Microsoft®

Office 365

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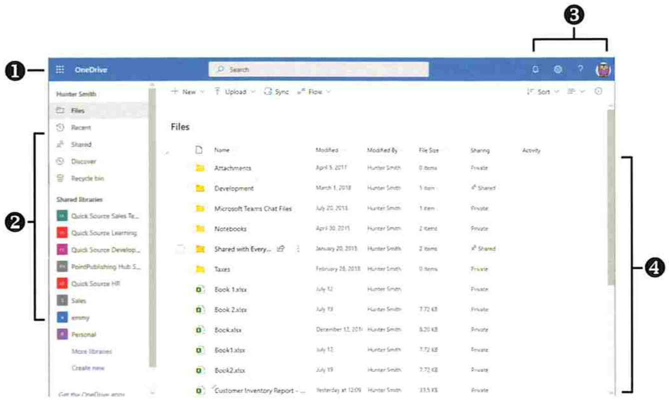
Getting Started

Office 365 OneDrive Page



Note: Office 365 functions best in the Microsoft Edge web browser.

❶ **App Launcher** – displays the main hubs for most features and all Office apps.
❷ **Navigation Pane** – lists shortcuts within your current hub.
❸ **Nav Bar** – contains tools and shortcuts for working within Office 365.
❹ **File List** – displays all types of files stored on your OneDrive. You can view or edit them with Office apps.

Signing in to the Office 365 Portal

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

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

Accessing the App Launcher

To access features and apps, click the **App Launcher** button. Hover your mouse cursor over the app and click the **More** ⋮ button that appears. Do any of the following:

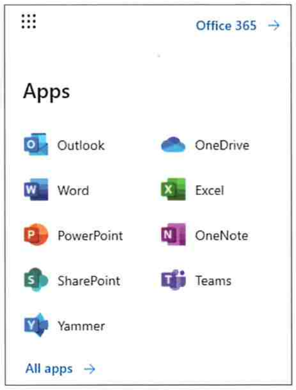
- *To open the app in a new tab*, select **Open in new tab**.
- *To learn more about the app*, select **Learn more**. Click the **Back** ← button when you are finished.
- *To pin an app to the Launcher*, select **Pin to launcher**.

Removing an Item from the App Launcher

1. Click the **App Launcher** button.
2. Hover your mouse cursor over the app or feature you want to remove and click the **More** ⋮ button.
3. Select **Unpin from launcher** to remove the item.

Using the App Launcher Features

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



- **Outlook** - the email hub to send and receive messages.
- **Word** - create and edit documents.
- **PowerPoint** - create and work with presentations.
- **SharePoint** - access your **Team** or **Public** site, as well as sites you are following. You can also create new sites.
- **Yammer** - communicate and share information with your coworkers.
- **OneDrive** - contains the Office Web Apps and your file list for storing and editing different types of Office items.
- **Excel** - create and work with worksheets and workbooks.
- **OneNote** - create notebooks for storing information.
- **Teams** - collaborate and share files with your coworkers.

*Note: Depending on your Office 365 account and what you have pinned to the **Launcher** you may see other apps. Click the **All apps** shortcut to see additional apps.*

Settings

Changing Your User Password

1. Click the **User** icon on the **Nav Bar**.
2. Click the **My account** shortcut.
3. Select **Security & privacy** in the left pane.
4. Click the **Password** shortcut.
5. In the **Old password** box, enter your old password.
6. In the **Create new password** box, enter your new password.
7. In the **Confirm new password** box, enter your new password again to verify the correct spelling.
8. Click the **submit** button.

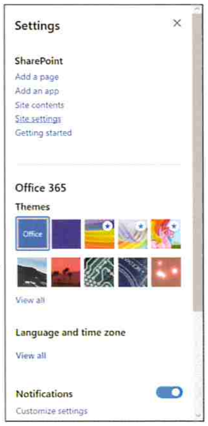
Signing Out

1. Click the **User** icon on the **Nav Bar**.
2. Click the **Sign out** shortcut.

Changing the Theme

Changing the theme in any Office 365 app will change it across all apps.

1. Click the **Settings** button on the **Nav Bar**.
2. Click the **View All** shortcut in the **Office 365** section. In some apps you may not need this step.
3. Click **View all** to expand the theme options.
4. Click the theme that you want to apply



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Mail

Sending an Email

1. Click the **App Launcher** button and select **Outlook**.
2. In the **Mail** screen, click the **New message** + button.
3. Do one of the following:
   - *To enter email addresses*, enter addresses in the **To** and **Cc** fields. When you begin typing or click in the **To** field, likely addresses will appear in the **Suggested contacts** list. Click to select a contact. (*Repeat to add additional contacts*.)
   - *To select email addresses from your contacts*, click the **To** button. Click on a contact to select it from the list that appears. (*Repeat to add additional contacts*.)
   - *To send a blind carbon copy*, click **Bcc** on the right of the **To** field. Enter the email addresses of the contacts you want to include in the **Bcc** field.
4. Enter a subject in the **Add a subject** field.
5. Enter message text in the **Message** box.
6. Click the **Send** button.

Reading a Message

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

*Note: To mark a message as unread, select the message and click the **More** ··· button. Select **Mark as unread**. To mark it again as unread, select **Mark as read**.*

Replying to a Message

1. Select the message you want to reply to.
2. Do any of the following:
   - *To reply to the sender only*, click the **Reply** button.
   - *To reply to the sender and all recipients*, click the **Reply all** button.
   - *To forward a message to additional recipients*, click the **Forward** → button.
3. Enter reply text in the message box.
4. Click the **Send** button.

Liking a Message

You can "like" a message in Outlook similar to how you would on a social networking site. To like a message you receive, click the **Like** button on the right side of the email message.

Inserting a Signature

1. Click the **Settings** button on the **Nav Bar**.
2. Click the **View all Outlook settings** shortcut at the bottom of the pane.
3. Click the **Compose and reply** shortcut.
4. In the **Email signature** box, enter and format signature text.
5. *Optional*: **Check the Automatically include my signature on new messages that I compose** box.
6. *Optional*: Check the **Automatically include my signature on messages I forward or reply to** box.
7. Click the **Save** button.
8. Click the **Close** × button to return to your Inbox.

Calendar

Scheduling an Event

1. Click the **App Launcher** button and select **Calendar**.
2. Click the **New event** + button.
3. Enter a name for the event in the **Add a title** field.
4. *Optional*: Click in the **Invite attendees** box and enter or select people you want to invite.
5. Enter a date or click the **Calendar** button to select a date for the event.
6. Click the arrow on the time boxes to select a start and end time. You can also click the **All day** slider to make the event last all day.
7. *Optional*: To make the event recur, click the arrow on the **Repeat** box and select a recurrence option.
8. *Optional*: Click in the **Search for a room or location** box to select a location for your event.
9. *Optional*: To set a reminder for the event, click the arrow on the **Remind me** box and select a time to be reminded.
10. Enter details in the text box.
11. Click the **Save** or **Send** button when you are finished.

Scheduling an Online Meeting

1. Click the **App Launcher** button and select **Calendar**.
2. Click the **New event** + button.
3. Enter the information about your event.
4. Click the **Teams meeting** slider to create a meeting that you can join in Teams.
5. Click the **Save** or **Send** button when you are finished.

Sharing Your Calendar

1. Click the **App Launcher** button and select **Calendar**.
2. Click the **Share** button and select the calendar you want to share.
3. Enter the contacts you want to share the calendar with in the **Enter an email address or contact name** box.
4. Click the arrow on the boxes to set permissions for people within and outside of your organization.
5. Click the **Share** button.
6. Click the **Close** × button when you are finished.

Responding to a Meeting Request

1. In your Inbox, double-click the meeting to open it or click once on the request to view it in the **Reading Pane**.
2. *Optional*: Enter a message to the sender in **Add a message to** space.
3. Do one of the following:
   - *To add the meeting to your calendar*, click the **Yes** ✓ button.
   - *To add the meeting to your calendar labeled as tentative*, click the **Maybe** ? button.
   - *To decline the meeting request*, click the **No** × button.
4. *Optional*: To change your meeting response open the meeting in your **Calendar**. Click the arrow next to your response at the top of the event and select an option from the resulting menu. If you want to propose a new time for the meeting, select **Propose new time** and select an option from the resulting menu.

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People

Creating a New Contact

1. Click the **App Launcher** button and select **People**.
2. Click the **New contact** + button.
3. In the **Name** section, enter a name for the contact in the **First name** and **Last name** spaces.
4. Enter additional contact information in the spaces provided.
5. Optional: To enter additional information about the contact click the **Add more** shortcut and select the item you want to add.
6. Click the **Create** button.
7. *Optional*: To delete a contact, click the **Your contacts** shortcut in the **Navigation Pane**. Select the contact you want to delete and click the **Delete** button at the top of the window. Click the **Delete** button to confirm the deletion.

Interacting with a Contact

1. Click **Your contacts** in the **Navigation Pane**.
2. Select the contact that you want to interact with to open the **Contact** pane. From here you can do one of the following:
   - *To email the contact*, click the **Send email** button or the contact's email address.
   - *To send an instant message to the contact*, click the **Start chat** button. You may have to select the chat app you want to use.
   - *To edit the contact information*, click the **Edit contact** button. Make the desired changes and click the **Save** button.

Creating a Contact List

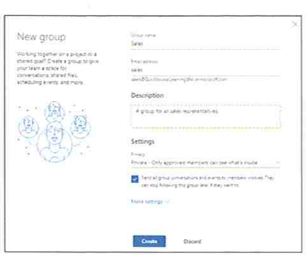
A contact list allows you to send email to multiple people at once.

1. Click the **App Launcher** button and select **People**.
2. Click the arrow beside the **New contact** + button.
3. Select **New contact list** from the resulting menu.
4. Enter a name for the list in the **Contact list name** space.
5. Click in the **Type a name or an email address** space and select contacts from the menu that appears. You can also enter an email address in the box and click the **Add** button.
6. Enter a description for the list in the **Description** box.
7. Click the **Create** button.

Creating a Group of Contacts

A group allows you to easily share with a group of your contacts.

1. Click the **App Launcher** button and select **People**.
2. Click the arrow beside the **New contact** + button.
3. Select **New group** from the resulting menu.
4. In the **New group** box, enter a name for the group in the **Group name** space.
5. In the **Description** box, enter a description of your group that will inform the invited members of the purpose of the group.
6. Click the arrow on the **Privacy** box and select a setting for who can see the group.
7. *Optional*: To subscribe members to receive updates in their inbox, make sure the **Send all group conversations and events to members' inboxes** box is checked. Clear the box to disable this option.
8. Click the **Create** button.



Teams

Teams is a hub for collaboration in Office 365. You can use Teams to instantly message contacts within your organization, make voice and video calls, hold online meetings, share files, and so much more.

Teams and Channels

A team is a group of people who are joined together to get something done in your organization. It may even be your entire organization. Teams are comprised of channels which are the conversations you have with your teammates. Channels may be dedicated to a specific topic, department, or project. Channels are where the work takes place.

Finding and Joining a Team

1. Click the **App Launcher** button and select **Teams**.
2. Click the **Teams** button.
3. Click the **Join or create a team** shortcut and do one of the following:
   - *To join a team using a code*, enter the code in the **Join a team with code** box.
   - *To join a team without using a code*, hover your mouse pointer over the team and click the **Join team** button.

*Note: You can also click in the **Search Bar**, enter "**/join**", and enter the team name or team code in the box.*

Changing Channel Notifications

1. Locate the channel name that you want to follow in the **Teams** list.
2. Click the **More options** ... button next to the channel name.
3. Select **Channel notifications** from the resulting menu.
4. Click the arrow on the **All new posts** box and select an option.
5. *Optional*: Check the **Include all replies** box to get notified about replies.
6. Click the arrow on the **Channel mentions** box and select an option from the resulting menu.
7. Click the **Save** button.

Starting a Private Chat

1. To send a private chat, click the **New chat** button at the top of the window.
2. Enter the name of the person you want to chat with in the **To** box.
3. Enter the message in the **Type a new message** box and click the **Send** button.

Mute a Chat

When you mute a chat you will no longer receive notifications for that chat. You will still receive messages and an icon will appear next to the names of the participants so you know that the chat has been muted.

1. Click the **More options** ··· button next to the chat that you want to mute.
2. Select **Mute** from the resulting menu.
3. *Optional*: To unmute a chat, click the **More options** ··· button again.
4. Select **Unmute** from the resulting menu.

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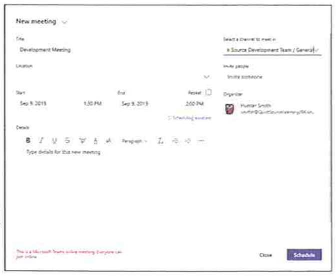
Scheduling a Meeting



1. Click the **Calendar** button.
2. Click the **New meeting** button.
3. Enter a title for the meeting in the **Title** box.
4. Select start and end dates and times in the **Start** and **End** boxes.
5. *Optional*: To make the meeting repeat, check the **Repeat** box and make selections for how often you want the meeting to repeat.
6. Enter details about the meeting in the **Details** space.
7. *Optional*: Click the arrow on the **Select a channel to meet in** box and select a channel from the resulting menu.
8. Click in the **Invite someone** box and begin entering the name of the person that you want to invite.
9. Click the **Schedule** button when you are finished.

Scheduling a Private Meeting

Private meetings only include the people who were invited to the meeting when it was scheduled. Every private scheduled meeting creates a new chat thread for everyone in the meeting.

1. Click the **Calendar** button.
2. Click the **New meeting** button.
3. Make sure **None** is selected in the **Select a channel to meet in** box.
4. Fill in additional information for the meeting and invite the people that you want in the meeting.
5. Click the **Schedule** button.

Starting a Call From a Chat

You can make calls with anyone in your organization from a chat without having to host a meeting. These calls are private and won't appear in your team conversation but entries will appear in your chat.

1. Click the **Chat** button.
2. Select the chat that contains the person you want to call.
3. Click the **Video call** or **Audio call** button to start a call with the people in the chat.

*Note: If you're not currently in a chat with someone you can enter "**/call**" in the search bar and enter the name of the person you want to call.*

Explore the Files List

Click the **Files** button to see all of your files.

- The **Recent** view shows all Office 365 documents that you have viewed or edited recently.
- The **Microsoft Teams** view shows files that have been created or edited within your favorite channels.
- The **Cloud storage** section shows all of the cloud services you have connected to Teams. Click on one to see your cloud files.

*Note: You can also view your recent files by typing "**/files**" in the search bar.*

Upload a File to a Channel

1. Click the **Teams** button.
2. Select the channel that you want to upload the file to.
3. Click on the **Files** tab.
4. Click the **Upload** button.
5. Locate the file that you want to upload and click the **Open** button.

SharePoint

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

Creating a New Page

1. Click the **App Launcher** button and select **SharePoint**.
2. Open the site where you want to create the page.
3. On the **Home** page, click the **New** + button.
4. Select **Page** from the resulting menu.
5. Select a template in the **Templates** section or click **Blank**.
6. Click the **Create page** button.
7. Click in the **Name your page** space and enter a name for the page.
8. Click the **Save as draft** button to save the page for editing later, or the **Publish** button to make the page live.

*Note: You can also click the **Pages** shortcut on the **Quick Launch** pane and click the **New** + button.*

Deleting a Page

1. Click the **Pages** shortcut on the **Quick Launch** pane.
2. Hover your mouse over the page you want to delete and click the check mark that appears.
3. Click the **Delete** button.
4. Click the **OK** button to confirm deletion.

Renaming a Page

1. On the page you want to rename, click the **Edit** button.
2. Enter a new name for the page over the existing name.
3. Click the **Save as draft** or **Publish** button.

Note: There are some pages that you cannot rename.

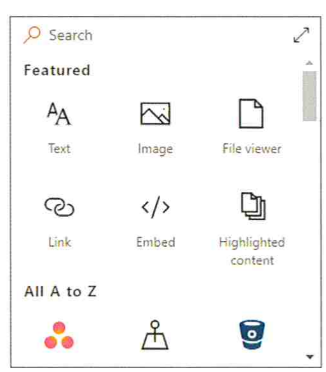
Editing a Page

1. Click the **Pages** shortcut on the **Quick Launch** pane.
2. Click on the page you want to edit.
3. Click the **Edit** button in the upper-right corner of the page.
4. Make changes to the page and click the **Save as draft** or **Publish** button when you are finished.

*Note: To discard your changes and stop editing the page click the **Discard changes** button. Click the **Yes** button to confirm.*

Adding a Web Part

1. Open the page you want to add the web part to.
2. Click the **Edit** button.
3. Hover your mouse pointer over the page until a **plus sign** appears and click the plus sign.
4. Select a web part from the list that appears.
5. Repeat to add additional web parts.



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Creating a New Document

1. Click the **Documents** shortcut in the **Quick Launch** pane.
2. Click the **New** + button and select the type of document you want to create from the resulting menu. A new window will open with the authoring program for the type of document you have selected.
3. *Optional*: To rename the document click on the existing name in the bar at the top of the document. Enter a new name and press the *Enter* key.
4. Enter and format information in the document. The document will be saved automatically.
5. Click the **Close** button on the browser window to close the authoring program and return to your SharePoint window.

Creating a New Folder

1. Click the **Documents** shortcut on the **Quick Launch** pane.
2. Click the **New** + button and select **Folder** from the resulting menu.
3. Enter a name for the folder in the **Enter your folder name** box.
4. Click the **Create** button.

Uploading a Document

1. Click the **Documents** shortcut in the **Quick Launch** pane.
2. Click the **Upload** ⤒ button and select **Files**, **Folder**, or **Template** from the resulting menu.
3. Locate and select the item you want to upload and click the **Open** button.

*Note: To quickly upload a document, drag the file into the **Documents** area.*

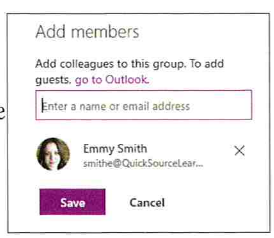
Downloading a Document

1. Click the **Documents** shortcut in the **Quick Launch** pane.
2. Hover your mouse pointer over the document you want to download and click the check mark that appears.
3. Click the **Download** ⤓ button.
4. Depending on your browser you may be prompted to save the document at the bottom of your browser window.

Editing Site Information

1. Click the **Settings** ⚙ button on the **Nav Bar**.
2. Select **Site information** from the resulting menu.
3. *Optional*: To change the site name, click in the **Site name** box and enter a new name.
4. *Optional*: Click in the **Site description** box and enter a description for the site.
5. *Optional*: Click the **Privacy settings** button and select a privacy setting from the resulting menu.
6. Click the **Save** button.

Adding Members



1. On the **Home** page click the member number in the top-right corner of the page.
2. Click the **Add members** button in the pane that appears.
3. Click in the **Enter a name or email address** box and enter the member information or select from the list that appears.
4. Click the **Save** button.

OneDrive

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

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Uploading a File

1. Click the **App Launcher** button and select **OneDrive**.
2. Click the **Upload** ⤒ button, and select **Files**.
3. Select the file you want to upload.
4. Click the **Open** button.
5. The file will appear in the **Files** pane.

Creating a File

1. Click the **App Launcher** button and select **OneDrive**.
2. Click the **New** + button.
3. Select the type of file you would like to create from the resulting menu, including **Word document**, **Excel workbook**, **PowerPoint presentation**, and other options.

Sharing a File

1. Click the **App Launcher** button and select **OneDrive**.
2. Check to select the document you want to share in the **Files** pane.
3. Click the **Share** button.
4. Enter the names of users with whom you wish to share the document in the **Enter a name or email address** box.
5. *Optional*: To make changes to who can view or edit the document, click the arrow on the **Anyone with the link can edit** box and select options.
6. *Optional*: To include a message, enter text in the **Add a message** space.
7. Click the **Send** button.

Creating a Folder

1. Click the **App Launcher** button and select **OneDrive**.
2. Click the **New** + button.
3. Select **Folder** from the resulting menu.
4. Enter a name for the new folder in the **Enter your folder name** box.
5. Click the **Create** button. Your new folder will appear in your **Files** list.

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

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