

Quick Reference Guide

About

What is Office 365?

Office 365 is a web-based subscription service that gives you anywhere-access to MS Office tools and applications, such as Word, Excel, Access, Publisher, PowerPoint and Outlook.

What can I do with it?

Depending on the level of subscription selected, you may be able to:

- Work from anywhere using your PC, Mac or mobile device
- Create a website that is specific to your organization and customize it to promote your company brand
- Collaborate on project files – with SharePoint, file sharing is fast and simple and users can access files from almost anywhere
- Access emails, look up contacts and share calendars from wherever you are
- Host online conference meetings with real-time note taking, screen sharing and HD video conferencing
- Access, edit and share Word, Excel and PowerPoint files from your mobile device using Office Web Apps

What else should I know?

- Office 365 is easy to set up and receives automatic updates
- Your files are automatically backed up online
- Office 365 has built-in anti-malware protection and spam filters
- Round-the-clock IT-level web and phone support is available
- Guaranteed 99.9% uptime



With OneDrive, you can store and access files from anywhere, and set permissions so that you can control who accesses and edits what.

Basics

Accessing your Office 365 account

If your network administrator has set up an Office 365 account for you and your organization, logging into your account is really easy:

- Navigate to your Office 365 login page, using the link provided to you or by typing <https://login.microsoftonline.com> into your address bar on your web browser
- On the sign in page, fill in your credentials and click **Sign In**

Setting up your mobile device

A great feature of Office 365 is that it allows you to access files and collaborate with team members from certain mobile devices – like the Windows Tablet, iPhone, Android or Blackberry smartphone.



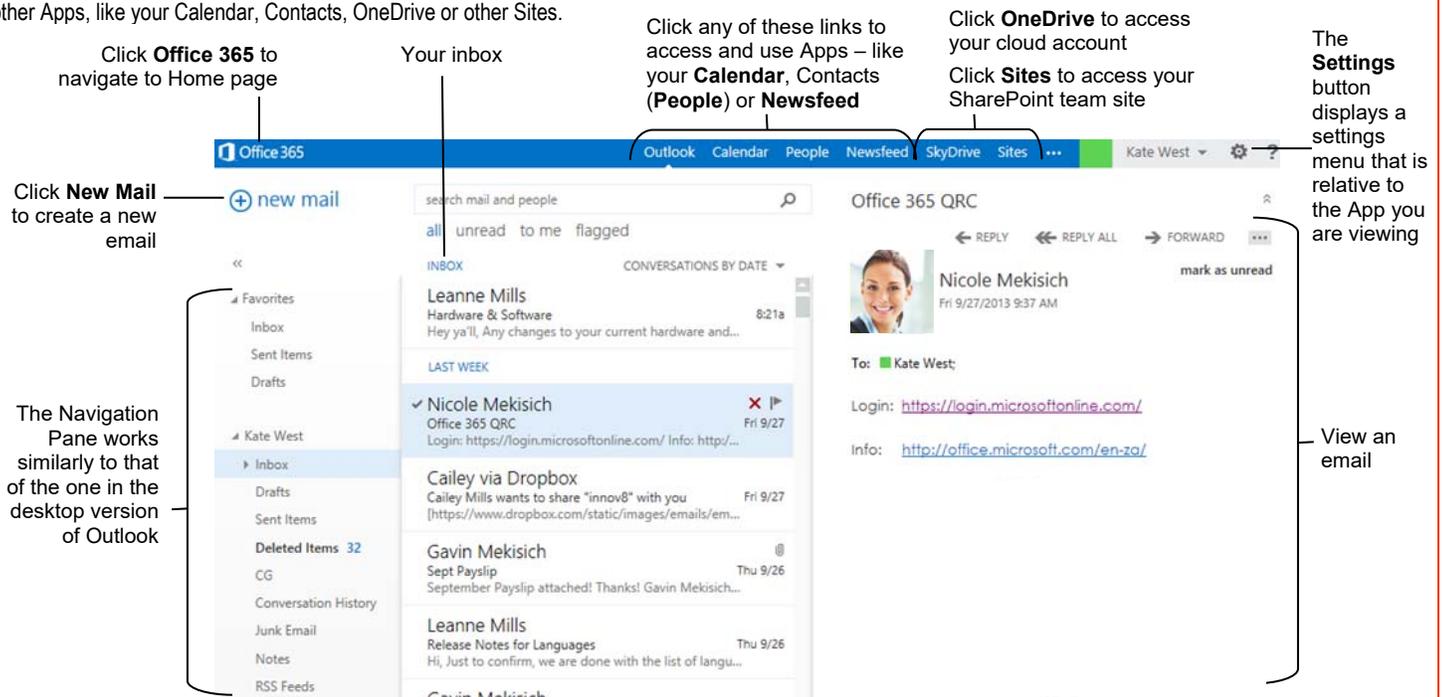
To connect Office 365 to your mobile device:

- On your Office 365 account home page, click the **Settings** button and select **Office 365 Settings** from the drop menu
- On the Office 365 settings page, click **Get Started** from the list of options
- Select **Phone & Tablet** on the Get Started with Office 365 page
- Options appear near the bottom of the screen – choose your mobile device from the list of options available
- The Office 365 help window opens and displays instructions for your particular device. Follow the instructions to complete setup

You should now be able to access your account from your mobile device. If prompted, enter in your credentials.

Outlook Web App

When you log into your Office 365 account, your page will by default display your Outlook Web App. From here, you can view or send emails, as well as access other Apps, like your Calendar, Contacts, OneDrive or other Sites.



Click **Office 365** to navigate to Home page

Your inbox

Click any of these links to access and use Apps – like your **Calendar**, **Contacts (People)** or **Newsfeed**

Click **OneDrive** to access your cloud account

Click **Sites** to access your SharePoint team site

The **Settings** button displays a settings menu that is relative to the App you are viewing

Click **New Mail** to create a new email

The Navigation Pane works similarly to that of the one in the desktop version of Outlook

View an email

Using OneDrive with Office 365

OneDrive works like an online storage site, where you and your team members can access, edit and share files, depending on your permission levels. To get to your OneDrive site, click the **OneDrive** link at the top of your Office 365 home page.

Contextual tabs allow you to perform various functions depending on the App you are using

The screenshot shows the Office 365 interface with the SkyDrive app selected. The top navigation bar includes Outlook, Calendar, People, Newsfeed, SkyDrive, and Sites. The SkyDrive app has contextual tabs for BROWSE, FILES, and LIBRARY. The main area displays 'Documents' for user 'Kate West' at 'innov8'. A search bar is present with the text 'Search everything'. A 'new document or drag files here' button is visible. A list of documents is shown, including 'Project X' and 'Shared with Everyone'. A sidebar on the left lists 'My Documents', 'Followed Documents', 'Shared with Me', and 'Recent Documents'.

Click **New Document** to create or upload a new file

Select a file or library to work from

Search your site

Select a file from the library to open it

Creating a file with Web Apps

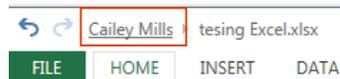
With Office 365, you are able to create, edit and access files from wherever you are. Your shared files are stored on your team site with SharePoint or on your OneDrive, depending on which one your company uses.

Creating a new file

To create a new file from your OneDrive site using Office 365 Web Apps:



- Navigate to your OneDrive site by clicking the **OneDrive** link at the top of the page. Click the **New Document** link on the page
- The Create a New File menu opens. Select the appropriate Web App for the file (Word, Excel, PowerPoint, etc.) you want to create
- On the Create a New Document window, insert a name for your file and click **OK**
- The selected Web App opens. You'll notice that the Web App uses basically the same functionality as a desktop based version. Go ahead and create your file
- Save the file by clicking the **Save** icon at the top left of the screen. If you wish to save a local copy of the file, click **File** → **Save As** → **Download**. If you are prompted, click **Save**. The file is downloaded into the default folder where your other downloads are usually stored
- To navigate back to OneDrive, click your name in the top right of the screen
- Your new file is listed in the OneDrive folder you chose



Hint: If you need to use a feature that is not available in the Web App, click the **Open in Word** tab on the Ribbon. The tab will change depending on the Application you are working in. Remember, if you work locally, you will need to have the desktop version of the application and you will need to save and upload the file to SharePoint or OneDrive.

Editing and uploading a file

Editing a file

To edit a shared file:

- Navigate to the folder on OneDrive where the file is stored and click on the file
- The file opens in a relevant Web App. Click **Edit Document** and select **Edit in Word Web App** from the menu (note that the name of the App will change depending on which one you are working in)
- Your file opens. Edit your file
- When you are finished editing your file, click the **Save** button. Remember that if you are working in a local version, you need to save the file by clicking **File** → **Save As**, and selecting the OneDrive location that it needs to be stored in. If necessary give your file a new name and then click **Save**. Your file is saved to OneDrive

Uploading a file to OneDrive

If you created a file locally or simply want to add an existing file to a folder, you can upload it to OneDrive.



- On OneDrive, select the Folder that want to upload the file to. Click the **Files** tab on the Ribbon and select **Upload Document**; or click the **+ New Document** link on the page and select **Upload Existing Document** from the contextual menu
- Click **Browse...** and find the file you want, select it and click **Open** → **OK**
- If you want to upload a file from a desktop version of Office, open the file in Office and click **File** → **Save As** and select to upload to your OneDrive. Click **Browse** and select the folder on OneDrive that you are uploading the file to – then click **Save**

Note: SharePoint works in a similar way to OneDrive. If you wish to create or upload a file there, navigate to your SharePoint site by clicking the **Sites** link at the top of the page and then selecting **Team Site**. Your SharePoint team site opens. Follow the same steps, as above, to create, edit or upload a file.