

Microsoft® Office

# Office 365

Microsoft®  
Office  
Specialist 2013  
Series

Courseware  
3257-1



Microsoft®

# Office 365

## Lesson 1: Getting Started with Office 365

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### Lesson Objectives

In this lesson, you will become familiar with the features and functions of Office 365, gather a little insight on how Office 365 is configured for an organization, tour the global navigation bar and work a little bit with Office Online. On successful completion of this lesson, you will be comfortable with:

- ☐ describing the features and functions of Office 365
  - ☐ describing basic system requirements
  - ☐ describing how to subscribe to Office 365 and how to set up a domain name
  - ☐ describe authentication in Office 365
  - ☐ signing in to Office 365
  - ☐ updating your password
  - ☐ describing the features of the Get Started with Office 365 page
  - ☐ describing Office 365 settings
  - ☐ contrasting Outlook Web App and SharePoint Online
  - ☐ describing the purpose and function of personal sites
  - ☐ using the social networking features of the newsfeed
  - ☐ searching for people
  - ☐ working with the OneDrive for Business document library
  - ☐ describing the purpose and function of the Sites page
  - ☐ using Help and support
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# What Is Office 365?

Office 365 is a bundled package of *cloud solutions*. It includes *Exchange Online*, *SharePoint Online* and *Lync Online* hosted by Microsoft. These are hosted server solutions. Instead of purchasing and maintaining servers for email, intranet, shared documents and real-time communication, organizations can instead subscribe to these services and can access and manage them over the Internet.

Office 365 also includes the *Outlook Web App*, which is an online version of Microsoft Outlook. The Outlook Web App gives users the power to manage their email from anywhere in the world (and from any computer).

Because the only requirements for access are an Internet connection, a browser, and a valid user name and password, individuals can access documents, collaborate with co-workers and communicate with one another and with the home office any time, day or night, from practically anywhere in the world.

## A Changing Face but a Solid Foundation

Microsoft is constantly working improvements and refinements into Office 365. New features, new functionality and revised user interfaces are developed and pushed out to all users automatically. While this means that you always have the latest functionality, it also means that you may log in one morning and discover that things look different. A window layout may have changed, or a new toolbar may display where one had not been seen before.

While change can be unsettling, an altered interface should not be cause for alarm. Familiar command buttons are still a click away – but you may need to look around the screen for a moment to find their new location. Keep in mind that functionality remains constant. Trust what you already know, and you will adapt to interface changes easily.

Keep in mind also that interface appearance and the exact sequence of steps required to perform particular tasks may have changed since the time of this writing. In such cases, use the listed steps as a guideline, trust what you have learned, and make any minor adjustments as required.

## What is Included with Office 365?

Depending on the subscription plan, Office 365 includes the following tools and features:

- **Outlook Web App (OWA)** – formerly called Microsoft Exchange Online; OWA is an email, calendar, contacts and task management application. OWA is designed to integrate seamlessly with your local installation of Microsoft Outlook; however, you can use it even if Outlook is not installed.
- **Personal Sites** – (previously called My Sites) a Personal Site is a private, personal environment created on SharePoint 2013 or SharePoint 2013 Online, wherein each user can store documents, maintain a blog, and use social networking features to follow other users or sites on the company intranet.
- **Team Sites** – a *team site* is a central location on which company documents can be stored, edited and managed. Team sites are internal web sites (or intranets) hosted on SharePoint Online, and they provide services for collaboration, and document storage, sharing and editing.
- **Public Site** – SharePoint Online can also be used to create and maintain a public-facing web site for your company or organization.
- **Office Online** – (previously called Office Web Apps) is a free online office suite offered by Microsoft, which allows users to create and edit files using lightweight, web browser-based versions of Microsoft Office applications: Word, Excel, PowerPoint and OneNote.

- **OneDrive for Business** – (previously called SkyDrive Pro) 25 GB of cloud storage per user; tied to the user's SharePoint Online account. The OneDrive for Business folder is accessible only through Office 365 (or SharePoint Online), and is an online storage location for business files. Users can sync files stored here to file on their PCs. OneDrive for Business is separate and distinct from a personal OneDrive cloud storage account.
- **Office on Demand** – a feature that provides online access to Office desktop applications, including Word, Excel, and PowerPoint, when using a PC that doesn't have the latest version of Office installed locally and the editing power of Office Online is not sufficient to meet your needs. Office on Demand is available to anyone who has an Office 365 subscription that includes the Office 2013 application suite. Not all subscription plans include Office on Demand.
- **Lync 2013** – a real-time communication application that provides presence information, instant messaging, PC-to-PC audio/video calling and online meetings. The Lync Online service is accessed through the Lync client, which must be installed on the individual computers. The Lync client is included with the Microsoft Office 2013 suite, and is also available as a free download.
- **Office 2013 Suite** – a subscription-based version of the Office 2013 application suite, delivered as a service (as opposed to being installed from a single user license DVD). You can install the Office 2013 application suite on up to 5 computers and 5 mobile devices. Not all subscription plans include the Office 2013 suite.

## Centralization, Communication, Collaboration

You will discover as you work your way through the course, that Office 365 provides centralization, communication and collaboration solutions. An organization's documents, images and other files can be stored and accessed at central locations on the SharePoint team site. Communication services (through Lync calling, Lync instant messaging or Outlook email) are integrated into and accessible from almost any Office 365 view.

## System Requirements

Office 365 is fully supported on Windows 8 and Windows 7 systems running Internet Explorer 10 or later. It will also run on Windows systems using the latest release version of Firefox or Chrome.

On Macs, Mac OS X 10.7 (Lion) and 10.6 (Snow Leopard) and later are supported. These systems should use the latest release version of Firefox, or Safari 5 or later.

A version of the Office suite must also be installed on the system. Office 365 supports the following Office clients:

- Office 2013
- Office 2010 SP1
- Office 11 for Mac and Outlook 2011 for Mac

## Internet Access Requirements

Because the Office 365 software and storage locations reside in an online data center, Internet access is required. A high-speed Internet connection will provide the best performance.

# Office 365: Behind the Scenes

Using Office 365 is as easy as opening your web browser and signing in to your subscribed services. As a user, you will probably not be involved in the setup or subscription process. However, you should understand that one or more administrators configure the service for use by your organization, and create and manage the accounts and services associated with your organization's Office 365 subscription.

You can also subscribe as an individual user.

The first step is to select a *subscription plan* that suits your needs and sign up for service. Office 365 subscriptions are available in different plans which offer various features and pricing options. Visit <http://office.microsoft.com/en-us/business/compare-all-office-365-for-business-plans-FX104051403.aspx> for a side-by-side comparison of the available business plans, or <http://office.microsoft.com/en-us/buy/compare-microsoft-office-products-FX102898564.aspx> for home plans.

## Signing Up

Whether you are an individual user or an administrator representing an organization, the sign up process for Office 365 is essentially the same.

When you sign up, you enter pertinent information for identification and billing purposes, and you will need to provide an existing email address. During signup, you will create a new domain that you will use for your Office 365 subscription. You will also create a user name and password for yourself.

When you complete the signup process, you will receive an email message at your existing address that includes your user ID and the URL of the Office 365 portal sign-in page, where you sign in to Office 365.

If you are an administrator signing up for your organization, you will then sign in to Office 365 and use the administrative tools to create accounts (with user names and passwords) for people within your organization. You can create an account for each license to which you have subscribed. That is, if your subscription is for five licenses, your account uses one license and you can create four additional accounts.

## Office 365 Domain and Microsoft Online Services ID

Each individual or corporate subscriber uses a unique *Office 365 domain name*, which is created during the signup process. The new domain name will resemble the following: *yourdomain.onmicrosoft.com*. For example, the administrator for the fictitious company Tolano Adventures might create the domain *tolano.onmicrosoft.com*. The "onmicrosoft" portion of the domain signifies that the domain is associated with Microsoft Online Services.

Additionally, you must create a user name for each license you want to use. Each user name within the domain must be unique. The user name, along with the domain name, constitutes a *Microsoft Online Services ID*. These take the form *username@yourdomain.onmicrosoft.com*. For example, the following would be Microsoft Online Services IDs for employees working at Tolano Adventures:

- *inklassen@tolano.onmicrosoft.com*
- *amcweeney@tolano.onmicrosoft.com*
- *cstevens@tolano.onmicrosoft.com*
- *phenderson@tolano.onmicrosoft.com*

You use your Microsoft Online Services ID to sign in to Office 365. It also becomes your email address for Office 365.

If you signed up for Office 365 yourself, you created your ID and password during the signup process. If you access Office 365 as part of an organization or school, you likely received your ID and a temporary password from the administrator or your classroom instructor. When you sign in for the first time using the temporary password, you will be required to update your password.

**But my ID doesn't include onmicrosoft.com...**

The Microsoft Online Services ID can be customized if an organization owns a custom registered domain. For example, Nick Klassen of Tolano Adventures could use the ID `nklassen@tolano.com` instead of `nklassen@tolano.onmicrosoft.com` if the administrator adds the Tolano.com domain to Office 365. Your instructor will provide you with a valid Microsoft Online Services ID for the classroom domain.

## Administrators and Users

The people who access Office 365 are either administrators or users. A user is a person who uses Office 365 service offerings but cannot perform any administrative tasks.

An *administrator*, on the other hand, has the ability to perform tasks within Office 365 that affect services or other user accounts. There are various types of administrator roles in Office 365. The most powerful role is that of the global administrator.

### The Global Administrator

The person who signs up for Office 365 is, by default, a *global administrator*.

Global administrators have access to all administrative features. These permissions include assigning licenses, creating new users and groups, resetting passwords, and managing services. Only a global administrator can assign other administrative roles.

**Note:** There can be more than one global administrator within an organization.

The following additional administrator roles are available:

<b>Billing administrator</b>	Can perform common billing related tasks such as making purchases, managing subscriptions, managing support tickets (requests for support), and monitoring service health. (The billing administrator role is available only in a Microsoft Office 365 for Enterprises subscription.)
<b>User management administrator</b>	Can perform common user management related tasks, such as resetting passwords, adding, editing, or deleting users, monitoring service health, and managing user accounts, user groups and service requests. The user management administrator cannot delete a global administrator account, cannot reset passwords for billing, global or service administrators, and cannot create other administrators.
<b>Service administrator</b>	Can perform common support tasks, such as managing service requests and monitoring service health.
<b>Password administrator</b>	Resets passwords, manages service requests, and monitors service health. Password administrators can reset passwords only for users and other password administrators.

## Getting Started

In this courseware it is assumed that an administrator has set up the Office 365 domain for your classroom, and created the necessary user accounts. Your instructor will provide you with Microsoft Online Services ID and password for a non-administrative user account to use for this course.

It is further assumed that the Lync 2013 client has been installed on your classroom system, that Office 2013 has been installed, that Outlook 2013 is connected to Office 365 and that you have been given access to the SharePoint Online team site.

## Introducing Tolano Adventures

The images and descriptive text in your course book refer to the fictitious company Tolano Adventures, a company that provides eco-friendly travel services. All Tolano Adventures tours meet stringent requirements to ensure that each "adventure" leaves a low carbon footprint and is environmentally friendly. Tolano Adventures has offices around the world and is a sister company to Tolano Environmental Consulting. Nick Klassen, the New York-based VP of Tolano Adventures has recently approved the opening of a small new office in Seattle, Washington.

Andrew McSweeney and Philip Henderson are travel directors who will be based in the new Seattle office, and Carolyn Stevens is the Seattle office manager.

The new Seattle office has purchased a subscription to Office 365 on the [tolano.onmicrosoft.com](http://tolano.onmicrosoft.com) domain. In addition to their normal job tasks, the staff of the Seattle office, along with VP Nick Klassen, will use and evaluate Office 365 to see if it fits the business needs of Tolano Adventures.

Nick Klassen and Andrew McSweeney have global administrator accounts for Office 365, while Philip Henderson and Carolyn Stevens have standard user accounts. Any additional staff that may be hired would likely have standard user accounts as well.

## In Your Classroom

Your classroom will have its own domain name. Be sure to ask your instructor if you have any questions regarding the classroom domain. It is highly likely that your instructor will be a global administrator on the classroom domain, and that you and your classmates will have standard, non-administrative user accounts.

Your Microsoft Online Services ID and password will be supplied to you by your instructor, who has created an account for you on the classroom domain. Depending on how the instructor has configured the classroom accounts, you may or may not be prompted to update your password when you sign in for the first time.

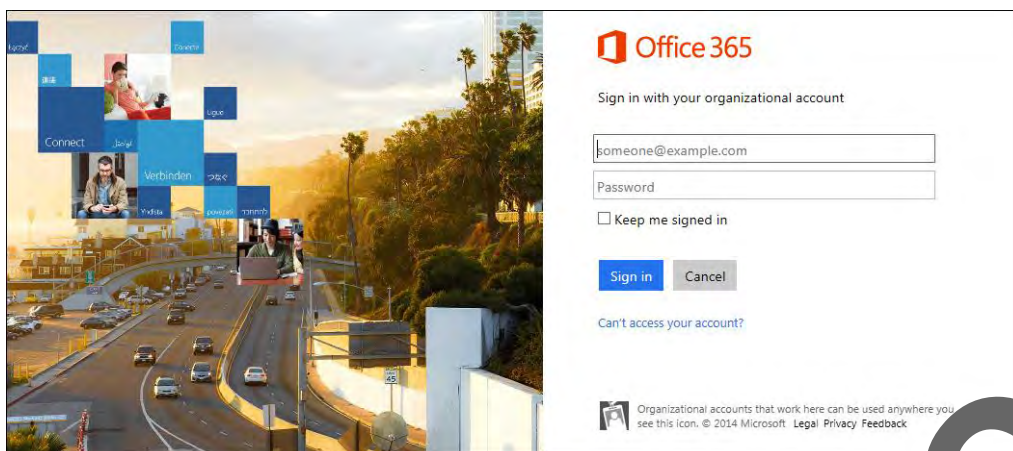
## The Office 365 Portal

You access the applications and features of Office 365 through a *portal* (a collection of web pages that house the Office 365 services) that you open in your web browser. You can think of the Office 365 portal as a "frame" or window through which you use the online services to which you have subscribed. Within the portal, you can navigate to the various services that are part of your subscription.

## Authentication in Office 365

*Authentication* is the process of verifying the identity of a user. Authentication takes place in Office 365 when a user provides valid credentials (ID and password) on the portal sign-in page. You must sign in on the Office 365 portal sign-in page before you can access the portal pages.





To authenticate yourself and access the portal, enter your Microsoft Online Services ID and password in the appropriate boxes and then click the **Sign in** button.

Notice that you can select the **Keep me signed in** option, which allows you to access Office 365 without entering either your ID or password. Microsoft recommends that you select this option only if you are working on a private computer (that is, one that you do not share with anyone else).

You can access the portal sign-in page directly by typing <https://portal.microsoftonline.com> in the address bar of your browser.

#### **It's good to be remembered ...**

Office 365 will remember the account you use to sign in, and suggest that account on subsequent sign-ins. You can, however, use a different account by clicking the Use Another Account link that will display on the portal sign-in page. If multiple users have logged in, those accounts will appear as well.

You can also access the portal sign-in page from the Office365.com web site ([www.office365.com](http://www.office365.com)).

The Office365.com web site provides information about Office 365, including subscription plans and pricing, customer stories and links to various support topics.

Click the **Sign In** link at the upper-right corner to open a sign-in box. Enter the Microsoft Online Services ID and click **Next** to be redirected to the Office 365 portal sign-in page.

## Updating Your Password

In most cases, you will be assigned a one-time use password for your initial sign-in. When this is the case, you will be prompted to update your password.

#### Update password

You must update your password because this is the first time that you've signed in or your password has expired.

User ID:

phenderson@torano.onmicrosoft.com

\* Old password:

\* New password:

Password strength

\* Confirm new password:



Enter your old password in the **Old password** box, then type a new password in the **New password** box. The password strength indicator will show you when you have created a password of sufficient strength (you cannot use a weak password).

When you have created a password of sufficient strength, re-enter it in the Confirm new password box, then click **Save**.

The sign-in page will redisplay and you will be prompted to enter your new password once more. Enter the new password and click the **Sign in** button again.



## Learn the Skill

*In this exercise, you will sign in to Office 365, change your password if prompted, sign out and sign back in again.*

- 1 Open your web browser, type:  
<https://portal.microsoftonline.com> in the browser address bar, then press **Enter** to access the Office 365 portal sign-in page.
- 2 Type your Microsoft Online Services ID in the User ID box.
- 3 Press **Tab**, then type your password in the Password box.
- 4 Click the **Sign in** button.

If you are prompted to update your password, type your original password in the **Old password** box, type a new password (as directed by your instructor) in the **New password** box, then type the new password again in the **Confirm new password** box and click the **Save** button. The portal sign-in page will redisplay and you will be prompted to enter your new password once more. Enter the new password and click the **Sign in** button again.

If you are prompted to select a display language and a time zone on the Outlook Web App page, select the appropriate language and time zone from the drop-down list, then click **save** at the bottom of the page.

Depending upon the classroom configuration, either the Outlook Web App Inbox page or the Getting Started page displays in the Office 365 portal. In either case, notice that your username displays in the upper-right corner of the portal window.

Now sign out of Office 365.

- 5 Click your **username** to open a drop-down menu, then in the menu, click **Sign out**. You are signed out of Office 365, and the portal sign-in page displays in the browser window.

Sign back in.

- 6 If your account appears in the list of accounts on the Office 365 portal sign-in page, click your account then type your password in the Password box and click **Sign in**. If other accounts appear in the list but yours does not, click **Use another account**, type your Microsoft Online Services ID in the User ID box, press **Tab**, then type your password in the Password box and click **Sign in**. (If no accounts are listed and only the User ID and Password boxes display, type your Microsoft Online Services ID in the User ID box, press **Tab**, type your password in the Password box, then click **Sign in**.)
- 7 Minimize your browser window until the next exercise.

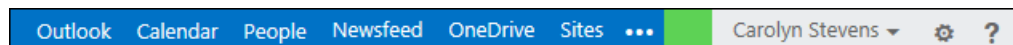
### Strong passwords ...

A strong password includes eight or more characters and includes characters letters, punctuation, symbols, and numbers. To create a password that is sufficiently complex, use the entire keyboard, not just the letters and characters you use or see most often. The greater the variety of characters you use in your password, the stronger the password is. (Keep in mind, however, that password hacking software automatically checks for common letter-to-symbol conversions, such as changing "and" to "&" or "to" to "2.")

To create a strong password, begin with a sentence. Remove the spaces between the words in the sentence, then turn the words into shorthand or intentionally misspell a word. Add length with numbers.

## Global Navigation Bar

When you are signed in to Office 365, your username displays in the global navigation bar that appears in the upper-right area of the browser window. The links on the global navigation bar remain constant no matter which portal page you are viewing. A sample global navigation bar is shown here.



The global navigation bar includes the following links:

<b>Outlook</b>	Click to launch the Outlook Web App (the Web-based version of Microsoft Outlook) and displays your Inbox. The Outlook Web App is also called OWA.
<b>Calendar</b>	Click to view your calendar in OWA.
<b>People</b>	Click to view your contacts in OWA.
<b>Newsfeed</b>	Click to access your organizational social networking page. In some Office 365 configurations, the administrator may have elected to use Yammer for social networking instead of the default SharePoint Newsfeed. In such cases, the link will appear in the global navigation bar as "Yammer."
<b>OneDrive</b>	Click to access your OneDrive for Business cloud storage library where you can store your work-related documents. You can sync this online storage location to a folder on your computer.
<b>Sites</b>	Click to access links to your team site or to your organization's public web site.
<b>More (...)</b>	Click to access links to the Office Store and to the Office.com web site.
<b>Username</b>	Click to access your personal settings, add information about yourself, or to log out of Office 365.
<b>Settings (⚙)</b>	Click the button (referred to as the Settings gear) to access various settings for Office 365 and specific portal pages.
<b>Help (?)</b>	Click to access context-sensitive help topics.

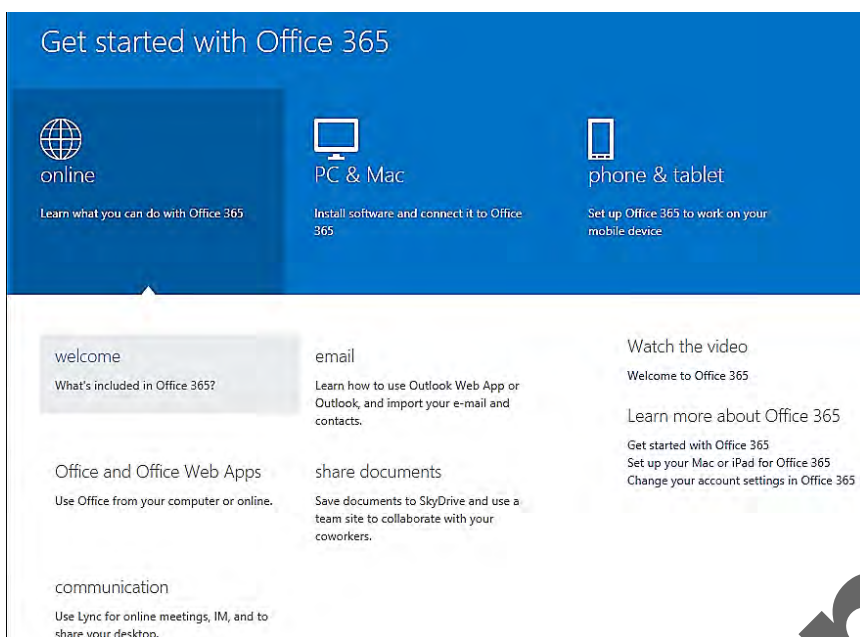
## The Get Started with Office 365 Page

The first few times a standard user signs in to Office 365, the Get Started with Office 365 page displays. This page has three tabs – Online, PC & Mac, and Phone & Tablet.

**Note:** You can also access the Get Started page by clicking **Settings, Office 365 Settings, Get Started**.

### Online Tab

The Online tab includes links you can use to access introductory videos and tips for working productively with Office 365. It is tied in to the Office 365 Help system.

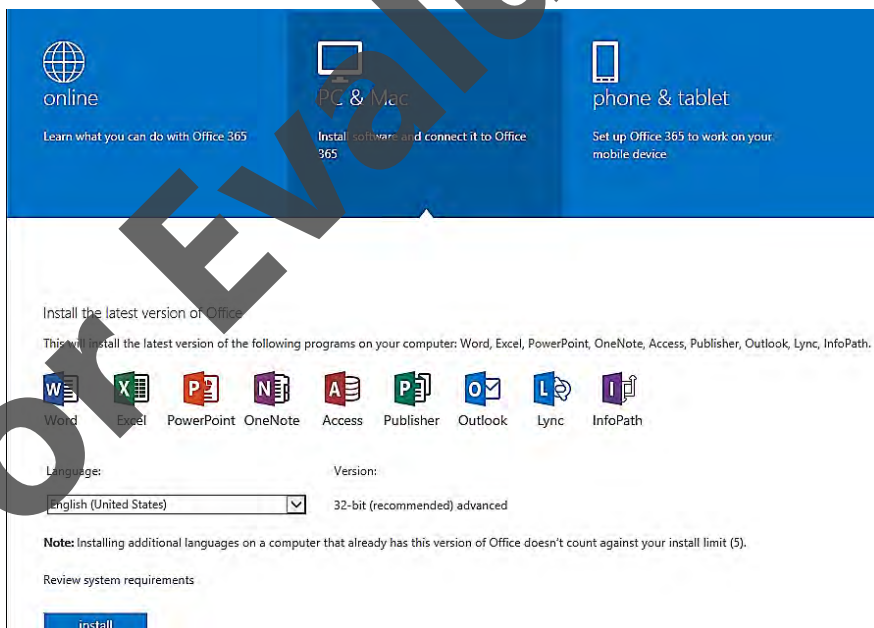


The links that appear under the Watch the video and Learn more about headings change depending on the currently selected topic. Topics appear in the left and middle columns; the currently selected topic is indicated by a light gray box. In the preceding figure, the welcome topic is currently selected.

Click a topic to access links to pertinent videos and Help system articles.

## PC & Mac Tab

The PC & Mac tab presents links you can use to access software and/or configuration utilities. Many Office 365 plans include the latest version of Office available as a subscription. Use the PC & Mac tab to download and install it on your computer.



On a Windows machine, the latest version of Office includes Access, Excel, Lync, OneNote, Outlook, PowerPoint, Publisher and Word. Depending on your subscription plan, InfoPath may be included. (On a Mac, Office 2013 includes Excel, Outlook, PowerPoint and Word).