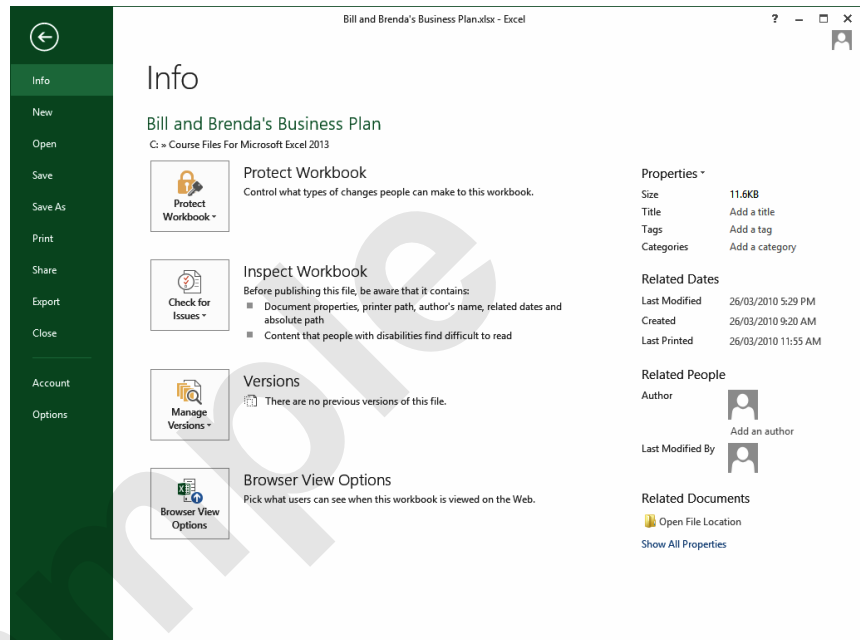
The Backstage View

The *FILE* tab on the *ribbon* is not a normal tab – as you can tell by the fact that it is coloured. Clicking on the *FILE* tab launches a mini-program within Microsoft Excel known as *Backstage view*. *Backstage*, as it's known for short, occupies the entire screen.

At the left of the *Backstage* is a navigation pane which is made up of *tabs*. These tabs provide you with access to various operations, such as printing, saving and sharing. They can also provide you with information about your workbook such as the file size.

Clicking on one of these tabs brings up a range of options associated with the particular operation.

The whole underlying purpose of the *Backstage* is to let you protect your data, share it with others, and provide you with valuable information about your workbook. Depending on what type of workbook it is and what has been done to it, different information may display when the *Info* tab is selected.

Backstage Tabs

The *Backstage tabs* provide more options for working with a document.

|	
Info	Provides status information about the current workbook and lets you manage versions and permissions.
New	Lets you create a new workbook and provides access to a gallery of inbuilt templates and ready access to a range of online templates.
Open	Provides a list of recent workbooks as well as the option to search through your Computer, SkyDrive or other place, to find what you are looking for.
Save	Saves your current workbook (if already saved to a location) or prompts you to save to a location.
Save As	Allows you to name your workbook and save it to a location.
Print	Lets you print the current workbook and preview it.
Share	Lets you share your workbook with other people via email, online presentation, blog or Cloud (SkyDrive).
Export	Allows you to create a PDF/XPS document or change the file type of your workbook.
Close	Closes your current workbook.
Account	Lets you log into your SkyDrive account or switch accounts. You can also see a list of connected services, such as Twitter and Facebook, and add services such as LinkedIn and SkyDrive. The Product Information area gives you information about the status of any available updates.
Options	Presents you with a range of options which assist in the creation and editing of your workbook.

ACCESSING THE BACKSTAGE VIEW

The **Backstage view** provides you with options for working on workbook files and key information about the status of Microsoft Excel 2013. It is usually accessed by clicking on the **FILE** tab to the left of the **ribbon**, but it can also appear when keyboard shortcuts for specific commands are used.

Try This Yourself:

Before starting this exercise ensure Excel has started and you have a blank workbook open…

1 Click on the **FILE** tab on the **ribbon** to display the **Backstage**

2 Click on the **Info** tab in the left green panel if it is not already selected to view information relating to your workbook such as the **Properties**

3 Click on the **Print** tab to see the printing options

If the worksheet has data in it, a preview of how the printing will look will appear. If this is a new worksheet no preview will appear…

4 Click on the **Account** tab to see the account options and product licensing information

5 Click on the **Back** arrow at the top of the green panel to close the **Backstage** and return to the worksheet

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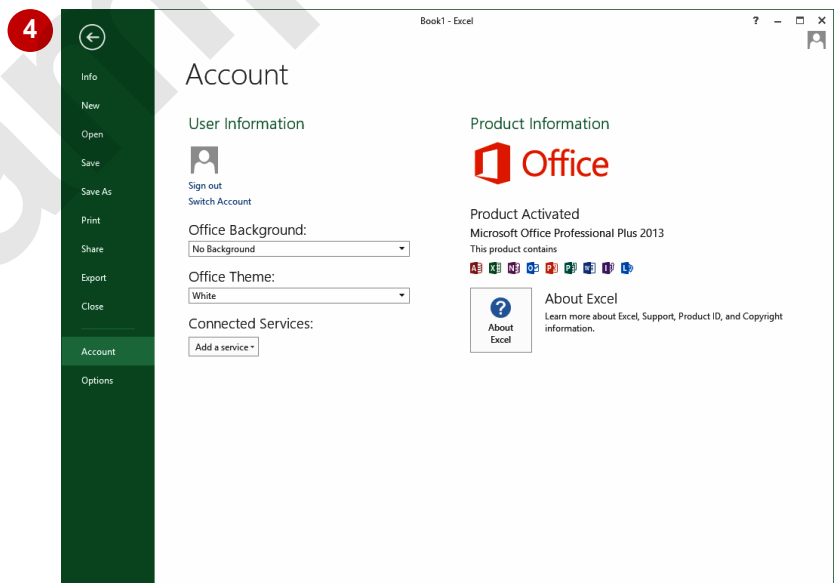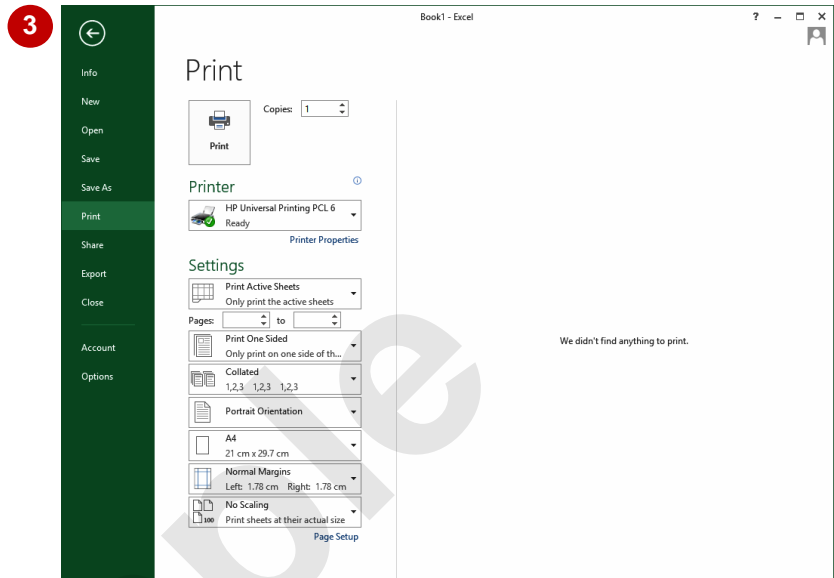
For Your Reference…

To *access* the **Backstage view**:

1. Click on the **FILE** tab on the **ribbon**
2. Click on the desired tab in the green panel to the left of the screen

Handy to Know…

- You can also close the **Backstage view** by pressing `Esc`.

INTEGRATING WITH THE CLOUD

Cloud computing, in very simple terms, refers to internet-based computing (*cloud* is a metaphor for the *internet*) where different services like storage and applications are provided to computers and devices through the internet. Microsoft is making a major push towards *cloud computing* with Office 2013 by encouraging users to save their documents and files to *SkyDrive*.

What Is SkyDrive?

SkyDrive, or *SkyDrive.com*, is an online file storage system from Microsoft. Currently, Microsoft gives you 7 GB of free cloud storage (or 20 GB for Office 365 users) on SkyDrive to store your files and photos, sync files across your computers and devices, share specific files with friends and colleagues, and edit and collaborate on Office documents. You can access the latest version of your files from any computer with an internet connection, including mobile devices. You can even create new files directly in SkyDrive.

Before you can upload files to SkyDrive, you will need to create a *Microsoft account* (which you will be prompted to do the first time you try to save a document to SkyDrive). From then on, you can go to SkyDrive.com and sign in with your Microsoft account to access, view and share your online files.
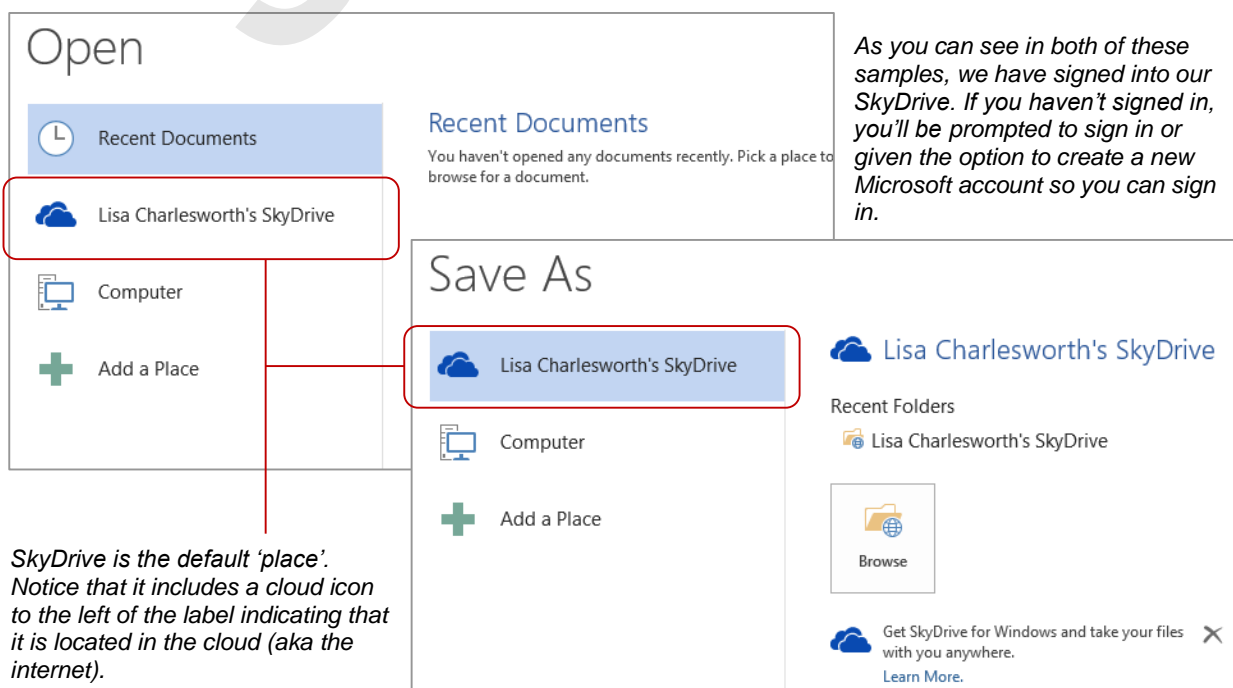
Why Use SkyDrive?

Once you have saved a document to SkyDrive, you can access it from any device that's connected to the internet – such as a smart phone, tablet, desktop in an internet café – anywhere and at any time. For example, you could print the latest version of an important report at a print shop or access a to-do list using your smart phone.

With SkyDrive, it's easy to share files securely and easily with your friends or co-workers. They don't even need to have Office installed or sign up for a Microsoft account. When they click on the link to your document, it will open in the relevant free Office Web App in their browser which lets them view and edit the document. And you have control – your files will only be shared with the people you choose.

You can work collaboratively on Word, Excel and PowerPoint files saved in SkyDrive. When you share a document with colleagues, SkyDrive allows all users to work together editing it at the same time. When you or your colleagues make changes, SkyDrive saves them online in one place and informs the other users of the change. SkyDrive will keep track of the previous 25 versions of all documents automatically so you don't need to store multiple versions of the same document. And if a change is made that you don't like, it's easy to restore or download an older version.

Opening And Saving Office Files In SkyDrive

Because SkyDrive lets you access your files from any device attached to the internet, Microsoft is really wanting users to utilise this feature. For instance, when you save a new document or access *Backstage* view to open an existing document – be it in Word, Excel or PowerPoint – SkyDrive appears as the top option (except in *Open* where it falls immediately below *Recent Documents*) as shown below.

As you can see in both of these samples, we have signed into our SkyDrive. If you haven't signed in, you'll be prompted to sign in or given the option to create a new Microsoft account so you can sign in.

SkyDrive is the default 'place'. Notice that it includes a cloud icon to the left of the label indicating that it is located in the cloud (aka the internet).
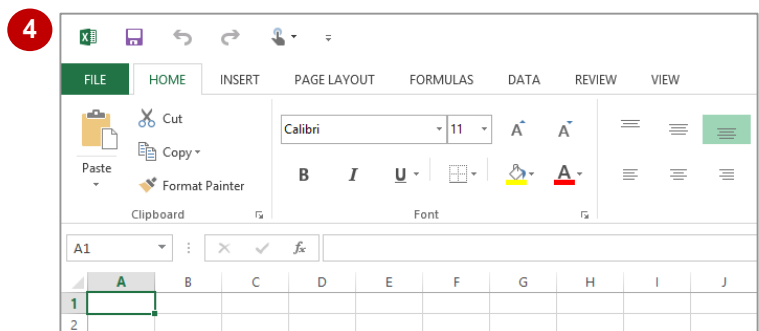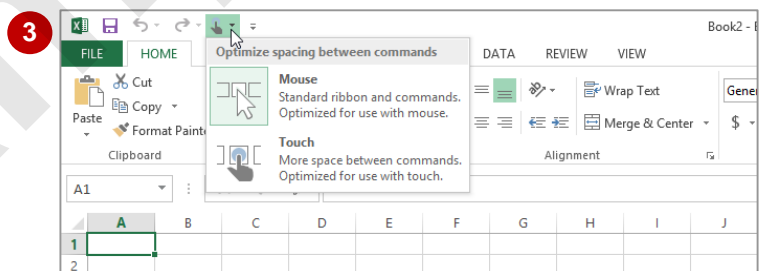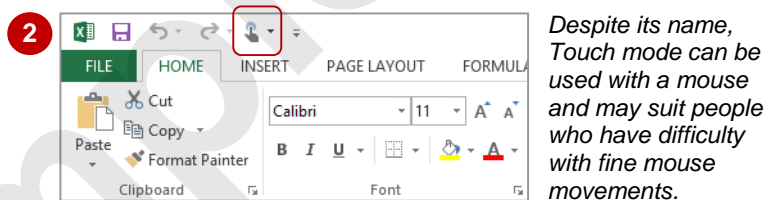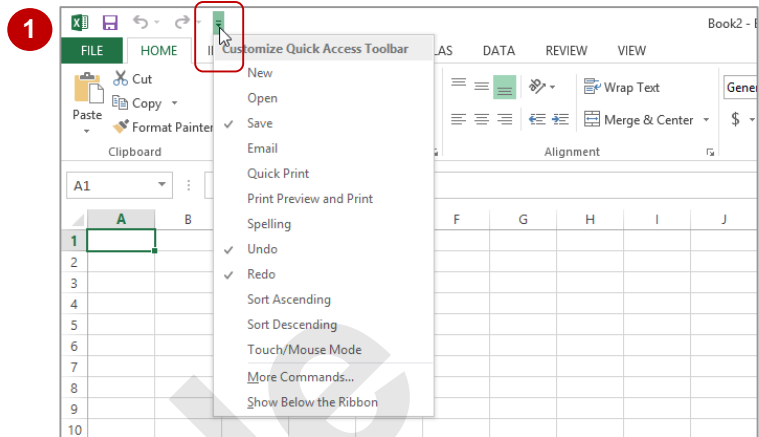
WORKING WITH TOUCH MODE

These days many people are using Office programs on touchscreen devices such as tablets and even smart phones. Because these screens are small, it is easy to accidentally tap the incorrect command. To help prevent this, you can activate *touch mode* which creates more space between tools on the QAT, commands on the ribbon and the tabs on the ribbon.

Try This Yourself:

Before starting this exercise ensure a blank workbook is open in Microsoft Excel…

1. Click on *Customise Quick Access Toolbar* as shown

2. Select **Touch/Mouse Mode**

   This will only add the tool to the Quick Access toolbar, not activate Touch mode…

3. Click on *Touch/Mouse Mode* in the Quick Access toolbar to open a menu

   Mouse mode is selected by default. With this mode the commands are optimised for use with a mouse…

4. Select **Touch**

   The tools on the Quick Access toolbar, tabs on the ribbon and each command on the ribbon will be significantly spread out. Let's revert to the default Mouse mode…

5. Repeat steps *2* and *3*, then select **Mouse** to activate *Mouse mode*

   Let's remove the tool from the Quick Access toolbar…

6. Right-click on *Touch/Mouse Mode* in the QAT and select **Remove from Quick Access Toolbar**

Despite its name, Touch mode can be used with a mouse and may suit people who have difficulty with fine mouse movements.

For Your Reference…

To *activate Touch mode*:

1. Click on *Customise Quick Access Toolbar*
2. Select **Touch/Mouse Mode**
3. Click on *Touch/Mouse Mode* in the Quick Access toolbar
4. Select **Touch**

Handy to Know…

- To gain more screen space with *Touch mode*, you should consider setting the ribbon's display option to *Auto-hide Ribbon* or *Show Tabs*.

- When you activate *Touch mode*, it is automatically activated in *all* other Office programs (Word, Outlook etc) immediately.

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CHAPTER 2

INFOCUS

PERSONALISING THE RIBBON

When **Office 2007** was released its new **ribbon** interface was fixed and locked in place. Unlike menus in previous versions of Office, you couldn't customise the ribbon because basically the *User Experience Team* at Microsoft felt they had got it right – why change something that's perfect!

However, by the introduction of **Office 2010**, the *User Experience Team* were forced to bow to user pressure and since then, not only can you customise the quick access toolbar and status bar, but you can also personalise the ribbon.

In this session you will:

✓ gain an understanding of the type of changes you can make to the ribbon (changed in **Office 2010**)

✓ learn how to display or hide tabs on the ribbon (new in **2010**)

✓ learn how to modify tabs on the ribbon (new in **2010**)

✓ learn how to create a new tab on the ribbon (new in **2010**)

✓ learn how to place commands on a tab (new in **2010**)

✓ learn how to organise commands in a tab grouping (new in **2010**)

✓ learn how to add more groups to a tab on a ribbon (new in **2010**)

✓ learn how to export ribbon personalisation settings (new in **2010**)

✓ learn how to remove tabs from the ribbon (new in **2010**)

✓ learn how to import personalisation settings (new in **2010**)

✓ learn how to reset personalisation settings (new in **2010**).

UNDERSTANDING PERSONALISING THE RIBBON

Since **Office 2010**, Microsoft has made it possible to personalise the **ribbon**. But why would you want to do this? Well, some people have lots of macros they'd like to run from the ribbon, while others want to simplify the interface for less skilled users. And some just want to lump their favourite commands in one easy to access location.

Personalising The Ribbon

When Microsoft first introduced the ribbon to the interface in **Office 2007**, it was locked so users couldn't change it – you couldn't add new ribbon tabs, move commands around, change the order of tabs, or anything even remotely similar. Unless, of course, you were an advanced XML developer!

Microsoft underestimated the response they received from the user community which begged, and often demanded, the ability to make changes to the ribbon. So when Microsoft released **Office 2010**, they back-flipped and offered users the ability to personalise the ribbon without having to be a programming genius – well sort of, anyway. This ability and process remains virtually unchanged in **Office 2013**.

You can add *custom ribbon tabs* complete with *groups* and *commands* just like standard ribbon tabs. The commands can be clones of existing inbuilt commands or can be driven by your own macros. You can even add commands to the ribbon that don't normally appear there – for example you can add commands that are on the Backstage to your own tabs on the ribbon. All ribbons can be changed, both the 'main' ribbon that always appears (such as Home or View) and the Tool ribbons that appear when appropriate (like the Drawing, Picture and PivotTable ribbons).
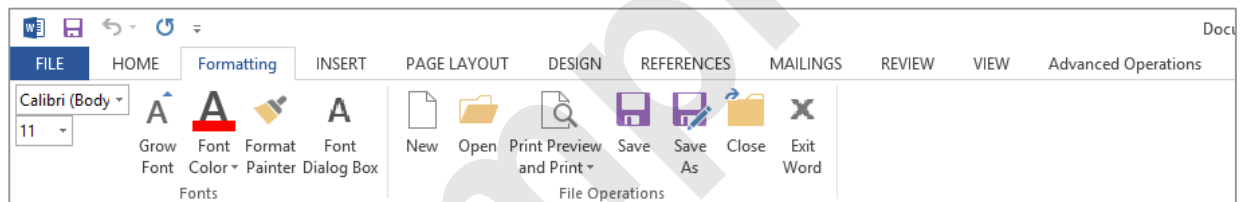
But the process isn't pretty and it certainly isn't complete. For example, change the interface in an **Office 2013** application and the changes are there irrespective of which document or template you are working from. And this is the real key to understanding user options for changing the interface – they apply to the entire application, not to specific documents or templates. What Microsoft gives you is an *all or nothing* scenario.

Nevertheless, at least we can change the ribbon if desired.