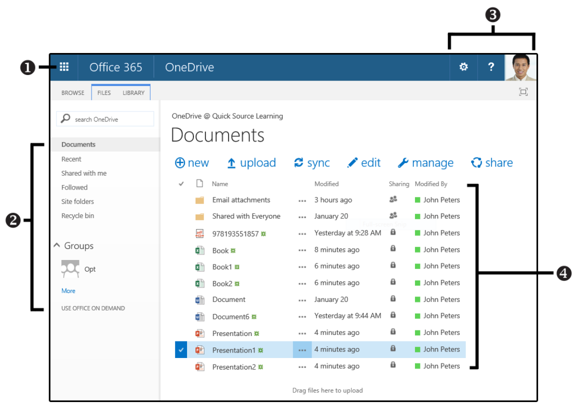
Microsoft®

Office 365

Quick Source LEARNING

Getting Started

Office 365 OneDrive Page



Note: Office 365 functions best in the Internet Explorer web browser.

❶ **App Launcher** – displays the main hubs for most features and all Office apps.

❷ **Navigation Pane** – lists shortcuts within your current hub.

❸ **Nav Bar** – contains tools and shortcuts for working within Office 365.

❹ **Document List**– displays all your types of files stored on your OneDrive. You can view them or edit them with Office apps.

Signing in to the Office 365 Portal

To access Office 365, you must sign in at the customer portal.

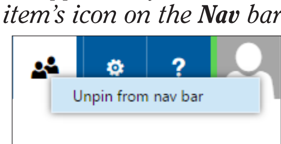
1. Navigate your web browser to **portal.office.com**.
2. Enter your User ID and password. If you haven't yet received your account information, check with your administrator.
3. Click **Sign In**.

*Note: You can also click on the **Microsoft Office 365 Portal** on your **Start** menu or **Start Screen**.*

Accessing the App Launcher

To access features and apps, click the **App Launcher** button. To easily access an app or feature, you can also pin that item to your nav bar. To pin an item, click the **App Launcher** button. Hover your mouse cursor over the app or feature you wish to pin until the **More** button appears. Click the **More** button and click **Pin to nav bar**. The app or item's icon will appear on your nav bar.

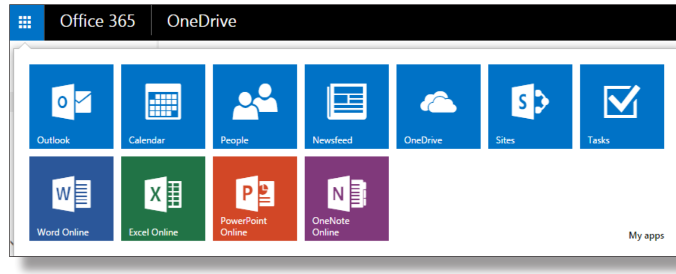
*Note: To unpin an item, right-click the item's icon on the **Nav** bar and click **Unpin from nav bar**.*



Removing an Item from the App Launcher

1. Click the **App Launcher** button.
2. Hover your mouse cursor over the app or feature you wish to remove until the **More** button appears.
3. Click **Unpin from app launcher** to remove the item.

Using the App Launcher Features

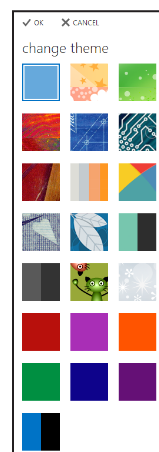


To access features and apps, click the **App Launcher** button.

- **Outlook** – the email hub to send and receive messages.
- **Calendar** – the schedule planner where you can set and manage appointments and tasks.
- **People** – the contact list where you can store names, email addresses, and other information.
- **Newsfeed**– your personal hub on Office 365 where you can post status updates, blog posts, or edit your profile.
- **OneDrive** – contains the Office Web Apps and your document list for storing and editing different types of Office files.
- **Sites** – access your **Team** or **Public** site, as well as sites you are following. You can also create new sites.
- **Tasks** – manage and create tasks or schedule reminders.

Settings

Changing Your User Password



1. Click the **Settings** button on the Navigation bar.
2. Select **Office 365 settings** from the drop-down menu.
3. Click the **Password** section. (*You may be prompted to sign in again for security purposes.*)
4. In the **Old password** box, enter your old password.
5. In the **New password** box, enter your new password.
6. In the **Confirm new password** box, enter your new password again to verify the correct spelling.
7. Click the **Save** save button.

Signing Out

1. Click your **User picture** icon on the **Nav** bar.
2. Click **Sign Out**.

Note: Sign out of your account every time you access Office 365, especially if you are using a public computer.

Changing Your Start Page

Your start page is the page that first appears when you sign in to Office 365. By default, this is the home page. You can set it to the page you use most often.

1. Click the **Settings** button on the **Nav** bar.
2. Click the **Start page** section.
3. Select the page you want to land on.
4. Click the **Save** save button.

Outlook

Sending an Email

1. In the **Outlook** screen, click the **New Mail** button.
2. Do one of the following:
   - *To enter email addresses,* enter email addresses in the **To:** and **Cc:** spaces. *(Separate multiple addresses with a semicolon.)*
   - *To select email addresses from your contacts,* click the **Add** button. Begin typing the name of the contact in the **To:** space or select a contact or group you want to send the message to. Click the **OK** button. *(Repeat to add additional contacts.)*
   - *To send a blind carbon copy,* click the **More** button. Select **show bcc:**. Enter the email addresses of the contacts you wish to include beside the **Bcc:** space.
3. *Optional:* Click the **More** button. Select **check names** from the drop-down menu to make sure that it is possible to send the message to the names or email addresses you have entered.
4. Enter a subject in the **Subject** space.
5. Enter message text in the **message** space.
6. Click the **Send** button.

Reading a Message

1. Click the **App Launcher** button and select **Outlook**.
2. In the **View Pane**, do one of the following:
   - *To view the message in the **Reading** pane,* click the message once.
   - *To view the message in its own window,* double-click the message.

*Note: To mark a message as read, click **mark as read** in the message space. To mark it again as unread, click **mark as unread**.*

Replying to a Message

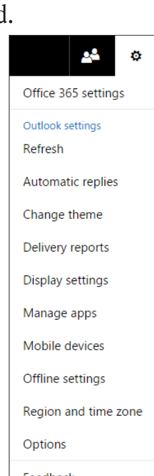
1. Select the message to which you want to reply.
2. Do one of the following:
   - *To reply to the sender only,* click the **Reply** button.
   - *To reply to the sender and all recipients,* click the **Reply All** button.
3. Enter reply text in the message text box.
4. Click the **Send** button when you are finished.

Forwarding a Message

1. Select the message you want to forward.
2. Click the **Forward** button.
3. Enter recipient email addresses in the **To:** box.
4. *Optional:* Enter message text in the message text space.
5. Click the **Send** button when you are finished.

Inserting a Signature

1. Click the **Settings** button on the **Nav** bar.
2. Select **Options** under the **Outlook settings** drop-down menu.
3. Select the **Email Signature** shortcut in the **Layout** section of the **Navigation** pane.
4. In the **Email signature** section, enter and format signature text.
5. *Optional:* Check the **Automatically include my signature on messages I send** box.
6. Click the **Save** button.
7. Click the **Back** button to return to your Inbox.



Calendar

Scheduling an Event

1. Click the **App Launcher** button and select **Calendar**.
2. Click the **New** button.
3. Enter a name for the event in the **Event:** space.
4. Enter a location for the appointment in the **Location:** space.
5. Enter a contact name in the **Attendees:** space or click the **Add contact** button and select a contact.
6. Click **add a room** and select a room from the directory.
7. Enter or select a start date in the **Start:** box.
8. Select a duration by clicking the arrow beside the **Duration:** box and check a time for the event's duration.
9. Enter details in the text box.
10. *Optional:* To set a reminder for the event, click the arrow on the **Reminder:** box and check a time to be reminded.
11. *Optional:* To make the event recur, click the arrow on the **Repeat:** box and check a recurrence option.
12. *Optional:* To mark the event as private, check the **Mark as private** box.
13. Click the **Save** button when you are finished.

Note: To quickly add an event, double-click the date and time on which you want the appointment to occur.

Scheduling an Online Meeting

1. Click the **App Launcher** button and select **Calendar**.
2. Click the **New Event** button.
3. Enter the information about your event.
4. Click the **Online Meeting** button to insert a link to your online meeting.
5. Click the **Save** button when you are finished.

Sharing Your Calendar

1. Click the **App Launcher** button and select **Calendar**.
2. Click the **Share** button in the upper-right corner of the calendar.
3. Enter the contacts with which you wish to share in the **Share with:** space.
4. Enter a subject in the **Subject:** space.
5. Click the arrow at the **Calendar:** space to select the calendar you wish to share.
6. Click the **Send** button.

Responding to a Meeting Request

1. In your **Inbox**, double-click the meeting request to open it or click once on the meeting request to view the request in the **Reading Pane**.
2. Do one of the following:
   - *To add the meeting to your calendar,* click the **Accept** button.
   - *To add the meeting to your calendar labeled as tentative,* click the **Tentative** button.
   - *To decline the meeting request,* click the **Decline** button.
3. Click the arrow beside the response you have chosen and select one of the following options:
   - *To send a response with comments,* select **Edit the response before sending** from the resulting menu. Enter comment text and click the **Send** button.
   - *To send a response without comments,* select **Send the response now** from the resulting menu.
   - *If you do not want to send a response,* select **Do not send a response** from the resulting menu.

People

Connecting to a Social Network

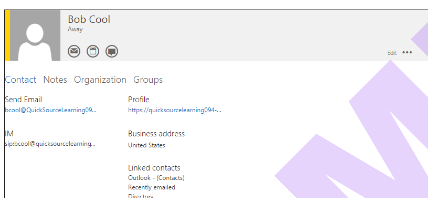
1. Click the **App Launcher** button and select **People**.
2. Click the **Settings** button on the **Nav** bar and select **Options** in the **People settings** drop-down menu.
3. Under the People section of the Navigation pane, click the **Connect to social networks** shortcut.
4. Click **Connect** next to the social media account you want to connect and follow the onscreen instructions to connect your account.

Creating a Contact Card for a New Contact

Contact Cards store individual contact and social media information.

1. Click the **App Launcher** button and select **People**.
2. Click the **New Contact** button.
3. Click the **Create Contact** button.
4. Enter a name for the contact in the **First name** and **Last name** boxes.
5. Enter additional contact information. If you have connected to a social network, the information will be filled in automatically as soon as **Outlook** recognizes the name of your contact.
6. Click the **Save** button.

Using Contact Cards



In the **My Contacts** pane, click the contact with which you wish to interact to open the contact card. From here, you can do one of the following:

- *To email the contact,* click the **Email** button. Enter the subject and details of the email and click the **Send** button.
- *To schedule a meeting with the contact,* click the **Schedule Meeting** button.
- *To chat with the contact,* click the **Chat** button.
- *To edit the contact information,* click the **Edit** button. Make the desired changes and click the **Save** button.
- *To delete the contact,* click the **More** ••• button. Select **delete** from the drop-down menu. Click **Delete** to confirm.

Creating a Group of Contacts

A group allows you to share conversations, documents, and a calendar with a group of your contacts.

1. Click the **App Launcher** button and select **People**.
2. In the **Groups** section of the **Navigation** pane, click the **Create group** shortcut.
3. In the **Create a group** pane, enter an available name for the group in the **Choose a name:** space.
4. In the **Add a description:** space, type a description of your group that will inform your invited members of the purpose of the group.
5. Click the arrow on the **Privacy:** box and select a setting for who could see the group.
6. *Optional:* To subscribe members to receive updates in their inbox, check the **Subscribe members so they receive group conversations in their inbox.**
7. Click the **Create** button.
8. Enter the name of contacts you wish to add to the group and click the **Add** button.

Lync

Lync is a communication program that allows you to instantly message other users within Office 365. You can make voice and video calls, share content, schedule and hold online meetings, and check the availability of contacts. Once you download Lync from your 365 portal, the Lync window will automatically appear on your desktop when you start your computer.

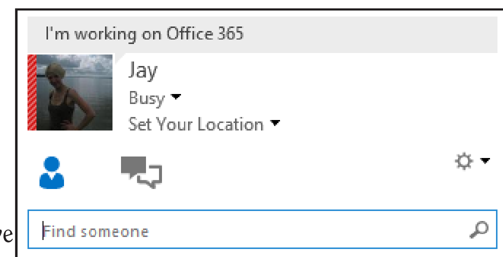
Adding a User Picture

1. Click the **Options** button.
2. Click **My Picture**.
3. Click the **Show my picture** button.
4. Click **Edit or remove picture**.
5. Click **Browse** and select a photo from your files.
6. Click **Open**.
7. Click the save button.

Setting Your Personal Note and Status

You can display a brief message and show your online availability to your contacts.

1. In the **Personal Note** area, enter your custom status message. Click out of the area to save it.
2. Click the **Status** arrow to open the status options. You can select:
   - **Available**: You are online and free to talk.
   - **Busy**: You are busy but can still receive conversation alerts.
   - **Do Not Disturb**: Only alerts from your **Workgroup** contacts will appear.
   - **Be Right Back**: You have stepped away and will return soon.
   - **Off Work**: You are not at work.
   - **Appear Away**: Your computer is set to **away**.



Setting Your Location

You can display your current location to your contacts.

1. Click **Set Your Location**.
2. Enter your current location into the box.
3. *Optional:* Click the arrow to select a custom location you have already used.

*Note: You can also check or uncheck the **Show Others My Location** box to determine if your contacts can view your current location.*

Adding Contacts

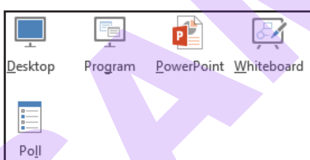
1. Click the **Add Contact** button.
2. Select one of the following options from the drop-down menu:
   - *To add a new contact from your organization,* click **Add a Contact in My Organization**.
   - *To add a new contact not in your organization,* click **Add a Contact Not in My Organization**.
   - *To add the new contact group,* click **Create a Group**.

   Enter a name for the group in the **New Group** box and click the **Enter** key. Drag contacts into the group.

Adjusting Your Lync Display Options
1. Click the **Add a Contact** button.
2. Click **Display options**.
3. Click the buttons to toggle the display and order options to suit your preferences.
4. *Optional:* Check options in the **Show this information:** section to show or hide details.
5. Click **OK**.

Sending an Instant Message
1. Double-click on the contact you wish to instant message.
2. Type your message into the text box provided and press the **Enter** key to send.
3. *Optional:* To place a call through **Lync**, hover over the **Call** button and select **Lync Call**. Click **Call**.
4. *Optional:* To place a video call through **Lync**, click the **Video** button.
5. *Optional:* To invite a contact to an on-going conversation, hover over the **Participants** button. Select a recent contact or click **Invite More People** to choose from your contacts.

Presenting Content through Lync
One of the most powerful features in Lync is the ability to directly present content to your contacts.
1. Double-click on the contact with which you wish to share to open a conversation window.
2. Click the **Present** button. From here, you can share one of the following:
   - **Desktop**: displays your entire desktop screen.
   - **Program**: displays your work in a selected program.
   - **PowerPoint**: displays a complete **PowerPoint** file.
   - **Whiteboard**: displays a writing slate.
   - **Poll**: displays a poll that your contact can participate in.
3. Click **Stop Presenting** to end the sharing session and return to your private screen.

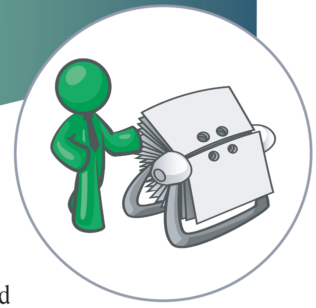


*Note: When you are presenting in Lync, your status will automatically change to **Presenting**. No instant messages or calls will come through. You should also make sure any sensitive or private information is closed on your desktop before you begin sharing.*

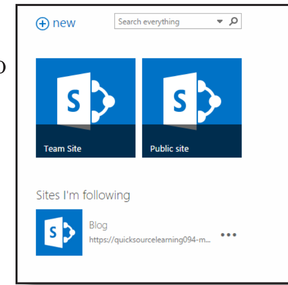
Scheduling a Meeting in Lync
1. In your **Lync** window, right-click the contact with which you wish to schedule a meeting.
2. Click **Schedule a Meeting.**
3. Enter the details of the meeting such as **Subject**, **Location**, **Start Time**, and **End Time**.
4. *Optional:* On the **Meeting** tab, click **Scheduling Assistant** in the **Show** group. Coordinate your meeting with other contacts.
5. Click the **Send** button.

Joining a Meeting
1. Open the meeting invite.
2. Click **Join Lync Meeting**.
3. Select an audio connection option from the **Join Meeting Audio** window.

Sites



My Site is a SharePoint resource that allows you to collaborate with other users within your organization. It contains sites to which you can add individual pages, libraries, lists, and apps. You can share and edit different types of Office files, host discussions, manage tasks, and share calendars. Click on the **Team Site** tile to start building your default site or click the **new** button to create a new site.



Sharing a Site
1. Click the **App Launcher** button and select **Sites**.
2. Click the site you wish to share.
3. Click the **Share** button below the **Nav** bar.
4. Enter contacts into the **Enter names, email addresses, or 'Everyone'** space.
5. *Optional:* To send a message with your invitation, enter text into the **Include a personal message with this invitation** space.
6. Click **Share.**

Creating a New Page
1. Click the **App Launcher** button and select **Sites**.
2. Click **Team Site**.
3. Click the **Settings** button.
4. Select **Add a page** from the resulting menu.
5. Enter a name for the page in the **New page name** box.
6. Click the **Create** button.

Deleting a Page
1. On the page you would like to delete, click the **Page** tab.
2. Click the **Delete Page** button in the **Manage** group.
3. Click **OK** to confirm deletion.

Renaming a Page
1. On the page you would like to edit, click the **Page** tab.
2. Click on the **Edit Properties** button in the **Manage** group.
3. Select **Edit Properties**.
4. Enter a new name for the page in the **Name** box.
5. Click **Save**.

Editing a Page
1. On the page you would like to edit, click the **Page** tab.
2. Click the **Edit** button in the **Edit** group and select **Edit**.
3. From here, you can do any one of the following:
   - *To insert text,* click in a text box and enter text.
   - *To format text,* select the text you want to format and make selections in the **Font** and **Paragraph** groups of the **Format Text** tab.
   - *To insert a picture or video,* click the ***Insert*** tab and select one of the options in the **Media** group. Select a location to upload the media and select the file. Click **OK** when you are finished.
   - *To check out the page and lock editing,* click the **Check Out** button in the **Edit** group and select a layout style from the resulting menu.
   - *To check in a page you have checked out*, click the **Check In** button. Enter any comments to inform other users about changes you have made, and click **Continue**.
4. Click the **Save** button.

Adding a App

1. Open the page to which you want to add an app.
2. Click the **Settings** button.
3. Select **Add an app** from the resulting menu.
4. Select an app from the **Your Apps** space.
5. *Optional:* To sort apps, click **Newest** or **Name**.
6. *Optional*: To search for a specific app, enter the name of the app in the **Find an app** box and click the **Search** button.
7. Enter a name for your app.
8. Click **Create**.

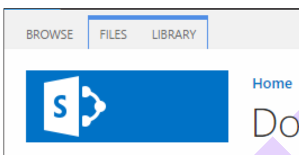
Adding a Link

1. Click the **App Launcher** button and select **Sites**.
2. Click **Team Site**.
3. Click **Edit Links**.
4. Click the **link** button.
5. Enter display text for the link in the **Text to display** box.
6. Enter the web address for the link in the **Address** box.
7. Click **OK**.

Note: You can also drag and drop links on the Navigation pane.

Changing the View Type

1. In your **Navigation Pane**, select the list or library that you want to change the view.
2. Click on the **List** or **Library** tab.
3. Click the **Create View** button in the **Manage Views** group. You can select one of the following:
   - *To view your information in a list,* click the **Standard View** button.
   - *To view your information in chronological format,* click the **Calendar View** button.
   - *To view your information in table format similar to a spreadsheet,* click the **Datasheet View** button.
   - *To view your information in visual graph,* click the **Gantt View** button.
   - *To view your information in **Microsoft Access**,* click the **Access View** button.



*Note: To create a view, click the **Modify View** button and adjust the settings as needed. Click **OK** when you are finished.*

Using Quick Edit

To quickly edit a list or library with a lot of information, use the Quick Edit feature to convert the item to an easy-to-edit spreadsheet format.

1. Click the item you wish to edit.
2. Click on the **List** or **Library** tab.
3. Click on the **Quick Edit** button in the **View Format** group.
4. Click in the box and make the desired changes.
5. When you are finished, click the **View** button to return to standard view or click **Stop editing this list**.

Customizing Site Settings

1. Click the **Settings** button.
2. Select **Site Settings** from the drop-down menu.
3. Click an option under one of the headings on the **Site Settings** page.

OneDrive

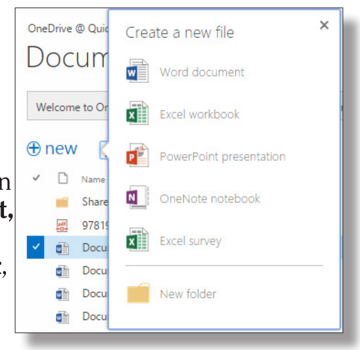
OneDrive is Microsoft's online cloud storage system. In Office 365, it also serves as a hub for working with folders and files, similar to File Explorer on a PC. You can create, access, and edit documents anywhere, whether or not you have the Office Suite installed on your current computer. Your documents will be stored in your OneDrive, which you can sync to your local files on your computer to keep everything up to date.

Uploading a File

1. Click the **App Launcher** button and select **OneDrive**.
2. Click the **upload** shortcut.
3. Select the file you wish to upload.
4. Click **Open**.
5. The file will appear in the **Documents** pane.

Creating a Document

1. Click the **App Launcher** button and select **OneDrive**.
2. Click the **new** button.
3. Select the type of file you would like to create from the drop-down menu, including **Word document, Excel workbook, PowerPoint presentation, OneNote notebook,** and **Excel survey**.



Sharing a Document

1. Click the **App Launcher** button and select **OneDrive**.
2. Check to select the document you want to share from the **Documents** pane.
3. Click **Share**.
4. Enter the names of users with which you wish the share the document in the **Invite people** box.
5. *Optional:* To only allow other users to view the document without making changes, click the arrow at the **Can edit** box and select **Can view**.
6. *Optional:* To include a message, enter text in the space.
7. Click **Share**.

Creating a Folder

1. Click the **App Launcher** button and select **OneDrive**.
2. Click the **new** button.
3. Select the **New Folder** button from the drop-down menu.
4. Enter a name for your new folder in the **Name*** box.
5. Click **Save**. Your new folder will appear in your **Documents** list.

*Note: To add items to your folder from your **Documents** list, click and drag the items onto the folder.*

Newsfeed

The Newsfeed hub is a fast and easy way to convey short, informative updates and personal information to other users in your organization.

Viewing Your Newsfeed

1. Click the **App Launcher** button and select **Newsfeed**.
2. Click one of the following options:
   - *To view posts of everyone you are following,* select **Following**.
   - *To see all news,* click **Everyone**.
   - *To see posts which mention you,* click **Mentions**.

Posting a Newsfeed Status

1. Click the **App Launcher** button and select **Newsfeed**.
2. *Optional:* Set who sees your status by clicking the arrow beside the **Share with everyone** heading. Select an option from the drop-down menu to choose the privacy level.
3. Enter the text of your status in the **Start a conversation** box.
4. Press **Post** to publish your status.

Deleting a Status Post

1. Click the **App Launcher** button and select **Newsfeed**.
2. Select **Newsfeed** in the **Navigation** pane.
3. Click the **Delete** ✕ button beside the status update you wish to delete.
4. Click the **Delete it** button to confirm deletion.

Connecting with Newsfeed

You can connect with other users several different ways when you post in your Newsfeed.

- **Tagging** – adds keywords that help users easily sort pertinent information from posts. Trending tags will appear in the right pane on your **Newsfeed**. To add a tag, type the pound sign # and word you wish to tag. As you type, commonly used tag suggestions will appear under the box.
- **Mentioning** – inserts a shortcut to the **About me** page of the user you have mentioned. The user will also receive a notification that they have been mentioned by you. To mention a user, type an @ character before the user's name and select the user from the list of available users.
- **Following** – connects another user's **Newsfeed** to your own so their updates appear on your page. You can also click the **Follow** ☆ button to follow pages.

Editing Your About Me Profile

Your About Me Profile is a personal hub within your organization. Other users can view your contact links, profile photo, and information about yourself.

1. Click the **App Launcher** button and select **Newsfeed**.
2. Click **About Me** on the **Navigation** pane.
3. Click the **edit your profile** button.
4. Enter a brief description of yourself in the **About Me** space.
5. *Optional:* To set a profile picture, click **Change your Photo**. Click **Browse** to locate a photo from your files and then click **Open**. Click the save button.
6. *Optional:* To enter in skill sets or interests that you can provide help or specialization with, enter information in the **Ask Me About** space.
7. Click **Save all and close** to save your changes.

Adding Your Contact Information

1. Click the **App Launcher** button and select **Newsfeed**.
2. Click **About Me** on the **Navigation** pane.
3. Click the **edit** button in the edit your profile heading.
4. Click the **Contact Information** tab in the **Edit Details** space.
5. Enter your contact information in the provided boxes.
6. Click **Save all and close**.

Note: To add additional information to your profile, click on the ***Details*** *tab. Enter more details in the additional boxes and click* ***Save all and close****.*

Creating a New Blog Post

1. Click the **App Launcher** button and select **Newsfeed**.
2. Click **Blog** on the **Navigation** pane.
3. Click the **Blog** shortcut in the **Quick Launch** pane.
4. Click the **Create a post** shortcut in the **Blog tools** section.
5. Enter a title for the post in the **Title** box.
6. *Optional:* Enter post text in the **Body** space.
7. *Optional:* Select an option in the **Category** box.
8. *Optional:* To insert an item into the post, click in the **Body** space to access the **Insert** tab. Select an item to insert to the blog, including a **Table**, **Picture**, or **Link**. You can also click the **Upload File** button to attach a file to the post, or click the **Embed Code** </> button to paste script or code into the blog entry.
9. Enter or select a date and time in the **Published** section.
10. Click **Publish**.

Note: You can also click the ***Manage posts*** *shortcut in the* ***Blog Tools*** *section and click the* ***new item*** *shortcut.*

Commenting on a Blog Post

1. Click the name of the post on which you want to comment.
2. Click in the **Add a comment** space at the bottom of the post.
3. Enter the comment text.
4. Click the **Post** button.

Note: To delete a comment, click ***Manage Comments*** *in the* ***Blog tools*** *section. Check the box beside the comment you would like to delete and click the* ***Items*** *tab. Click the* ***Delete Item*** ✕ *button.*

Deleting a Blog Post

1. Click the **Manage posts** shortcut in the **Blog tools** section.
2. Check the box next to the post you want to delete.
3. Click the **More** ... button.
4. Select **Delete Item** from the drop-down menu.
5. Click the **OK** button to confirm deletion.

Adding a Category

When you create a new blog post, you can sort it to appear in pertinent categories for easy access. By default, you can choose from Events, Ideas, or Opinions. You can also create specific unique categories to use.

1. Click the **App Launcher** button and select **Newsfeed**.
2. Click **Blog** on the **Navigation** pane.
3. Click the **Add Category** shortcut under the **Categories** section of the **Navigation** pane.
4. Enter a name for your category in the **Title*** space.
5. Click **Save**. The new category will appear in your **Navigation** pane and as an option when you create a new blog post.