

http://

Microsoft® Office

Office 365

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Introducing CustomGuide Courseware

Thank you for choosing CustomGuide courseware as the solution to your training needs. A proven leader in the computer training industry, CustomGuide has been the key to successful training for thousands of students and instructors across the globe.

This manual is designed for computer users of all experience levels. Novice users can use it to learn skills, such as formatting text, while advanced users can use it to create their own templates.

All of this information is quickly accessible. Lessons are broken down into basic step-by-step instructions that answer “how-to” questions in minutes. You can print a complete 300-page training manual or a single page of instructions.

Here’s how a CustomGuide manual is organized:

Chapters

Each manual is divided into several chapters. Aren't sure if you're ready for a chapter? Look at the table of contents that appears at the beginning of each chapter. It will tell you the name of each lesson and subtopic included in the chapter.

Lessons

Each chapter contains lessons on related topics. Each lesson explains a new skill or topic and contains an exercise and exercise file to give you hands-on experience. These skills can also be practiced using CustomGuide Online Learning.

Review

A review is included at the end of the manual. Use these quiz questions and answers to assess how much you've learned.

What People Are Saying

“I have saved hundreds of hours of design time by just picking and choosing what I want from the courseware.”

— Stephanie Zimmerman
Lancaster County Library

“We have been able to customize our training sessions on all Microsoft Office products, at all levels. The ROI of these guides is great.”

— Dawn Calvin
Las Virgenes Municipal Water District

“All in all, the friendliest, most open and easy to understand tutorial of its type that I’ve ever seen.”

— W. Boudville
Amazon.com

“...Curriculum that is of high quality, student friendly, and adaptable to the audience.”

— Sherrill Wayland
St. Charles Community College

“...A nice training option for almost any need. Their complete Microsoft Office package is by far the best deal on the market.”

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Purdue University

“Any instructor teaching classes on Windows or Microsoft Office will definitely want to give serious consideration to this important collection of titles that will definitely fit well into their classroom learning.”

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How It Works

1. Open Microsoft Word

Our customizable courseware is provided as simple-to-use, editable Microsoft Word documents—if you can use Microsoft Word you can create your own training materials in minutes!

2. Select Your Topics

Select the content you need from our award-winning courseware library. You can even mix and match topics between titles, such as Microsoft Outlook and Microsoft Word.

3. Customize

Arrange topics in the order you want—the courseware automatically updates to reflect your changes. Add your organization's name and logo for a professional “in-house” look.

4. Print and Distribute

Print as many copies as you need at your site, without paying any per-unit royalties or maintaining physical inventories. You can print single-page handouts, a group of related lessons, or a complete manual. It's fast, convenient, and very affordable.

5. Teach and Learn

You'll love having your own customized training materials, and your users will appreciate the colorful illustrations, down-to-earth writing style, and the convenience of having a reference guide that they can use in or out of the classroom.

Courseware Features

A Working with Shapes and Pictures

F **Positioning Pictures**

Whenever you insert a graphic into a document, it is inserted inline with text by default. This means that the text in the document moves in order to accommodate the graphic. This lesson will show you how to adjust text wrapping and how to use the grid to position objects.

Tips

If you want to use a graphic with other graphics or objects, they must be on a drawing canvas. See the lesson on *Inserting Shapes* for more information.

B **Adjust text wrapping**

To adjust how text reacts to the objects in your documents, change the object's text wrapping.

1. Double-click the object whose text wrapping you wish to adjust.

The Format contextual tab appears on the Ribbon.

A list of text wrapping styles appears. Take a look at the Text Wrapping Styles table for a description of each style.

2. Click the **Text Wrapping** button in the Arrange group.

The text wrapping style is applied to the image.

3. Select a text wrapping style from the list.

C **Other Ways to Adjust Text Wrapping:**

Right-click the image, point to Text Wrapping in the contextual menu, and select an option from the submenu.

To display/hide the grid

Just like the graph paper you used to use in geometry class, the *grid* consists of horizontal and vertical lines that help you draw and position objects.

1. Click the View tab on the Ribbon.
2. Click the **Gridlines** check box in the Show/Hide group.

Horizontal and vertical gridlines appear on the page.

Other Ways to Display the Grid:

Press <Shift> + <F9>, or click the **Format** contextual tab on the Ribbon, click the **Align** button in the Arrange group, and select **View Gridlines** from the list.

Tip: Gridlines do NOT appear in the printed document.

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E **Exercise**

- **Exercise File:** AmericanHistory7-3.docx
- **Exercise:** Select the header row containing the month labels, the Income row, the Total Exp. Row, and the Net Inc. row (use the Ctrl key to select multiple rows). Create a 2-D Clustered Column chart.

Table 7-2: Text Wrapping Styles

	In Line with Text	This places the object at the insertion point in a line of text in the document. The object remains on the same layer as the text.
	Square	Wraps text around all sides of the square bounding box for the selected object.
	Tight	Wraps text tightly around the edges of the actual image (instead of wrapping around the object's bounding box).
	Behind Text	This removes text wrapping and puts the object behind text in a document. The object floats on its own layer.
	In Front of Text	This removes text wrapping and puts the object in front of text in a document. The object floats on its own layer.
	Top and Bottom	Wraps text around the top and bottom of the object, leaving the area to the right and left of the object clear.
	Through	Similar to the Tight style, this style wraps text throughout the image.

H

D **Figure 7-3:** A document with the grid displayed.

A Lessons are presented on one or two pages, so you can follow along without wondering when a lesson ends and a new one begins.

E Each lesson includes a hands-on exercise and practice file so users can practice the topic of the lesson.

B Clear step-by-step instructions answer “how-to” questions. Anything you need to click appears **like this**.

F Tips let you know more information about a specific step or topic as a whole.

C Whenever there is more than one way to do something, the most common method is presented in the numbered step, while the alternate methods appear beneath.

G Tables provide summaries of the terms, toolbar buttons, and options covered in the lesson.

D The table of contents, index, tables, figures, and quiz questions automatically update to reflect any changes you make to the courseware.

H Icons and pictures show you what to look for as you follow the instructions.

The Fundamentals

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Welcome to Microsoft Office 365!

Office 365 is the latest offering from Microsoft, just in time to fall in with the new era of online accessibility and productivity.

We have become accustomed to being able to videoconference, network socially and use email facilities online, from anywhere, at any time.

When it comes to creating a document, spreadsheet or presentation however, we've had to do so locally on a PC or laptop, and then find a way to distribute, transfer or store those files via email or on some kind of storage device. Until now.

Office 365 is based on an online subscription facility that allows you to install applications, access, create, distribute and store documents from just about anywhere, anytime using a combination of application types. It's easy to setup and has many advantages like multi-device installations, and access to free version upgrades.

In this chapter, we will introduce you to the options and setup of Office 365.

Overview

Office 365 is an online, subscription-based facility that allows you to download, access, create, distribute and store Office documents and files from anywhere, any time. **NB:** To download the latest Office Applications, you will need to have a Windows 7 or 8 Operating System.

Choosing a Subscription

The first step to getting started is choosing the type of subscription you need. See **Table 1-1: Office 365 Home Subscriptions** and **Table 1-2: Office 365 Business Subscriptions** for a breakdown of the available options.

Each Subscription has different fees and payment options attached to it. To find out the exact costs and payment types for each, please refer to www.office365.com.

Exercise

- **Exercise File:** None required.
- **Exercise:** Go through some of the relevant subscription options and features.



Table 1-1: Office 365 Home Subscriptions

	Home Premium	Home & Student	Home & Business	Office Professional
No. of Installations	Up to 5 PCs/Macs ¹ plus select mobile devices ²	1 PC	1 PC	1 PC
Annual Subscription (includes ongoing access to version updates and Office on Demand ³)	✓	✗	✗	✗
Licensed for	Home Use	Home Use	Home or Business	Home or Business
Word, Excel, PowerPoint & OneNote⁴	✓	✓	✓	✓
Outlook	✓	✗	✓	✓
Publisher⁴ & Access⁴	✓	✗	✗	✓
SkyDrive (20Gb Storage Space)	✓	✗	✗	✗
Instant Access	✓	✗	✗	✗
Office on Demand	✓	✗	✗	✗
Skype World Minutes (60 minutes/mth in 40+ countries)⁵	✓	✗	✗	✗

! Trap: There are some restrictions to which subscriptions and services can be combined when using Office 365. Find out more about these restrictions on the Office 365 website.

The Fundamentals

Table 1-2: Office 365 Business Subscriptions

	Small Business	Small Business Premium	Midsize Business	Enterprise (Exchange OLP 1)	Enterprise E1	Enterprise E3	Enterprise E4
No. of Users	25	25	300	Unlimited	Unlimited	Unlimited	Unlimited
Office Applications (Installation on up to 5 PCs/Macs per user) ^{6&7}							
Hosted Email (50Gb storage space) ⁸	✓	✓	✓	✓	✓	✓	✓
Web conferencing, presence & IM	✓	✓	✓	✗	✓	✓	✓
SkyDrive Pro (25Gb Space) ⁹	✓	✓	✓	✗	✓	✓	✓
Public Website (No additional hosting fees)	✓	✓	✓	✗	✓	✓	✓
Spam and Malware Protection	✓	✓	✓	✓	✓	✓	✓
Community & Phone Support	✓	✓	✓	✓	✓	✓	✓
99.9% Uptime	✓	✓	✓	✓	✓	✓	✓
Intranet Site (SharePoint)	✓	✓	✓	✗	✓	✓	✓
Office Web Apps	✓	✓	✓	View Attachments only	✓	✓	✓
Site Mailboxes	✗	✓	✓	✗	✓	✓	✓
Office Mobile for iPhone and Android Phone	✗	✓	✓	✗	✗	✓	✓
Other Mobile Apps ¹⁰	✓	✓	✓	✗	✓	✓	✓
Active Directory Integration	✗	✗	✓	✓	✓	✓	✓
Advanced Email	✗	✗	✗	✗	✗	✓	✓
eDiscovery Center	✗	✗	✗	✗	✗	✓	✓
Advanced Voice	✗	✗	✗	✗	✗	✓	✓
Business Intelligence	✗	✗	✗	✗	✗	✓	✓
Enterprise Voice	✗	✗	✗	✗	✗	✗	✓

The Fundamentals

Subscription Notes

Refer to the ^{Superscripted} numbers on **Table 1-1: Office 365 Home Subscriptions** and **Table 1-2: Office 365 Business Subscriptions** to see important notes and conditions applicable to the corresponding subscription features.

Table 1-3: Notes on Available Subscriptions

- | | |
|-------|---|
| 1 | PC/Mac: Current Office applications for Office 365 are Office 2013 for PC and Office 2011 for Mac. An active subscription will give you access to the latest versions as they become available. |
| 2 | Mobile Devices: As of October 2013, Office Mobile can be installed on Android, Blackberry or iPhones, iPads and Windows Tablets. Office Mobile is available on Win phones and does not count toward the 5-device limit. |
| 3 | Home Premium Annual Subscription: Windows 7 or 8 OS and Internet access required. |
| 4 | Office Applications (Home): Applications availability and features vary by device and platform. These specific applications are available on PC only. |
| 5 | Skype World Minutes: A Skype account is required and excludes special, premium and non-geographic numbers. Skype world minutes and calls to mobiles are for select countries only. For a list of regions and countries refer to the FAQ section on the Office 365 website. |
| 6 & 7 | Office Applications: Those framed in red are Windows client programs/features only, and cannot be used across devices. |
| 8 | Hosted Email: You can connect the following versions of Outlook to use on your Hosted Email: for PC – the latest version of Outlook, Outlook 2010 or Outlook 2007 (limited functionality). For Mac – Outlook 2008 or Outlook 2011. |
| 9 | SkyDrive Pro: To be able to sync files with SkyDrive Pro, you must have a subscription that includes Desktop versions of Office 2013 applications, or you must have Office 2013 Standard or the 2013 Professional suite installed on your PC (subscriptions that do not include a Desktop version of Office, are Exchange OLP or Online Plan 1, Small Business and Enterprise E1). |
| 10 | Other Mobile Apps: Apps that allow you to access, edit, view Word, Excel and PowerPoint on Windows phones and apps like OneNote, OWA, Lync Mobile and SharePoint Newsfeeds do not necessarily require a subscription, however, they may have other requirements attached to them. |

✓ Tips:

- ✓ In addition to the Exchange Online subscription, there are also individual services for SharePoint and Lync Online. Kiosk plans are also available for “roaming” users.
- ✓ Two options are available for businesses requiring Office without IT services: Businesses who need applications for a larger employee base and Office 365 ProPlus – a version offering additional capabilities.
- ✓ Plans that do not include a Desktop version of Office work with the latest PC version of Office, Office 2010 and Office 2007 (limited functionality), or Office 2008/2011 for Mac.
- ✓ With Enterprise plans you can combine E1, E3 and E4 Plans, the K1 plan (for Kiosk users), and the full range of standalone offers for individual services.

System Requirements

Microsoft has something called an Office 365 Client System Requirements Policy, and it lays out the requirements for the use of Office 365.

To really get the most out of Office 365, this policy states that you should have the latest apps, browsers, clients as well as mobile devices, and that you should install any updates and new versions of this software as soon as they are released.

New Office 365 features and functions may not work correctly on older versions of Office client or older Web Browsers.

✔ **Tip:** When using Office 365 Pro Plus, updates and versions are automatically streamed to you.

The main two (2) requirements for Office 365 are:

- Current or immediately prior versions of Internet Explorer, Chrome, Firefox, or Safari.
- Any installed version of Microsoft Office still in mainstream support. This includes: MS Office 2011 for Mac, MS Office 2007, MS Office 2010, and MS Office 2013 for PC's.

❗ **Trap:** Office products still in mainstream support do vary by country/region.

Each subscription has different operating system requirements. Some advanced options, tools and features within Office 365 do depend on certain operating systems – for instance, you cannot download the latest Office version unless you have Windows 7 or 8.

Certain browsers and Office clients may also have their own requirements, which may be affected by which operating system you have.

When it comes to Office Web Apps, you will need to have the latest operating system on your phone/tablet in order to download, install and use any of the available Office Web Apps.

1. To find out exactly which requirements apply to your subscription choice and PC/Mac, refer to <http://www.office.com>.

Exercise

- **Exercise File:** None required.
- **Exercise:** Discuss some of the relevant system requirements.



Figure 1-1: <http://office.microsoft.com>

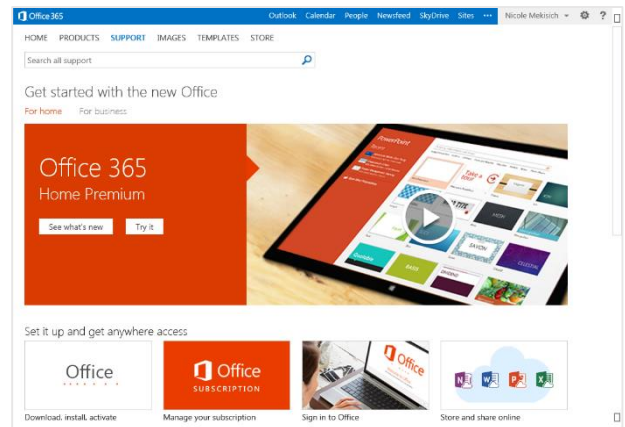


Figure 1-2: Get started with Office 365

Background

Now that you know all the features and services available to you on an Office 365 subscription, you can get started with actually using your account.

Before you get going, let's quickly take a brief look at how you would normally get to this point.

Sourcing and Setting up Office 365

1 Purchase an Office 365 Subscription/Trial

This can be done by an individual for Home use, or by a company representative within an Organization.

2 Email Setup

Business and Enterprise subscriptions have an Email Hosting feature. A Network Administrator would normally be responsible for setting this feature up so that users can make use of their company email address with the Hosting service on Office 365.

3 Setting up the Team

Again, this will be the responsibility of the individual who purchased the subscription – for Home to add family members as users, or a Network Administrator to add employees as users so that the users can connect to and make use of all the features and services available on their chosen subscription. Administrators will send users their User ID and a temporary password to sign in with, as part of this process.

4 Collaboration Tools

Depending on the subscription chosen, users can make use of the SkyDrive to create, store, sync, and share documents with others. They can connect to the SharePoint site (also known as Team sites or the Intranet) in order to coordinate and share companywide projects, documents, tasks, and more. Last but not least, users can also access their documents and files from anywhere by using online tools like Mobile and Web Apps.

A Network Administrator would usually make sure that these features are also setup and accessible to users.

5 Software Installation

This brings us to where we will be starting. Depending on whether or not the subscription you'll be using includes Office, software installations can be done by you, the user, or if you work for a large organization that is setup to do so, software installations may be arranged as a deployment, or a Technician may be sent to assist users with this process.

Exercise

- **Exercise File:** None required.
- **Exercise:** Go through the steps from purchasing a subscription to receiving a User ID and password.

Customise your Office 365 email

Change your email address to your own domain name.

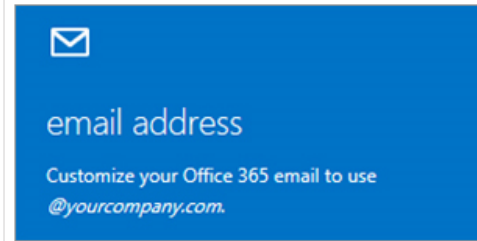


Figure 1-3: Email Setup

Add users

The sooner you add team members the sooner you can start enjoying the full benefit of the collaboration tools built into Office 365.

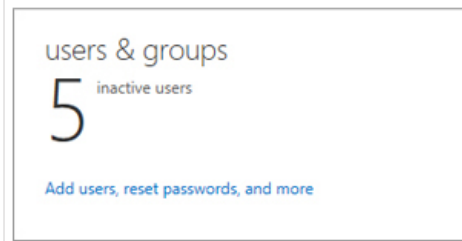


Figure 1-4: Setting up the Team

Get started with collaboration tools

Work better together with SkyDrive Pro, Office Web Apps and team sites.

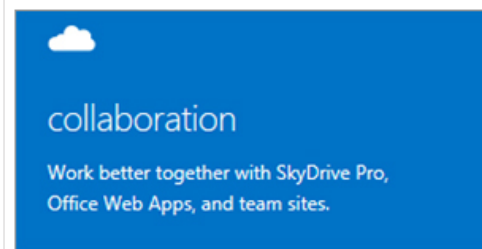


Figure 1-5: Collaboration Tools

The Office 365 User Account

At this point, you would have received an email with a User ID and temporary password from your Network Administrator.

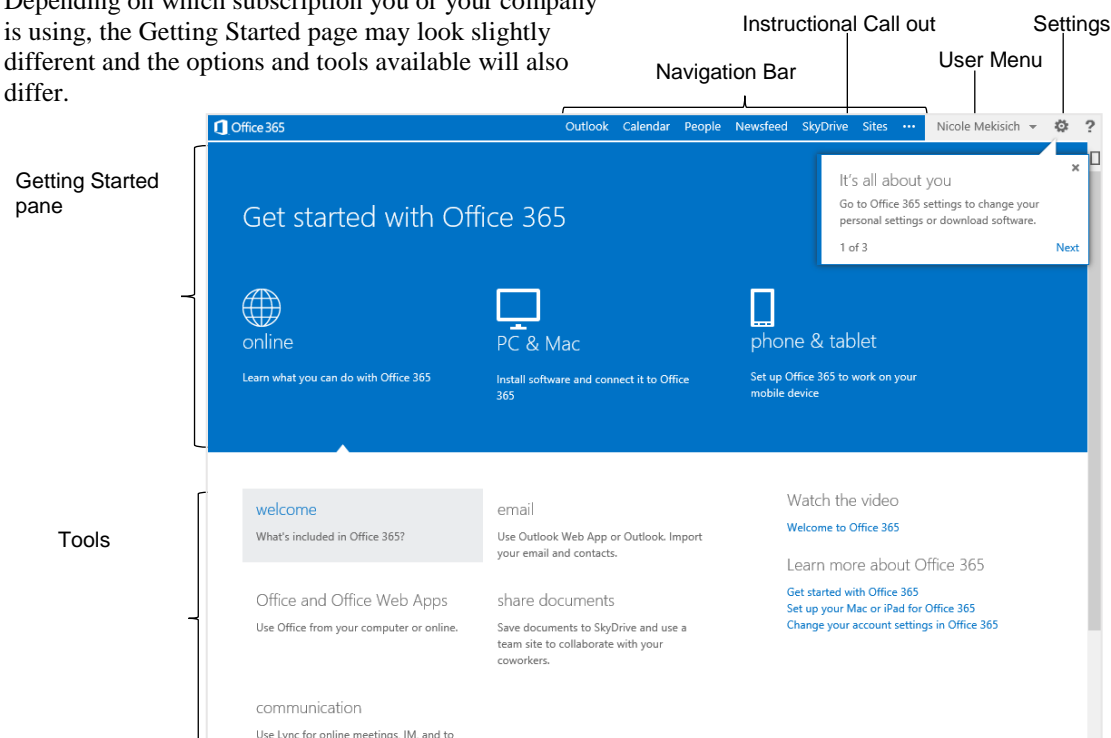
Now, you can log in to your new User Account where all your new apps, software, tools, and features are based and begin setting up your account and devices.

Accessing your Account

1. Open your Internet Browser, type <https://login.microsoftonline.com/http://www.office365.com/> in the address bar and press <Enter>.
- ✓ **Tip:** You will use this link a lot, so consider adding it to the browser Favorites on all your devices.
2. Enter your new User ID and temporary password in the fields provided.
3. Click **Sign in**.
4. You will need to update your password to replace the temporary one you were given.
5. Click **save** when you're done.

The Getting Started Page

Depending on which subscription you or your company is using, the Getting Started page may look slightly different and the options and tools available will also differ.



Exercise

- **Exercise File:** None required.
- **Exercise:** Log on to your local account and familiarize yourself with your account menu and options.

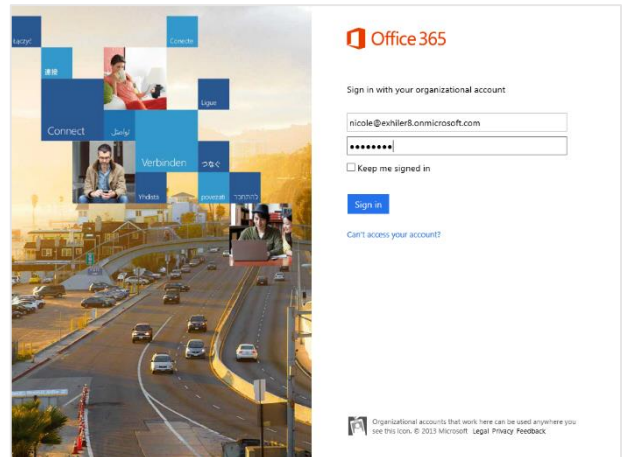


Figure 1-6: Office 365 Sign in page

Figure 1-7: User Account Getting Started page - Office 365 Small Business Premium

Table 1-4: User Account Options

Settings	Click the Settings button to change your Office 365 Settings.
User Menu	Click the User Menu to Sign out or edit your Profile.
Instructional Callout	Instructional Callouts will help you get started with setting up and using your account.
Navigation Bar	Use buttons on the Navigation bar to access your Email, Calendar and Contacts on the Outlook Web App. Access your SharePoint site and SkyDrive where applicable. Network on Newsfeed, or purchase more Office apps by clicking the More button (...).
Getting Started pane	Learn more about Office 365, install software or set up your mobile device using options available on the Getting Started pane.
Tools	Use available tools in this section to further customize your account and features.

Change your Settings

If you need to make any basic changes to your Office 365 Account, access your account settings and make the necessary changes.

1. On the User Account Getting Started page, click the **Settings** button and select **Office 365 Settings**.
2. Select one of the options and make your changes as necessary.

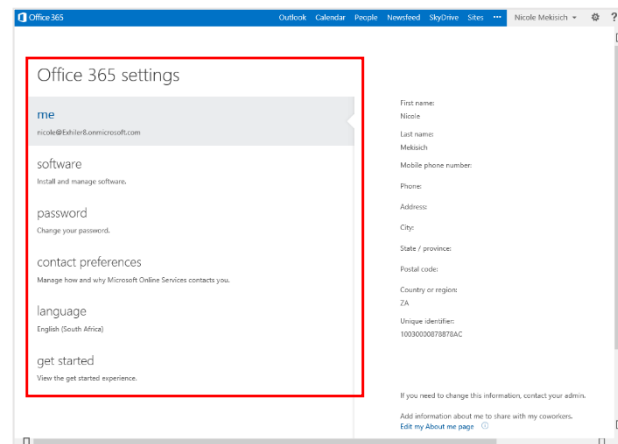


Figure 1-8: Office 365 settings page

Table 1-5: Office 365 Account Settings

me	Select me if you need to make changes to any of your personal details like phone number etc.
software	Select software if you want to install or manage software installations.
password	Select password to change your Office 365 Password.
contact preferences	Select contact preferences if you want to change the way Microsoft contacts you and what they contact you about.
language	Select language if you need to change or update your language preference.
get started	If at any time you want to return to the User Account Getting Started page, select this option.

Office for Desktop/Laptop

You have logged onto your new User Account. Now it's time to set up your software. Depending on the Office version you currently have installed, you may need to perform your desktop installation in one of two ways. Standard Desktop Installation (if you have the latest Office or no Office at all), or Desktop Setup (if you have Office 2007 or 2010).

- ❗ **Trap:** When installing or accessing some Web apps, you may need a Microsoft account. An Office 365 Subscription provides you with a User account, which gives you access to features and apps relevant to your subscription. A Microsoft account is an email address and password you use to sign into other Microsoft services. If you use any of the following, you already have a Microsoft account: Hotmail, Outlook.com, Gmail, Yahoo, Xbox Live, SkyDrive, MSN, Messenger and others.

Standard Desktop Installation

If you don't have Office installed, or you have the latest version installed, you can use the Standard Desktop Installation instructions below. If this is not the case, refer to the Desktop Setup lesson that follows.

1. Click **PC & Mac** on the Getting Started pane.
2. Select your language, your system version (32-bit is recommended), and click **install**.
3. You'll be prompted to run or save the Setup files, select **Run**.
4. On the User Account Dialog box, click **Yes** to confirm.

Depending on your connection speed, installation may take some time.

5. When installation is complete, a Setup Wizard will pop up. Click **Next**.

Follow the easy onscreen prompts, and keep clicking **Next** in order to complete your Office setup.

- ✔ **Tip:** Remember, options in the Wizard may vary according to the subscription chosen.

You are now ready to begin using the latest Office products available with your chosen subscription.

Exercise

- **Exercise File:** None required.
- **Exercise:** Install Office 365 Software on your Desktop/Laptop.



Figure 1-9: Some services that make use of a Microsoft Account

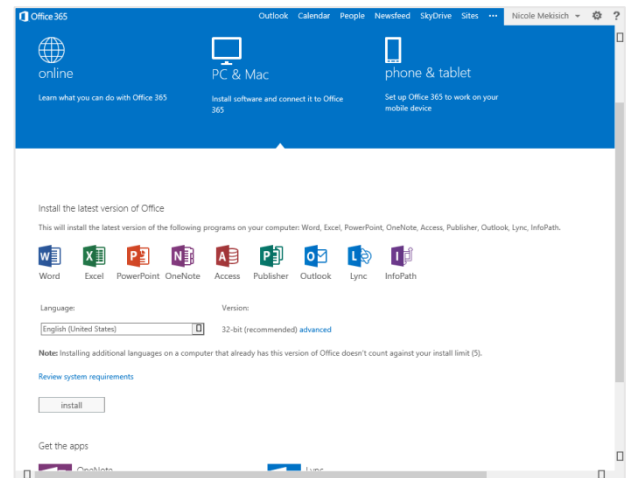


Figure 1-10: Standard Desktop Software Installation

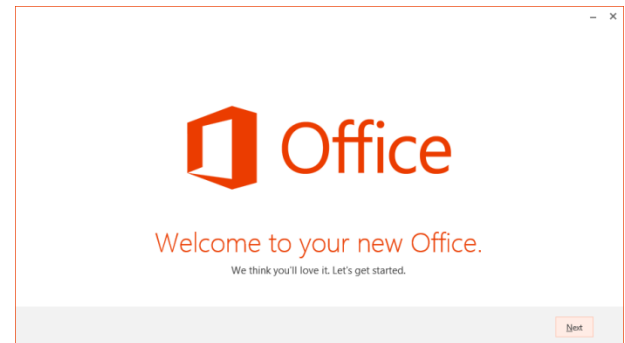


Figure 1-11: Installation Wizard

The Fundamentals

Desktop Setup

If you currently have Office 2007 or Office 2010 installed, you will need to first update Office so that you can save documents to the SkyDrive and use Outlook with Office 365 for mail and other features.

1. Click the **Settings** button on the top right and select **Office 365 Settings**.
2. On the Settings page, select **software**.
3. Select **desktop setup** from the menu listed on the left.
4. Click **set up**.
5. You'll be prompted to run the application, click **Run**.
6. A Sign in window will pop up when set up is ready. Sign in, using your Office 365 credentials.

Office 365 will now check your system configuration. Depending on the speed of your system, this may take a while.

7. Once the configuration check is complete, the upgrade can begin. On the pop-up that appears, choose which applications you'd like to configure by selecting the applicable checkboxes. Then click **Continue**, to allow Office 365 to configure and update your system.
8. Click **Yes** on the confirmation dialog box.
9. Once you have reviewed and agreed to the service agreement, click **I accept**.

The upgrade will begin.

10. Click **Finish** on the confirmation screen. You may need to restart your PC before proceeding.

Your desktop should now be ready to install Office.

11. Back on your Office 365 User Account, select **Office** from the Software menu on the left, and then follow steps 2 – 5 from the Standard Desktop Installation lesson above to install the latest Office version on your desktop.

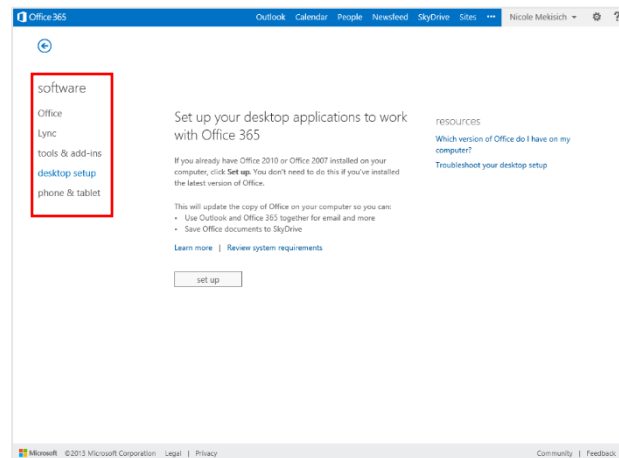


Figure 1-12: Software Menu for Desktop Setup

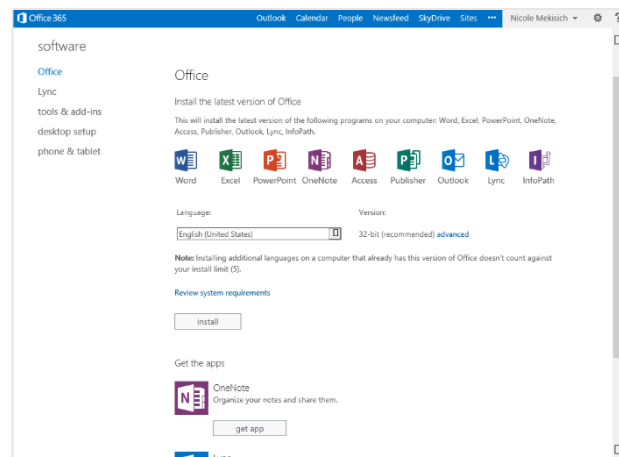


Figure 1-13: Software Installation for Desktop Setup

Office for Mobile Devices

There are a few confusing terms related to Office Applications in general. Phrases include: Office Mobile, Web Apps, Mobile Apps, Client Apps, Office Mobile, and Office on Demand. With so many different names, it can sometimes be hard to know what's what and how it relates directly to you and Office 365.

Before we go any further, we're going to have a look at the different types of applications not installed on your desktop and how they may relate to you:

Web App: This refers to any application that uses a Web Browser as the client. (A "client" in layman's terms is the channel responsible for delivering a service/application from a server.) So you could, for example, use any device with an Internet connection to log on to your Office 365 Account and check your email, using the Outlook Web App from your User Account. Web Apps are also free!

Mobile Web App: This is basically the same thing as a Web App, except it's specifically optimized for a phone, so the screen size is a lot smaller and the browser may work a little differently.

Client App: This is an application that makes use of onboard resources, such as memory or space on your hard drive, to deliver a service/application from a server. Internet Explorer is a perfect example of a Client App.

Mobile Client App: This is a Client App optimized for use on a phone.

Office Mobile: This is the Office Suite optimized for phones, and it requires an Office 365 Subscription. Although it has limited functionality, it's compatible with the desktop version, so you can view and edit a PowerPoint presentation on your phone using Office Mobile, while retaining the content and format when working with the same file on a desktop.

Office on Demand: This type provides access to full=featured Office programs from PC's that don't necessarily have Office locally installed. This means you can use someone else's PC, log on to your Office 365 Account, open your SkyDrive account, and create a PowerPoint presentation from scratch. The difference between this type and a Web App is that Web Apps don't provide full application features, and they are available on a variety of devices.

So which types of applications does Office 365 make use of? It depends on which subscription you choose, but the idea is that Office 365 makes use of all the types for the specific reason of giving you access to as many of your documents and files from as many different devices as possible.

Exercise

- **Exercise File:** None required.
- **Exercise:** Discuss the different types of applications.



Figure 1-14: App Design for Office 365

The Fundamentals

Mobile Installation

Once you've installed software on your desktop, you can set up Office 365 apps on your Smartphone as well. You need an iPhone, Blackberry, Android, or a Nokia-based (Symbian OS) device.

1. Open the Internet browser on your phone, type in www.office.com/business-apps in the address bar and select **<Enter>**, or the relevant equivalent on your phone.
2. Select the app you wish to download from the list of available options for your device, and click **Install** or the relevant equivalent on your phone. Follow any onscreen instructions to complete installation.

You are now ready to use the app on your phone.

- ❗ **Trap:** Even if you have a supported phone, in most cases, you need the latest version of the phone OS to install the apps on your phone.

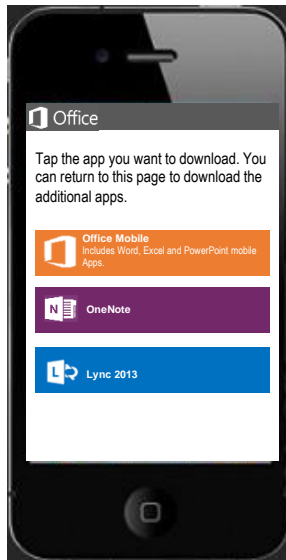


Figure 1-15: www.office.com/business-apps

Tablet Installation

You can also install apps on your tablet, depending on the subscription you have chosen. You will need an iPad, Windows RT device, or Windows 8 Tablet.

1. Open the Internet browser on your tablet, type in www.office.com/business-apps in the address bar and select **<Enter>** or the relevant equivalent on your tablet.
2. Select the app you wish to download from the list of available options and click **Install**, or the relevant equivalent on your tablet.

Follow any additional onscreen prompts to complete installation.

The app is now installed on your tablet.

- ❗ **Trap:** Even if you have a supported tablet, in most cases, you need the latest version of the tablet OS to install the apps on your device. Office may not be available for all tablets.

- 🔗 **Another way to Access the Setup on your Phone or Tablet:** Log on to your User Account, via your Internet browser, and click **phone & tablet** on the Getting Started pane. Choose the type of phone or tablet that you have and click the applicable **get app**. Enter the email address that you have setup on your phone (or tablet) and click **Submit**. This will send the link for www.office.com/business-apps to your phone or tablet.

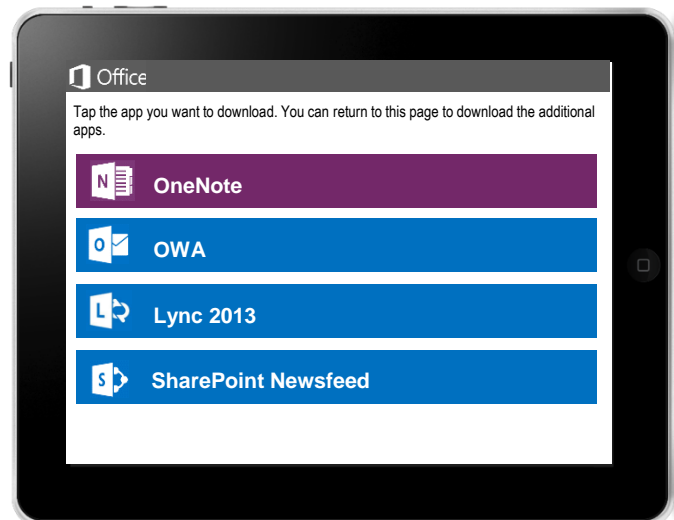


Figure 1-16: www.office.com/business-apps

The Fundamentals Review

Quiz Questions

1. In order to use Office 365, you must have Windows 7 or 8 as your operating system. (True or False?)
2. You can mix and match any subscriptions in Office 365 to meet your requirements. (True or False?)
3. How many PCs or devices may you install Office 365 Home & Business on?
 - A. 2
 - B. 1
 - C. 5
 - D. Unlimited
4. Which of the following devices is not currently supported by Office 365?
 - A. Blackberry
 - B. iPad
 - C. Android Tablet
 - D. Nokia (Symbian OS)
5. All Office 365 Subscriptions allow you to download and install Office. (True or False?)
6. You can use Office 365 with PC and Mac. (True or False?)
7. Desktops that do not currently have the latest Office version installed must first be configured and upgraded before the Office applications included in their subscription can be installed. (True or False?)
8. Office 365 apps will work on any device supporting the listed technologies, namely Android, Blackberry, iPhone, etc. (True or False?)
9. You will be able to download and install all the available apps listed under your subscription on your mobile/tablet devices. (True or False?)
10. The fastest way to install Office 365 apps on your mobile/tablet device is to:
 - A. Use your device's app store feature to find and install the app.
 - B. Email or text a link to the app site to your device from your User Account.
 - C. Enter the app URL into your device's browser address bar.
 - D. A & C.

Quiz Answers

1. False. Office 365 does support some previous versions and applications, however, if you want to download and install the latest Office applications from Office 365, you will need to have Windows 7 or 8 as your OS.
2. False. There are restrictions to which subscriptions you can combine.
3. B. You can install Office 365 Home & Business on 1 PC only. If you want a subscription for Home use that allows you multiple device installations, up to 5 PC's, you'll need to select Office 365 Home Premium.
4. C. Although Android phones are supported, Android Tablets are currently not supported.
5. False. Some subscriptions do not include Office applications.
6. True. Office 365 is available for PC and Mac, however, not all versions of operating systems on these devices may be supported.
7. True. Office 365 has a special desktop setup feature that configures and upgrades 2007/2010 versions of Office so that users can install and use the latest Office applications on their PC.
8. False. Although in theory certain technologies are listed as compatible with Office 365, it is recommended that you have the latest OS versions available in order to guarantee that Office 365 will work with your device.
9. False. The apps from the subscription that you are able to install on your Mobile or Tablet devices will vary by device.
10. C. You could probably also fish around the app store to see what you can find, but the fastest and easiest way is to type the URL directly into your device's browser address bar and select your apps from there.

The Outlook Web App

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By now you should have a pretty good idea of what Office 365 is and what you need to do to get it set up.

Now it's time to get stuck in, and begin using, Office 365. Using the Outlook Web App, you can read and reply to emails and manage your calendar and contacts from anywhere.

All this can be done using Office 365 on a desktop, mobile, or tablet device. Web apps are available currently for Outlook, Word, Excel, PowerPoint, and OneNote.

In this chapter, we will show you how to access and use the Outlook Web App on different devices.

Setting up the Outlook Web App

The Outlook Web App is incredibly handy. It's one of those apps you will probably find yourself using almost daily. It syncs your email, contacts, and calendar, making it extremely easy to use your email from any device and any location, even if you're offline.

It looks very similar to Outlook 2013. The only difference is that you do not have full "Backstage" functionality, so use is mostly limited to basic functionality in Email, Contacts, and the Calendar.

❗ Trap: Some app features in Outlook Web App are only available when using Exchange.

Desktop Set up

With just a few clicks, you'll be ready to use the Outlook Web App from anywhere.

1. Sign in to your Office 365 User Account.
2. Click **Outlook** on the Navigation bar.
3. Select your Language and Time Zone from the drop-down list provided and click **save**.

The Outlook Web App will open, ready for use.

Mobile Set up

Depending on your phone and office subscription, you can also install and set up the Outlook Web App on your Smartphone. **Note:** Instructions and commands may differ by device.

1. Open the Internet browser on your phone, type in www.office.com/business-apps in the address bar and select **<Enter>**, or the relevant equivalent on your phone.
2. Select the **Outlook Web App** and click **Install**, or the relevant equivalent on your phone.

Follow any onscreen instructions to complete installation.

3. Enter your email Address and password on the sign in screen and click **sign in**.
4. Follow any additional onscreen instructions or prompts. You will also have the opportunity to enter a 4-digit pin number for extra security on your phone.

Exercise

- **Exercise File:** None required.
- **Exercise:** Setup the Outlook Web App on a Desktop.

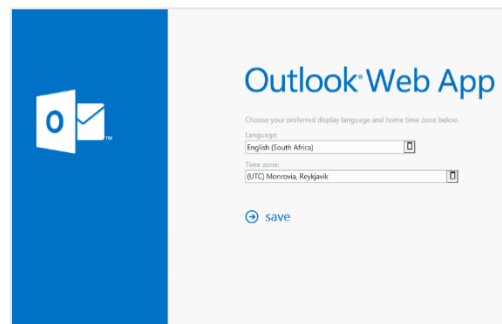


Figure 2-1: Outlook Web App Desktop Set up



Figure 2-2: Outlook Web App Mobile Set up

The Outlook Web App

Tablet Set up

If you have a supported tablet device, you can install the Outlook Web App on your tablet as well. **Note:** Instructions, prompts, and commands may differ from tablet to tablet.

1. Open the Internet browser on your tablet, type in www.office.com/business-apps in the address bar and select **<Enter>**, or the relevant equivalent on your tablet.
2. Select the **Outlook Web App** and click **Install**, or the relevant equivalent on your tablet.

Follow any onscreen prompts to complete installation.

3. Enter your User ID and password on the sign in screen and click **sign in**.
4. Follow any additional onscreen instructions or prompts until you reach the point where you can click **go to inbox**.

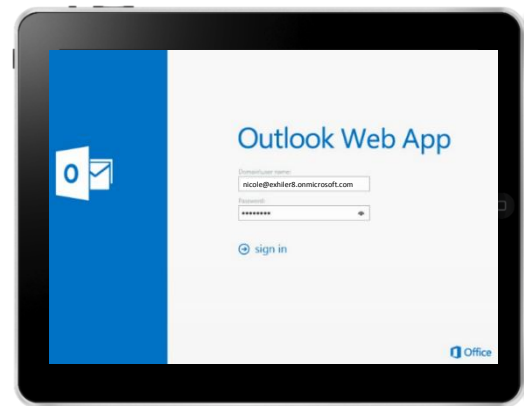


Figure 2-3: Outlook Web App Tablet Set up

Outlook Web App for Email

As mentioned before, the Outlook Web App works in a similar way to Outlook 2013. You'll see that whether you're using the app on a desktop, tablet or mobile phone, the layout and functionality are pretty similar. The major difference lies in that Web Apps for phones and tablets are optimized for touch.

1. Launch the app from your mobile/tablet device, or log on to your User Account from a desktop.

For Desktop Users: Once on your User Account, click **Outlook** on the Navigation bar.

2. Use the available menu options specific to your device to perform actions in your Email account, e.g. read, reply, forward, delete or flag messages etc.

✓ **Tip:** The menus and actions available on specific devices may be different. If you're using a tablet/mobile device, you are most likely using your finger to tap or swipe your selections, whereas desktop users would be using a mouse to click through their options. See

Exercise

- **Exercise File:** None required.
- **Exercise:** Send an email to your neighbor using the Web App.

Open the SharePoint invitation email, go to the site, and follow the site so that you can access it from your new User Account. Delete the email when you're done.

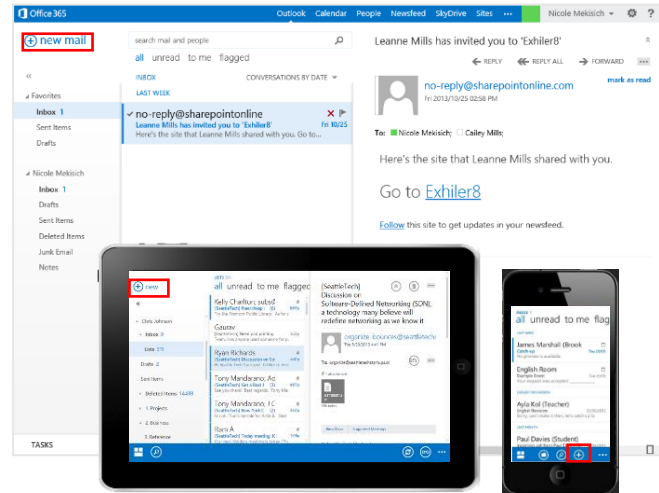












Figure 2-4: Outlook Web App Inbox on Desktop, Mobile and Tablet

✔ **Table 2-1: Device Specific Menu Options for Email**






- ✔ for an idea of what some of the available basic menu options on Tablet and Mobile devices look like.

Table 2-1: Device Specific Menu Options for Email

Tablet:

	Use the Navigation button to switch between Email, Calendar, Contacts, and Options. Select and hold this option to activate Voice input.
	New
	Search your email
	Check for mail
	View email message in full screen mode
	See more actions and options
	Collapse/Expand specific section of screen
	Delete message
	See more actions and options
	Reply, Reply to all, or Forward a message

Phone:

	Use the Navigation button to switch between Email, Calendar, Contacts, and Options. Select and hold this option to activate Voice input.
	New
	View Folder list
	Search your email
	See more actions and options

Outlook Web App for Calendar

Using the Outlook Web App, you can also manage your calendar – make appointments, set reminders, create multiple calendars, link, and share calendars with others.

1. Launch the App from your mobile/tablet device, or log on to your User Account from a desktop and then:

- **For Desktop Users:** Once on the User Account, click **Calendar** on the Navigation bar.
- **For Mobile/Tablet Users:** Select the **Navigation** button on your screen and click the **Calendar** icon on the Navigation menu.

2. Use the available menu options specific to your device in order to perform actions in the Calendar, e.g. view, create, edit, delete appointments, set reminders, etc. See **Table 2-2: Device Specific Menu Options for Calendar** for an idea of what some basic menu options available in the Calendar on the Outlook Web App look like.

Exercise










- **Exercise File:** None required.
- **Exercise:** Open the Calendar from your desktop and familiarize yourself with the slightly different look.



Figure 2-5: Mobile Calendar View

Table 2-2: Device Specific Menu Options for Calendar

Tablet/Phone:

	Use the Navigation button to switch between Email, Calendar, Contacts, and Options. Select and hold this option to activate Voice input.
	New
	Daily View
	Weekly View
	Monthly View by Week
	This Month
	See more actions and options
	Collapse/Expand specific section of screen
	View Today

Sharing your Calendar

You can, of course, share calendars in Outlook as well, but when using the Outlook Web App from your desktop, it works slightly differently, and this is one of those features only available if you are using Exchange.

1. Log on to your User Account and click **Calendar** on the Navigation bar.
2. Click the **Share** button on the top right.
3. In the **Share with** field, enter the name of the user you want to share your calendar with, or their email address if they're not in your address book.
4. Click the **Permissions** list arrow to select what the user can see on your shared calendar.
5. Confirm a subject for the email the user will receive.
6. Use the **Calendar** drop-down to select the calendar you want to share with the user and then click **Send**.

The user will receive an email with a link to your shared calendar.

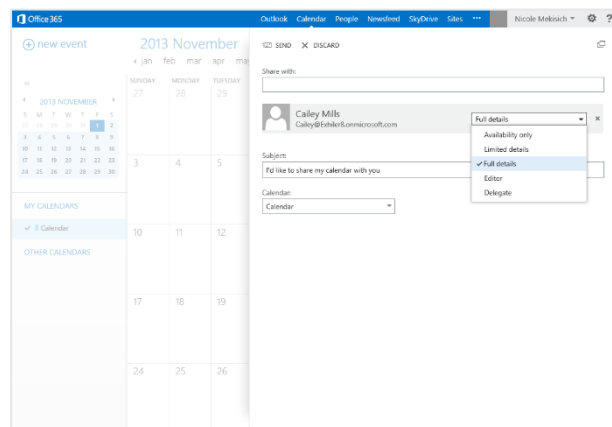


Figure 2-6: Calendar Sharing dialog box.

Outlook Web App for People

In older versions of Outlook, we used to refer to our people database as Contacts. Now, we simply call the database People.

Using the Outlook Web App you can add, edit, and delete People, as well as view available address books your organization may have set up.

1. Launch the App from your mobile/tablet device, or log on to your user account from a desktop and then:
 - **For Desktop Users:** Once on the User Account, click **People** on the Navigation bar.
 - **For Mobile/Tablet Users:** Select the **Navigation** button on your screen and click the **People** icon on the Navigation menu.
2. Use the available menu options specific to your device in order to perform actions with People, e.g. view, create, edit, delete contacts and address books, etc. See Table 2-3: Device Specific Menu Options for People

Exercise

- **Exercise File:** None required.
- **Exercise:** Open People from your desktop and familiarize yourself with the available options.










Figure 2-7: Mobile People View

Table 2-3: Device Specific Menu Options for People

3. for some basic menu options available in People on the Outlook Web App.

Table 2-3: Device Specific Menu Options for People

Tablet/Phone:

	Use the Navigation button to switch between Email, Calendar, Contacts, and Options. Select and hold this option to activate Voice input.
	New
	Search People
	Edit
	See more actions and options
	Collapse/Expand specific section of window
	Schedule an appointment



Send a message

Outlook Web App Extras

Even though the Outlook Web App works a lot like the standard Outlook application, there are some features only available in the Web App, and one or two overlapping features, that may work slightly differently.

Let's take a look at the most prominent ones.

Linking and Unlinking Contacts

It's easy to lose track of a contact when you have hundreds listed, and not having time to search through your contacts, you end up entering bits and pieces of different information for the same person.

Linking contacts allows you to consolidate all the information for someone on one business card. This is something only available on the Outlook Web App.

1. Launch the App from your mobile/tablet device, or log on to your User Account from a desktop and then:
 - **For Desktop Users:** Once on the User Account, click **People** on the Navigation bar.
 - **For Mobile/Tablet Users:** Select the **Navigation** button on your screen and click the **People** icon on the Navigation menu.
2. Select the contact you want to link.
3. In the Preview pane, select the **manage** link under linked contacts.
4. Contacts listed under Linked Contacts will show any current links made, and Suggested Links will provide potential matches to the contact.
 - 🔄 **Another way of finding a Contact to Link:** Start typing in the name of the contact you want to link in the **Find a Contact to Link** search box and click **<Enter>**, or the equivalent on your mobile/tablet device.
5. Select the contact from the Suggested Links or the Search results and click **link**.
6. Click **OK**.

When you select this contact now, all their information will appear on one business card.

- ✔ **Tip:** When you link/unlink a contact, you may need to refresh the Outlook Web App on your

Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new task called "Complete Sales Report" due the last Friday of this month. Set a reminder for the task for 1 week before the due date.

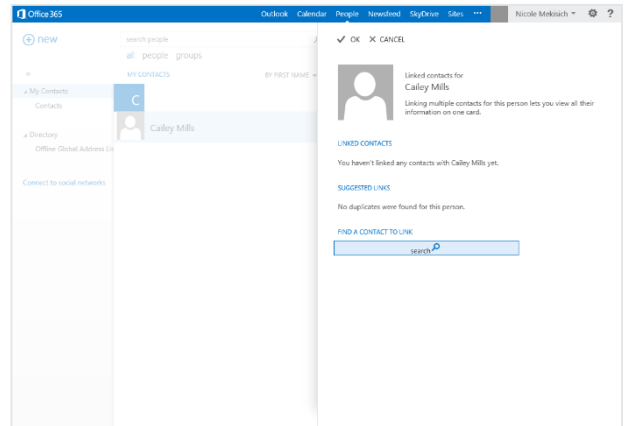


Figure 2-8: Linking a Contact dialog box

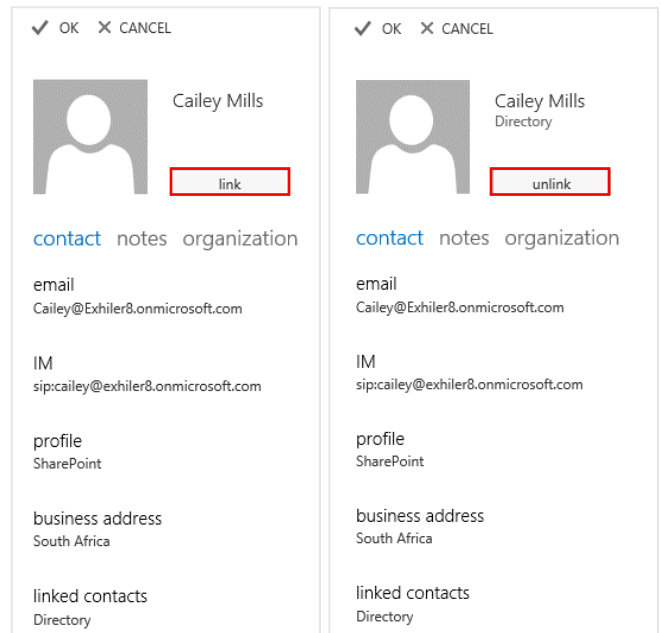


Figure 2-9: Linking and Unlinking Contacts

The Outlook Web App

other devices before you will be able to see the newly created link.

7. To unlink a contact again, select the contact.
8. Click the **Manage** link in the Preview pane.
9. Select the contact from the Linked Contacts section and click **unlink**.
10. Click **OK**.

Voice Input on a Tablet/Mobile Device

The Outlook Web App also has a feature for Voice Input applicable to users with Windows 7 or Windows 8.

If your device is set up for Speech Recognition, you will be able to issue certain verbal commands, such as “New,” “Open,” “Close,” etc., to navigate and perform actions in the Outlook Web App.

❗ Trap: This feature is not available in all languages.

To access this feature on your tablet/mobile device, select and hold the **Navigation** button as shown in **Figure 2-10: Voice Input for Tablet/Mobile devices**.



Figure 2-10: Voice Input for Tablet/Mobile devices

Creating Tasks

Outlook 2013 has a lot more functionality available when it comes to working with tasks, but the Web App does offer limited functionality from a desktop device, if your organization has been set up to support Tasks.

1. Log on to your User Account and click **Outlook** on the Navigation bar.
2. Click **Tasks** on the bottom left of your screen.
3. Click the **new task** button.
4. Enter a subject for the new task.
5. Select **show more details** to set reminders and other details relevant to the task.
6. (Optional) Add an attachment to the Task by clicking the **Insert** button.
7. Enter any notes or comments in the text box provided.
8. When you're done, click **Save**.

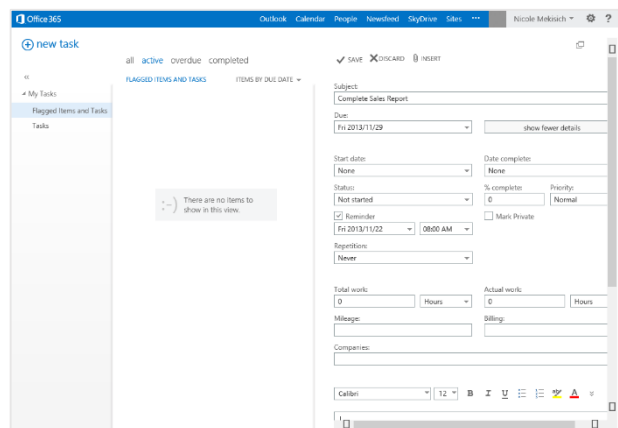


Figure 2-11: Tasks Dialog box for the Outlook Web App

Managing the Outlook Web App

As mentioned previously, you may not have complete “Backstage” functionality in the Outlook Web App, but there are certain settings and options that you will be able to change and adjust to make integration and accessibility streamlined and effective, according to your requirements.

Setting Desktop Options

1. Log on to your User Account and click **Outlook** on the Navigation bar.
2. Click the **Settings** button next to the User menu.
3. Select the setting you wish to change from the list provided and follow onscreen instructions to adjust the selected setting.

See **Figure 2-12: Outlook Web App Settings menu** for a list of available settings you can adjust within the Outlook Web App. (Available settings may differ by subscription type, device, and use of Exchange.)

See **Table 2-4: Outlook Web App Options for Desktop** for a list of attributes you can change when selecting Options in the Settings menu.

Exercise

- **Exercise File:** None required.
- **Exercise:** Add a signature to your new email account that displays your full name, position as Event Planner, and the company name: Exhiler8.

Activate the offline settings for Desktop use.

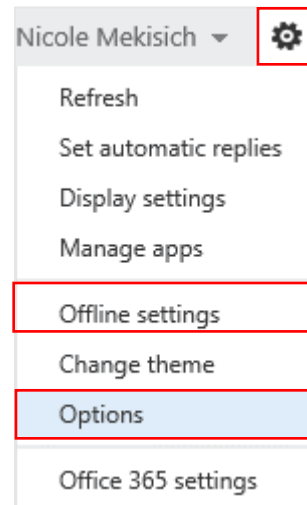


Figure 2-12: Outlook Web App Settings menu

Table 2-4: Outlook Web App Options for Desktop


Account	Change options for “my account” and “connected accounts” here. Pop and IMAP settings can be found under the “my account” tab, as well as most account related details. Under the “connected accounts” tab, you can set email forwarding and connect your Outlook Web App to other email accounts where required.
Organize email	Here, you can select from four tabs: inbox rules, automatic replies, delivery reports, and retention policies.
Groups	Create distribution groups here that can be used in the address book for others to use. You can also join or leave existing groups.
Site mailboxes	Save and access content from shared projects in one place. Add the Site Mailbox app to the SharePoint site and select which of these mailboxes to list in Outlook 2013.
Settings	There are three tabs here: mail, calendar, and regional. Add a signature under mail or make changes to the way the Outlook Web App deals with your mail, calendar, and regional settings.
Phone	Select this option if you want to *sync the Outlook Web App with a mobile device. Block or remote wipe your phone from here as well. (*Available with Exchange only.)
Block or allow	Change the way Outlook Web App deals with your junk mail and blocked and safe senders.
Apps	Add and remove apps within Outlook, such as Unsubscribe and Action Items, etc.

Setting Mobile/Tablet Options

You can also manage your Outlook Web App from a mobile/tablet device.

- 1. Launch the app from your mobile/tablet device.
- 2. Click the **More actions** button on your screen.
- 3. Select **options**.
- 4. Select the setting you wish to change from the list provided and follow onscreen instructions to adjust the selected setting.

See **Table 2-5: Outlook Web App Options for Mobile/Tablet** for a list of attributes you can change for your mobile/tablet device.

 **Another way to access your settings on a mobile/tablet device:** Click the **Navigation** button on the bottom left of your screen, and select the **options** icon. (This way may not be available on all devices).

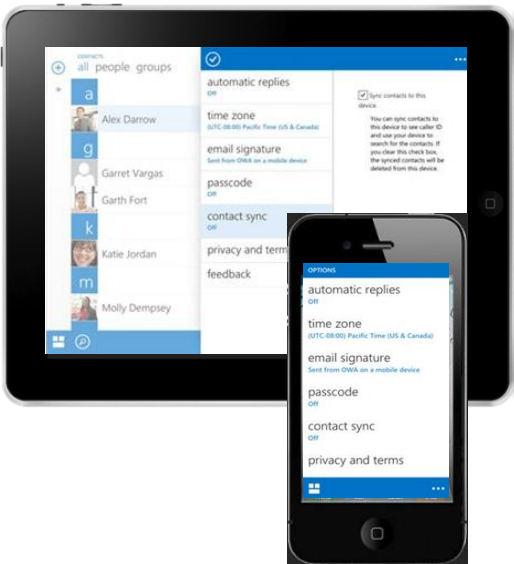



Figure 2-13: Mobile Options View





Table 2-5: Outlook Web App Options for Mobile/Tablet

Automatic replies	Select this option if you are going to be out of the office, or on leave, and you’d like to set up an automatic reply to be sent on your behalf, while you’re away.
Time zone	If you are someone that does a lot of travelling, it’s important to make sure your time zone settings are always correct.
Email signature	Create an email signature to be sent out on your email messages.
Photo	Upload or update your profile picture – this picture accompanies any social/interactive applications you use, e.g. emails, social networking, Lync, User Account, etc.
Passcode	Set a passcode to safeguard the Outlook Web App on your mobile device.
Contact sync	You can sync contacts to your mobile/tablet device to see caller ID and to use the device to search for contacts. This option is selected by default. If you uncheck the box, synced contacts will be deleted from the device.
Offline folders	The Inbox and Drafts folders will always be synced so that you can view them offline, but you can select to manually choose up to five (5) additional folders you want to sync offline.
Privacy and terms	Change the way the Outlook Web App treats privacy and cookies, third-party notices, and view the app license terms.
Feedback	You have an opportunity to let Microsoft know how the Outlook Web App is working out on your mobile/tablet device.

 **Tip:** To sort your Inbox folder by either date or conversation, click the **More actions** button and select **sort by date/sort by conversation**.

The Outlook Web App Review

Quiz Questions

1. Which device allows you to input a 4-digit pin code as extra security for access to the Outlook Web App?
A. Desktop
B. Tablet
C. Mobile Phone
D. B & C
2. The Outlook Web App looks and works exactly the same way as the Outlook application. (True or False?)
3. The commands used on devices can be quite different. Which of the following commands, applicable to a tablet device, would you use to view an email message in full screen mode?
A. 
B. 
C. 
D. 
4. How do you activate voice input on a mobile/tablet device?
A. Click the More actions button, select options, and then select settings.
B. Click and hold down the Navigation button.
C. Click the Navigation button, select the options icon, and then select automatic replies.
5. Which of the following apps are currently available within the latest version of Outlook 2013:
A. Unsubscribe
B. Action Items
C. Suggested Meetings
D. All of the above
6. Which of the following features are only available on the Outlook Web App:
A. Tasks
B. Sharing your Calendar
C. Voice Input
D. Linking/Unlinking Contacts
7. You cannot sort your email by sender on a tablet device. (True or False?)

Quiz Answers

1. C. All devices do offer facilities for password use to protect access to the Outlook Web App. However, only the mobile phone offers an extra layer of protection by implementing a 4-digit pin code as well.
2. False. Although there are many similarities between Outlook and the Web App version, the Web App version does not have complete “Backstage” functionality, and the layout is slightly different.
3. A. Selecting the icon representing a pair of glasses on a tablet device will allow you to read the message in full-screen mode.
4. B. Select and hold down the Navigation button. Remember, if your device is not setup for speech recognition, this will not work.
5. D. All of the listed apps are currently available. You can also download and install more apps by going to the Office Store.
6. D. Linking/Unlinking Contacts is only available on the Outlook Web App.
7. True. You can sort your email on a tablet device, but only by conversation or date, not by sender.

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No more going in to the office at odd hours or waiting to use your personal device. Now, you can open and edit Office documents from anywhere, anytime. All you need is an Internet Browser!

Work with colleagues across different devices, and store your files online so that even users that don't have office can view the documents.

All this can be done using Web Apps. Web apps are available currently for Outlook, Word, Excel, PowerPoint, and OneNote.

In this chapter, we will show you how to access and use some of these web apps on different devices.

Accessing Other Web Apps

So what's the difference between a standard Office application and a Web App?

To access Word or Excel and other standard Office applications, you need to have purchased and installed the relevant software on a device. By launching the application on the device, you are able to then create, edit, and save files and documents locally.

With Web Apps, you don't necessarily need a purchased license or installation. The Web application makes use of your Internet browser to open, allowing you to work with the file online, either via the SkyDrive or SharePoint.

! Trap: When accessing a Web app from certain devices, you may need a Microsoft account. While an Office 365 Subscription provides you with an account, which gives you access to features and apps relevant to your subscription, a Microsoft account is an account you use to sign in to other Microsoft services. If you use any of the following, you already have a Microsoft account: Hotmail, Outlook.com, Gmail, Yahoo, Xbox Live, SkyDrive, MSN, Messenger, and others.

Access from a Mobile or Tablet Device

1. Select the Web App icon from the mobile or tablet device menu.
2. Select **Sign in**.
3. You may be asked here for your Microsoft Account details. (Not to be confused with your Office 365 Subscription credentials).
4. Fill in the applicable User Name and Password.
5. Click **Sign in**.

You can now start using the app.

✓ Tip: Once you've signed in the first time, you won't have to sign in again to use the app. Just select the Web App icon to launch it, as you would any other program or application.

! Trap: Currently, you can only view Word, Excel, and PowerPoint Web Apps from your phone; you cannot edit files. To read Word and PowerPoint files from a phone, you will also need Internet Explorer 7, on Windows Mobile 7, or Safari 4, on iPhone 3G or 3GS.

Exercise

- **Exercise File:** None required.
- **Exercise:** Discuss the main differences between Web Apps and standard Office applications.



Figure 3-1: Some examples of services that make use of a Microsoft Account.



Figure 3-2: Office Web Apps currently available

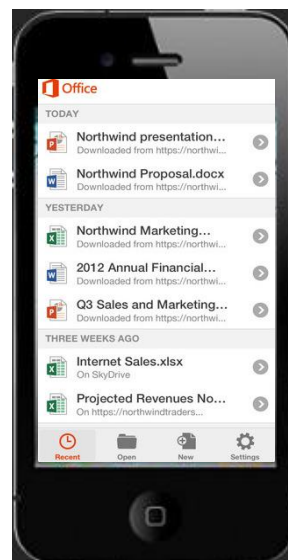


Figure 3-3: Opened Office app on a Mobile Device.

Using Other Web Apps

Access from a Desktop Device

Web Apps are aimed at mobile and tablet device users, as well as users who do not have Office installed, but need access to view and edit documents and files.

When your desktop isn't close by and you don't have a mobile/tablet device, having your Office 365 Account with Web Apps can be a very handy tool.

1. Open your Internet Browser, enter <https://login.microsoftonline.com/> in the address bar and click **<Enter>**.
2. Enter your Office 365 User ID and password and click **Sign in**.
3. Use the buttons on the Navigation bar to select which type of app you want to access:
 - Click **SkyDrive** to access documents or files stored on the organizational SkyDrive.
 - Click **Sites** if you want to access your Team site and use Office web apps on SharePoint.

Using the Newsfeed

Unlike the SkyDrive and SharePoint, we have not dedicated a whole lesson to the Newsfeed, even though it can be considered to be part of the online collaboration tools offered in Office 365.

Newsfeed, “hosted” by the SharePoint feature in Office 365, is basically there to give you your own “expression” space.

With limited SharePoint functionality, you can add selected apps and keep up-to-date with what's going on with others using the Newsfeed. You can create your own blog posts and view a summary of all the People, Documents, Sites, and Tags you're currently following from the Home page.

- ✓ **Tip:** Your organizational SkyDrive account is also available from this hub as a Document Library listed on the apps page.

1. To access your Newsfeed, log on to your Office 365 Account and click **Newsfeed** on the Navigation bar.

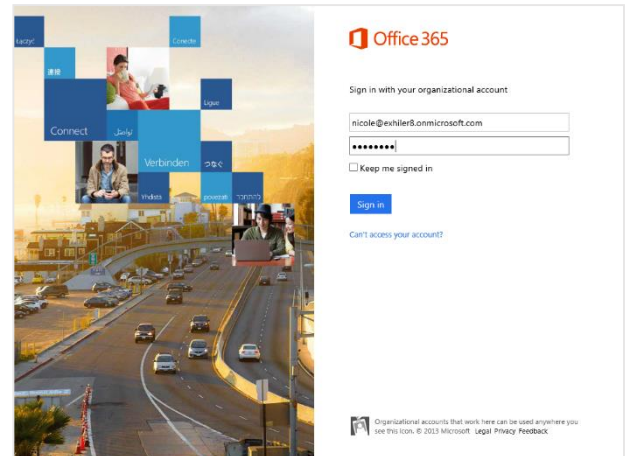


Figure 3-4: Office 365 Sign in page

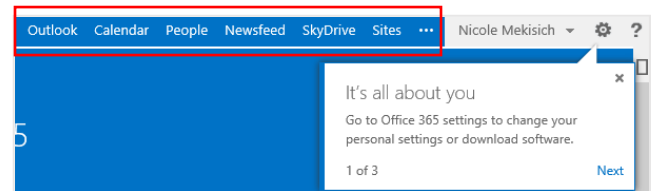


Figure 3-5: Navigation bar options

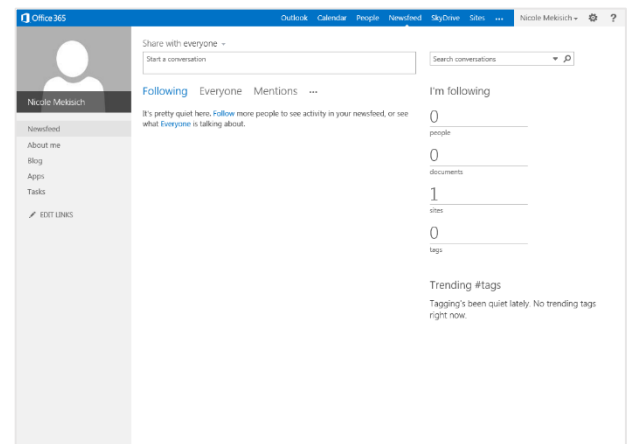


Figure 3-6: The Newsfeed Home page

The SkyDrive

Enter the SkyDrive. Most of the documents and files you want to access, create, edit, store, and share will probably come from your SkyDrive.

Also referred to as the Cloud, your SkyDrive provides you with online storage space for your documents and files and makes it easy to sync, share, and collaborate with others.

- ❗ **Trap:** Not all Subscriptions come with access to a SkyDrive, and if your subscription does have a SkyDrive, don't forget to keep an eye on the available storage space as space is limited.

Depending on your Subscription, you may have two variants of a SkyDrive; Organizational and Personal. It's important to understand the difference.

Organizational (SkyDrive Pro)

The first variant is your organizational SkyDrive. It's hosted as a Document Library within the SharePoint feature of an applicable Office 365 subscription, or the latest version of SharePoint. When you use this SkyDrive, you can create, store, and access documents and files that can also be made available to others in your organization.

- ❗ **Trap:** After placing or creating documents in the Shared with Everyone folder, it can take a while before the document becomes available to others.

1. Access this SkyDrive by logging on to your Office 365 Account and clicking the **SkyDrive** button on your Navigation bar.

Personal (SkyDrive)

The second SkyDrive account is your personal account. This account is meant for personal use and comes free with Outlook or a Microsoft Account. The documents and files you create and save here are only available to you and those you specifically share them with.

1. Using your Microsoft Account credentials to sign in – access this account directly via: <https://skydrive.live.com/> or, click the **Open, Save As** or **Share** options on the applicable FILE tab of the Office application you're working in.

For the purpose of this guide, we'll be focusing on the organizational SkyDrive.

- ❗ **Trap:** Available features and options for the SkyDrive may not be the same or available on some devices!

Exercise

- **Exercise File:** None
- **Exercise:** Discuss the different types of SkyDrive and have a look at the options available on SkyDrive Pro.

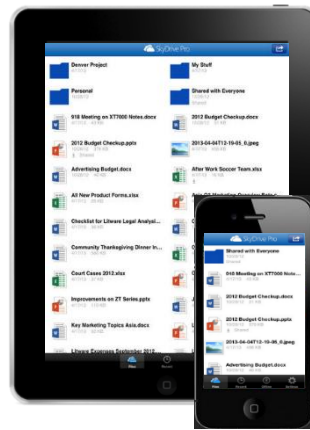


Figure 3-7: SkyDrive Pro on Tablet and Mobile Phone

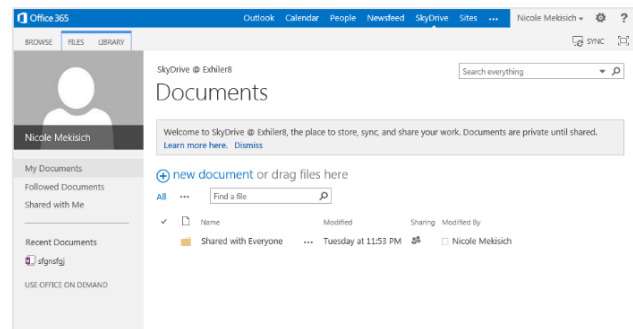


Figure 3-8: SkyDrive Pro on a Desktop (organizational)

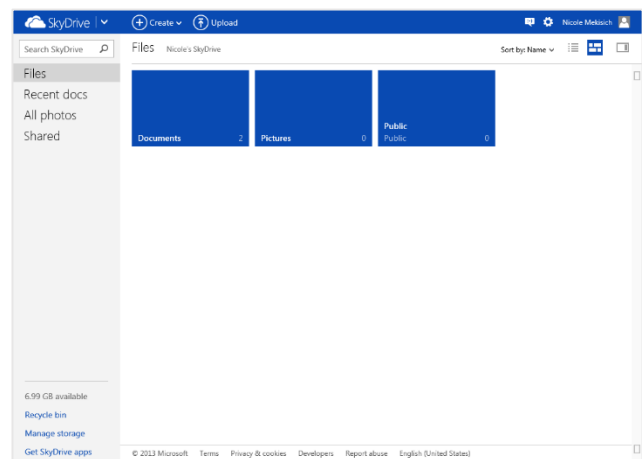


Figure 3-9: SkyDrive on Windows Live (personal)

Using Web Apps on the SkyDrive

Having documents and files available on the SkyDrive can be a great advantage. Depending on the space you have available, you could even use the SkyDrive as a backup location for important documents/files, and of course you can access, create, and share your files from anywhere.

Upload a Document to the SkyDrive

Uploading documents and files you need to the SkyDrive means all you need to access them, is a supported device and an Internet connection.

1. Open your Internet Browser, enter <https://login.microsoftonline.com/> in the address bar and click **<Enter>**.
2. Enter your Office 365 User ID and password and click **Sign in**.
3. Click **SkyDrive** on the Navigation bar.
4. Click **new document** and select **Upload Existing File**.
5. Click **Browse**. Navigate to and select the file you want to upload.
6. Click **Open**, and then click **OK**.

Share a Document on the SkyDrive

Place a document/file in the Shared with Everyone folder to share it with the rest of your organization. Any files outside this folder will have to be shared manually in order for others to access or see them. Here's how:

1. Select the file you want to share by clicking the Open Menu button (...) for the file and select **Share**.

➡ **Another way to select files on SharePoint:** Point your cursor at the file and select the tick that appears to the left. You can then select an action from the ribbon that will be applied to the selected files. Deselect files by clicking the tick again.

2. On the Share Dialog box, select **Invite people** or **Get a link**.

Invite people: Use this option for sending an email with a link to the document to users within your organization.

Exercise

- **Exercise File:** Exhiler8_BusinessCard.pub
- **Exercise:** Upload the Exhiler8_BusinessCard file to the SkyDrive and manually share it with one other user.

Create a new PowerPoint presentation in the Shared with Everyone folder, entitled "New Event Portfolio.."

Apply the Ion Boardroom, Variant 3 theme to the presentation, then close it and return to the SkyDrive.

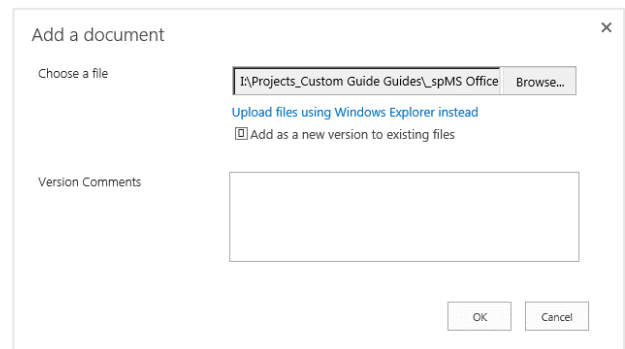


Figure 3-10: Upload Dialog box

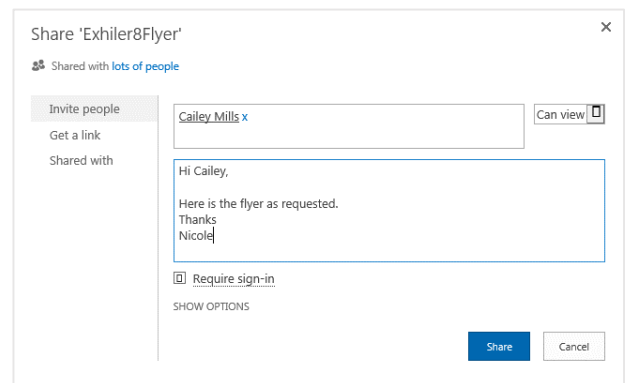


Figure 3-11: Sharing a File

Using Other Web Apps


Get a link: Use this option to generate links for editing or viewing the file, and then send the link to anyone you want to share the file with.

3. Make your selection and fill in the fields and options provided.

Create a New Document on the SkyDrive

Depending on your subscription and device capability, you can create new documents from anywhere using the SkyDrive Web Apps.


1. On the SkyDrive, click **new document** and select the type of document/file you want to create from the available list of options.
2. Type a name for your new document in the name field and click **OK**.
3. The new document/file will open in the applicable Web App.
4. Click the Username link (e.g. Bob Smith) at the top left of the screen to save, exit, and return to the SkyDrive.

 **Another way to exit/close the Web App:**
Click the **FILE** tab and select **Exit**.

Edit a Document on the SkyDrive

Not all devices are enabled for editing, but where applicable, this is a great tool to have.

1. On the SkyDrive, navigate to the document/file you want to edit and click the document/file name link to open it.

 **Another way to open a file/document:** Click the Open menu (...) button for the file you want to edit and select **Edit**. You can also select the document/file you want to edit, click the **FILE** tab, and select **Edit Document** from the Open & Check Out group.

2. Click the applicable **EDIT** tab and select the type of application you want to use for editing.
3. Make any changes necessary, and click the Username link to save and return to the SkyDrive.

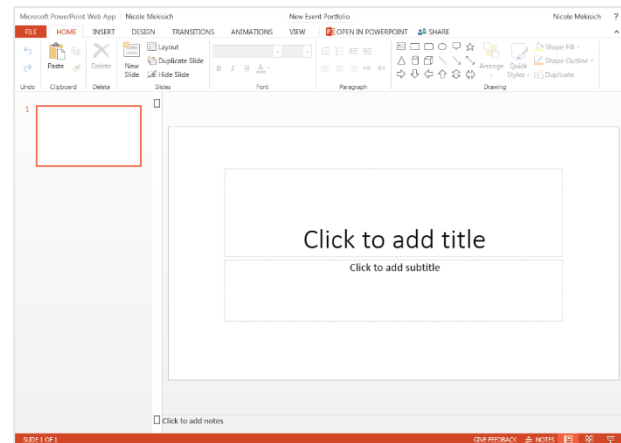


Figure 3-12: A newly created presentation in PowerPoint Web App

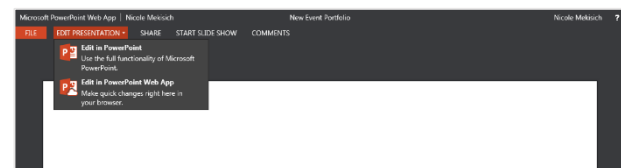


Figure 3-13: Editing a Web App document/file.

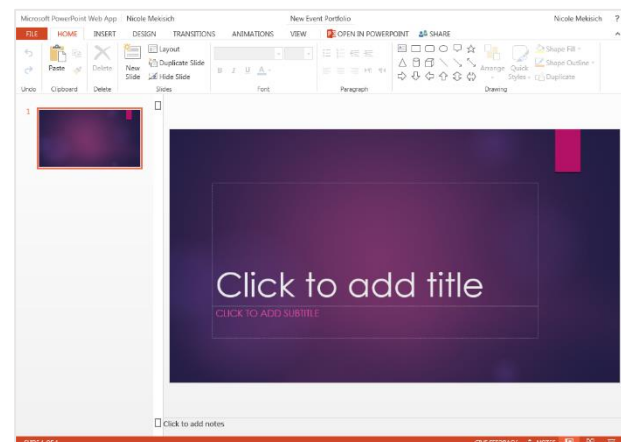


Figure 3-14: Open file in a Web App.

Use Office on Demand

This is a great little gem Microsoft added to SkyDrive Pro. People often travel and need to use different workstations. Although Web Apps can be a great substitution, sometimes you just need the “real” thing, especially if you need to create new files and demand full functionality to create something comprehensive.

With Office on Demand, you get the full functionality of Office applications, without having to install Office on the workstation you’re using.

❗ **Trap:** The workstation you use will need to have Windows 7 or 8 and an Internet connection. Not all subscriptions have Office on Demand.

1. Open the Internet Browser, enter <https://login.microsoftonline.com/> in the address bar and click **<Enter>**.
2. Enter your Office 365 User ID and password and click **Sign in**.
3. Click **SkyDrive** on the Navigation bar.
4. Select **Use Office on Demand** from the bottom, left-hand side of your screen.
5. Select the application you want to use from the menu available.
6. You’ll be prompted to **Run** or **Save** an Office Add-on: make your selection as required.

✔ **Tip:** You only have to run or save the Add-on once per workstation.

7. A pop-up will appear confirming the Add-on installation. Click **Close**.

Office will launch the application. Depending on the speed of your system, this process could take a while.

8. Create and save your file as you normally would.

✔ **Tip:** If you need to save the file to SkyDrive, you may have to first add your Office 365 SharePoint as a File location first.

9. Click **Go back** on the Office on Demand menu to return to your SkyDrive.

Exercise

- **Exercise File:** None
- **Exercise:** Discuss the differences between Web Apps and Office on Demand.

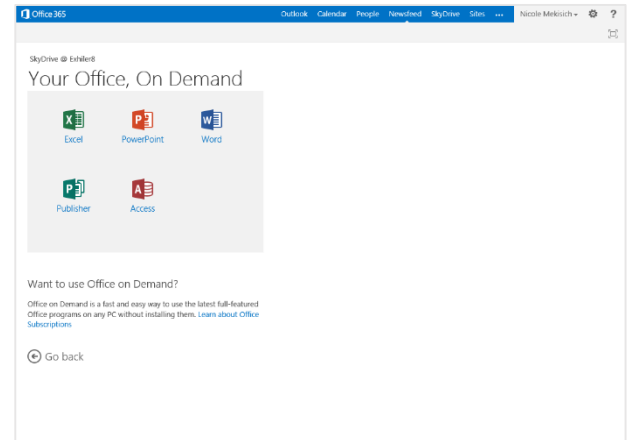


Figure 3-15: Office on Demand menu

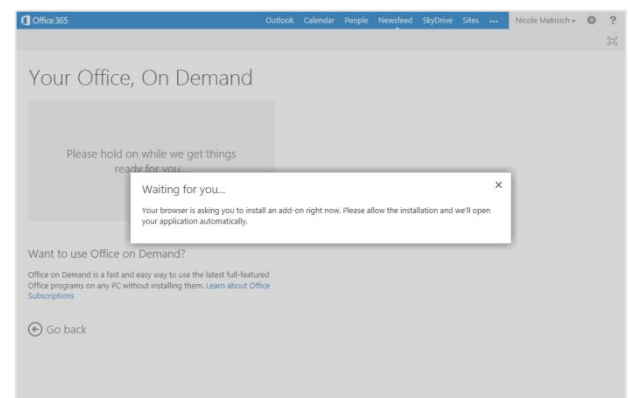


Figure 3-16: Installing the Office Add-on

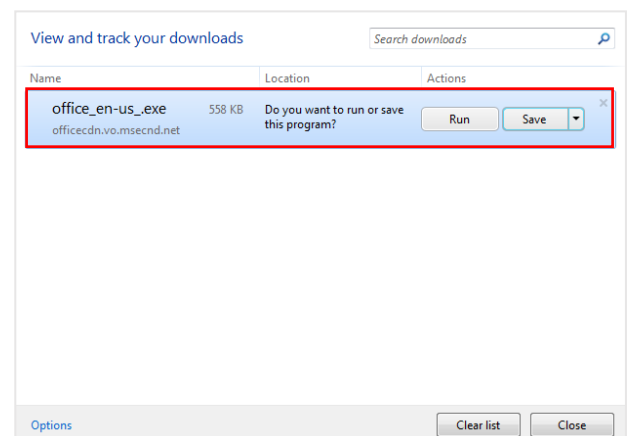


Figure 3-17: Run/Save Office Add-on

Use Search on the SkyDrive

It's great to know that you can access, share, and collaborate with others using online collaboration tools like your SkyDrive, but how do you find shared files and documents that others have created?

You wouldn't necessarily want to send emails to everyone, or receive emails from others, every time a file or document gets shared. So how do you find what you're looking for?

1. Open your Internet Browser, enter <https://login.microsoftonline.com/> in the address bar and click **<Enter>**.
2. Enter your Office 365 User ID and password and click **Sign in**.
3. Click **SkyDrive** on the Navigation bar.
4. Click the **list arrow** in the Search box and select the scope of where you want to search:
 - **Everything:** Use this option to find shared documents or files.
 - **People:** Use this option to directly access the SkyDrive of another person in your organization. (Only their shared details and files will be available.)
 - **Conversations:** Use this option to find specific conversations.
 - **This Site:** Use this option to search for keywords or phrases.
5. Once you've made your selection, type in the partial name of a file, person, phrase, or keyword in the Search box and click **<Enter>**.
6. Select the item you're looking for from the results shown.

Exercise

- **Exercise File:** None
- **Exercise:** Search for and view another person's SkyDrive account.

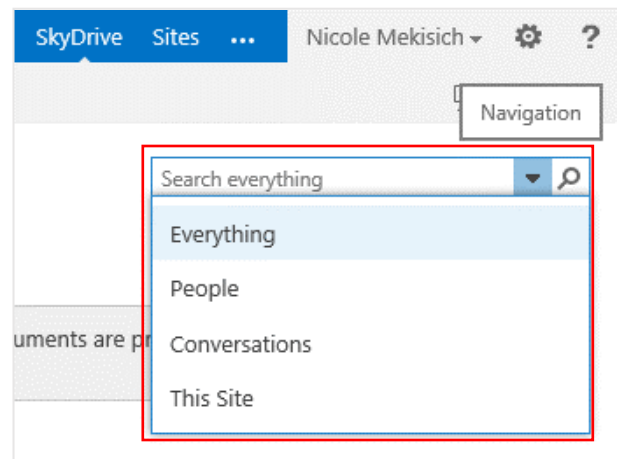


Figure 3-18: Search Scope options on the SkyDrive

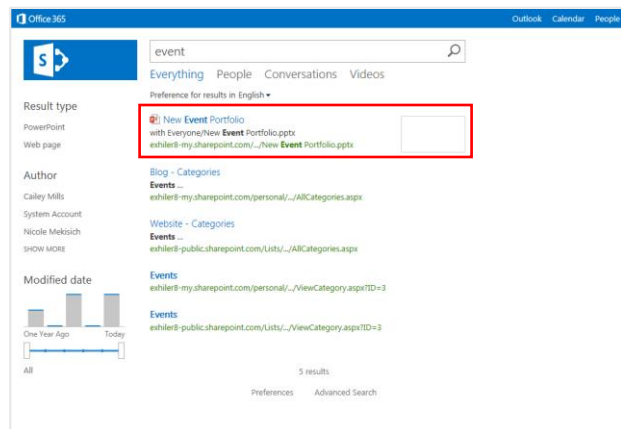


Figure 3-19: Search Results for a file name.

SharePoint (Team Site)

So we already know SharePoint “hosts” the Newsfeed, and SkyDrive Pro hubs on the Office 365 account, but what exactly is SharePoint?

In its most basic form, it closely resembles a glorified external hard drive, mixed with the look and functionality of a website. Also referred to as Intranet or Team Site, SharePoint is mostly used by organizations to create websites. These websites can be dedicated to different departments, clients, or projects to form a secure base where anyone, given access, can log in, organize, and store shared information in many different forms.

To access a Team Site, you will need to be given a link with a username and password from an authorized administrator, or you will need an Office 365 Account.

1. Open your Internet Browser, enter <https://login.microsoftonline.com/> in the address bar and click **<Enter>**.
2. Enter your Office 365 User ID and password and click **Sign in**.
3. Click **Sites** on the Navigation bar.
4. Select the site link for the site you want to go to.

Exercise

- **Exercise File:** None
- **Exercise:** Have students look at the Team Site to familiarize themselves with how it looks.

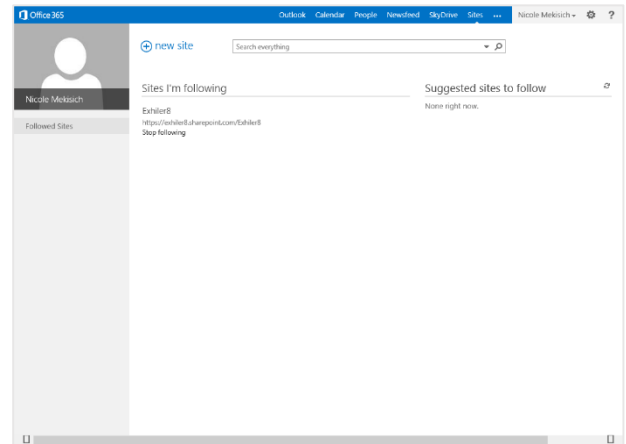


Figure 3-20: Sites page on Office 365

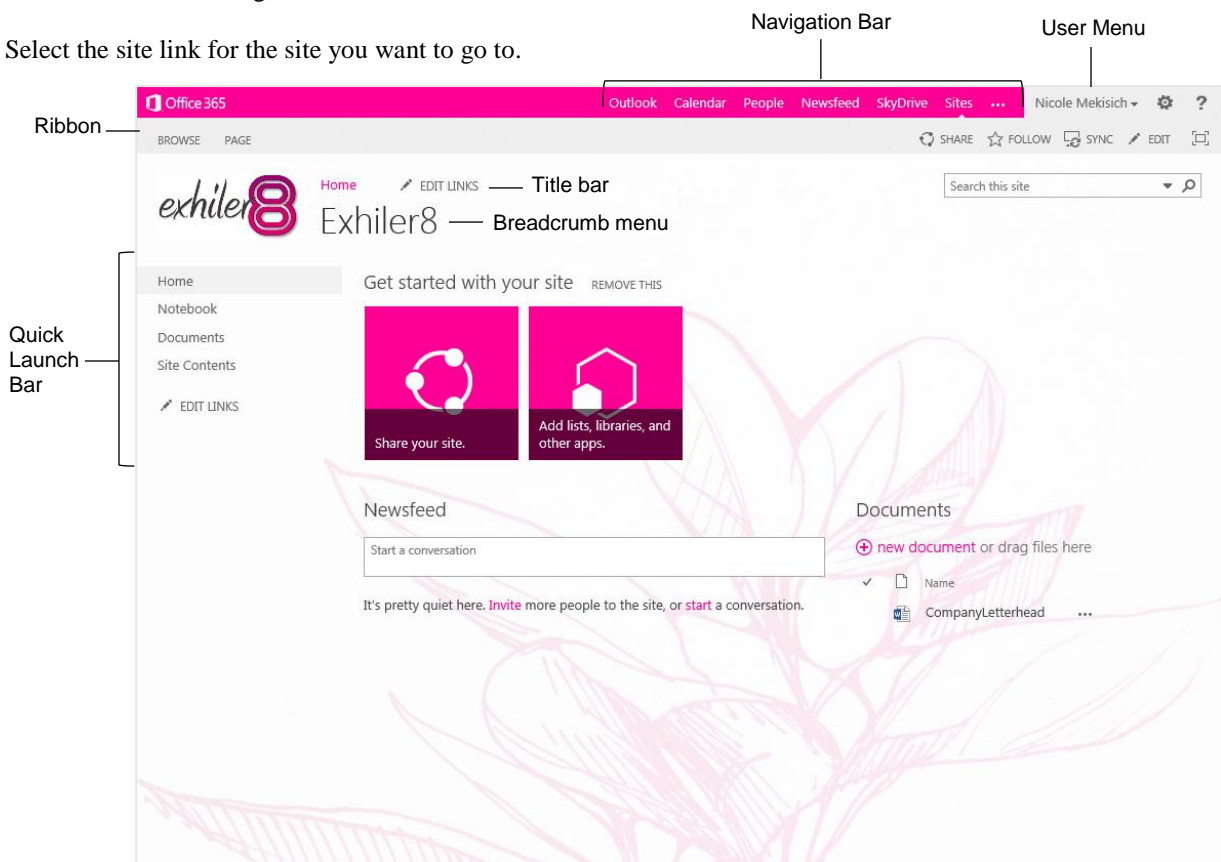


Figure 3-21: SharePoint Home page

Using Web Apps on SharePoint

How your organization has set up SharePoint will determine which actions you can perform and how you perform them. Most organizations will be set up to require the checking in and out of documents, or there may be an approval process for uploading documents, so you will need to contact your SharePoint administrator to find out exactly how your organization has set things up on your Team Site

Upload a Document to SharePoint

If you have the permission to do so, you can also upload documents and files to SharePoint so that others can access them.

1. Open your Internet Browser, enter <https://login.microsoftonline.com/> in the address bar, and click **<Enter>**.
2. Enter your Office 365 User ID and password and click **Sign in**.
3. Click **Sites** on the Navigation bar.
 - ❗ **Trap:** Only sites you have “Followed” will appear here.
4. Select the link for your Team Site.

The Team Site will open.

5. Navigate to the site or folder you want to upload a document to.
6. Click **new document** and select **Upload Existing File** from the list of options.
7. Click **Browse**.

- ✔ **Tips:**
 - ✓ If you have multiple files to upload and your site is set up to do so, you can click the available **Upload files using Windows Explorer instead** link. **Note:** You need to have selected the **Keep me signed in** checkbox when logging in, and the Team Site needs to be added to Trusted Sites in order to use this facility.

- 🔗 **Another way to upload a new file:** Select and drag the file on your computer in Windows Explorer toward the **new document or drag files here** link. A **Drop here...** block will appear, release your mouse and the file/s will be uploaded.

Exercise

- **Exercise File:** Budget_VanderPelt.xlsx
- **Exercise:** Upload the Budget_VanderPelt.xlsx file to SharePoint.

Open it in the Web App and adjust the actual Photography cost to \$1600. Save your changes and return to SharePoint.

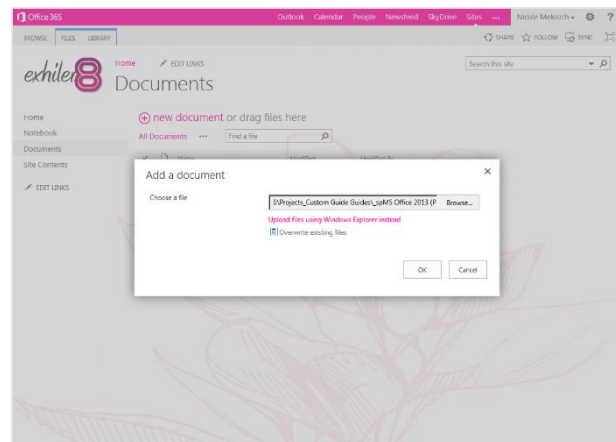


Figure 3-22: Uploading a file to SharePoint

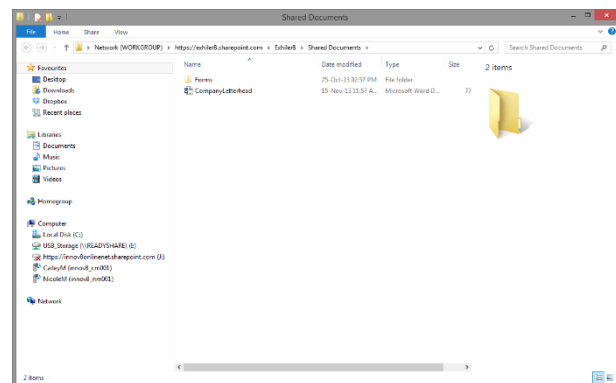


Figure 3-23: Windows Explorer (Multiple File Upload)

Using Other Web Apps

8. Navigate to and select the file you want to upload. Click **Open**.
9. Click **OK**. The file is uploaded. Depending on the approval settings on your site, the document may not be available to others until it has been approved.

Create a New Document on SharePoint

As mentioned before, SharePoint “hosts” the SkyDrive Pro account which means the look, feel and processes on the SkyDrive are very similar to SharePoint; this applies to creating new documents as well.

1. Navigate to the site and folder you want to create a new document in.
2. Click **new document** and select the type of document you want to create from the list of options available.
3. Type a name for your new document in the name field and click **OK**.
4. The new document/file will open in the applicable Web App.
5. To save your changes, exit and return to SharePoint; click the **Team Site** link on the top left side.

➡ **Another way to save, exit and return to SharePoint:** Click the **FILE** tab and select **Exit**.

Edit a Document on SharePoint

Editing files on SharePoint can be a bit trickier, depending on the way your Team Site has been set up.

For instance, you may have to first check out a document before you can edit it and check in the document again when you’re finished. Your organization may also have versioning in place.

1. Navigate to, or search the site, for the file you want to edit.
2. Click the file name link to open it for editing.

➡ **Another way to open a file/document:** Click the Open menu (...) button for the file you want to edit and select **Edit**. You can also select the document/file you want to edit, click the **FILE** tab on the Ribbon, and select **Edit Document** from the Open & Check Out group.

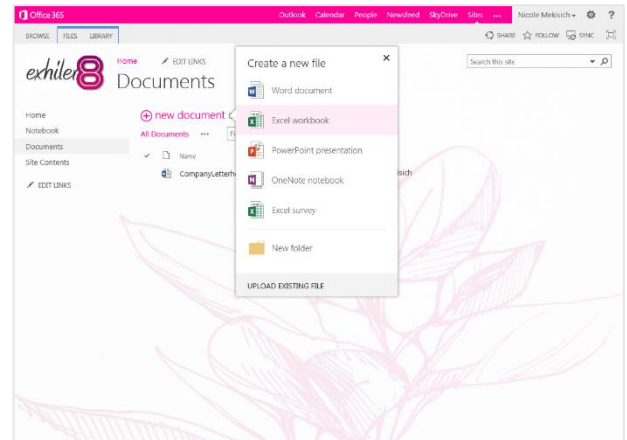


Figure 3-24: Selecting a New Document Type

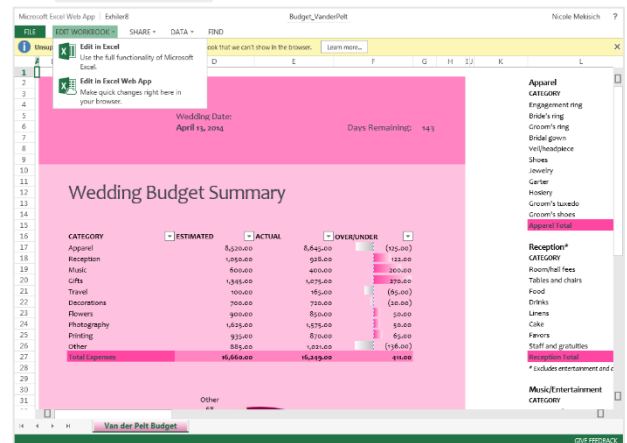
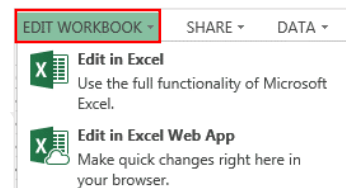


Figure 3-25: Opening/Viewing a (Web App) file on SharePoint

Using Other Web Apps

- Click the **EDIT** tab and select to either edit the file in the desktop version or the Web App. Make your selection as required.

✓ Tips:

- ✓ If your organization uses document check out/check in, you'll see a Check Out button under the Ribbon on the document you've opened. Selecting the Check Out button means that no one else can edit the file while you're busy with it. You can make your changes as necessary, and when you close the file, you'll be prompted to check in the document again. Follow onscreen instructions to make the updated document available to others again.
- ✓ If your SharePoint settings allow more than one person to work on a document at a time, more than one person can open a document without checking it out. When this happens, a pop up will inform you of who else is editing the document at the same time.
- ✓ Where an editing conflict occurs, the person who saves their document first will retain the original copy, while those who follow will be saved as "conflict" copies, e.g. CompanyLetterhead.docx (Bob Smith's Copy). Users will have to discuss a solution with each other when this happens.

- To save and exit, for:

- **Web Apps:** Make your changes as necessary and click the Username link to save and exit the Web App.
- **Another way to save and exit a Web App:** Click the **FILE** tab and select **Exit**.
- **Desktop Applications:** Make your changes as necessary, click **Save**. On the Save dialog box you can rename the file (if read only) or to replace the one currently in the destination folder; just click **Save** again.

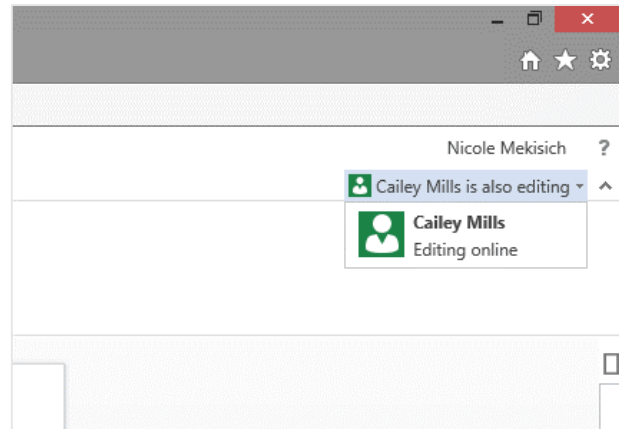


Figure 3-26: Editing Status Notification (Web App)

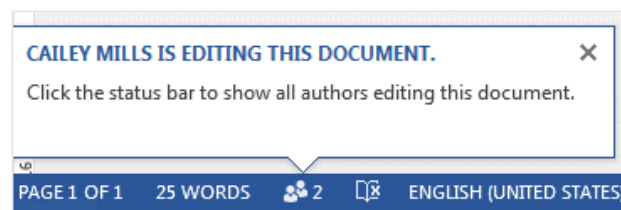


Figure 3-27: Editing Status Notification (Desktop)

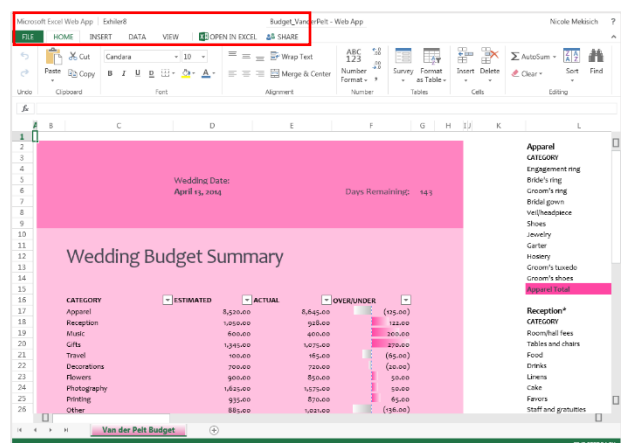


Figure 3-28: Editing in a Web App

Use Search on SharePoint

This is just another way Office 365 makes online collaboration easy. Because SharePoint “hosts” the SkyDrive and Newsfeed, you can use the Search boxes on any of these “hubs” to find users, shared documents, or conversations, even those that are not directly uploaded or captured on the specific hub.

1. Click the Search box **list arrow** and select the scope of what you want to search:

- **Everything:** Use this option to find shared documents or files.
- **People:** Use this option to directly access the SkyDrive of another person in your organization. (Only their shared details and files will be available.)
- **Conversations:** Use this option to find specific conversations.
- **This Site:** Use this option to search for keywords or phrases.

2. Once you’ve made your selection, type in the partial name of a file, or person, phrase or keyword in the Search box and click **<Enter>**.

- ✓ **Tip:** To get the most accurate results, type the full name of what you’re looking for. If you don’t know the full name, don’t worry, the search results will pick up on any keyword or phrase; it may just take a little longer to get through all the results.

3. Select the item you’re looking for from the results shown.

Exercise

- **Exercise File:** None
- **Exercise:** Search for the New Event Portfolio presentation you previously created in the Shared with Everyone folder and open it in the PowerPoint Web App. Return to the Team Site.

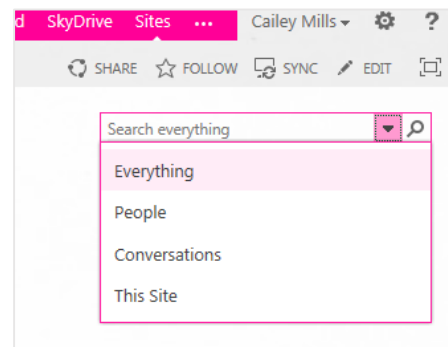


Figure 3-29: SharePoint Search Scope options

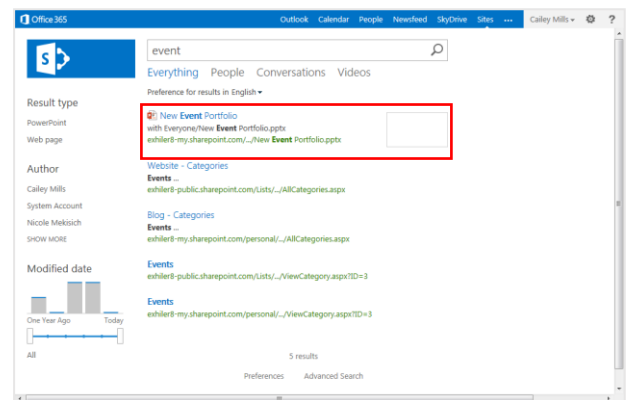


Figure 3-30: Search Results on SharePoint

The Using Other Web Apps Review

Quiz Questions

- Which of the following Web Apps are not available currently:
A. Outlook
B. Excel
C. Access
D. OneNote
- To view a Word or PowerPoint file from an iPhone 3G or 3GS, you can use any browser. (True or False?)
- The Newsfeed hub is aimed at organizational social networking. Which of the following tools would you find on the Newsfeed hub:
A. Blog
B. Apps
C. Tasks
D. All of the above
- There are two different types of SkyDrives. (True or False?)
- Name the best way to access your organizational SkyDrive account:
A. Log on to your Office 365 Account and select SkyDrive from the Navigation bar.
B. Log on to your SkyDrive Account directly.
C. Log on to your Office 365 Account and select Sites from the Navigation bar.
D. Log on to your Microsoft Account and select SkyDrive.
- You can use your SkyDrive to create, store, edit, and share files. (True or False?)
- Office on Demand is part of which Office 365 feature:
A. SharePoint (Team Site)
B. SkyDrive Pro
C. Newsfeed
D. Document Library
- You only require a link, username, and password to access and edit files on SharePoint. (True or False?)
- Only sites you have selected to “Follow” will appear on your Sites hub. (True or False?)
- When creating a new file on SharePoint, you can select from available Web Apps, uploading an existing file, or you can create a new folder (True or False?)
- There are a few ways to open a file in SharePoint for editing, which one below is incorrect:
A. Click the File name link.
B. Point to the Open menu (...) button and select Edit.
C. Select the File name, click the FILE tab and select Edit Document from the Open & Check Out group.
D. Point to the Open menu (...) button and select Open.
- You can use the Search box on SharePoint to find any shared file, even if the file was not directly uploaded or created on SharePoint. (True or False?)

Quiz Answers

1. C. Access is not currently available as a Web App.
2. False. To read a Word or PowerPoint file on your iPhone 3G or 3GS, you will need Safari 4 or later.
3. D. All of the listed tools can be found in the Newsfeed hub.
4. True. There are two different types of SkyDrives, one for personal use, included with a Microsoft account or Outlook, and one for organizational use, included as a feature in Office 365.
5. A. Log on to your Office 365 Account and select SkyDrive from the Navigation bar.
6. True. You can use the SkyDrive to create, edit, store, and share files with whomever you choose.
7. B. Office on Demand is part of the SkyDrive Pro feature on Office 365.
8. False. A link, username, and password may give you access to SharePoint but not necessarily enable you to edit all files. What you can access and edit will be controlled by your Team Site administrator and the permissions they give to you as a user.
9. True. If you have not specifically “Followed” a site, it will not appear on your Sites hub.
10. True. Depending on your permissions, you will be able to create new documents using available Web Apps, upload files from your desktop, or create new folders in SharePoint.
11. D. There is no “Open” option available on the Open menu (...).
12. True. You can use the Search box on SharePoint to find any organizational user, conversation or shared file, even if the item was not originally captured or uploaded directly to the Team Site.

The OneNote Web App

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There was a time when many of us were attached at the hip to a diary or day planner. Then, came Outlook Calendar and suddenly, managing our appointments and days became a lot easier.

There's a second group of people who may still be slightly attached to the idea of carrying around a notepad and pen – always ready to take notes, a license plate number, or write down something they need to do as it comes to mind.

OneNote was introduced to replace the notebook and pen, and with most people either carrying around a tablet or smartphone these days, OneNote is even more relevant and easy to use.

It allows you to enter and sort any notes you may need to work with, whether it's planning a family vacation or creating a list of action items required for a work project.

In this chapter, we will show you how to access and use the OneNote Web App on different devices.

Setting up the OneNote Web App

Most “tech-savvy” people left pen and paper behind long ago. Almost anything you need to do, you can now do electronically. Of course, some people would argue the reliability of technology versus “hard copy,” but the convenience and capacity that electronic services provide these days are sometimes hard to argue with.

- ❗ **Trap:** Remember, you may need Microsoft Account credentials to access or use this app.

Desktop Set up

OneNote 2013 is included in the latest Office version, so if your Office 365 Subscription includes Office, OneNote will already be installed as part of the desktop software installation you did right at the start of this guide.

1. To start using OneNote, launch the application from your desktop/laptop.
2. Click **Sign In**, enter your Microsoft Account credentials, and click **Sign in** again.

OneNote will open, ready for use.

Mobile Set up

1. Open the Internet browser on your phone, type in www.office.com/business-apps in the address bar and select **<Enter>**, or the relevant equivalent on your phone.
2. Select the **OneNote** App and follow onscreen instructions and prompts in order to download, install, and open OneNote on your phone. (Instructions and options may differ by device).
3. Enter your username and password. Then, click **Sign In**.

- ❗ **Trap:** OneNote Mobile does not currently support Syncing with SharePoint.

Exercise

- **Exercise File:** None required.
- **Exercise:** Launch OneNote on your desktop.

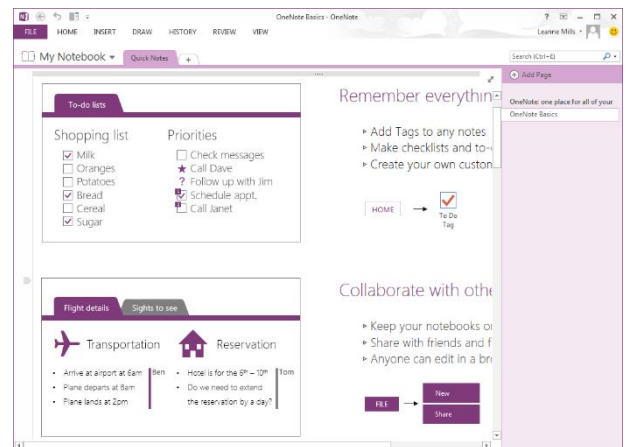


Figure 4-1: OneNote 2013 (Desktop)



Figure 4-2: OneNote Console on a Mobile Phone

The OneNote Web App

Tablet Set up

1. Open the Internet browser on your tablet, type in www.office.com/business-apps in the address bar and select **<Enter>**, or the relevant equivalent on your tablet.
2. Select the **OneNote** App.
3. Follow onscreen instructions and prompts to download, install, and open OneNote on your tablet. (Instructions, prompts, and commands may differ from tablet to tablet).
4. Enter your Username and password before clicking **Sign In**.

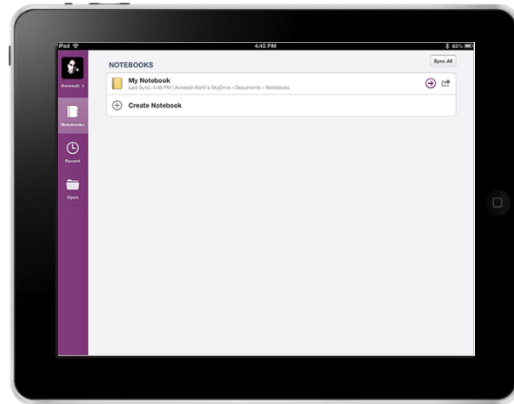


Figure 4-3: OneNote Console on a Tablet

Using the OneNote Web App

OneNote, an electronic version of a notepad, allows you to create notebooks, add pages, sections, links, pictures, and tables to help organize and enhance your notes.

With Office 365, your Notebooks will also automatically synchronize, so whether you're using your browser or desktop, your latest notes will always be available.

Create a New Notebook

To get started, you first need to create a notebook. You can create Notebooks for family vacations, grocery lists, an event, or a project, and then add sections and pages within the notebook to help sort and arrange the notes you capture.

❗ Trap: Remember, the OneNote Web App will not have all the features or functionality of OneNote 2013, and certain limited features of the App will not be available on every device.

1. Launch OneNote on your device. Then:

- **For Desktop/Laptop Users:** Click the **Notebook** list arrow and select **Add Notebook**.
- **For Tablet Users:** Select the **Notebooks** icon and click **Create Notebook**.

🔄 Another way to Create a New Notebook: If you're on the move, you can also create a new Notebook from your SkyDrive Pro account. Log on to your Office 365 Account, click **SkyDrive** on your Navigation bar, and select **new document**.

2. Enter a name for the new notebook.
3. Select a location for the notebook to be saved.
4. Click **Create** or your device equivalent.
5. You'll be prompted to share the new Notebook if you intend to have multiple people working on the Notebook. If this is the case, select **Invite people**; otherwise, select **Not now**.

Exercise

- **Exercise File:** None required.
- **Exercise:** Create a new notebook for the Van der Pelt Wedding from your desktop, and save it to your SkyDrive Pro account.

Rename the first section "Music," and then close OneNote.

Go online and use the Web App on your SkyDrive Pro account to add a new Page in the Music section, called "Live Band," and make a note to "book the band ASAP."

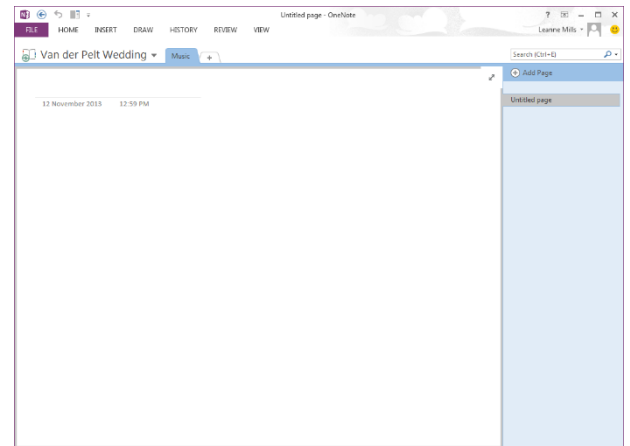


Figure 4-4: New Notebook (Desktop)

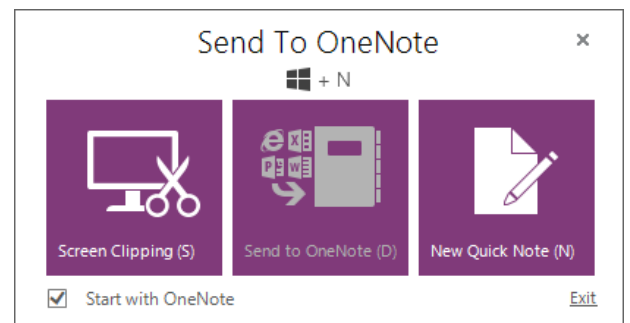


Figure 4-5: Send To OneNote Tool

The OneNote Web App

Add Pages and Sections

To help keep your notebooks organized, you can create different sections within a Notebook that has different pages in it. For instance, you have created a Notebook for a multi-city business trip – you could have a section for each city in your trip and pages under each city for what needs to be done at each site.

1. Launch the OneNote App on your mobile/tablet device, or log on to your Office 365 Account from a desktop.
 - **For Desktop/Laptop Users:** Click **SkyDrive** on your Navigation bar and select the **Documents** folder. Open the **Shared with Everyone** folder, or select the Notebook you want to work with from the available documents.
 - **For Tablet/Mobile Users:** Select the **Notebooks** icon and select the Notebook you want to work with.
2. Click **Insert** and select **New Page** or **New Section** in the Notebook group, as required (available features may differ on your device).
3. Follow any additional onscreen prompts relevant to your selection in order to add the new page or section.
 - ✔ **Tip:** (Desktop) Right-click items for additional options.

Add Notes

Capturing notes in OneNote is easy. No saving is necessary as any notes you capture are automatically saved as you enter them.

1. Open the Notebook and select the Page you want to add a note to.
 - **For Desktop/Laptop Users:** Click where you want to insert text and type your note as required.
 - **For Tablet/Mobile Users:** Click where you want to insert text and type your note as required.

Click the **Username** link (e.g. Bob Smith) on the top left to exit OneNote and return to your SkyDrive.

- 🔍 **Another way to exit the OneNote Web App and return to SkyDrive:** Click the **FILE** tab and select **Exit**.

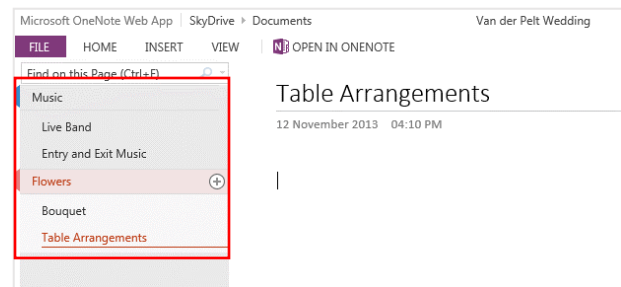


Figure 4-6: List of Sections and Pages (OneNote Web App)

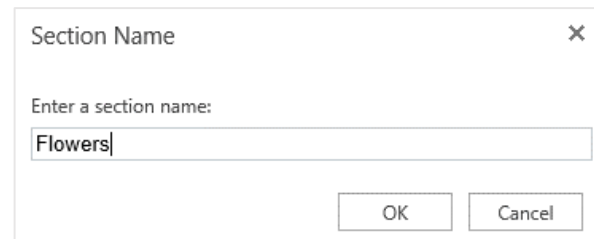


Figure 4-7: Adding a New Section (OneNote Web App)

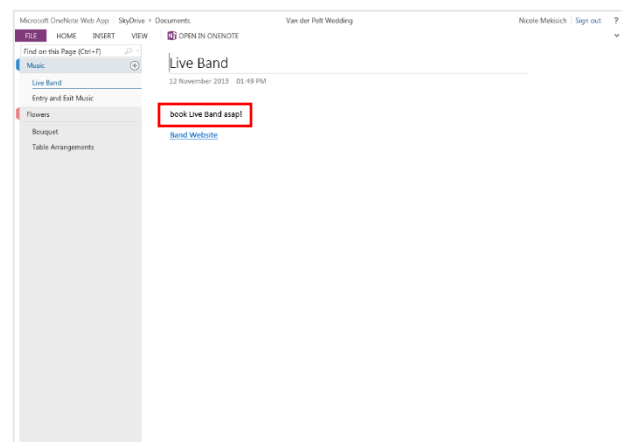


Figure 4-8: Adding a Note on the OneNote Web App.

OneNote Extras

In addition to the basic tasks you can perform on OneNote, there are some helpful features that you can use to help enhance your notes.

Add Links

Adding links in OneNote is done the same way you would in any other application.

1. Open the Notebook and select the Page you want to add a link to.

- **For Desktop/Laptop Users:** Click where you want to insert the link.
- **For Tablet/Mobile Users:** Click where you want to insert the link.

2. Type the link out, pressing **<Enter>**, or your device equivalent to activate the hyperlink.

- 🔗 **Another way to Add a Link:** If you are using the Desktop Web App or your device allows, you can also manually add a link. Click the **INSERT** tab and click **Link** in the Links group. Enter a display name for the link, enter the link address, and click **Insert**.

Add Pictures

Need ideas or inspiration, or maybe visual notes just work better for you? Whatever the reason, it's easy to add pictures to your notes.

1. Open the Notebook and select the Page you want to add a picture to.

- **For Desktop/Laptop/Tablet Users:** Click where you want the picture to be inserted, click the **INSERT** tab, and select an option from the Images group. Navigate to and select your picture. Then, click **Insert**. (Features or options may differ by device).
- **For Mobile Users:** Click where you want the picture to be inserted, click the **Camera** icon, and select **Photo library** to insert a picture you already have on your phone, or **Camera** to insert a new picture. (Features or options on your device may differ).

Exercise

- **Exercise File:** None required.
- **Exercise:** Discuss different ways these “extras” can help enhance notes for a project or list.

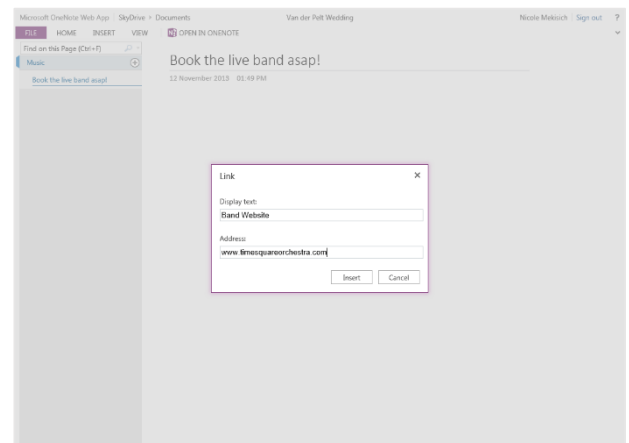


Figure 4-9: Manually Inserting a Link

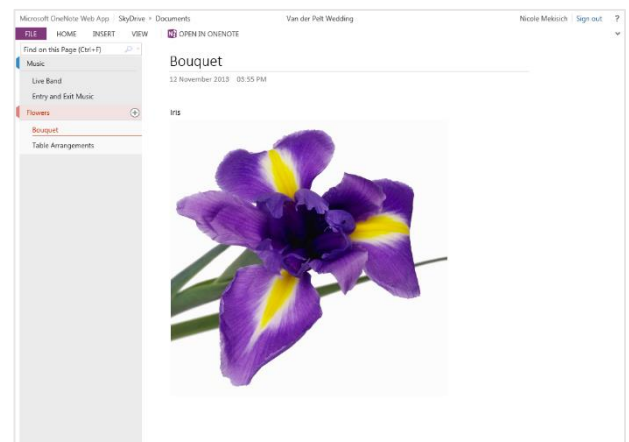


Figure 4-10: Inserted Picture (OneNote Web App)

Add Tables

We all know how helpful tables can be when it comes to sorting and listing information, so being able to add tables in OneNote is a great advantage.

✔ **Tip:** Excel elements you may add in OneNote 2013 will be stored in your Notebook, but not necessarily displayed when opening the Web App.

1. Open the Notebook and select the Page you want to add a table to.

- **For Desktop/Laptop/Tablet Users:** Click where you want the table to be inserted, click the **INSERT** tab, and select **Table** from the Tables group. Use the table grid to select how many rows and columns you want your table to have. The Table will then be inserted.

To modify the table, click the contextual **LAYOUT** tab under Table Tools, or select and right-click items to use formatting tools available on the Mini Toolbar. On Tablets, click the contextual **TABLE** tab. (Features or options on your device may differ).

- **For Mobile Users:** You will be able to view tables, but OneNote Mobile does not currently support the creation or modification of tables.

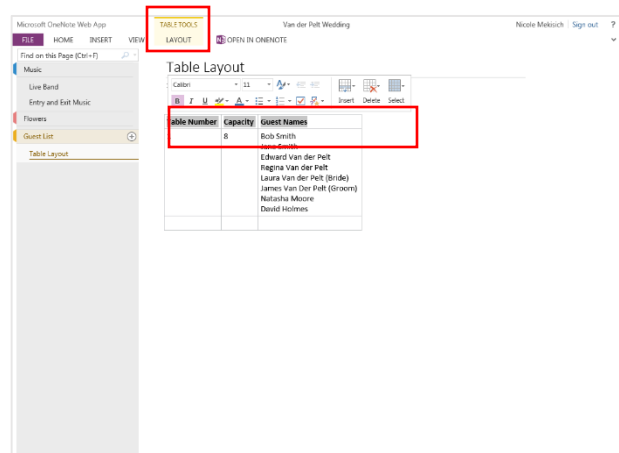


Figure 4-11: Modifying a Table (OneNote Web App)

The OneNote Web App Review

Quiz Questions

1. If you add a new note, page, or section in a desktop Notebook, you will be able to see it in the OneNote Web App. (True or False?)
2. When completing the desktop setup of OneNote, you will need to use your Office 365 Account credentials to sign in. (True or False?)
3. Which of the following features are not available on OneNote Mobile:
 - A. Creating, deleting, and renaming Notebooks
 - B. Adding links
 - C. Adding pictures
 - D. Adding notes
4. After creating a new Notebook, which of the following represents the most appropriate order of events?
 - A. Rename Section 1, then add a new page, then add a note
 - B. Add a new section, then add a new page, then add a note
 - C. Rename Section 1, then name the page in the section, then add a note
 - D. Add a new page, then add a note, then rename the section
5. To save a file/document to your organizational SkyDrive, you just need to select it as the file location when using the Share/Save As options on the applicable FILE tab. (True or False?)
6. With an open OneNote Web App on your organizational SkyDrive, what is the fastest way to close the app:
 - A. Click the FILE tab and select Exit.
 - B. Click the browser Back button.
 - C. Click the Close button.
 - D. Click the Username link on the top left side of the screen.
7. OneNote does not have a save feature. (True or False?)
8. Excel elements you add in OneNote will also be visible in the Web App. (True or False?)

Quiz Answers

1. True. Office 365 automatically synchronizes your Notebooks, so depending on the device you're using, your latest notes will always be visible.
2. False. You will need Microsoft Account credentials to sign in to the desktop version of OneNote.
3. A. OneNote Mobile does not currently support the creation, deletion or renaming of Notebooks.
4. C. Technically, there is no right or wrong order as such, but using option C as a guideline to adding sections, pages, and notes will go a long way to keeping your new notebook neat and organized.
5. True. Office 365 has made online collaboration an easy and useful tool. You may have to add your SkyDrive/SharePoint site as a new location the first time you use an application in Office 365, but once added, they remain as available file locations across all your Office programs.
6. D. Clicking the Username link on top of the screen is the fastest way to close the Web App without signing out of your Office 365 Account, but you can also use option A to close the App and return to your SkyDrive.
7. True. Any additions or changes you make to Notebooks are automatically saved.
8. False. Some of the Excel elements in OneNote are not available when using Web or Mobile Apps.

The Lync Web App

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Lync is a browser-based meeting client and Microsoft's all-in-one answer to Skype, Live Meeting and Instant Messenger.

It's an application that allows you to open persistent chat rooms, send instant messages, and hold video and audio enabled meetings. In addition to that, you can also share documents and your desktop – all from a central, user-friendly console.

In this chapter, we will show you how to access and use the Lync Web App on different devices.

Setting up the Lync Web App

Lync is a great tool for anyone who is regularly travelling or needs to stay connected to colleagues who are not based in the same location. New features in the 2013 version allow you to invite meeting attendees from outside your organization, and the best part is, users don't even have to have Lync installed on their device.

While use of Lync 2013 requires a Lync account, the Lync Web App does not require a Lync account.

NOTE: You cannot schedule meetings in Lync, but you can join meetings scheduled in Outlook or Lync Web Scheduler.

System Requirements

Lync works on Windows 7, Windows 8, Windows Vista, Windows XP, Windows Server and Macintosh.

Supported Browsers include: Internet Explorer, 8, 9, and 10, as well as Safari, Chrome, and Firefox.

❗ **Trap:** If you want to join Lync Meetings, you may also need audio and video capabilities on your device.

Desktop Set up

Lync 2013 is already included in the latest Office version, so if you have selected a subscription that includes Office, you will already have Lync 2013 installed on your desktop as part of the desktop software installation.

1. To start using Lync, launch the application from your desktop/laptop.

2. Use your Office 365 credentials to Sign in, and you're ready to go.

✅ **Tip:** If you selected a subscription that does not include Office, don't worry, you don't have to have Lync installed in order join meetings.

Exercise

- **Exercise File:** None required.
- **Exercise:** Launch Lync 2013 on your desktop.

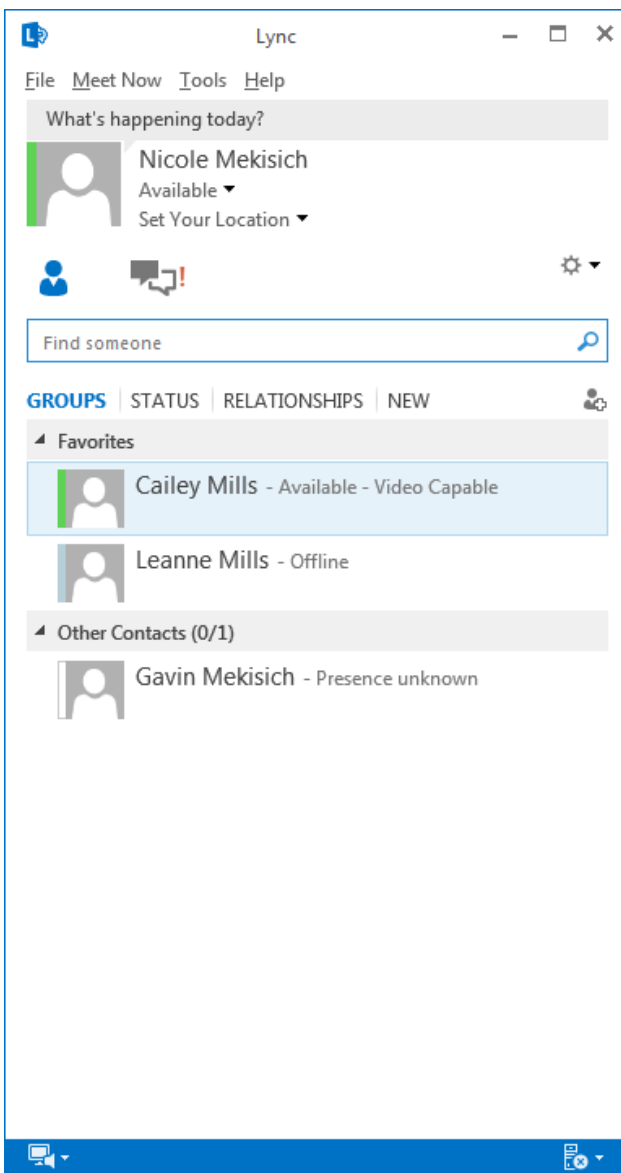


Figure 5-1: Lync Desktop Console

The Lync Web App

Mobile Set up

1. Open the Internet browser on your phone, type in www.office.com/business-apps in the address bar, and select **<Enter>**, or the relevant equivalent on your phone.
2. Select the **Lync** App – also called Lync for Mobile Clients.
3. Follow onscreen instructions and prompts in order to download, install, and open Lync on your phone. (Instructions, prompts, and commands may differ from phone to phone).
4. You may be prompted to allow Lync 2013 to access your contacts. Select **Don't Allow** or **OK** depending on your requirements.
5. Click **OK** to Sign in.
6. Enter your Office 365 credentials and click **Sign In**.

Tablet Set up

1. Open the Internet browser on your tablet, type in www.office.com/business-apps in the address bar, and select **<Enter>**, or the relevant equivalent on your tablet.
2. Select the **Lync** App.
3. Follow onscreen instructions and prompts to download, install, and open Lync on your tablet. (Instructions, prompts, and commands, may differ from tablet to tablet).
4. You'll be prompted to allow Lync 2013 to access your contacts. Select **Don't Allow** or **OK**, depending on your requirements.

Table 5-1: Device Specific Menu Options for Lync

Desktop:	
	View Contacts
	View Conversations
	View Meetings

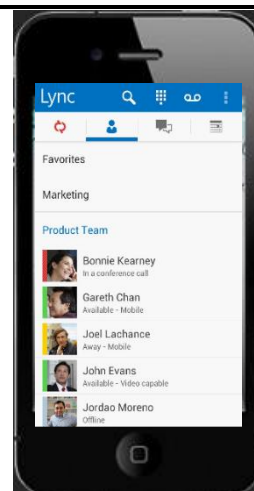


Figure 5-2: Lync Console on a Mobile Phone

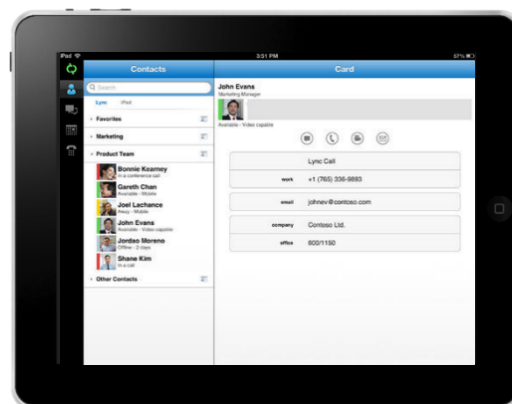




















Figure 5-3: Lync Console on a Tablet

5. Click **OK** to Sign in.
6. Enter your Office 365 credentials and click **Sign In**.

See **Table 5-1: Device Specific Menu Options for Lync** for some basic menu options available in Lync.

	Instant Message (Chat)
	Call
	Start Video
	Present (Collaborate) – Use OneNote and insert Attachments
	View Participants and Invite more Attendees
	More Options
Phone/Tablet:	
	View My Info and Settings
	View Contacts
	View Conversations
	View Meetings
	Call using Keypad*
	Full screen/Standard screen (Tablet)
	Invite Contacts
	Instant Message (Chat)
	Call
	Start Video
	Send an Email
	View Participants and Invite more Attendees

The Lync Web App

For more information on exactly which Lync features may be available for your device/organization, go to: www.office.com

- ❗ **Trap:** Call using the *Keypad is not available to Lync Online or Office 365 Users.

Using Lync




In an organization, using Instant Message (IM) to message colleagues can often be faster and more effective than email, simply because email often piles up and can take a while to get through. Unlike other Instant Messaging services, Lync is part of the Office suite, so it can also be used in conjunction with other Office products, such as Outlook Calendar, to make it an even more effective organizational tool.

Remember though, not all of these features will be available on your device or for your subscription.

Add a New Contact

One of the most basic actions you can perform is find and add a contact to your Lync account.

You will use these contacts to send instant messages, invite to meetings, etc. Unfortunately, you can only modify Contacts on Lync 2013 (Desktop version).

1. Launch Lync 2013 and use your Office 365 credentials to sign in.
 - ✓ **Tip:** (Optional) To improve accessibility, click the **Settings** list arrow  and select **Show Menu Bar**.
 2. Start typing a contact's name, number, or email address in the Search box. The system will automatically return potential matches. (Contacts in your organization that are online will automatically appear under the New tab as potential contacts you can add).
 3. Select the contact's name and right-click.
 4. Select which group to add the new contact to by selecting **Add to Favorites** or selecting the relevant group under **Add to Contacts List**.
 - ✓ **Tip:** Point to the contact's profile picture for additional options. Select an action icon or click the **More Options**  button. Make your selections as required.
- 🔄 **Another way to Add a New Contact:** Click the **Add a Contact**  button. Select whether the contact is in your organization or not, and use their IM Address or name (depending on your selection), to find and add them as a contact.

Exercise

- **Exercise File:** None required.
- **Exercise:** Add two contacts and send an instant message to one of your new contacts.

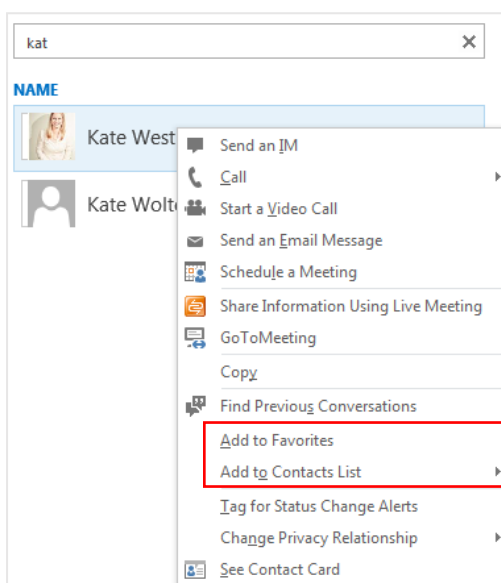


Figure 5-4: Adding a new Contact

The Lync Web App

Send an Instant Message

Another frequently used service on Lync is IM or Instant Messaging.

Like talking face-to-face, Lync's IM works much like Skype, BBM, or iChat, where the conversation is instantaneous.

1. Launch Lync from your mobile/tablet device or desktop and use your Office 365 credentials to sign in. Then:
 - **For Desktop Users:** Double-click the Contact's name you want to send an Instant Message to.
 - **Another way to Send an IM from a Desktop Device:** Right-click the Contact's name you want to send an Instant Message to and select **Send an IM** from the contextual menu. Or, point at the Contact's profile picture and select the **Chat** icon from the contextual menu that appears.
 - **For Mobile/Tablet Users:** Select the Contact's name you want to send an Instant Message to and click the **Chat** icon.

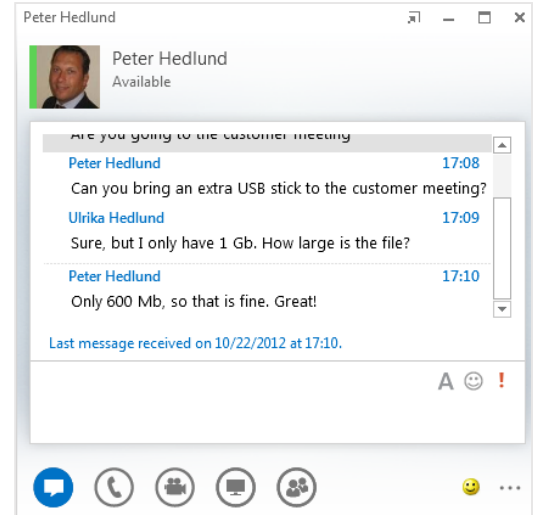


Figure 5-5: Desktop Chat

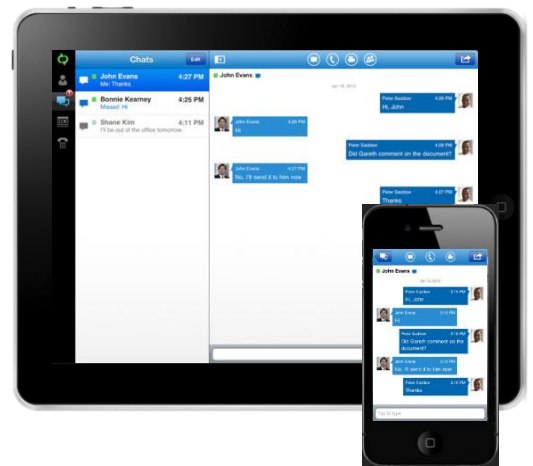


Figure 5-6: Tablet/Mobile Chat

Lync Extras

Having an audio/video enabled device can add that little something extra to your use of Lync.

Keep in contact with team members and colleagues from wherever you are. When sending an IM just isn't enough, you can also verbally communicate using Lync.

Check Audio/Video Settings

As mentioned before, you will need to have an Audio/Video enabled device if you want to use Lync for meetings.

- ✔ **Tip:** If your device has a camera, it will automatically enable the video feature in Lync.
- **For Desktop Users:** Click the **Audio/Video** icon on the bottom left of your Lync console. Click **Audio Device Settings** to select an audio device or select **Check Call Quality** to check the quality of your audio device.
- **For Mobile/Tablet Users:** Select **My Info** icon. Under Options you can adjust various settings for Lync, as well as enable Wi-Fi Voice and Video. Switch these features on and off as required.

Making and Receiving Calls

Being able to use Lync to make and receive calls is simple to do and can be extremely useful when it comes to meetings.

- **For Desktop Users:** Right-click the name of the Contact you want to call and select **Call** from the contextual menu.
 - 📌 **Another way to Call a Contact:** Point at the Contact's profile picture and select the **Call** icon from the contextual menu that appears.

To receive a call, hover your cursor over the Incoming Call Notification and click **Accept** to take the call. To ignore the call, click **Ignore**, or click **Options** if you want to Reply by IM or set your presence to Do Not Disturb.

- **For Mobile/Tablet Users:** Select the Contact you want to call and click the **Call** icon.

To answer a call, either click **Accept** or **Ignore**, or your device's equivalent, on the Incoming Call Notification.

Exercise

- **Exercise File:** None required.
- **Exercise:** Discuss when using Lync extras would be beneficial.

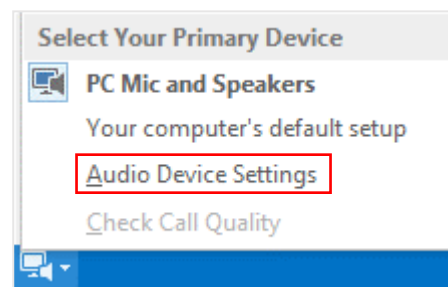


Figure 5-7: Selecting Audio Settings (Desktop)

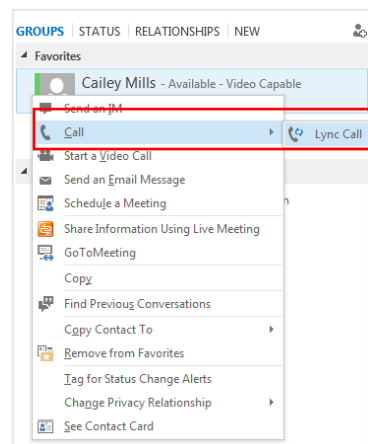


Figure 5-8: Calling from a Desktop

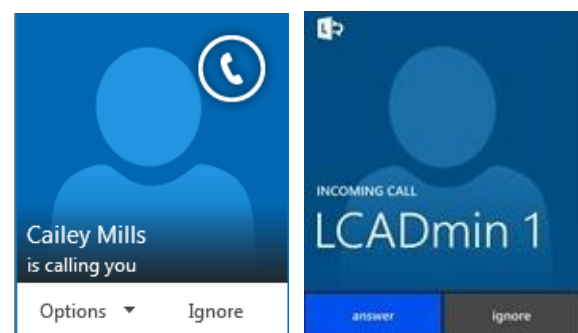


Figure 5-9: Incoming Call Notifications (Desktop & Mobile Phone)


Collaboration

This is definitely one of the best features of Lync. Being able to share your desktop or a program with meeting attendees, or share a PowerPoint presentation makes Lync a flexible, invaluable meeting or training tool to have.

! Trap: Like many of the other Web Apps available in Office 365, not all the features are available for all devices.

The collaboration tools can be utilized when a desktop user hosts/presents a Lync Meeting or Conference call. This is not to be confused with using the Call icon to call a contact.

A meeting can be scheduled using Outlook Calendar or Lync Web Scheduler. Alternatively, you can use the Meet now feature available on Lync to start a meeting immediately.

1. Click **OK** to confirm using Lync for full audio/video experience.
2. In the Meeting window click the **Present**  icon and select the collaboration feature you want to use.

See **Table 5-2: Collaboration Features on the Lync Web App** on the next page for a breakdown of the available collaboration features and how they work.

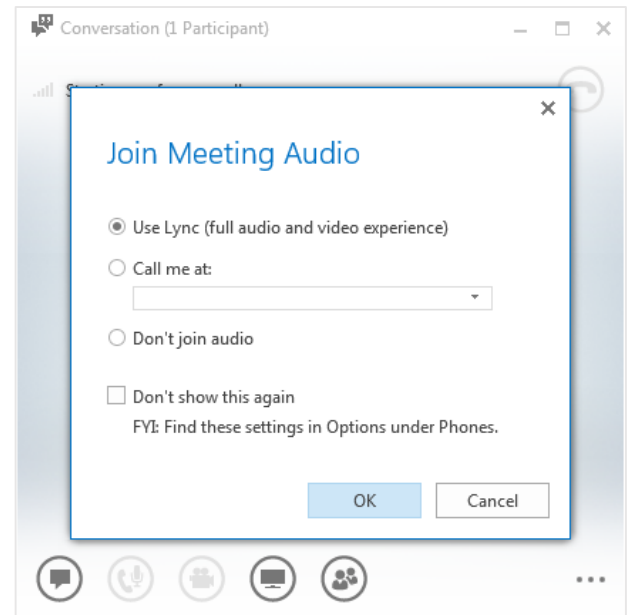


Figure 5-10: Meeting Options

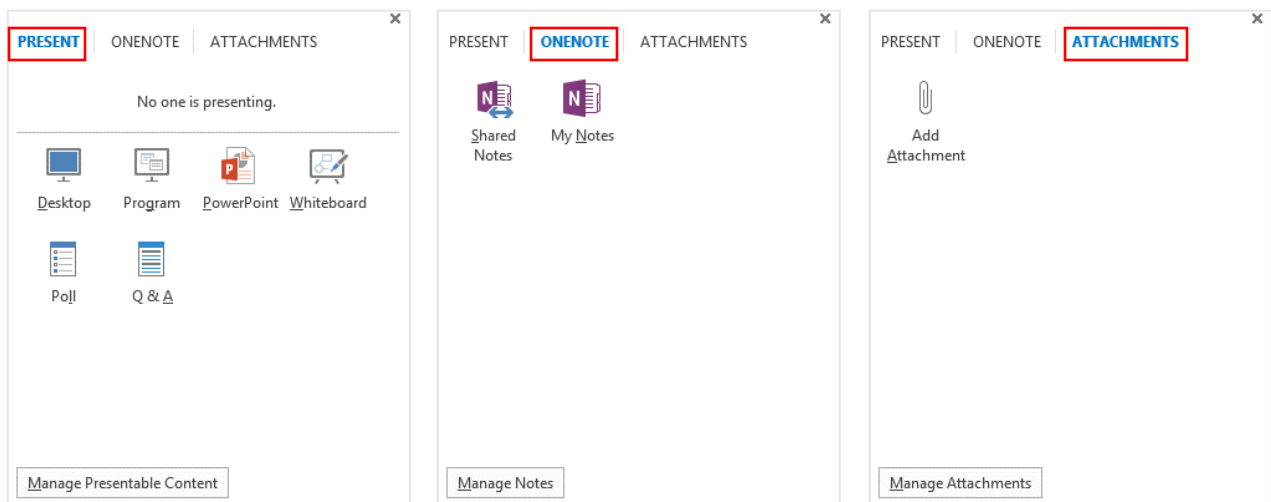


Figure 5-11: Menus for Collaboration Features in Lync

Table 5-2: Collaboration Features on the Lync Web App

PRESENT

Desktop	If you have something you need to share with meeting attendees that is best shown visually, and you need to switch between programs in order to do so, you can share your Desktop with them. Attendees will receive a notification that you are ready to present and they will need to accept the presentation in order to view your desktop.
Program	If you have something you need to share with meeting attendees that is best shown visually, but you don't want attendees to see anything else on your PC, you can share specific programs or documents with attendees. Attendees will receive a notification that you are ready to present and they will need to accept the presentation in order to view the program or document.
PowerPoint	You may have a PowerPoint presentation you'd like to work through during your meeting. Select this option to locate and open your presentation. Attendees will receive a notification that you are ready to present and they will need to accept the presentation in order to view it.
Whiteboard	Brainstorming is great, and just like using a physical whiteboard, you can share a whiteboard with your meeting attendees and everyone can scribble and draw their "two cents worth" on it.
Poll	Want to get feedback on the meeting or a specific topic? You can easily create a poll that meeting attendees can respond to, you can save poll results, and choose to hide or share responses with everyone.
Q & A	Create an effective session by opening a Q & A, allowing participants to post questions that you or another presenter can answer.

ONENOTE

Shared Notes	Add notes to the meeting that can be shared with all participants.
My Notes	Add your own notes regarding the meeting.

ATTACHMENTS

Add Attachment	Share documents/files by adding them as an attachment that participants can open or save.
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Using the Lync Web Scheduler

As mentioned before, you can use Outlook to schedule meetings, but if you don't have Outlook or Windows, you can still arrange meetings using the Lync Web Scheduler. To use the Web Scheduler, you will need to log on to your Office 365 Account.

1. Log on to your Office 365 User Account.
2. Click the **Settings** button and select **Office 365 Settings**.
3. Click **software**.
4. Select **Lync** from the Software menu on the left.
5. Click the **Launch Lync Web Scheduler** link.

The Web Scheduler will open.

6. Fill in the details, using the fields and drop-down lists provided, to schedule your meeting and click **save**.

- ❗ Trap:** The Web Scheduler will open in a new tab, but clicking **Sign out** when you're done in the Web Scheduler will sign you out of your Office 365 Account as well. To close the Web Scheduler without affecting your Office 365 Account, simply close the LYNC WEB SCHEDULER tab on your browser.

Exercise

- **Exercise File:** None required.
- **Exercise:** Schedule a meeting using the Lync Web Scheduler.
The Meeting should be for a 1 hour, Weekly Staff Meeting on Mondays at 9 am. Invite two Contacts to the meeting and make yourself the presenter.

The screenshot shows the 'Lync Web Scheduler' interface with a 'CREATE NEW MEETING' button. Below the button is a form with sections: 'General' (Subject, Location, Message), 'Meeting Time' (Time Zone, Start Time, End Time), 'Access and Presenters' (Who will bypass the lobby, Who is a presenter), and 'Participants and Audio'. The form is partially filled out with 'Lync Meeting' as the subject and location, and 'UTC+0200 Athens, Bucharest' as the time zone.

Figure 5-12: Lync Web Scheduler (Desktop)

The screenshot shows a 'Meeting Details' dialog box with the text: 'New Meeting has been created. Copy the meeting details to the invitation you send to participants.' Below this is a box containing the text 'Join Lync Meeting' and a highlighted URL: 'https://meet.lync.com/exhiler8/nicole/HVNBj056'. There is also a link 'First Lync Meeting?' and an 'OK' button at the bottom right.

Figure 5-13: Lync Meeting Link

Chat Rooms

If your organization is set up to do so and your Lync Administrator has given you authorization to, you can create and manage chat rooms. Using chat rooms can be a great way to keep communication channels open and efficient between large groups or team members regarding a particular topic or project. Chat history is always there as an easy referral point. Users can apply searches and alerts to also help keep them on track.

Create a Chat Room

Another name for a Lync Chat Room is a Persistent Chat Room; you may remember us mentioning that at the beginning of this chapter. Using a Chat Room helps keep communication centralized and organized, as opposed to just using IM between team members.

❗ Trap: This facility must be set up by your Lync Administrator before it will appear as a feature on your Lync Account.

1. Click the **Chat Room** icon on your console.
2. Click the **Add a room** button.
3. Click **Create a Chat Room**.

The My Rooms page will open.

4. Click the **Create A New Room** button.
5. Enter a new name for the Chat Room and click **Check Names**, to make sure it's not already being used.
6. Enter a description for the Chat Room so that users know what topic or project the Chat Room is for.
7. Select your privacy settings.
8. (Optional) add web apps to your Chat Room.
9. Add or remove Chat Room managers.
10. Add or remove Chat Room members.
11. Click **Create**.

Exercise

- **Exercise File:** None required.
- **Exercise:** Discuss the main difference between IM and a Chat Room, as well as some of the advantages of using a Chat Room instead of Email to communicate.

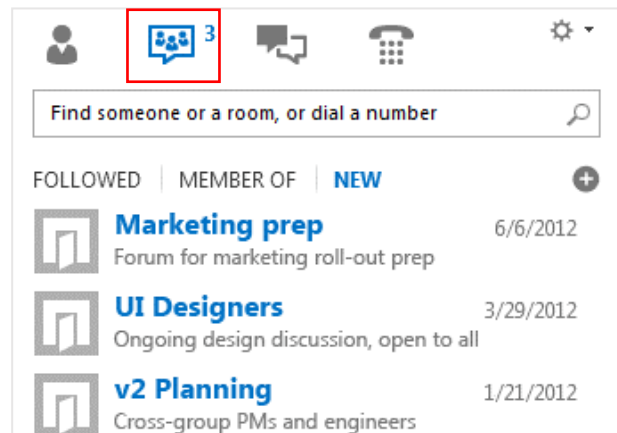





Figure 5-14: Chat Room Icon

Manage a Chat Room

If you have created a Chat Room, or you've been given the correct permissions, you can edit a Chat Room's details, change privacy settings for a Chat Room, and disable a Chat Room, among other things.

1. Click the **Chat Room** icon on your console.
2. Click the **MEMBER OF** tab.
3. Point to the icon  next to the Chat Room you want to change.
4. Click the **Open Room** icon .
5. Click the **More**  button, and then select **Manage this Room**.

The Edit a room page will open.

6. Make your changes as necessary and click **Commit Changes** when you're done.

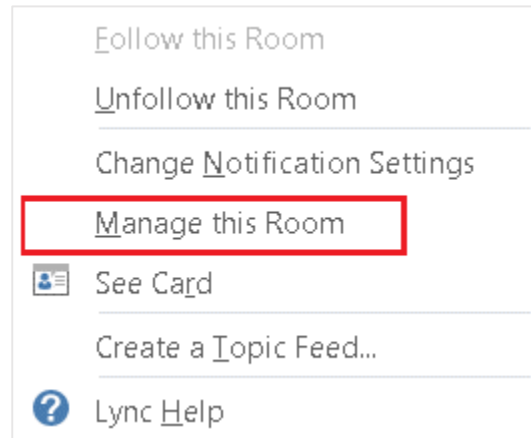


Figure 5-15: Chat Room Options

The Lync Web App Review

Quiz Questions

1. The Lync Web App requires a Lync Account. (True or False?)
2. You do not need Lync to be installed when joining a meeting. (True or False?)
3. Lync 2013 is installed on a desktop as part of the:
 - A. Office 365 Subscription
 - B. Windows 8 Metro Menu
 - C. Latest Office version
 - D. Office Web Apps
4. Which of the following features are not available to Lync Online or Office 365 users?
 - A. Presenting
 - B. Calling (Lync)
 - C. Inviting Attendees
 - D. Calling (Keypad)
5. You can add contacts using the Lync Web App. (True or False?)
6. You do not need an audio/visual-enabled device to make use of Lync. (True or False?)
7. There are a number of collaboration tools in Lync, which of the following are correct:
 - A. Q & A
 - B. OneNote
 - C. Attachments
 - D. All of the above
8. If you don't have Outlook, you can still schedule Lync Meetings using the Lync Web Scheduler. (True or False?)
9. Persistent Chat is another name for chat rooms that can be created using Lync 2013. (True or False?)

Quiz Answers

1. False. Lync 2013 requires an account, but the Lync Web App does not require a Lync account.
2. True. For users without Lync, or those using a Mac, Lync will automatically open so that they can join a Lync meeting.
3. C. Lync 2013 is included in the latest Office version.
4. D. Calling via Keypad is not available to Lync Online or Office 365 users.
5. False. You can only add or modify contacts on the Desktop version of Lync 2013.
6. True. You can use Lync without any audio or visual-enabled equipment. However, if you want to use Lync to host or join meetings that require collaboration or verbal communication, you will need to have an audio or audio and visual-enabled device.
7. D. All of the above and more are currently available on Lync to be used as collaboration tools.
8. True. The Lync Web Scheduler is available for use on your Office 365 Account.
9. True. If your organization is set up for it and you have the correct permissions, you can create and manage chat rooms that cover specific topics or projects so that team members are kept up to date with the latest information regarding the topic or project. These chat rooms are also known as Persistent chat rooms.