Work Smart by Microsoft IT

Get started: Office 365

Microsoft Office 365 productivity software is the same Office that you already know and use every day, and more. It includes the Microsoft Outlook messaging and collaboration client, Microsoft Word, Microsoft Excel spreadsheet software, the Microsoft PowerPoint presentation graphics program, and the Microsoft OneNote note-taking program—but it's hosted in the cloud.

When you use Office 365, you can collaborate by using Microsoft SharePoint Online and communicate by using Microsoft Lync communications software. You can access your files or applications from virtually anywhere—by using a PC, a Mac, and even select mobile devices. And they're always up to date. The same goes for updates to features: you get them automatically.

Read this guide to see how to use your Office 365 account to its fullest potential by checking email through Microsoft Outlook Web App, sharing files, and using Office 365 on mobile devices.

Topics in this guide include:

Signing in to Office 365 and reading email	Working on and sharing files	Installing software
Using Office 365 on a mobile device	For more information	

Microsoft

Signing in to Office 365 and reading email

In this section, you'll see how to sign in to your Office 365 account and use a web browser to check your email.

Signing in

To sign in to your Office 365 account:

1. Go to http://outlook.office365.com

2. Enter your **email address** and **password**, optionally select the **Keep me signed in** check box, and click **Sign in**.

After you've been authenticated, Office 365 starts Outlook Web App (which is described in more detail in the following section). You can also use the ribbon at the top of the browser window to access your calendar, SharePoint team sites, Yammer and Microsoft OneDrive for Business accounts, and more. We'll review some of these areas in other sections of this guide.

Reading your email

Signing in to your Office 365 account automatically takes you to your Inbox. This browser-based version of Outlook is called *Outlook Web App,* and it gives you much of the same user experience as your desktop Outlook application.
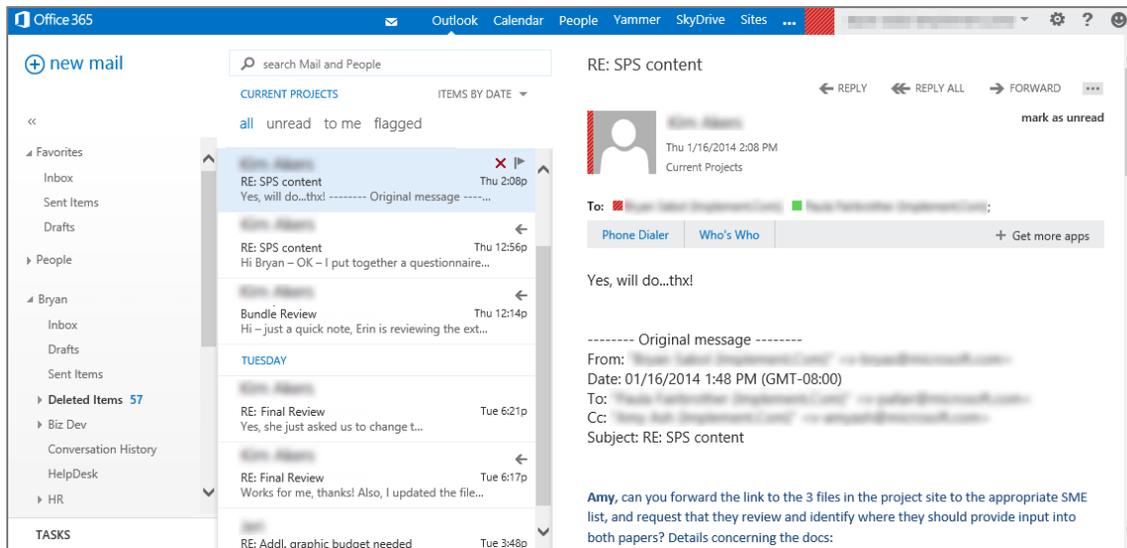
To familiarize yourself with the environment:

1. Scan through your emails, sort by name or date, group or ungroup by conversation, flag or unflag an email, or review your list of folders in the left pane.

2. Tap or click **new mail** in the upper-left corner to create a new email

3. Tap or click **TASKS** in the bottom-left corner to view your pending tasks

4. Tap or click **Calendar** on the toolbar to view your appointments.

TIP: To read more about using Outlook Web App for email and calendars, see Outlook Web App.

Working on and sharing files

Office 365 makes it easy to work on files from virtually any location or computer, and to share your work with your team members. This section of the guide introduces you to some of the basics of using your OneDrive for Business and SharePoint Online accounts, which are part of Office 365.
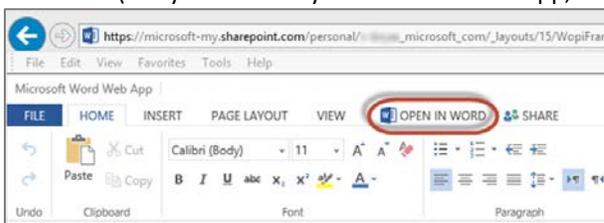
Working on files

To start working on files in Office 365:

1. If you haven't already done so, sign in to your Office 365 account at http://outlook.office365.com

2. Tap or click **OneDrive** on the global navigation bar

3. On the OneDrive screen, choose from the following:

    *   If you want to create a new file, tap or click **new document,** and then select the type of file that you want to create.

- If you want to create a new folder, tap or click **new document**, and then tap or click **New folder**.

- If you want to upload an existing file to OneDrive for Business, tap or click **new document**, and then tap or click **UPLOAD EXISTING FILE**.

- If you want to work on an existing file that's already in OneDrive for Business, tap or click the name of the file that you want to edit in your **Documents** list.

4. You now can work on a file that's in your OneDrive for Business account. Because your file resides in the cloud, you can use either of the following methods to edit it:
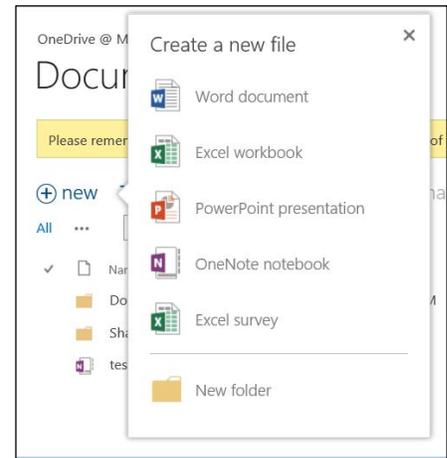
- Use the *web app* (such as Microsoft Word Web App or Microsoft Excel Web App), which is a browser-based version of your familiar Office application. This is the default app that starts when you open a cloud-based file. (But you can always switch to the full app, as shown in the following screen shot.)

- Use the full Office application for the desktop (such as Word or Excel). For a new file, you can switch to the full application by tapping or clicking **OPEN IN** *APP* on the ribbon, as shown previously. When you're working on an existing file, tap or click **EDIT DOCUMENT**, and then tap or click **Edit in** *app*, as shown for Word in the following screen shot.
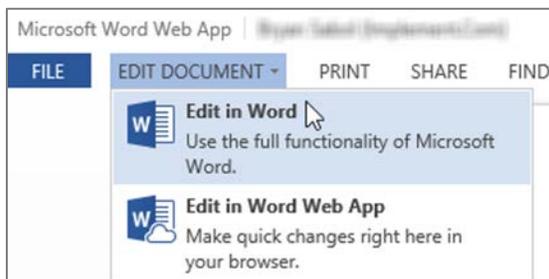
TIP: You always have a choice of which kind of app to use. In fact, you can temporarily load the full desktop versions of Office apps onto other computers, such as when you're traveling and borrowing someone's computer. For more information, see the "Installing software" section later in this guide.

Syncing and sharing files

In this section, you'll see how to use OneDrive for Business and SharePoint Online to synchronize and share your files.

TIP: To learn more about when it's best to save files to OneDrive for Business or to a SharePoint Online team site, see OneDrive or SharePoint?.

Syncing and sharing using OneDrive for Business

When you store files in the cloud by using OneDrive for Business, you can access them from virtually any device and share them with coworkers. But OneDrive for Business isn't just about the cloud. You can even work on a local file when you're not connected to the Internet and have OneDrive for Business synchronize it automatically to your cloud account when you reconnect. This is known as working on an *offline file.* As long as you've configured the file (or folder) to be synchronized with OneDrive for Business, your file will always be automatically updated.

CAUTION: *If you sync multiple devices, deleting a synchronized file from any device deletes it everywhere—including the cloud.*

To synchronize a file for offline use:

1. If you haven't already created a new file in OneDrive for Business or uploaded a local file to your OneDrive for Business account, follow the instructions in the previous section to do so.

2. After your file is in OneDrive for Business, tap or click the **SYNC** button in the upper-right corner of the global navigation bar in OneDrive for Business.

3. In the **Microsoft OneDrive for Business** dialog box, tap or click **Sync Now**.

4. Follow the instructions in the wizard. The wizard creates a OneDrive for Business folder (OneDrive @ Microsoft) in File Explorer/Windows Explorer.

5. Save your file to the OneDrive for Business folder on your computer. If you're offline, as soon as you connect to the Internet, your files will be synced to OneDrive for Business.

To share a file or folder:

1. If you haven't already created a new file in OneDrive for Business or uploaded a local file to your OneDrive for Business account, follow the instructions in the previous section to do so.

2. In your OneDrive for Business document library, tap or click the ellipsis button (...) next to the file or folder that you want to share, and then tap or click **SHARE** in the callout.

   TIP: If you want to share a file with everyone, simply drag it into the Shared with Everyone folder that OneDrive for Business creates for you.

3. In the **Share** dialog box, enter the names or email addresses of the people that you want to share with, and specify permissions (view or edit).

4. You can opt to enter a personal message to the recipients. If you don't want to send an email invitation, tap or click **SHOW OPTIONS**, and then clear the **Send an email invitation** check box. (You can always send an email later.)

5. Tap or click **Share**.

NOTE: *When you share a folder, you automatically share all items that you place in that folder. Sharing a folder saves you the trouble of sharing the files one at a time. But you need to be sure that you want to share any file that you place in a shared folder.*
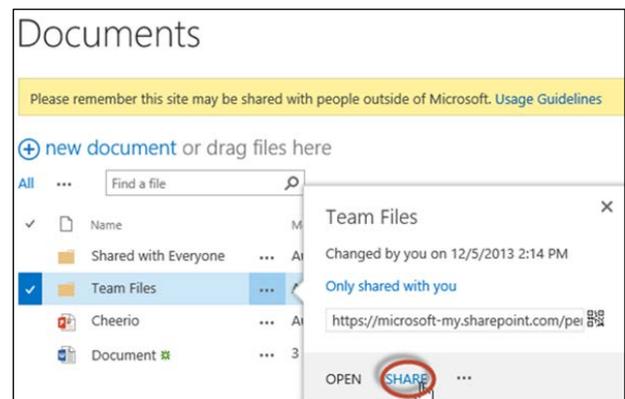
Syncing and sharing using SharePoint Online

One of the most common uses of SharePoint Online is to create a team site. A team site combines team collaboration with document management and project management features.

To create a team site:

1. If you haven't already done so, sign in to your Office 365 account at http://outlook.office365.com.

2. Tap or click **Sites** on the global navigation bar to browse to SharePoint Online, and then tap or click **new site**.

3. In the **Start a new site** dialog box, provide a name, URL, and description for the site, add at least one additional owner, and then assign a security level for the site's data.

4. To choose a language other than English, tap or click **SHOW OPTIONS**, and then select the appropriate language.

5. Tap or click **Create**.

*NOTE: By tapping or clicking **Create**, you are confirming that you agree to the usage guidelines.*

You're now ready to grant access to your team members.

## To grant people access to a team site:

1. From your team site, tap or click **SHARE** in the upper-right corner of the SharePoint Online window.

2. In the **Share** dialog box, add the people or groups that you want to share the site with. (If you want to share with everyone in your organization, enter **Everyone**.)

3. To assign permissions, tap or click **SHOW OPTIONS**, and then select from the list of options. In most cases, you can use one of the following default SharePoint groups:

    *   **Owners** have full control to manage the whole site. Owners can work with the structure and components of the site itself and grant permissions to others.

    *   **Members** can add, edit, and delete lists. Members can also view, add, update, and delete list items and files.

    *   **Visitors** can view pages and list items and can download files.

4. You can opt to enter an invitation email message to welcome people to your new team site. If you don't want to immediately send an email message to the people on your invitation list, clear the **Send an email invitation** check box. You can always copy the link and send it later in an email or an instant message.

5. Tap or click **Share**.

Installing software

Because Office 365 runs in the cloud, you can access it from almost anywhere. But it also works with software that you install on your computer. Office 365 includes licenses for Office, including Lync. And it works with PCs and Macintoshes, along with many mobile devices. This section shows you where and how to install Office products on your various computers.

To install the latest version of Office:

1. Sign in to Office 365 by using the computer where you want to install Office.

2. In the upper-right corner of the page, tap or click **Settings** ⚙, tap or click **Office 365 Settings**, and then tap or click **software**.

3. On the **Office** page, select a language, and then tap or click **Install**.
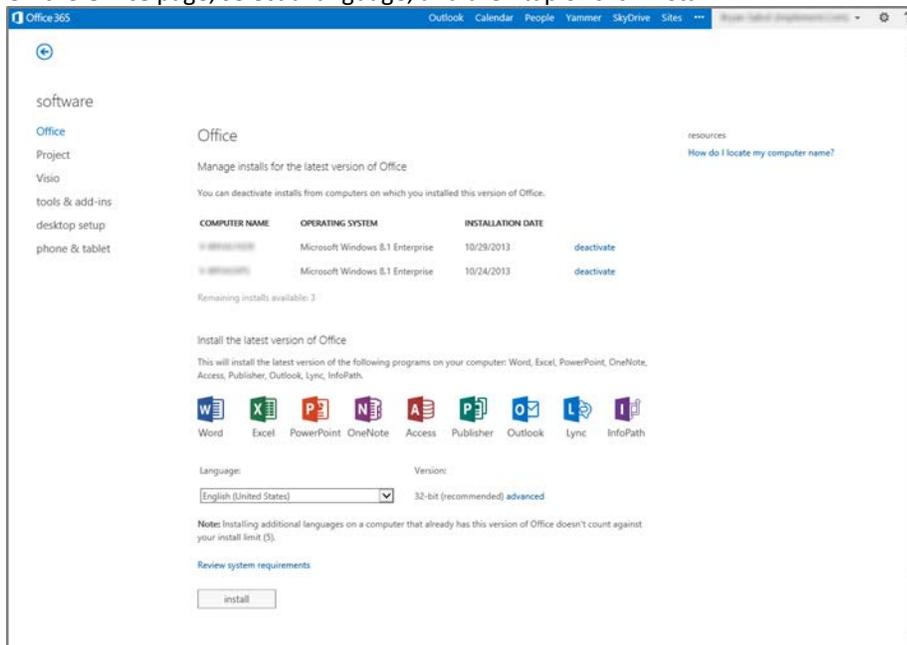

Another way that Office 365 helps you be productive is by offering Office on Demand. This feature gives you temporary access to the Office desktop applications (including Word, Excel, and PowerPoint) when you're using a computer that doesn't have the latest version of Office installed locally. This can be a real benefit when you're using a device that you don't own, such as when you're logged on as a guest on someone else's computer.

NOTE: Your computer must be connected to the Internet when you use Office on Demand, because Office on Demand streams the applications to the computer that you're using. Nothing is installed, so there's no offline access to Office on Demand.

To use applications in Office on Demand:

1. On a computer that doesn't have the current version of Office, sign in to your Office 365 account and then either create a new Office file or open an existing file in your OneDrive document library.

2. Edit a new file in the full desktop app (such as Word or Excel) by tapping and clicking **OPEN IN** *APP*, or open an existing file by tapping and clicking **EDIT DOCUMENT** and then tapping and clicking **Edit in** *App*. For either of these tasks, follow the previous instructions in the "Working on files" section of this guide.

3. In the **Want to use Office on Demand?** dialog box that appears, tap or click **Yes, let's go!** to stream the appropriate Office desktop app to your computer and start editing your file.
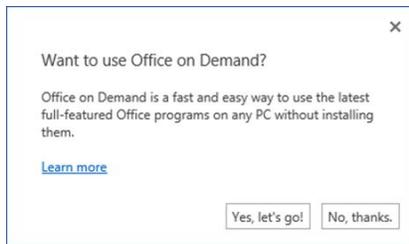
Office 365 also includes Lync and enables you to work with other versions of Office that you might already have. Table 1 directs you to information about how to install or configure these other apps.

Table 1. Additional Office 365 app installation or configuration.

Task	Description
Install Lync	Tap or click **Settings** ⚙, tap or click **Office 365 settings**, tap or click **software**, and then tap or click **Lync**. For more information, see Start using Lync for IM and online meetings at: Using Lync and Install Office on your PC or Mac with Office 365 for business at: Office 365 Install.
Set up the version of Office that you already have to work with Office 365	If you've already installed Microsoft Office 2010, the 2007 Microsoft Office system, or Microsoft Office for Mac 2011, they all work with Office 365. For more information, see Use my current Office desktop apps with Office 365 (PC) at: Using Desktop Apps or Use my current Office for Mac apps with Office 365 (Mac) at: Office for Macs.

Using Office 365 on a mobile device

You can access email, instant messaging, files, and other Office 365 services from your mobile phone or tablet. Supported devices include Windows Phone, iPhone and iPad, Android, BlackBerry, and Nokia (Symbian OS) devices.

To set up your mobile device with Office 365:

1. Tap **Settings** ⚙ > **Office 365 settings** > **software** > **phone & tablet**.

2. Under **Phone** or **Tablet**, select the appropriate device type.
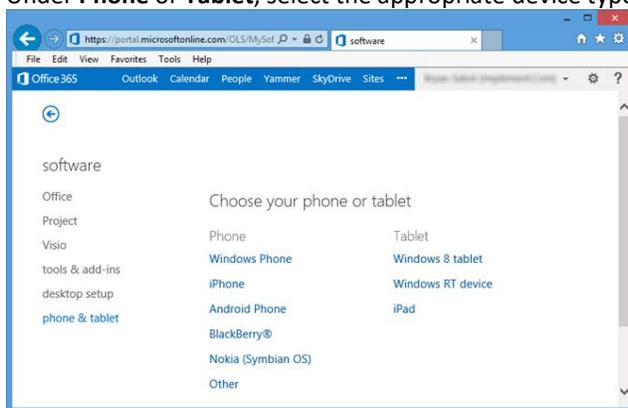
3. Follow the wizard's instructions to complete any required installation and configuration.

For more information

Microsoft Office 365 sign-in page
http://outlook.office365.com

Get started with Office 365
http://office.microsoft.com/en-us/office365-suite-help/get-started-with-office-365-HA102818409.aspx

What is Office 365 for business?
http://office.microsoft.com/en-us/business/what-is-office-365-for-business-FX102997580.aspx

Work Smart by Microsoft IT
http://aka.ms/customerworksmart

Modern IT Experience featuring IT Showcase
http://microsoft.com/microsoft-IT