

Microsoft Office 365 for Small Businesses Introductory User Guide

 Microsoft®
Office 365

Microsoft

Contents

This guide provides a step-by-step overview of Microsoft Office 365 for professionals and small businesses.

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Introduction

Microsoft Office 365 for small businesses is a set of Web-enabled tools that lets you access your e-mail, important documents, contacts and calendars from virtually anywhere and on almost any device. Designed for organisations with 5 to 50 staff, the service brings together online versions of the best communications and collaboration tools from Microsoft plus Microsoft Office Web Apps at a price that small businesses can afford. Office 365 works seamlessly with the programs you already know and use — Microsoft Outlook, Microsoft Word, Microsoft Excel and Microsoft PowerPoint. This is the much-anticipated cloud service that gives small businesses the capabilities and efficiencies to grow and target more rapid success.

Powerful security features from Microsoft Corp. help protect your data, and when the service is released for general availability, it will be backed with a 99.9 percent uptime guarantee. Office 365 was designed to be easy enough for small businesses to run without specialized IT knowledge.

Why Office 365 is Right for Your Organisation

Virtually Anytime, Anywhere Access

Office 365 helps you access your e-mail, important documents, contacts and calendar on nearly any device from almost anywhere. It frees you to work where and when you choose, allowing you to respond to important requests right away, no matter where you are. Because you can use your mobile device to access e-mail and documents, you won't have to hurry back to the office (or look for a Wi-Fi hot spot if you are using your computer). When traveling, you can access your e-mail and even edit online documents from most popular Web browsers.¹

Easy to Use

Office 365 is easy to try, simple to learn and straightforward to use. It works seamlessly with the programs you know and use most, including Outlook, Word, Excel and PowerPoint. With Office 365, you can choose which tools to use.

Improved Collaboration

With Office 365, you can create a password-protected portal to share large, hard-to-e-mail files both inside and outside your organization, giving you a single location to find the very latest versions of files or documents, no matter how many people are working on them.

Security and Reliability

Powerful security features from Microsoft help protect your data, and Office 365 will be backed with a 99.9 percent uptime, financially backed guarantee when commercially released (general availability). Office 365 helps safeguard your data with enterprise-grade reliability, disaster recovery capabilities, data centers in multiple locations and a strict privacy policy. It also helps protect your e-mail environment with up-to-date antivirus and anti-spam solutions.

¹ Access from mobile devices requires Wi-Fi capability or depends on carrier network availability.

Office 365 Services Overview

E-Mail, Calendar and Contacts



Office 365 provides you with access to e-mail, calendar and contacts from virtually anywhere at any time on desktops, laptops and mobile devices — while helping to protect against malicious software and spam.

- Easily manage your e-mail with 25GB mailboxes, and send e-mails up to 25MB in size.
- Work from almost anywhere with automatically updated e-mail, calendar and contacts across devices you use most, including PCs, Macintosh computers, iPhone, Android phones, Blackberry smartphones,² Microsoft Windows Mobile, and Windows Phones³
- Connect with Microsoft Outlook 2010 or Office Outlook 2007 and use all the rich Outlook functionality you already know and use, whether you are connected to the Internet at home or in the office or are working offline.
- Access your e-mail, calendar and contacts from nearly any Web browser while keeping a rich, familiar Outlook experience with Outlook Web App.
- Use your existing domain name to create customized e-mail addresses powered by Exchange Online (e.g., mark@contoso.com).
- Easily schedule meetings by sharing calendars and viewing them side by side, seeing your colleagues' availability and suggested meeting times from your calendar.
- Help protect your organization from spam and viruses with Microsoft Forefront Online Protection for Exchange, which includes multiple filters and virus-scanning engines.

Team Sites and Public Websites



SharePoint Online helps you create sites to share documents and information with colleagues and customers. It lets you do the following:

- Work together effectively by sharing team documents and tracking project milestones to keep everyone in sync
- Keep your team's important documents online so the latest versions are always at hand
- Provide all team members with online access to critical business information whenever and wherever they need it
- Easily protect critical business information by controlling who can access, read, and share documents and information
- Design and maintain a simple professional-looking public website with a custom domain name (e.g., www.contoso.com)

² Users of Blackberry Internet Service get push e-mail and can add calendar and contacts to their Blackberry device through a wired sync with Outlook on the PC.

³ Access from mobile devices depends on carrier network availability.

Office Web Apps



Office Web Apps are convenient online companions to Word, Excel, PowerPoint and Microsoft OneNote that offer you an easy way to access, view and edit documents directly from your Web browser.

- Simultaneously edit Excel spreadsheets and OneNote notebooks with others in real time and see exactly who is editing and viewing your documents.
- Access and view files from your mobile device.
- View documents in high fidelity.
- Ensure that viewers see files with consistent formatting when moving between Office Web Apps and desktop Office applications.

Instant Messaging and Online Meetings



Microsoft Lync helps you find and quickly connect with the right person from within the Office applications you already use.

- Find and connect with colleagues and customers from virtually anywhere via rich presence, instant messaging, audio-video calls and online meetings.
- Use the presence indicator to see when co-workers and partners are online and available.
- Make PC-to-PC voice and video calls with colleagues and customers.
- Conduct rich online meetings — including audio-, video- and webconferencing — with people both inside and outside your organization.
- Share your desktop, online whiteboards and presentations with colleagues and partners inside and outside your organization.
- Click to communicate with other users of Office 365, Microsoft Windows Live and MSN Messenger.

About My Office 365



Phone: 01342 410223

Web: www.my-office-365.com

email: sales@my-office-365.com

My Office 365 is brought to you by Microsoft Gold Partner Ballard Chalmers - recognised as Microsoft Online Services delivery experts. Our aim is to provide small and medium sized organisations with end-to-end services, to ensure they can capitalise on the revolutionary Microsoft Office 365 'cloud' service, delivered over the Web.

We mainly focus on new clients that are seeking a comprehensive, secure and low-cost solution to their IT needs, so they can avoid the time, cost and hassle of maintaining their own IT, software and servers.

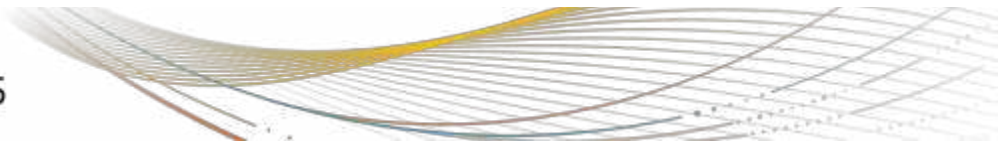
- A range of Microsoft Office 365 product packages to suit all needs, budgets and organisations
- Costs from just £4.25 per user per month with pay-as-you-go Office 365 subscription licensing
- Try before you buy - FREE 30 day trial on the entire range of Microsoft Office 365 packages

Click here for your FREE 30 day trial - explore all the features in Microsoft Office 365 'Plan P' designed for small businesses.

You can easily continue using Office 365 beyond the 30-day trial period if you choose to purchase.

Help Resources

Office 365 Help	Help and how-to information for Office 365
Office 365 Quick Start Guide	Get started with mail, contacts, calendar, instant messaging and document sharing
Office 365 Community	Forums where you can receive answers to questions, report service issues, bugs and suggestions and the Office 365 Beta blog and wiki.



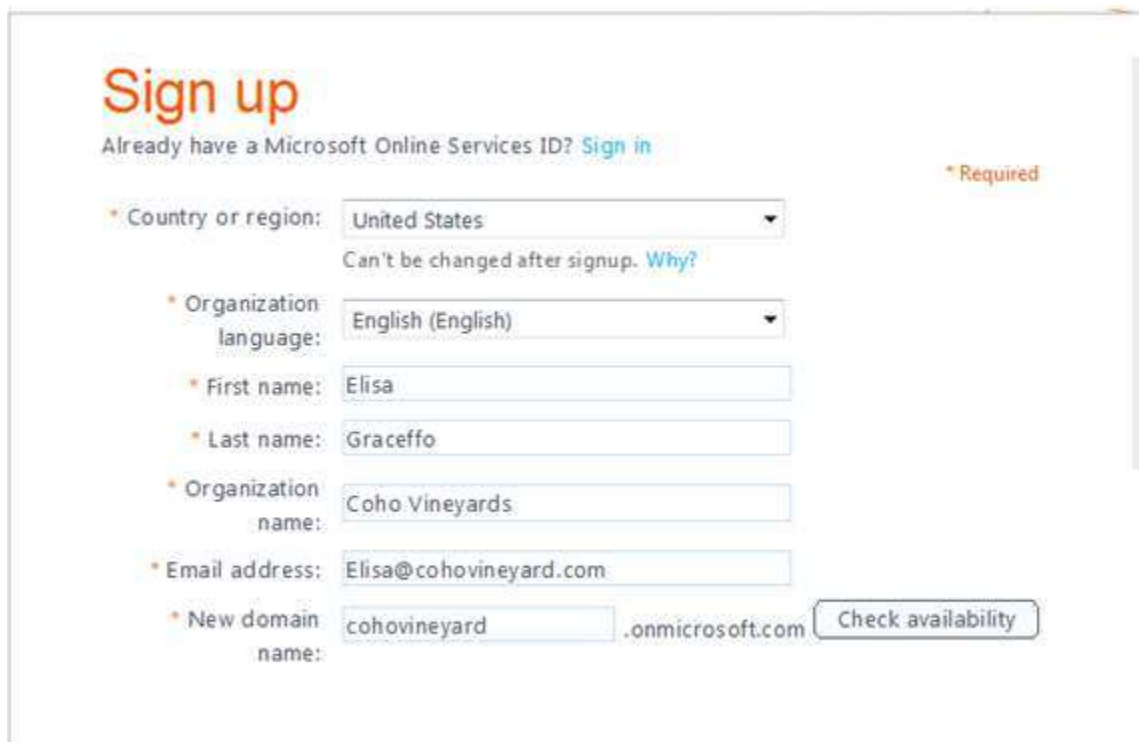
1: Sign Up and Get Started With Your Office 365 Account

Sign Up and Access Your Office 365 Account

Sign up for an account by accessing the URL that My Office 365 has provided to you. Please note that this URL can only be used to create a single Office 365 for professionals and small businesses account.

Note: You will need a separate URL to create an Office 365 for enterprises account should you want to do so.

Once you have accessed the URL, enter your country or region, language, name, organization name, e-mail address, and the name you want for your new subdomain on the Office 365 beta service:



The screenshot shows a web form titled "Sign up" with the following fields and options:

- Country or region: United States (dropdown menu, marked as required with an asterisk). Below the field, it says "Can't be changed after signup. Why?"
- Organization language: English (English) (dropdown menu, marked as required with an asterisk).
- First name: Elisa (text input field, marked as required with an asterisk).
- Last name: Graceffo (text input field, marked as required with an asterisk).
- Organization name: Coho Vineyards (text input field, marked as required with an asterisk).
- Email address: Elisa@cohovineyard.com (text input field, marked as required with an asterisk).
- New domain name: cohovineyard (text input field) followed by .onmicrosoft.com (pre-filled text) and a "Check availability" button (marked as required with an asterisk).

Click on **Check Availability** to confirm that your preferred subdomain name is available. Office 365 also enables customers to add a professional domain (such as cohovineyard.com) that they own. The professional domain can be used with e-mail and Web addresses. You may consider this a temporary address.

Next, enter a name for your Microsoft Online Services ID and select a strong password:

* New domain name:
The domain is available: cohovineyard.onmicrosoft.com

* New Microsoft Online Services ID: .onmicrosoft.com
Only letters, numbers, and hyphens (-). No spaces.

* Create new password:
Minimum of 6 characters. Case sensitive.
strong

* Confirm new password:

You will be prompted to enter verification text from a picture depicting numbers and/or letters. Next, decide if you want to receive offers from Microsoft and Microsoft partners and then click on the **I accept** button at the bottom of the page to create your account.

Clicking "**I accept**" means that the individual clicking has read and understood the [Microsoft Online Services PreRelease Agreement](#) and the [Privacy Statement](#). If "Customer" is an organization, the individual clicking "I accept and continue" represents they have the authority to bind Customer to these terms and that Customer agrees to be bound by the Microsoft Online Services Agreement terms and its linked websites.

After you successfully sign up, you will receive a welcome e-mail that will tell you how to access your Office 365 account.

If you have any problems during the sign-up process, please contact Mike Mitchell (mikem@waggeneredstrom.com) and Joel Steinfeld (jsteinfeld@waggeneredstrom.com). You can also call the Sign Up Support team at (866) 676-6546 between 9 a.m. and 5 p.m. Pacific Time.

Office 365 Prerequisites

1. [Microsoft Office Professional Plus](#) (Recommended)

IMPORTANT: Read all the notes below before installing.

Microsoft Office 365 is designed to work seamlessly with Microsoft Office 2010 and 2007. For the best experience, we recommend installing Office Professional Plus, which is available for subscription purchase through the admin portal.

- Be sure to back up all your important data before participating in this beta program.
- It is not required to uninstall versions of Office before Office 2010, such as Office 2007 or 2003, before installing Office Professional Plus. Office 2010 will need to be uninstalled to use the Office Professional Plus full product.
- If you are offered an upgrade upon installation, Office Professional Plus (with the exception of Microsoft Outlook and Microsoft SharePoint Workspace) can co-exist with previous versions of Office by selecting that option from within the Customize menu. Microsoft Outlook and Microsoft SharePoint Workspace cannot co-exist with previous versions, so you will need to select one version of the program to have installed on your computer.
- Before installing Office Professional Plus, please be sure you have the CD-ROMs/DVDs and product keys necessary should you later choose to reinstall your current version of Office.
- If you choose not to install Office Professional Plus, you can still participate in the beta; however, you will not be able to complete all the walkthroughs that involve using the Office applications with Office 365.
- Please review Microsoft Office Professional Plus [system requirements](#).
- See additional information in our [Frequently Asked Questions](#).

2. [Using Office Desktop Applications](#)

For the best experience with Office 365, a set of required components and updates must be applied to each workstation. To simplify the installation and maintenance of these components and updates, Microsoft provides an installable piece of software — called Office desktop setup — at no charge. These updates are required for all workstations that use rich clients (such as Microsoft Office 2010) and connect to the Microsoft Online Services. Office desktop setup provides multiple benefits:

- Preparing PCs to connect to Office 365 by applying required updates
- Configuring Outlook and Microsoft Lync for use with Office 365

See also: [Troubleshoot installation issues for Services Connector](#)

3. [Microsoft Lync](#)

With Lync, you can exchange instant messages, initiate audio and video webconferences, and see presence information for your colleagues. You can also set up Lync to enable users to communicate with others outside your organization who use Office 365 or Windows Live Messenger.

Getting Started with Office 365

Explore the Admin and Home pages

The Office 365 Admin page will help you navigate many of the important administrative functions of the service. The Home page, available to both admin and nonadmin users, will help you navigate many of the services included in Office 365. Please familiarize yourself with these pages because they are the starting point for completing many common tasks in the service.

Log on to the Office 365 service, and click on the **Admin** and **Home** links at the top of your screen:

[Home](#) [Outlook](#) [Team Site](#) | [Admin](#)

Note: If the **Outlook** and **Team Site** links are dimmed as shown above, these features are still being configured. Check back or reload the page in a few minutes. For a complete list of known issues, please view the [Release Notes for Office 365 Beta for small businesses \(English\)](#).

Verify That You Have Access to Your E-Mail, Team Site and Microsoft Lync

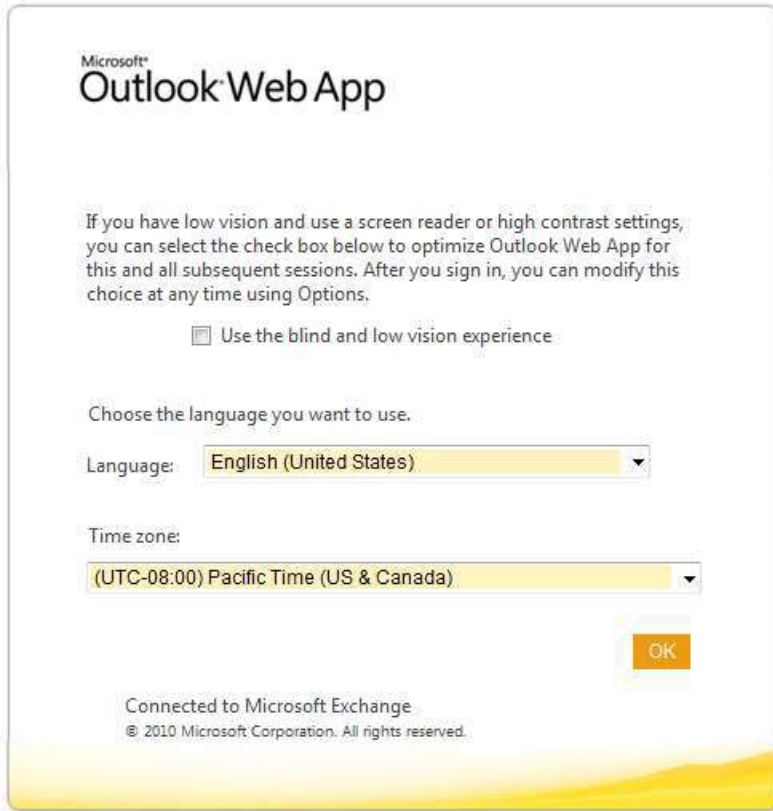
E-mail

Access your new Microsoft Office 365 e-mail inbox in your browser through the Microsoft Outlook Web App, a Web-based version of Microsoft Office Outlook. In Walkthrough 2 (below), you will learn how to access your Office 365 e-mail through your Outlook desktop application. All users will have a free noncustom e-mail address (e.g., joe@contoso.onmicrosoft.com). Customers will have the option to use their existing domain name to create professional e-mail addresses (e.g., joe@contoso.com).

1. Click on **Inbox** on the Home page:

Outlook
Read email and access your Outlook calendar, contacts, and tasks.
[Inbox](#) | [Calendar](#) | [Options](#)

2. You will be prompted to select your language, time zone, and whether you want to use accessibility features.



3. Make your selections, and click on **OK** to access your Inbox.

Team site

The Office 365 Microsoft SharePoint Online-based team site makes collaboration easier with a password-protected portal to share large files both inside and outside your organization. Please verify that you can access your team site from within the Web browser.

Click on **Team Site** on the Home page.

[Home](#) [Outlook](#) [Team Site](#) | [Admin](#)

Note: If the Team Site link is dimmed, this feature is still being configured. Check back or reload the page in a few minutes.

Microsoft Lync

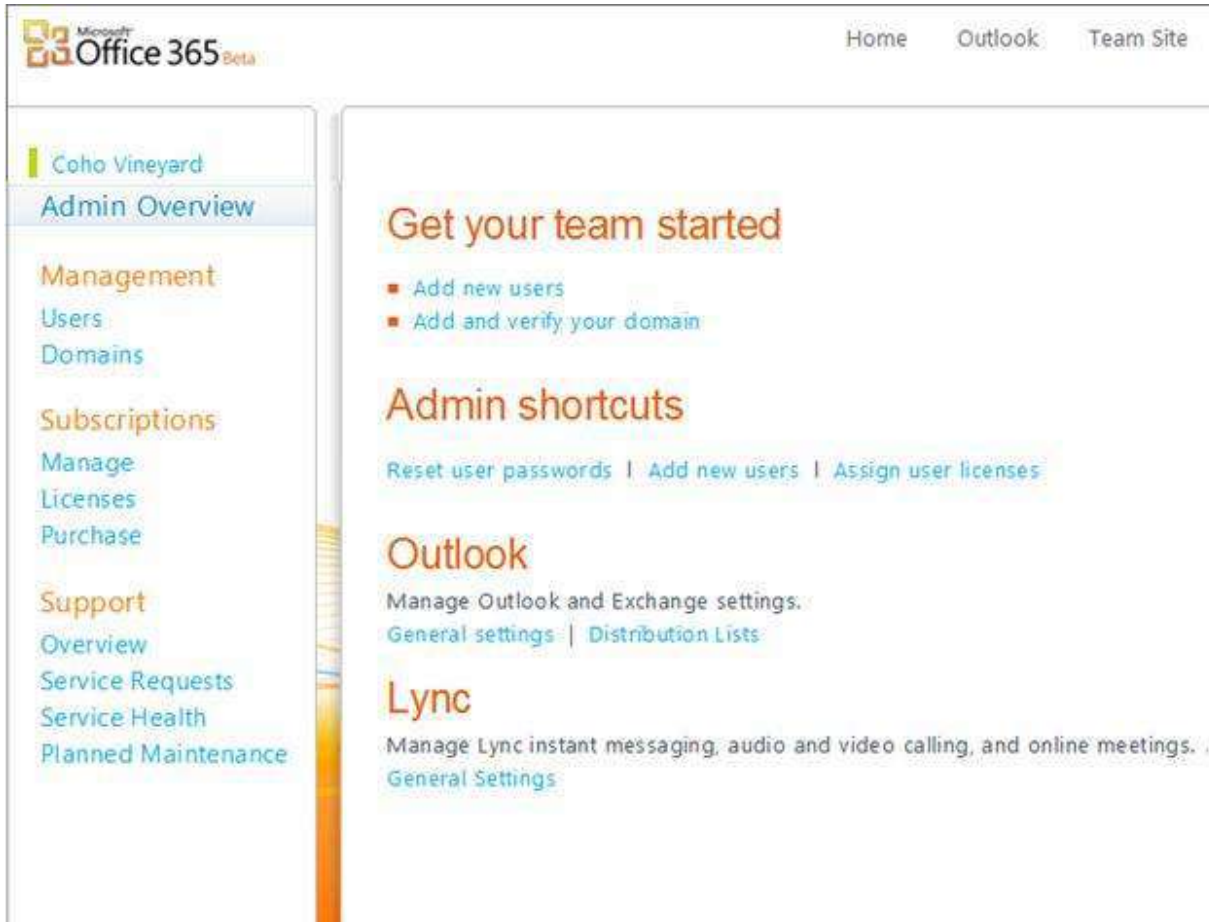
With Lync, users can send and receive instant messages, conduct PC-to-PC audio and video calls, conduct online meetings with up to 50 participants, and view presence information for their colleagues.

Launch the Microsoft Lync 2010 desktop application, and sign in to the service. Please note: If you have not installed Lync, please follow the instructions in Office 365 Beta Pre-Requisites above.

Add a new user to your account

Create a new user on your account. Save the information for the new user, making a note of the ID and password assigned to the user. We recommend that you set up a new user as a test, but you should also feel free to create new users for colleagues in your organization who would like to test Office 365.

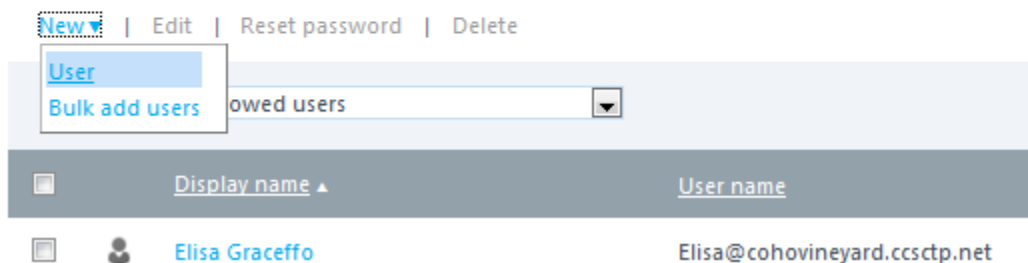
1. On your **Admin** page, click on **Users** under **Management** on the left side of your screen.



2. Now click on the **New** button and select **User**.

Users

Create and manage users for your company. You can also bulk-add users.
Manage external contacts in Exchange Online: [Learn more](#)



3. Next enter the name, display name and user name for the account you're creating.

New user

1. Properties

- 2. Settings
- 3. Licenses
- 4. E-mail
- 5. Results

Properties

Name

* Required fields

First name:	<input type="text" value="Mike"/>
Last name:	<input type="text" value="Nash"/>
* Display name:	<input type="text" value="Mike Nash"/>
* User name:	<input type="text" value="Mike"/> @ <input type="text" value="cohovineyard.ccsctp.net"/>

4. Optionally, you can add any of these **Additional properties** by clicking on the blue arrow to expand the entry fields list.

Additional properties ▲

Job title:	<input type="text"/>
Department:	<input type="text"/>
Office number:	<input type="text"/>
Office phone:	<input type="text"/>
Mobile phone:	<input type="text"/>
Fax number:	<input type="text"/>
Street address:	<input type="text"/>
City:	<input type="text"/>
State or province:	<input type="text"/>
ZIP or postal code:	<input type="text"/>
Country or region:	<input type="text"/>

5. When you are done, click on **Next** to review **Settings**.

New user

1. Properties
2. **Settings**
3. Licenses
4. E-mail
5. Results

Settings

Assign permissions

Do you want this user to have administrator permissions? [Learn more about administrator permissions](#)

- No
 Yes

Set user location

All required

The services available vary by location. [Learn more about licensing restrictions](#)

(Select a location)

6. Leave **Assign permissions** set to **No** unless you want to grant this user administrator privileges. At minimum, you need to select a user location here and then click on **Next** to review **Licenses**.

New user

1. Properties
2. Settings
3. **Licenses**
4. Email
5. Results

Assign licenses

- | | |
|---|-----------------------------|
| <input type="checkbox"/> Microsoft Office 365 Plan P1 | 23 of 25 licenses available |
| <input type="checkbox"/> Lync Online (P1) | |
| <input type="checkbox"/> SharePoint Online (P1) | |
| <input type="checkbox"/> Exchange Online (P1) | |
| <hr/> | |
| <input type="checkbox"/> Office Professional Plus | 24 of 25 licenses available |

7. To provide the new user with access to e-mail, SharePoint and Lync, you must check the box next to **Microsoft Office 365 Beta for small businesses** to assign license. Optionally, you can also grant access to a purchased license of Microsoft Office Professional Plus. Click on **Next** to assign a password.

New user

1. Properties
2. Settings
3. Licenses
4. **Email**
5. Results

Send results in email

The results (user names and temporary passwords for users who have them) will be displayed on the next page. You can also send the results in email to yourself or someone else; enter the email addresses of up to five recipients separated by semicolons.

Send email

Note: Passwords are sent in clear text through email.

8. Here you can enter up to five e-mail addresses to send the new user's temporary password. By default, your e-mail address is prepopulated so that you will receive a copy to provide to the user. Add any additional e-mail addresses separated by semicolons (up to five recipients), make sure the **Send e-mail** box is checked, and click on **Create**. This will open a summary page confirming that the account was created and showing you the temporary password.

Note: If you have a number of users to add, you can use the **Bulk add users** option. This will prompt you to download and populate a comma-separated values text file containing all your user data that you then upload and configure.

The screenshot shows the 'Bulk add users' page in the Microsoft Office 365 Admin console. On the left, there is a navigation menu with the following items: 1. **Select file**, 2. Verification, 3. Settings, 4. Licenses, 5. E-mail, and 6. Results. The main content area is titled 'Select a CSV file'. Below the title, there is a text box for 'Path and file name:' followed by a 'Browse...' button. There are two links: 'Download a blank CSV file' and 'Download a sample CSV file'. Below these links, there is a note: 'The column headings in your file must match the column headings in the sample. To change the column headings, use a text editor, such as Notepad.'

Edit the new user's settings, and reset the user's password

Make edits to the user that you created in the previous task. Assign administrator permissions to the user, and add an office phone number to the user's properties. Also, try resetting the user's password. Be sure to make a note of the new password.



1. On the **Admin** page, click on **Users** under **Management** on the left side of your screen. Locate the user that you want to manage.

Users

Create and manage users for your company. You can also bulk-add users.
Manage external contacts in Exchange Online: [Learn more](#)

[New ▼](#) | [Edit](#) | [Reset password](#) | [Delete](#)

View: ▼

<input type="checkbox"/>	<u>Display name</u> ▲	<u>User name</u>
<input type="checkbox"/>	 Elisa Graceffo	Elisa@cohovineyard.ccsctp.net
<input type="checkbox"/>	 Mike Nash	Mike@cohovineyard.ccsctp.net

[New ▼](#) | [Edit](#) | [Reset password](#) | [Delete](#)

2. Click on the user's name to make changes to properties, licenses and other settings. To make the user an administrator, go to the **Settings** section, click on the **Yes** radio button under **Assign permissions** and confirm the e-mail address for service notifications.

Mike Nash

[Properties](#) | [Settings](#) | [Licenses](#) | [More](#)

Assign permissions

Do you want this user to have administrator permissions? [Learn more about administrator permissions](#)

- No
 Yes

E-mail address

This e-mail address is used for important service notifications; for example, billing reminders.

Set sign-in status

- Allowed
User can sign in and access services.
- Blocked
User cannot sign in or access services.

Set user location

The services available vary by location. [Learn more about licensing restrictions](#)

▼

[Cancel](#)

3. To add details such as an office phone number, click on **Properties**.

Mike Nash

[Properties](#) | [Settings](#) | [Licenses](#) | [More](#)

Name

* Required fields

First name:

Last name:

* Display name:

* User name: @

Additional properties ▲

Job title:

Department:

Office number:

Office phone:

Mobile phone:

Fax number:

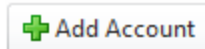
4. When you're done making changes, click on the **Save** button at the bottom of the page.

2: E-Mail, Calendar and Contacts

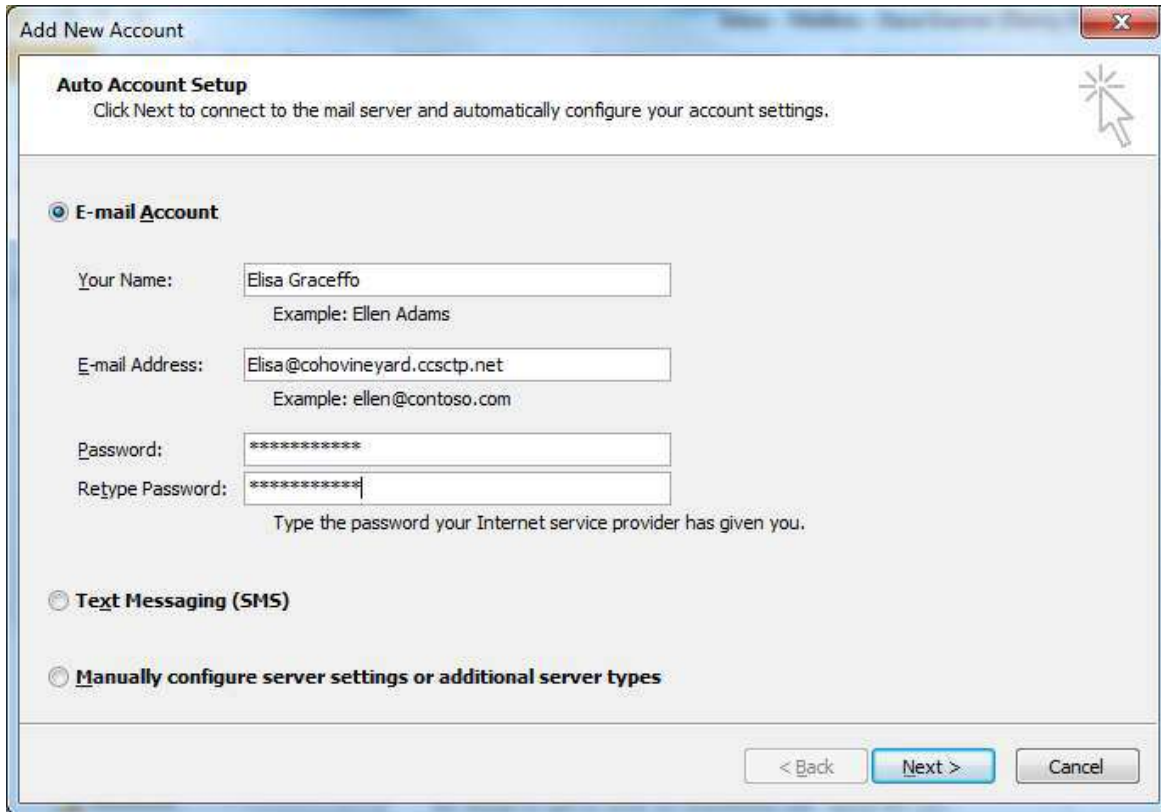
Connect Your Office 365 E-Mail to Your Outlook Desktop Application

Microsoft designed Office 365 to work with the functionality of your desktop version of Outlook e-mail, calendar and contacts. You can set up your Office 365 e-mail to be accessed through your Microsoft Outlook desktop application or through Microsoft Entourage 2008 for Mac.

1. In Outlook 2010, open the **File** tab and click on the **Add Account** button.



2. This opens the **Add New Account** dialog box.



3. Enter your e-mail address and password, and click on **Next**. When the account is done auto-configuring, click on **Finish**.

Set Up and Access E-Mail, Calendar and Contacts on a Mobile Device

Office 365 gives you anywhere access to your e-mail, important documents, contacts and calendar on nearly any device — including iPhone, Android, BlackBerry⁴ and Windows Mobile phones. Office 365 also automatically updates your e-mail, calendar and contacts across supported devices⁵ For assistance, [read the Connect a Mobile Device to E-mail in Office 365 Beta](#) help article.

Access and Send E-Mail Through Outlook and Outlook Web App

Microsoft Outlook Web App is a Web-based version of Outlook that provides the familiar, rich functionality and experience you are accustomed to from the desktop version of Microsoft Outlook. If you are limited by low bandwidth, Outlook Web App is optimized so it minimizes data and bandwidth use. Cross-browser support for Safari, Firefox, Chrome and Internet Explorer ensures that wherever you are connected to the Internet — at home, at the office or on the road — you can access your e-mail once you've followed the steps above to add your account.

Log in to Office 365, and click on **Outlook** at the top of the screen to access Outlook Web App or launch your Outlook desktop application.

Share Calendars Through Outlook or Outlook Web App and Send a Meeting Request

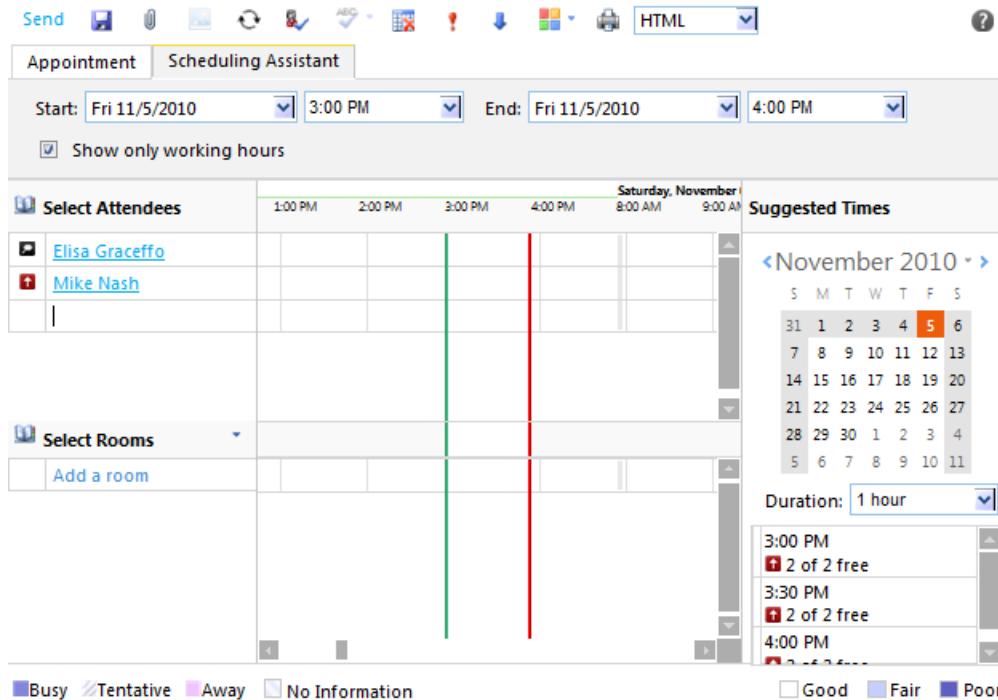
Sharing calendars with colleagues makes scheduling easier with the ability to see colleagues' availability from your Outlook calendar. When you set up a meeting request in Outlook or Outlook Web App, you can use the calendar to see your schedule

⁴ Users of Blackberry Internet Service get push e-mail and can add calendar and contacts to their Blackberry device through a wired sync with Outlook on the PC

⁵ Access from mobile devices depends on carrier network availability.

and to find times that your colleagues are available as well. You can choose to share only whether you are available or not, or the details of your calendar appointments. Note: You can only see the availability of your colleagues who are also on your Microsoft Office 365 Beta accounts. You can still send a meeting request to anyone, but you won't see their free/busy information unless they are in the beta and have been added as users for your organization.

In Outlook or Outlook Web App, create a new meeting request. You will be able to view the calendars of any users that you have created in Office 365 by adding them to the meeting request and clicking on **Scheduling Assistant**.

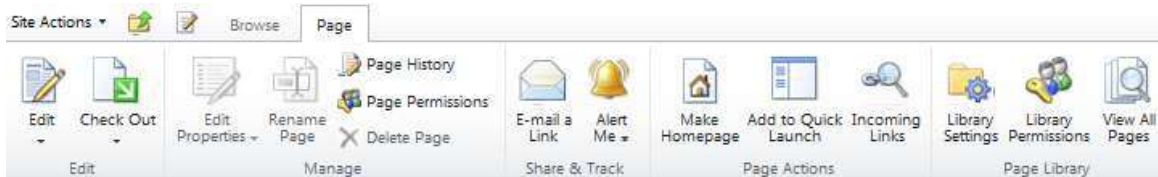


3: Storing and Sharing Documents with SharePoint Online Team Sites

Explore the Navigation of Your Team Site

Office 365 makes it easy for you to share documents with colleagues, customers and partners both inside and outside your organization through SharePoint Online. The team site page will help you navigate many of the important benefits and capabilities of SharePoint Online. Please familiarize yourself with the navigation “ribbon” at the top of your screen. The buttons you use to perform the most common team site actions are found here.

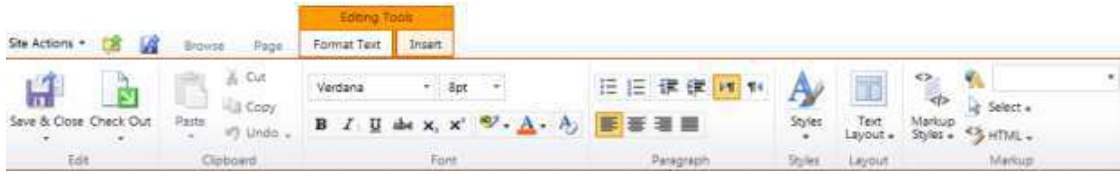
Log in to Office 365 and click on **Team Site**. Explore the navigation ribbon at the top of your screen. Click on the **Page** tab to open editing tools.



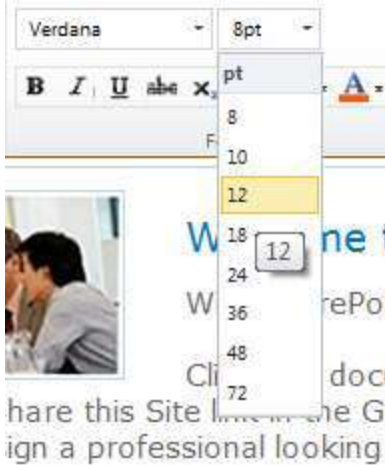
The buttons you use to perform the most common action are found here. Try making the following basic changes to your team site:

Change the Color and Size of the Text

1. Click on the **Edit** button or icon on your navigation ribbon to open the **Editing Tools**.



2. Select the text you want to change and then click on the **Font Size** selector on the ribbon.



3. To change the color, select your text and click on the **Font Color** selector.

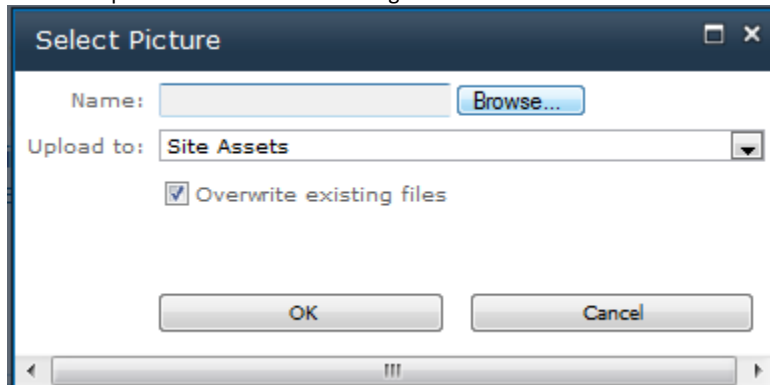


Add an Image to the Page

1. While still in Edit mode, click in the body of the page where you want to add the image. Click on the **Insert** tab and then on the **Picture** button.

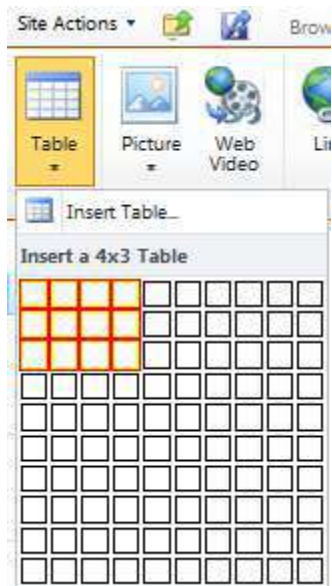


2. Select the source of the picture you want to add — for example, **From Computer** — to open a dialog box that lets you browse or paste the address of the image file.



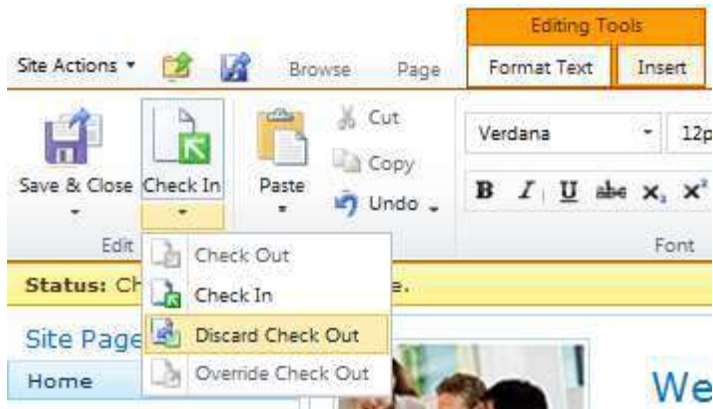
Add a Table to Your Page

1. This is similar to adding a picture. While in Edit mode, click in the body of the page where you want to add the table. Click on the **Insert** tab and then on the **Table** button.



2. Now select the dimensions you want from the drop-down menu and click to insert it.

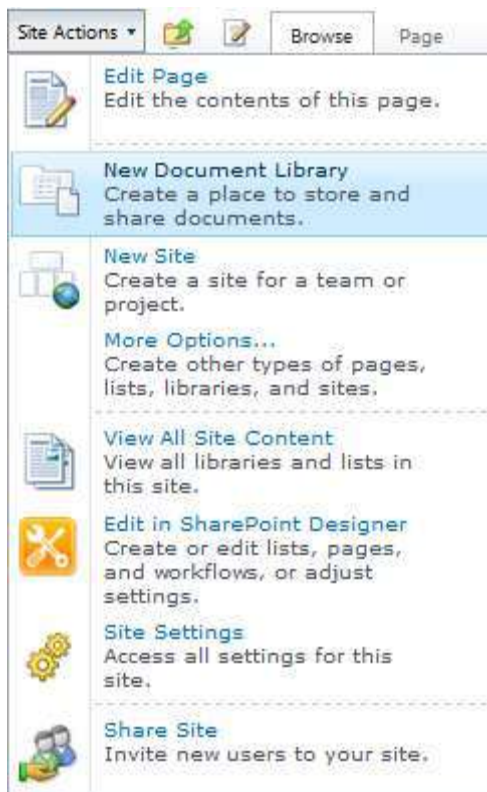
When you're done making changes to your team site page, click on the **Save** icon or go to the **Format Text** tab and click on **Save & Close**. If you do NOT want to keep your changes, click on the Check Out button and select **Discard Check Out**:



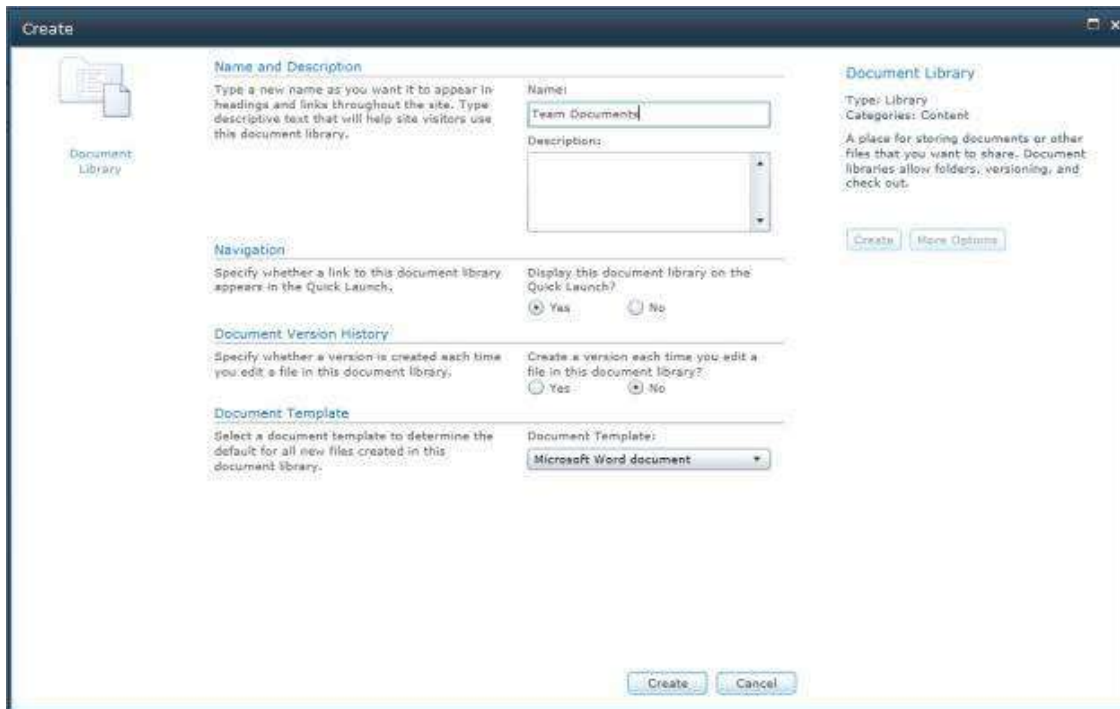
Upload a Document to Your Team Site

A team site gives your organization a single, password-protected location to find the very latest file or document version. Once you upload a document to a team site, you can access it from your Web browser, Microsoft Office desktop applications and supported mobile device.

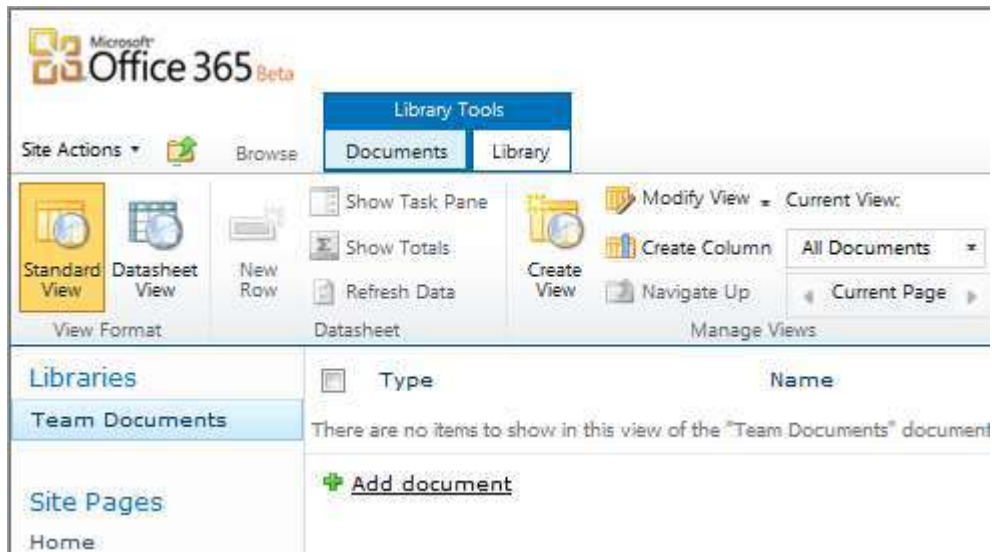
1. On your **Team Site**, click on **Site Actions** and select **New Document Library**.



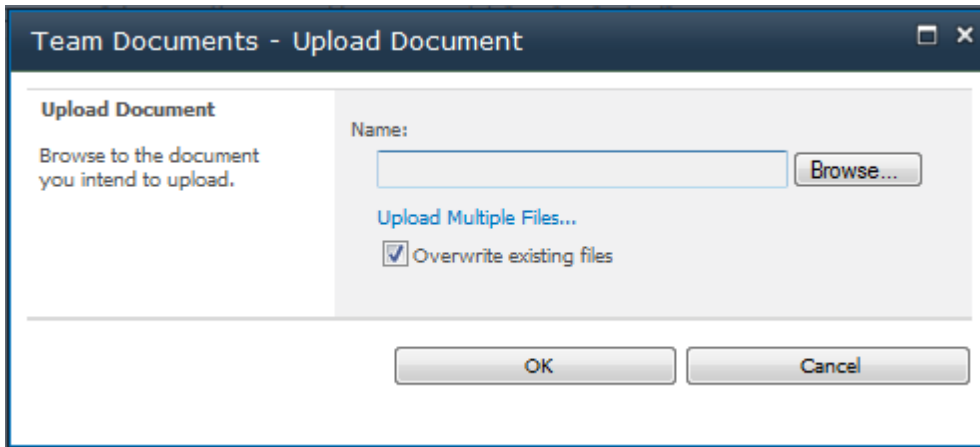
2. Give your library a **Name** and optionally add a **Description** and adjust any settings.



3. Click on **Create** and then on **Add document** when your library appears.



4. Add any file from your desktop and then click on **OK**.



Share Your Team Site outside Your Organization

As an administrator, you can grant access to users both inside and outside your organization to view and make changes to documents and data. By default, users within your organization will be granted access to your team site. Use an existing non-Office 365 e-mail account (e.g., Yahoo, Gmail or Hotmail account) to test sharing your team site with a user outside your organization.



1. In your team site, click on **Site Actions** in the top left corner of your screen then click on **Share Site**.





2. Type the nonemployee e-mail address in the group you want to add it to, and click on **Share**.

Share your SharePoint Site (http://cohovineyard.spoppe.com/TeamSite)

Browse for users to add to your site or type their e-mail address into the field provided. Separate multiple users with semi-colons.
Sharing this site may also share your other sites. [Learn more about Sharing](#)

Visitors:  

▼

Members:  

▼

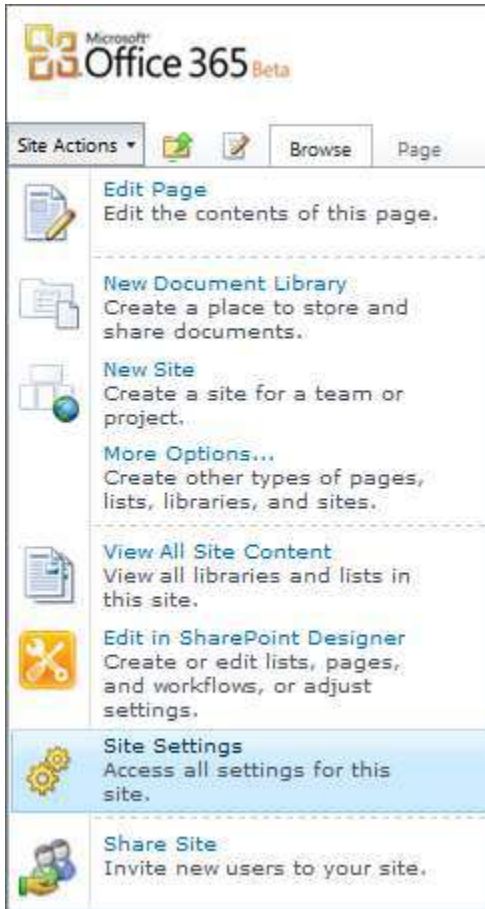
Subject:

Message:

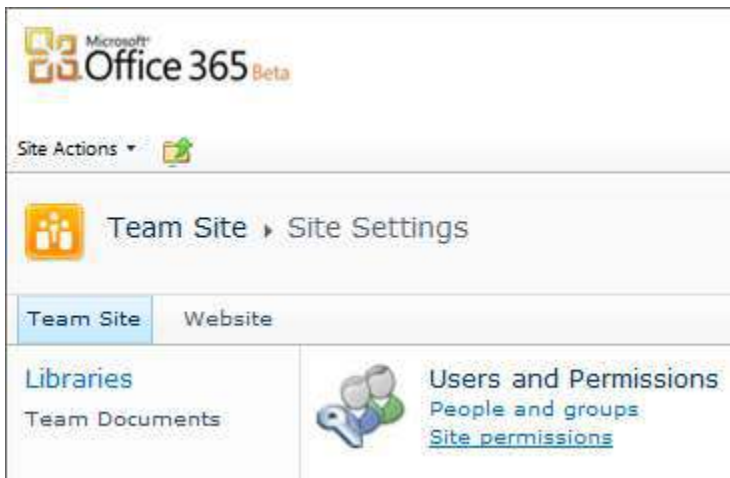
3. Verify that the external user can access the team site. Then send them a link to the document you uploaded in the task above and start collaborating.

Remove a User From a Team Site

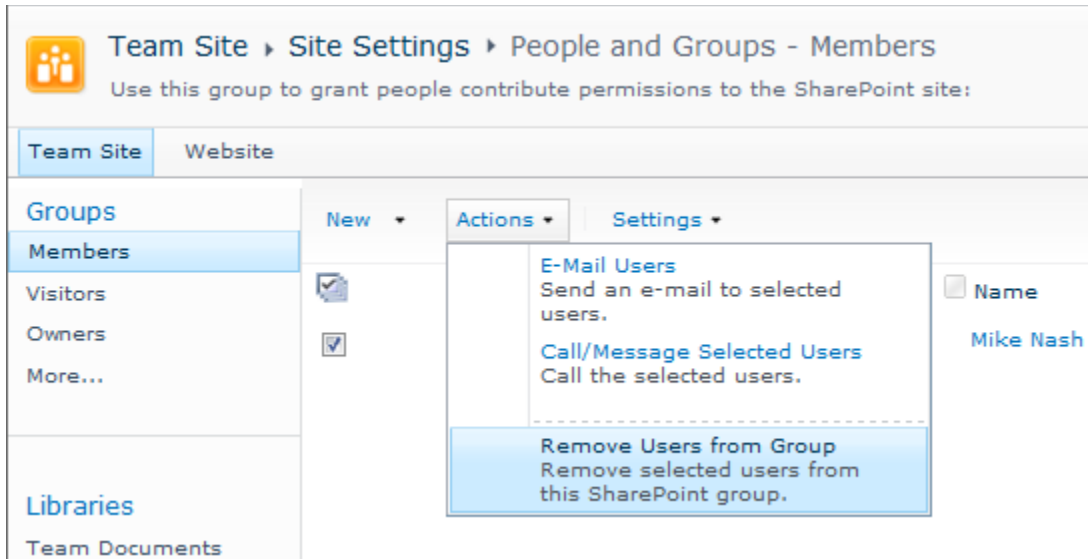
1. Click on **Site Actions** and then on **Site Settings**.



2. Click on **Site permissions** under **Users and Permissions**.



3. Find the user you want to remove, click on the checkbox next to the name, click on **Actions** and select **Remove Users from Group**.



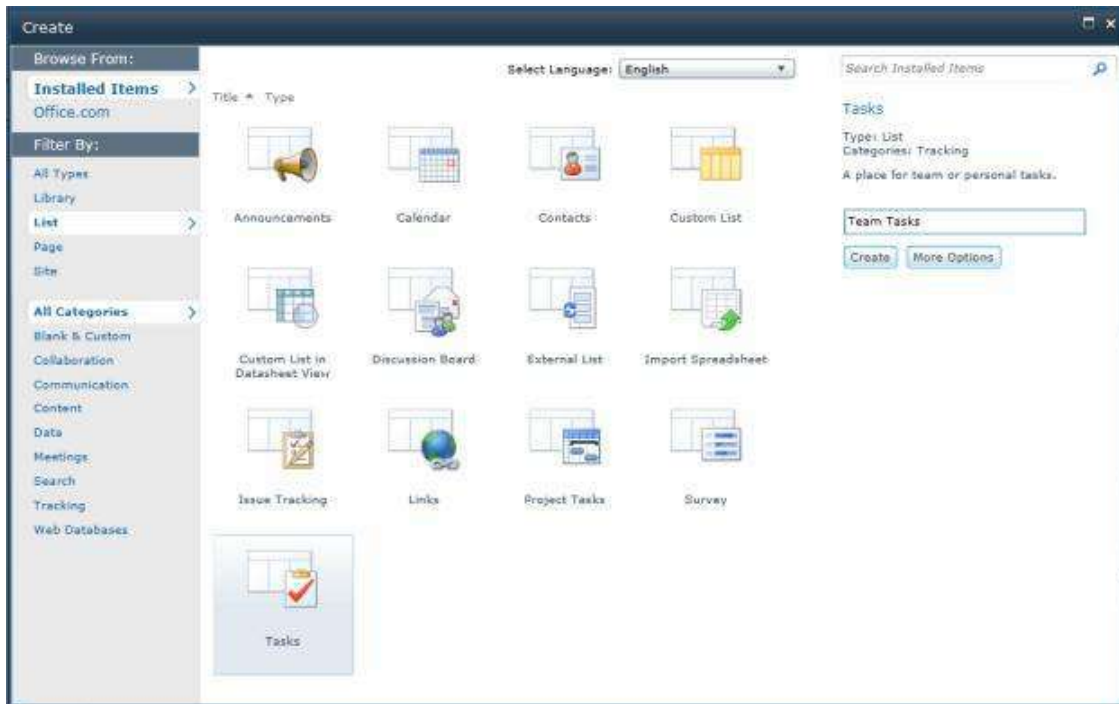
Create a List Then Create a New View of This List

You can create a list on your team site to store, share and manage team information. For example, you can create a task list to track work assignments or track team events on a calendar. Try creating a basic task list on your team site.

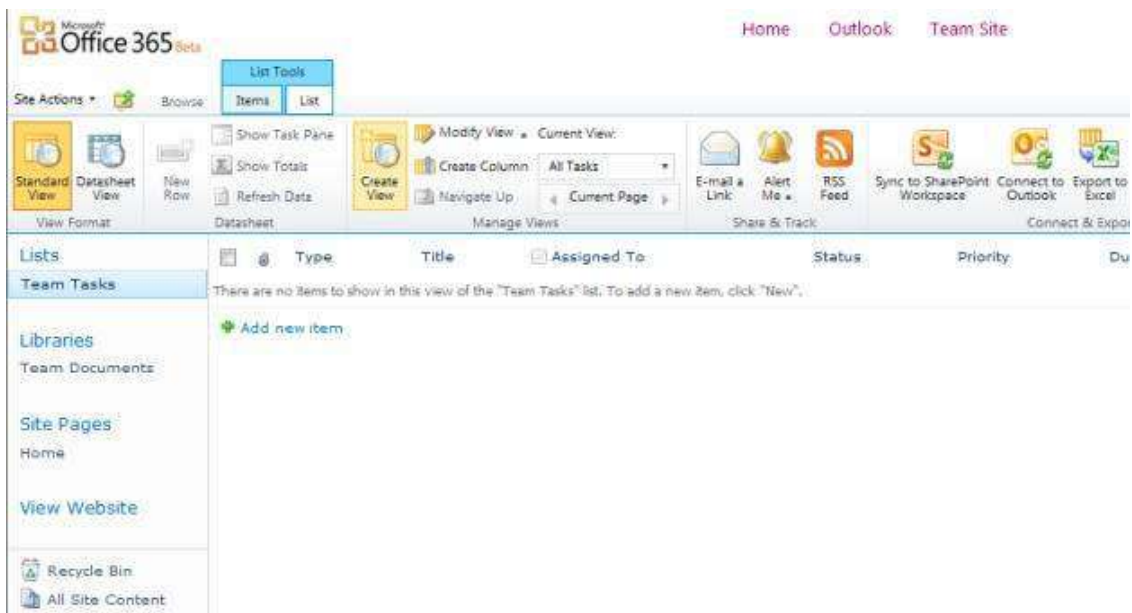
1. On your Team Site, click on the **Site Actions** menu and then click on **More Options**.



2. Click on List in the left navigation, and choose the type of list you want to create and give it a title.



3. Click on **Create**.

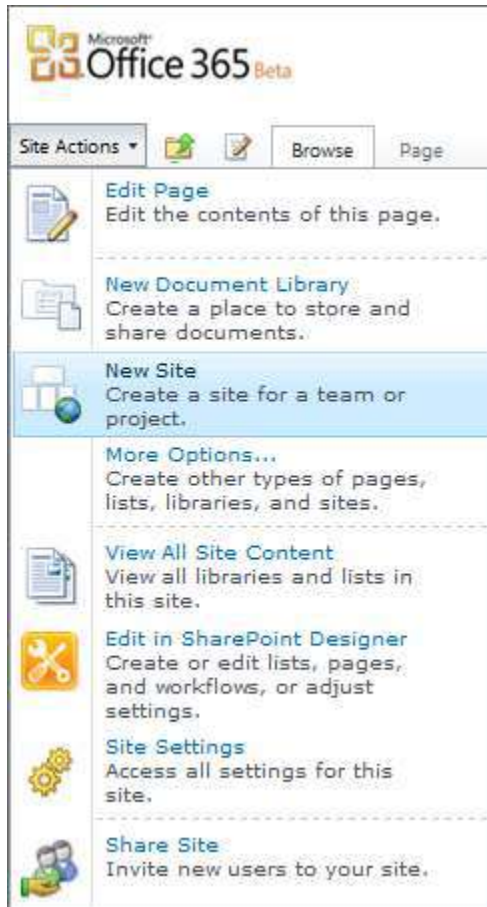


4. You can now add list items, configure different views on this list, set up alerts, subscribe via RSS, and take the content offline with Office.

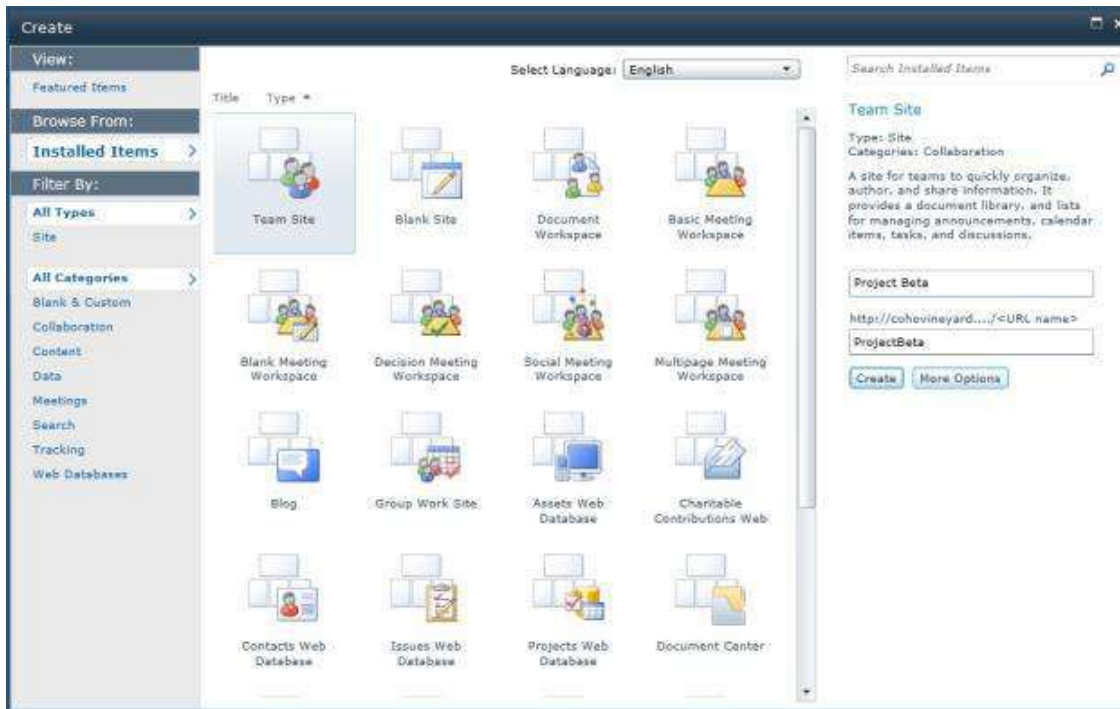
Create a New Team Site

You can create a new team site for a specific team or project. There are several types of site templates to give you a head start on creating a new site.

1. On your Team Site, click on the **Site Actions** menu and then click on **New Site**.



2. Choose the **Express Site** for a basic Team Site, or click on the **Browse All** tab for a variety of site choices including Document Workspace, Meeting Workspace, Blog and more.



3. Make your choice, enter a title and URL name, and click on **Create**.

View Your Team Sites on Your Mobile Device

You can view your SharePoint Online team sites from your mobile device browser. SharePoint Online supports mobile access to SharePoint pages and list data. Users of mobile devices navigate to the same URLs as do users of desktop browsers. The mobile device is automatically redirected to a version of the page that is optimized for mobile devices.

You can access a mobile page of an Office 365 site through an ordinary Web browser, such as Internet Explorer, by appending “?Mobile=1” to the end of the URL of the page.

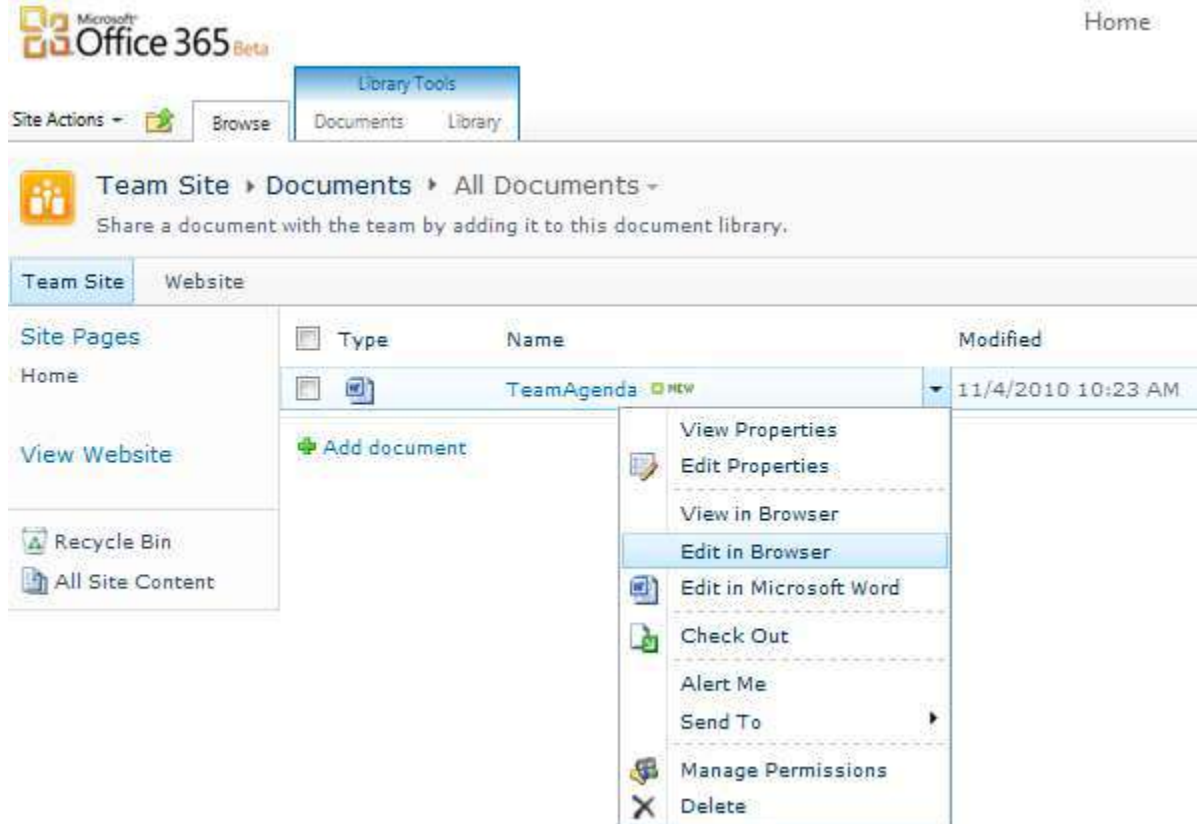


4: Explore Office Web Apps and Using Team Sites with Microsoft Office

Edit a Document on Your Team Site Using Office Web Apps

With Office 365, you can view and edit Microsoft Word, Excel, PowerPoint and OneNote documents directly from your Web browser using Office Web Apps. Office 365 is the only set of Web-enabled tools designed to be fully compatible with Microsoft Outlook, Word, PowerPoint and Excel. Open one of the Office documents that you uploaded to your team site in high fidelity, and update it with Office Web Apps.

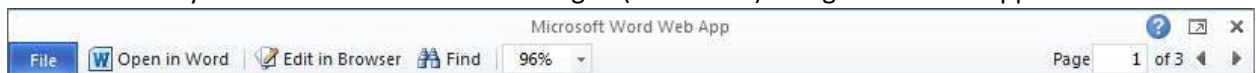
1. Go to your team site, and click on one of the Office documents you uploaded to open it, or hover over the title and select **View in browser** or **Edit in browser** from the drop-down menu.



If you just click on the document in SharePoint, the default behavior is for the document to open in reading view. You will notice that the document looks exactly as intended. When you switch to Editing view, the document might change. However, the content is not altered. The paramount design goal for the Office Web Apps was to provide people with consistent, high-fidelity experiences. Documents maintain integrity of content, features and formatting, no matter which Office application they were created in or shared with (desktop, Web or mobile). They may look slightly different in different experiences because of different feature sets, but the information and structure are maintained.

2. Make some edits, and note that the file is being auto-saved as you work.

Simultaneously Edit a Document With a Colleague (Co-Author) Using Office Web Apps



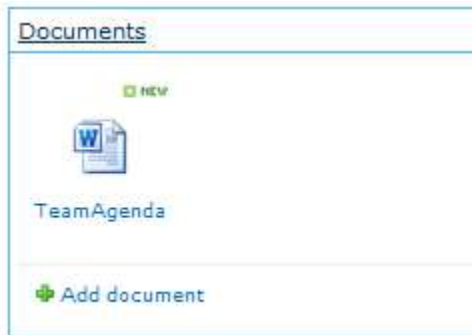
Office Web Apps allow you and your team to simultaneously edit the same spreadsheet or OneNote notebook from your individual locations. For example, you can work on one section in an Excel spreadsheet while a colleague works on another section in the same file at the same time.

1. If you haven't already, add a colleague as an Office 365 user using the steps outlined in Walkthrough 1 above.
2. Add an Excel spreadsheet or a OneNote notebook to your team site then try to edit the file at the same time as your colleague. Note that as you work you can see your colleague's name within the document and the area the colleague is working on.

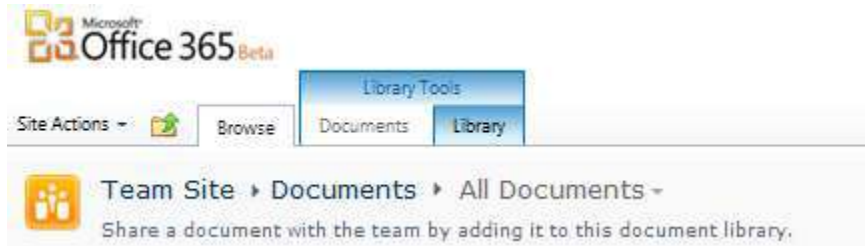
Add a Shortcut to a SharePoint Library in Microsoft Office

You can open, edit and save documents that are stored in your SharePoint Online team site's document library directly from your Microsoft Office desktop applications by creating a shortcut to a SharePoint library in Microsoft Office.

1. In your team site, click on **Documents**. If you don't have a Documents Library, follow the steps in Walkthrough 3 to create one.



2. At the top of your screen, click on **Library** under **Library Tools**.



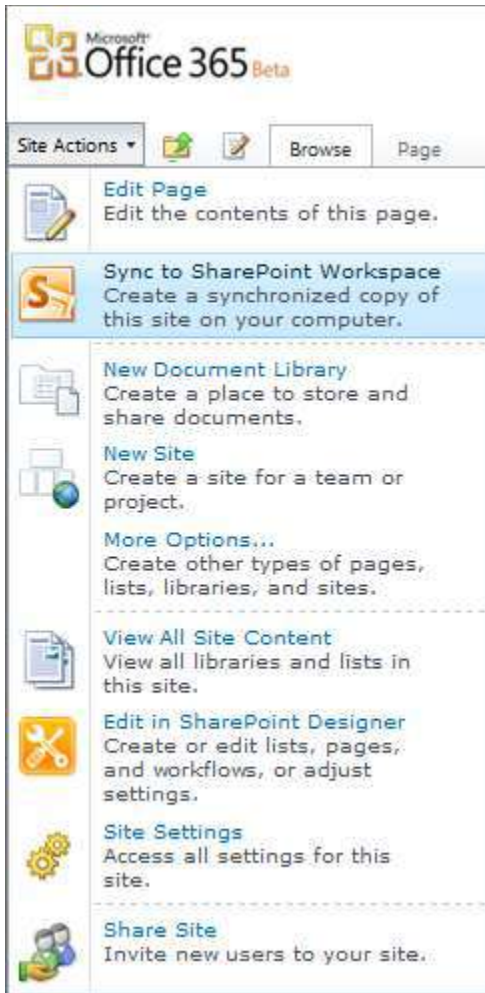
3. Click on **Connect to Office** in the ribbon at the top of your screen.



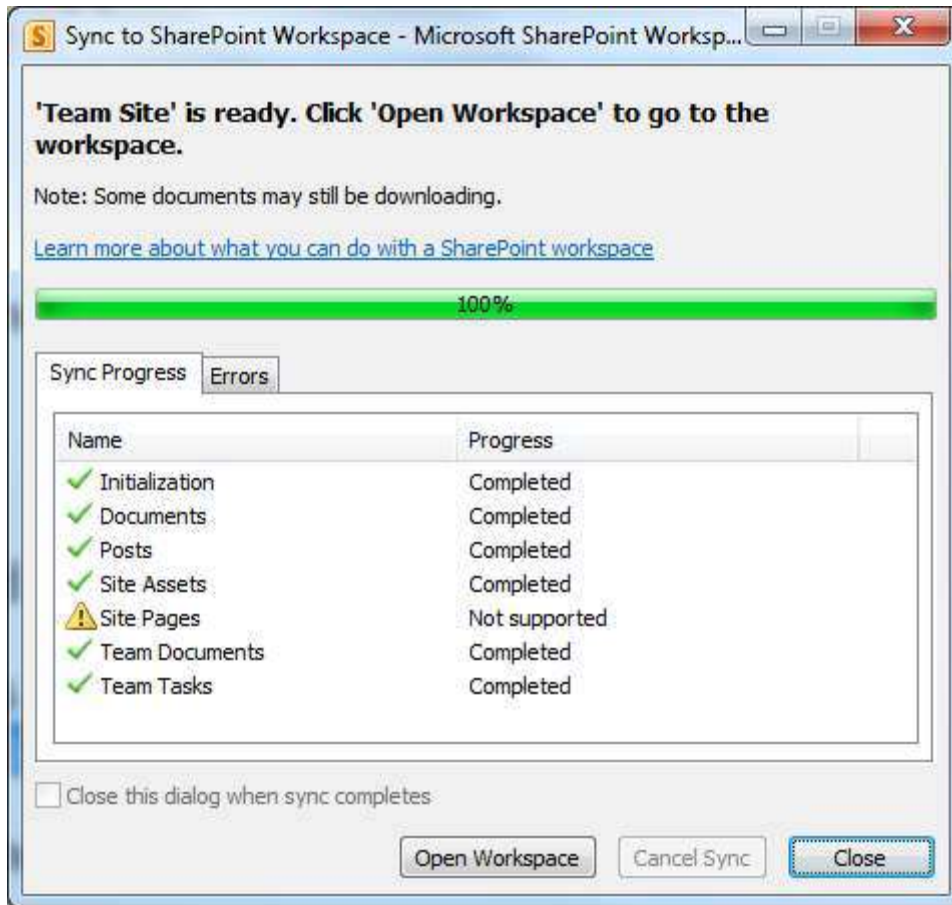
Access Team Site Documents Offline Using Microsoft SharePoint Workspace 2010

Microsoft SharePoint Workspace 2010 is available in Office Professional Plus. Workspace 2010 allows you to work with your SharePoint team sites, document libraries and lists when you're offline by creating a synchronized copy of your team site on your computer. Synchronization of changes between your computer and the SharePoint server are handled smoothly and efficiently — only transferring the changes that you've made, not the entire document each time.

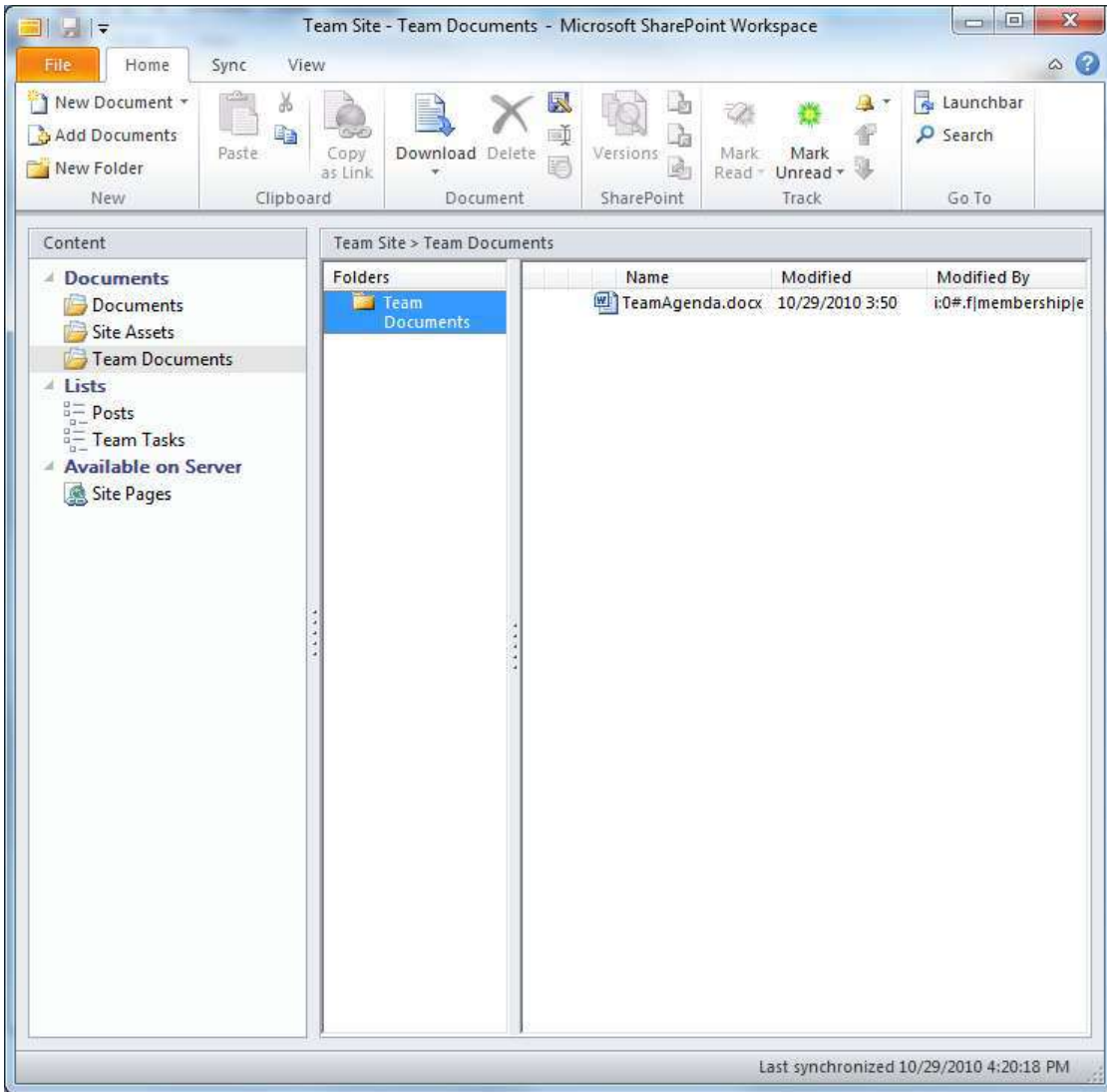
1. In your team site, click on **Site Actions** and then click on **Sync to SharePoint Workspace**.



2. If SharePoint Workspace 2010 does not open, you may need to run and configure it. Open your Windows Search box and type “SharePoint” to locate it. Once it's set up, try again.



3. Once the site is initially synchronized on your desktop, try adding new documents or list items from within SharePoint Workspace 2010 and note how they automatically synchronize back to the team site.

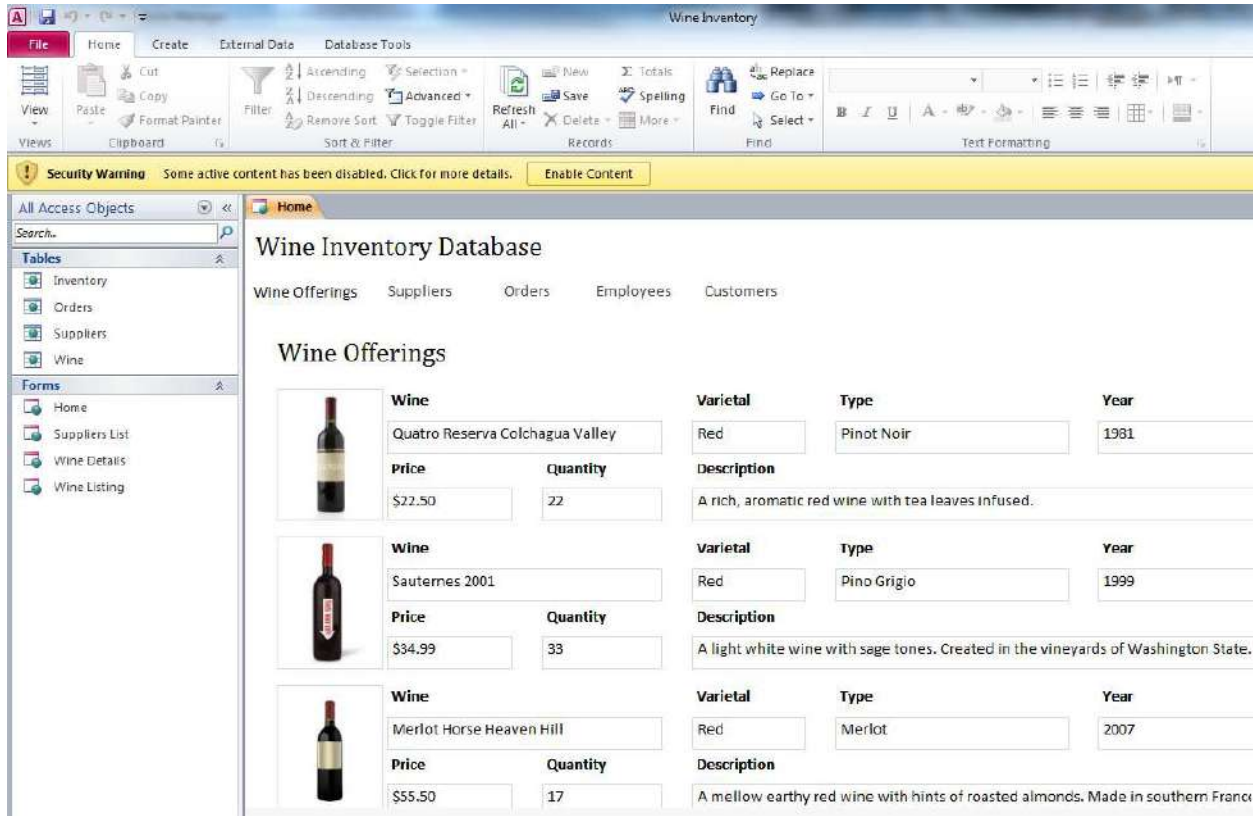


5: Databases

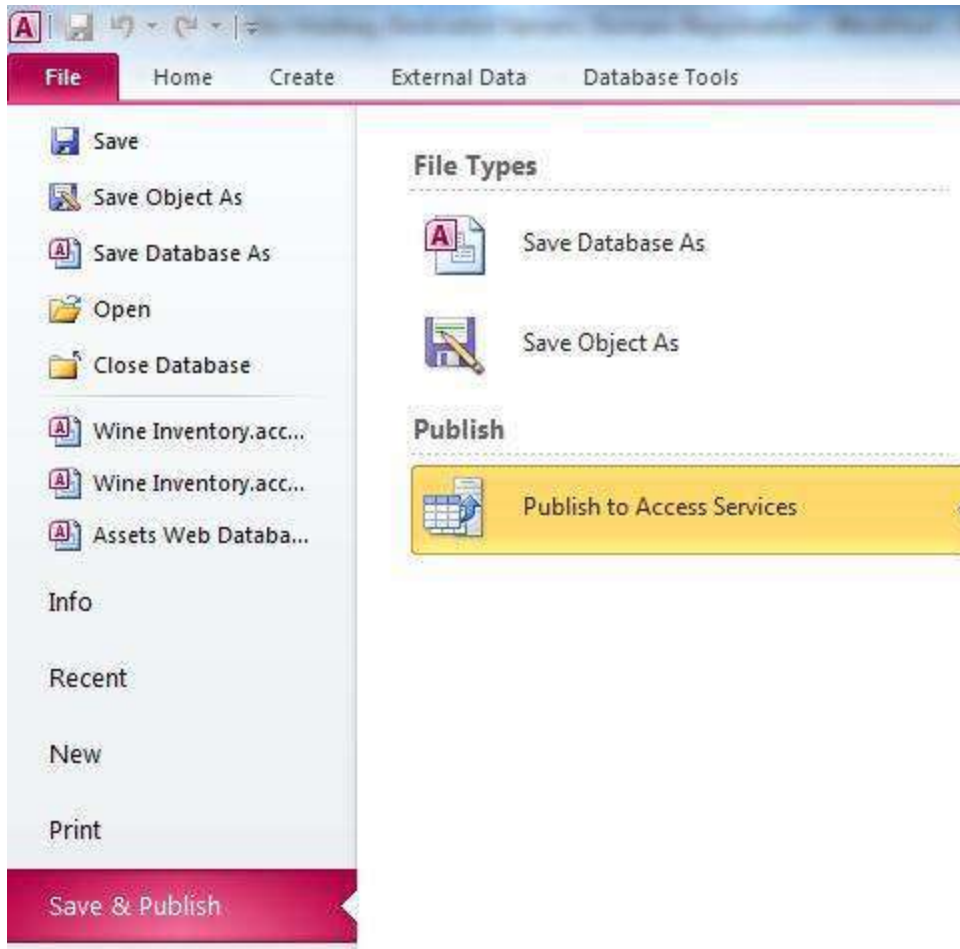
Publish a Microsoft Access Desktop File as a SharePoint Online, Web-Based Database (List)

Access 2010 is a database application included in Office Professional Plus, which you downloaded in Walkthrough 1. You can use Office 365 to publish Access databases to your SharePoint Online environment, allowing you to securely share your data with others, view and edit your database directly from your Web browser, and create database applications that don't require Access on the desktop to use.

1. Start Access 2010, click on the **File** tab and open a database such as the sample Wine Inventory Database.



2. Go back to the **File** tab, and click on **Save & Publish** on the left navigation and then select **Publish to Access Services**.



3. Enter the URL path to your team site. Be sure to omit any filenames and unnecessary paths
For example, <http://cohovineyard.spoppe.com/TeamSite/SitePages/Home.aspx> would be shortened to <http://cohovineyard.spoppe.com/TeamSite>.

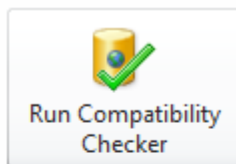
Access Services Overview

Share your database with your team, friends, or organization with Access Services and SharePoint.

Use this if you want to:

- Make your database available through a Web browser and Access.
- Store tables in a central SharePoint location.
- Round trip queries, forms, reports, code, and linked tables that are not Web compatible.

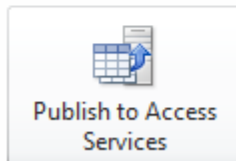
[Click here to watch a video demo](#)



Check Web Compatibility

You can check your database application for Web compatibility to identify items and settings that are not supported on the Web.

[Web Compatibility Issues](#)



Publish to Access Services

Full URL: <http://cohovineyard.spoppe.com/teamsite/Wine Inventory>

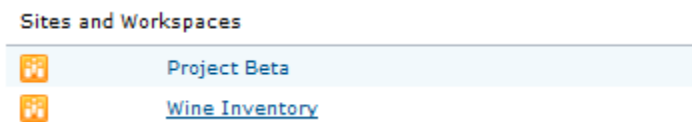
Server URL:

Site Name:

4. Click on the **Publish to Access Services** button. Once complete, the SharePoint Online database becomes the primary source of data and the desktop copy remains in sync but is no longer primary (it's secondary). Visit your team site, and click on and select **View All Site Content**.



5. Scroll down to **Sites and Workspaces**, and click on the name of your database to open it.



6. Click on **Options** at the top to **Share Site** and adjust **Site Permissions** and **Settings**.



Once granted access, users can view, edit and search the database from anywhere.

6: Public Websites

Design a Basic Public Website Using the SharePoint Online Site Designer Tool

Microsoft SharePoint Online comes with two types of sites — team sites and public sites. The public site is a lightweight, public-facing website that provides your customers with your company information, such as your products, services and contact information. With Office 365 for small businesses and professionals, you get a public-facing site that can be easily designed and customized to create and manage a professional-looking public Web presence.

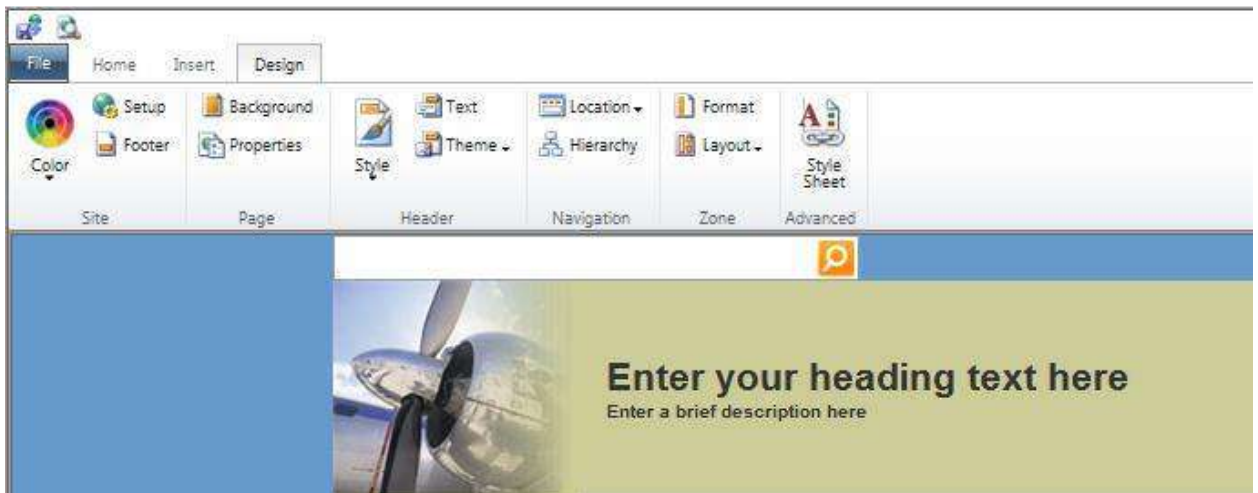
1. In SharePoint Online, click on the **Website** tab located on the top left corner of your screen (NOT the View Website link).



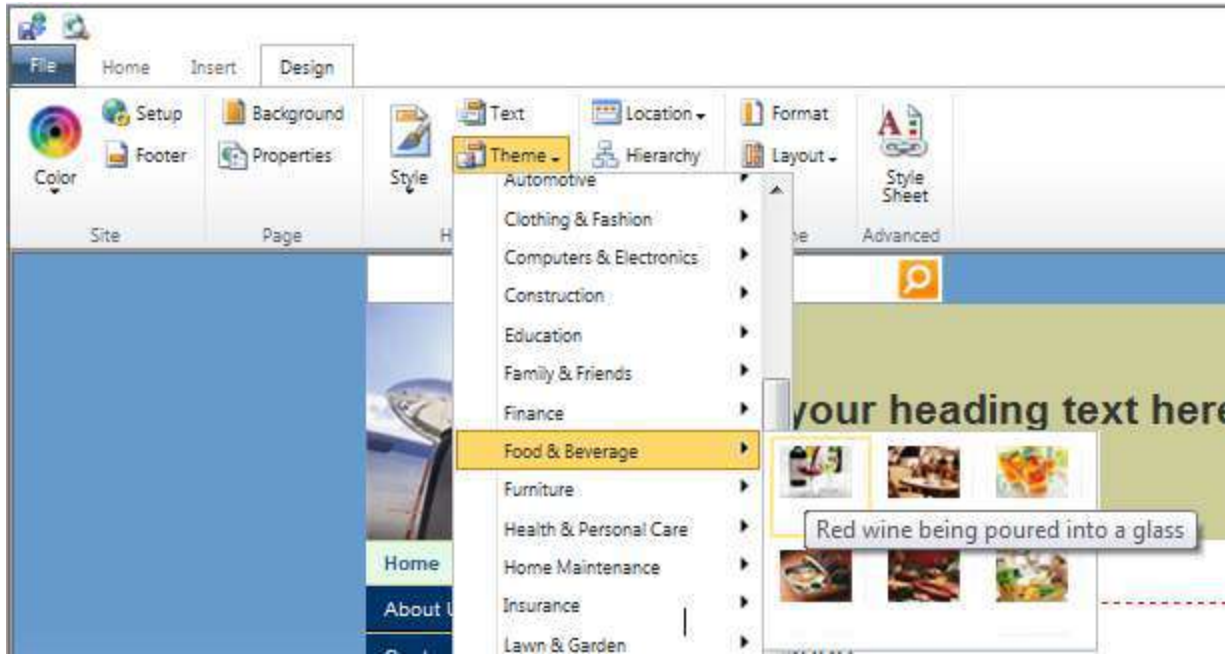
2. Click on **Home** to launch the Site Designer tool.



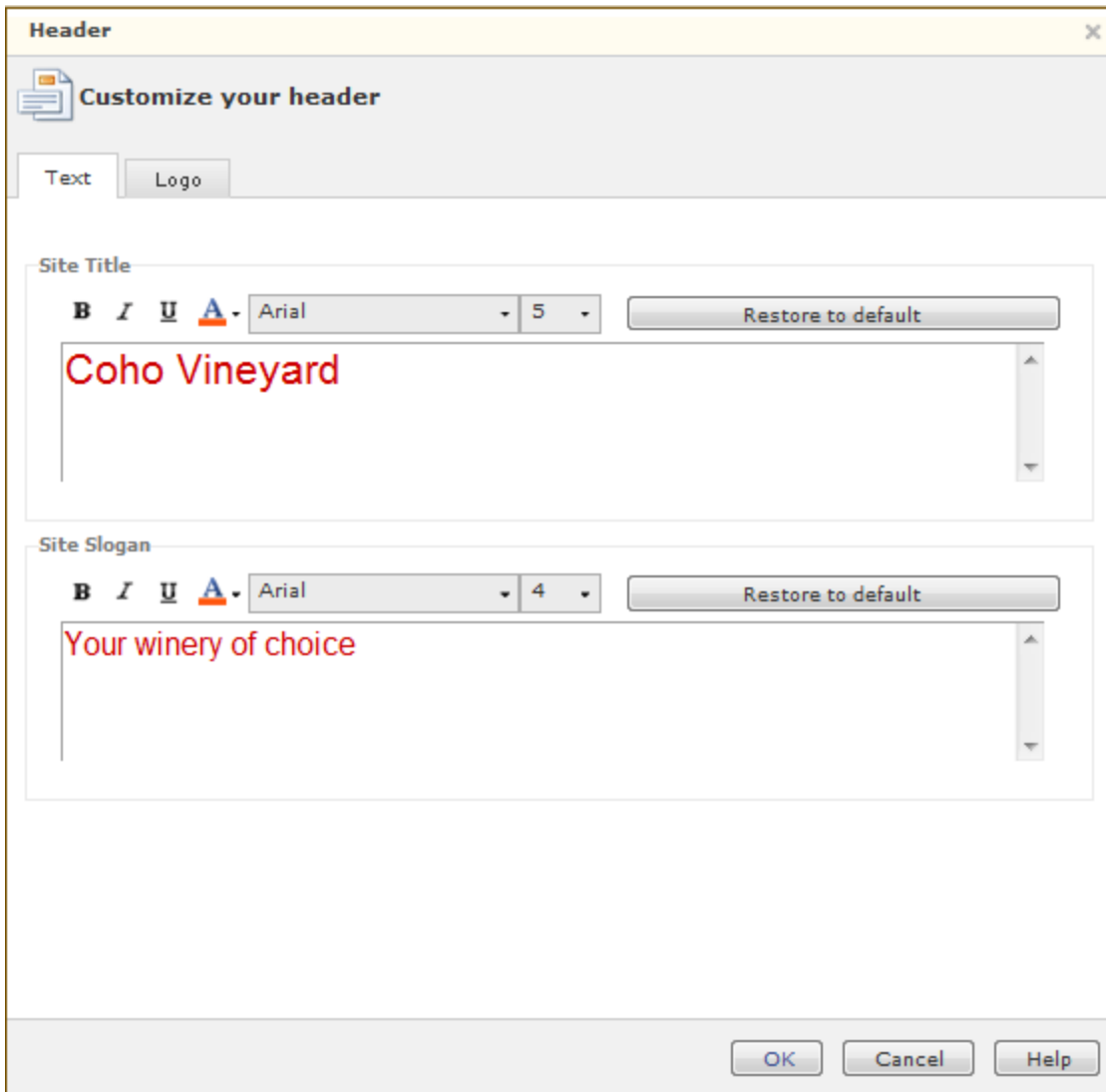
3. Click on the **Design** tab to begin designing your public website's home page.



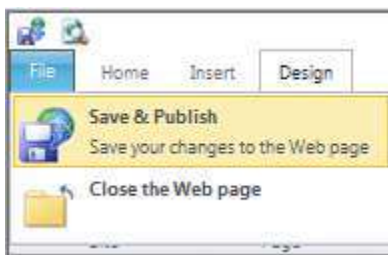
4. Use the ribbon to change the Style and Theme of your website.



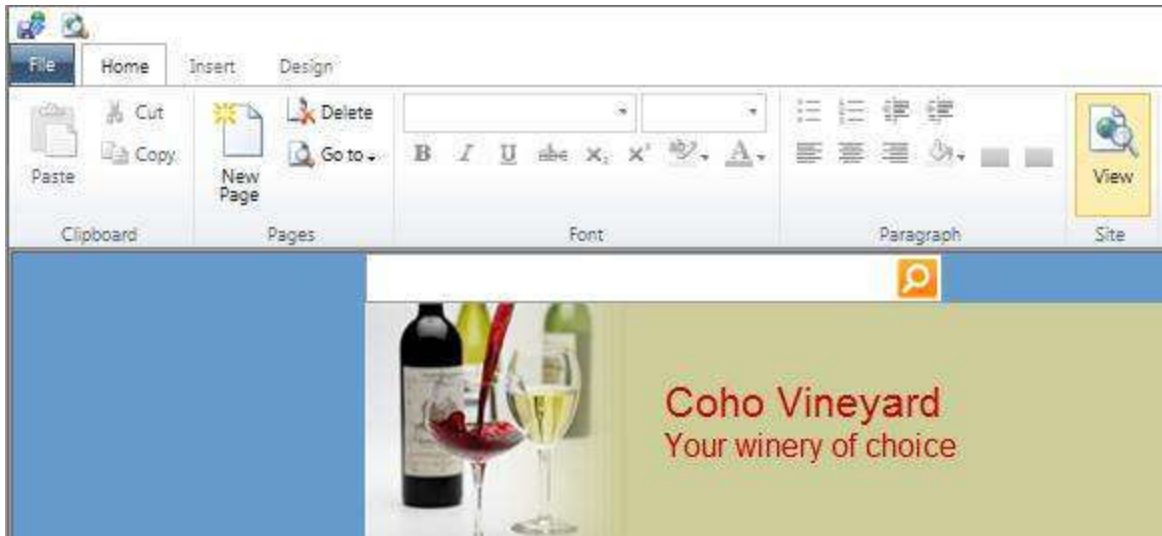
5. Click on **Text** to customize your header. Make other changes/additions to your website.



6. Click on **File** and **Save & Publish** to record your changes.



7. View what your site will look like to the public by going to the **Home** tab and then clicking on **View**.



7: Instant Messaging, Video Chat and Online Meetings


Sign In to the Microsoft Lync Client

Microsoft Lync Online is a next-generation online communications service that connects people in new ways, anytime from virtually anywhere. Lync Online provides rich and intuitive communications capabilities including presence, instant messaging, audio-video calling, and a rich online meeting experience that supports audio-, video- and webconferencing.

1. Launch Lync 2010, which you downloaded in Walkthrough 1. Enter your credentials and then click on **Sign In**.

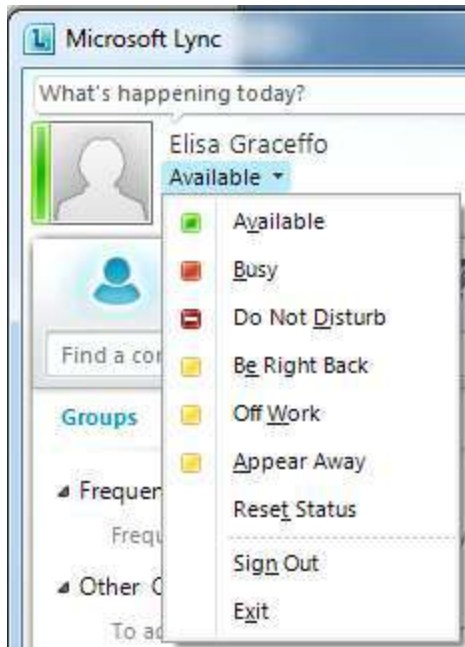


You may be prompted to install additional software to sign in to Office 365. This additional piece of software is the Office desktop setup described in Walkthrough 1. If prompted, install it then click on **Sign In** again.

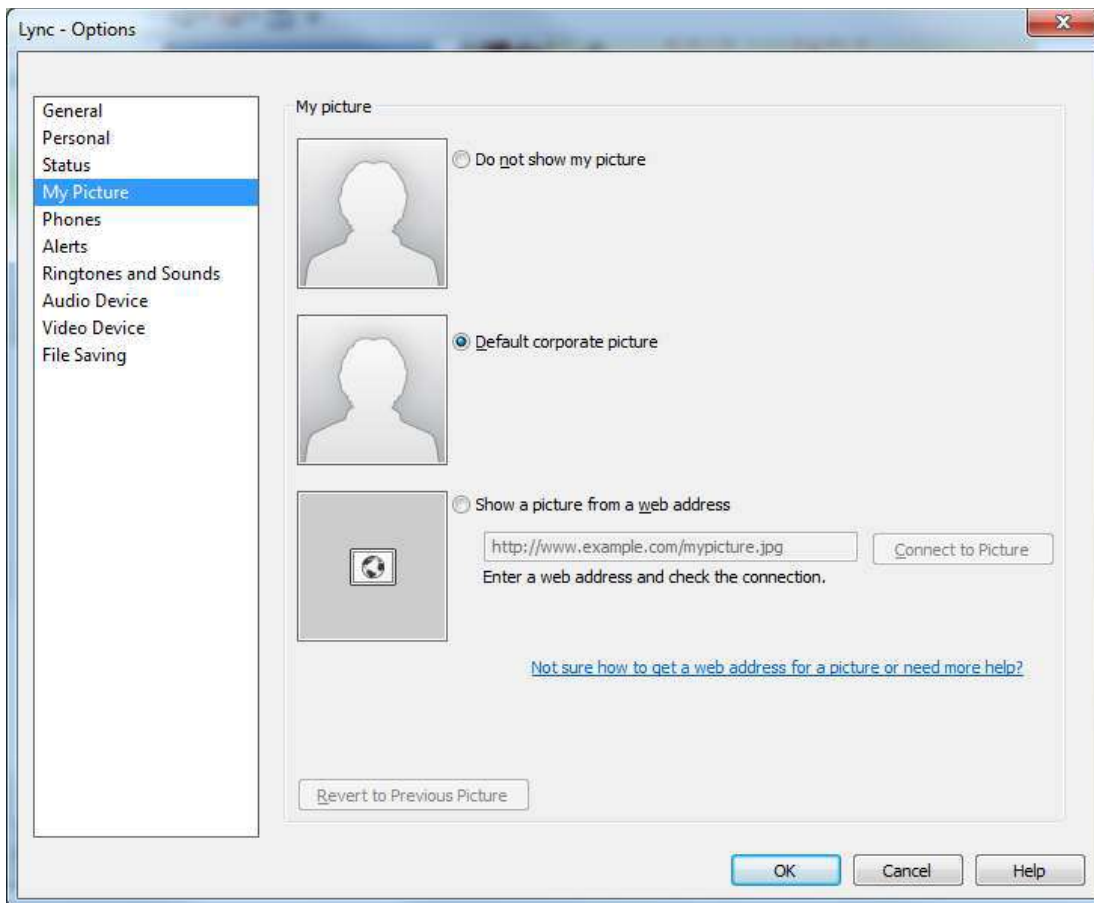
 To sign in, additional software is required.

[Download and install now?](#)

2. Set your presence so that your colleagues know you're available.



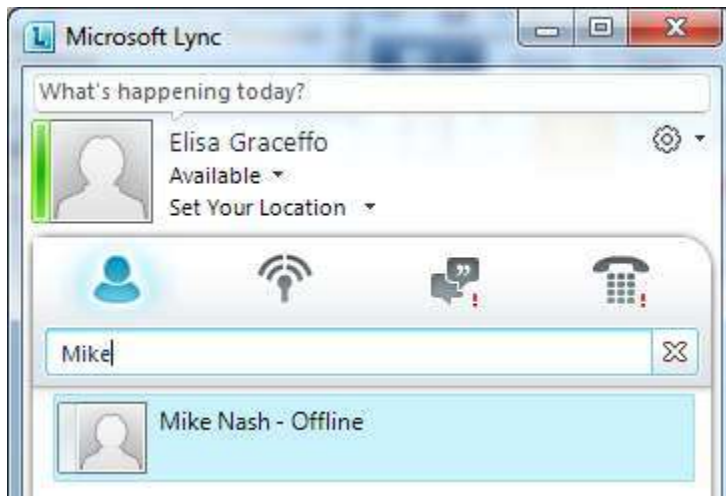
3. Click on the default photo to add a custom photo and personalize your contact information.



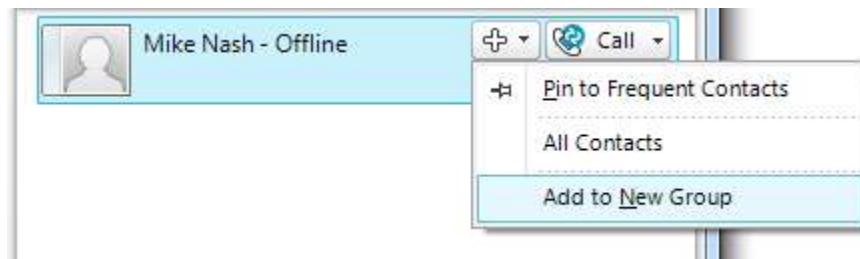
Locate and Organize Your Contacts

You can search for contacts by title, team or other keyword as well as name. You can organize them in handy groups and display them in a variety of ways, including their current status (such as “online” or “away”) or their relationship to you (such as “colleagues” or “friends and family”).

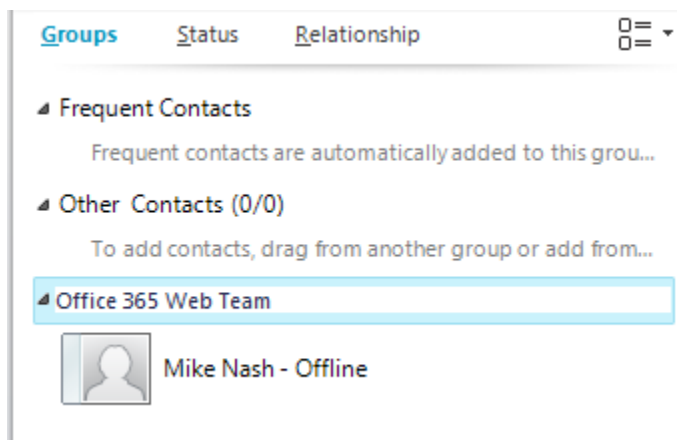
1. Use the **Find a contact** search box to locate a person in your organization that you’d like to add to your Contact List.



2. Click on the Plus Sign next to that person's contact to add him or her to a group.



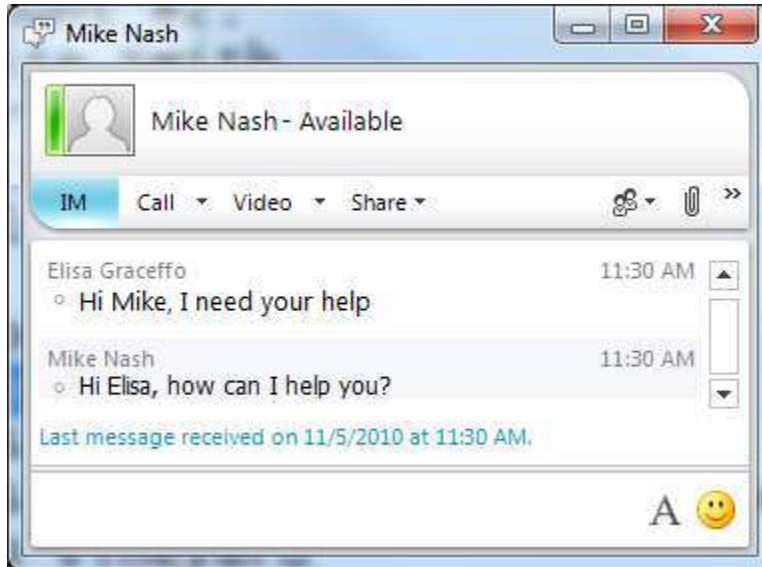
3. Then add the contact to a group that corresponds to how you work.



Send an Instant Message to One Contact and Then Add More People to the Conversation

Once you've located a contact and seen that he or she is available, it's simple to instant message that person then add additional people to the conversation as needed.

1. Double-click on a contact to start an instant message session.

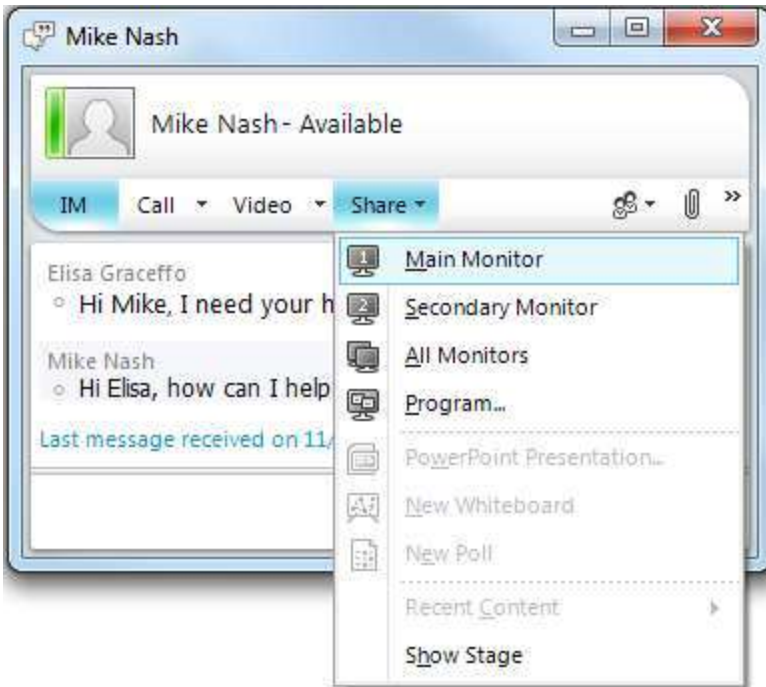


2. Drag another contact from your company to add to the conversation. Note: You can only communicate one-on-one with Windows Live Messenger contacts. You will not be able to drag other Windows Live Messenger contacts into an existing instant messaging conversation.

Initiate an Instant Messaging Conversation From SharePoint Online, Office Web Apps or Office

Your Contact List — as well as Lync features such as the presence indicator, instant messaging and screen sharing — are now directly accessible from Outlook, Word, PowerPoint, Excel and SharePoint Online team sites. This enables you to see the presence of those you are working with and quickly start collaborating with them without having to change applications.

1. When viewing e-mail messages (including in the Preview pane), you'll see presence for contacts in the From, To and CC fields. Pointing to or right-clicking on the contact displays the contact card and available commands.
2. Try sharing your desktop or starting a video call or online meeting.

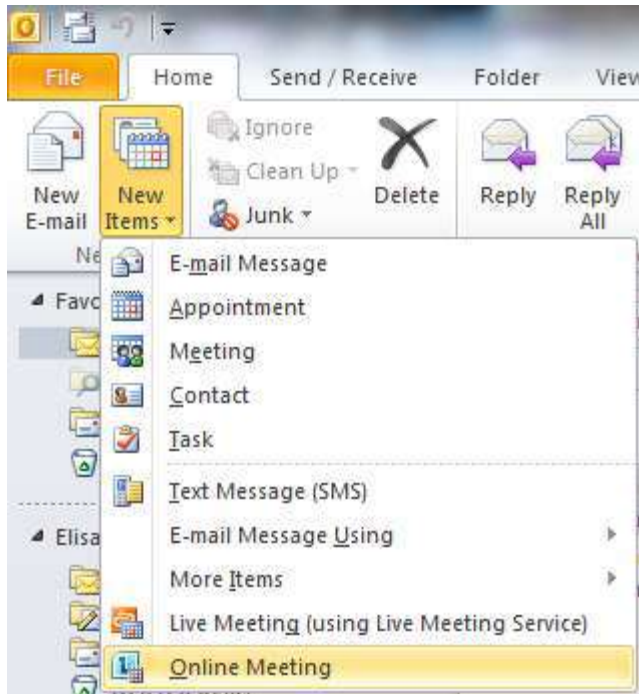


Schedule an Online Meeting

Microsoft Lync Online makes it easy for users to create, moderate and join conferences with internal and external users. A rich user experience and a unified interface make it easy for workers to collaborate frequently and effectively, even when time or distance prevents in-person meetings. With Lync Online, it's easier to schedule an online meeting and invite additional people once the meeting has started. Participants now have a "lobby" in which to wait until the meeting organizer arrives, and the organizer has new ways to ensure a smooth and productive meeting. You'll be able to collaborate on a file or whiteboard, share a view of your desktop, deliver a PowerPoint presentation, and much more.

Further, there are two new meeting applications so that your out-of-organization contacts can fully participate in your online meetings: Lync Web App and Lync Attendee. Use the Online Meeting Add-in for Microsoft Outlook (which was installed with Lync 2010) to set up a meeting with colleagues in different locations and organizations.

1. In Outlook 2010, click on the Home tab, click on New Items, then click on **Online Meeting**.



2. If you already have an Outlook appointment or meeting request open, you can make it an online meeting by clicking on the **Online Meeting** button.



Conduct a Meeting

As the meeting leader, you can control who enters the meeting and who has permission to share content. The meeting conversation window is designed to help you lead presentations and keep the meeting on course.

Note: Meeting participants inside and outside your organization will have access to audio and video during the meeting through their PCs. Dial-in conferencing requires a separate agreement with an audioconferencing provider. Additional information concerning dial-in conferencing will be made available later in the beta program.

In the Outlook invitation, click on **Join online meeting** or the meeting link. You can also join a meeting by clicking on the Join Online button in the Outlook pop-up Meeting Reminder.

The screenshot shows a Microsoft Office 365 meeting window. The title bar reads "Group Conversation" and "You are sharing." The main content area displays a presentation slide titled "Contoso Project: Projected Cost". The slide content includes:

- Section: Keeping our costs down
- Text: Lorem Ipsum is simply dummy text of the printing And typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting unchanged.
- List:
 - It was popularized in the 1960s
 - With the release of Letraset sheets
 - Containing Lorem Ipsum passages
- Figure: A 3D pie chart showing projected costs for four quarters: 1st Qtr (8.2), 2nd Qtr (3.2), 3rd Qtr (1.2), and 4th Qtr (1.4). The chart is titled "Fig. 1.2 Fabrikam expenses will decrease each quarter".
- Logo: Fabrikam

The meeting interface includes a sidebar on the left with a list of participants (Paul Koch, Bharat Suneja, Robert Brown), a video feed of Paul Koch, and a chat window with messages from Paul Koch. The bottom of the window shows a toolbar with various meeting controls and a status bar indicating "You and others are recording".