Office 365 End User Starter Guide

Contents

How to sign in to Office 365 for Business

Sign in to Office 365 for business on your computer or tablet by opening a web browser.

Note Microsoft has more than one kind of Office 365 service and each service has its own sign-in page. Where you sign in depends on which service you are using. If you're unable to sign in at the URL below, you may be signing in to the wrong service. See How to sign in to Office 365 for a list of sign-in locations. If you're trying to install Office 365 Home, Personal, or University, see Install Office 365 Home, Personal, or University.
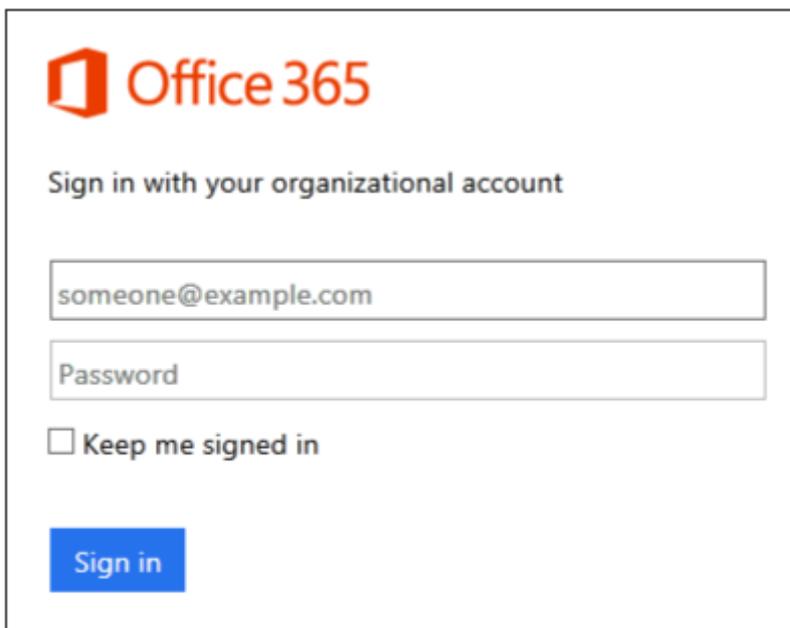
1. Go to http://portal.office.com to sign in.

2. Type your user name and password, and then select **Sign in**.

   Tip The first time you sign in, you'll use the work account and temporary password that you received from your Admin.

3. If this is your first time signing in, you're asked to change your password. Type a new password, and then select **Save**.
4. To sign out of Office 365, select your name in the upper left corner and select **Sign out**.

Tip After you sign in for the first time, you can go to http://portal.office.com and sign in anytime using new password. For quick access, you might want to add the sign-in page to your favorites.

Install Office for Windows

1. Sign in to Office 365, at http://portal.office.com/OLS/MySoftware.aspx.

   If you don't see Office listed, your plan probably doesn't include Office applications. If you know your plan includes Office, you may not have a license assigned, see What Office 365 product or license do I have? If Office is not listed ask your Office 365 administrator to assign a license to you.

2. On the **Office** page, select a **Language**, and then choose **Install**.
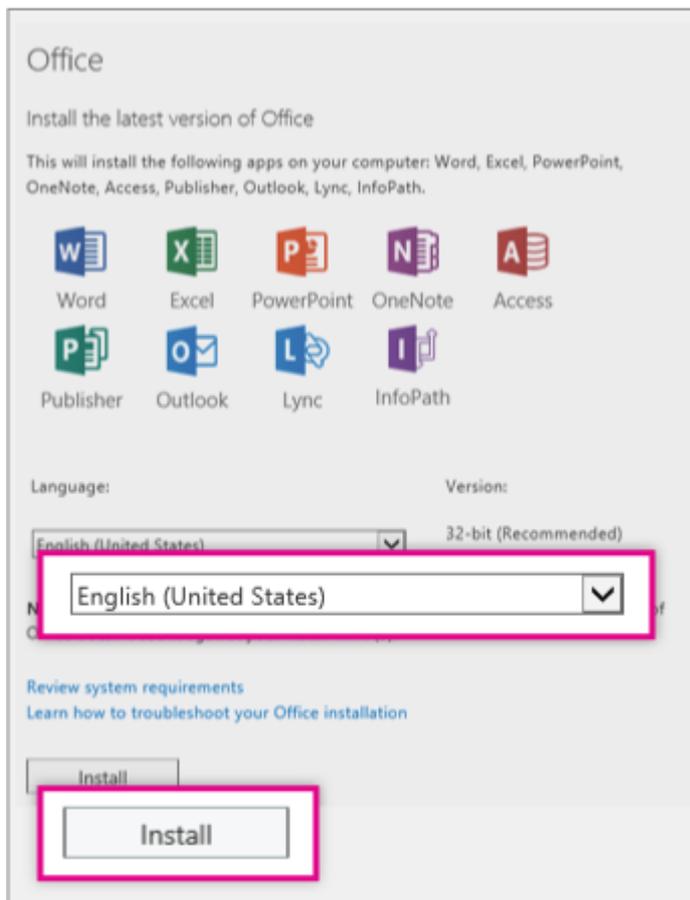
3. At the bottom of the screen, select **Run**.

4. Follow the prompts and accept the license agreement.
5. When you see "You're good to go," select **All done**.

Now you're ready to start using Office. In the Windows 8 start screen or on the Windows 7 start menu, type the name of the Office application you want to use, like Word, and open it.

Install Office for Mac
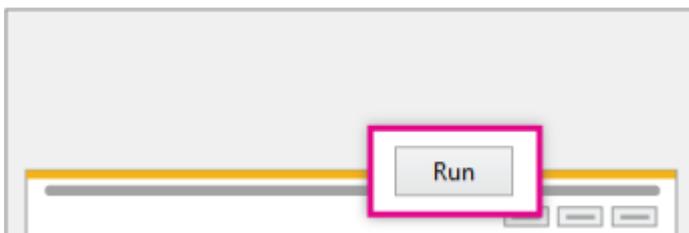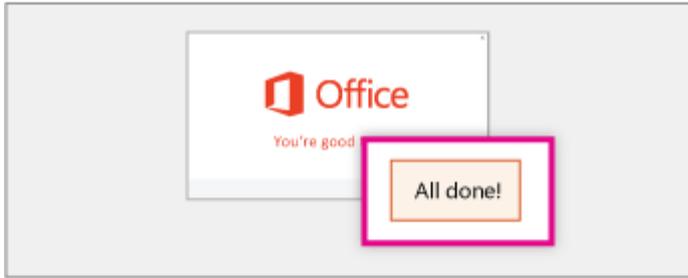
1. Sign in to Office 365, at http://portal.office.com/OLS/MySoftware.aspx.

   If you don't see Office listed, your plan probably doesn't include Office applications. If you know your plan includes Office, you may not have a license assigned, see What Office 365 product or license do I have? If Office is not listed ask your Office 365 administrator to assign a license to you.

2. On the **Office** page, select a **Language**, and then choose **Install**. This will install Office for Mac 2011.
3. After the disk image file finishes downloading, select the .dmg file to open the Office installer.
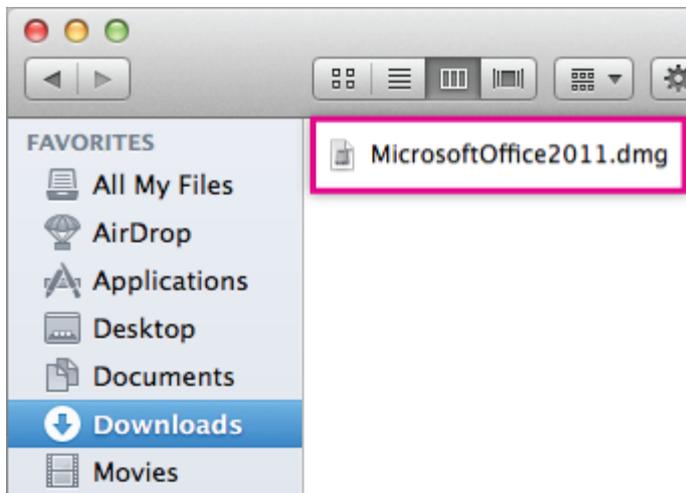
4. Accept the license agreement and enter your Mac password to start installing.
5. On the Welcome to Office: mac screen, select **Sign in to an existing Office 365 Subscription**, and then sign in with your Office 365 work or school account.

Install Outlook for Mac for Office 365

1. Sign in to Office 365, at http://portal.office.com/OLS/MySoftware.aspx.
2. On the **Office** page, scroll down to **Get Outlook for Mac** and select **Install**. Follow the steps in the wizard.

You can install Outlook for Mac side-by-side with your installation of Office for Mac 2011, but it's recommended you remove the Outlook for Mac 2011 Dock icon and launch Outlook for Mac using the new icon.

Delete the Outlook for Mac 2011 icon from the Dock

- In the Dock, drag the Outlook for Mac 2011 app to the Trash (located at the end of the Dock).

Set up a mobile device using Office 365 for business

Select the mobile device where you want to download and set up Office apps (Word, Excel, PowerPoint, and OneNote), set up email, or see a list of the Office 365 for business mobile apps for your device.

Tip To install Office on a Windows tablet, see Install Office using Office 365 for business.

| Mobile device	Download and set up Office apps (Word, Excel, PowerPoint, and OneNote)	Add your Office 365 email account (Outlook)	Additional Office 365 for business apps
Android Phone	Set up Office on an Android phone	Set up email on an Android phone	OneDrive for Business | Lync | Yammer
Android Tablet	Set up Office on an Android tablet	Set up email on an Android tablet	OneDrive for Business | Lync | Yammer
iPhone	Set up Office on an iPhone	Set up email on an iPhone	OneDrive for Business | Lync | Yammer
iPad	Set up Office on an iPad	Set up email on an iPad	OneDrive for Business | Lync | Yammer
Windows Phone	Set up Office on a Windows Phone	Set up email on a Windows Phone	OneDrive for Business | Lync | Yammer
Other devices		Set up email on a BlackBerry Set up email on other smartphones and tablets	

Signing in and using Office 365 for business in a browser

When you're signed in to Office 365, you can access any of the apps and services right in the browser window. You'll find your email under Outlook, any appointments or meetings under Calendar, and contacts under People. There is also a quick access to OneDrive for Business, where you can store your work files and access them from your computer, mobile phone, or tablet.

Sign in to Office 365 from a browser

To work with Office 365, you first sign in.

1. Sign in to Office 365 with your work or school account. For example ellen@contoso.onmicrosoft.com, ellen@contoso.edu, or ellen@contoso.com. If you're not sure what your work or school account is, check the welcome email message that asked you to sign in the first time.
2. At the top of the Office 365 window, just choose where you want to go. Your window will look like one of these:
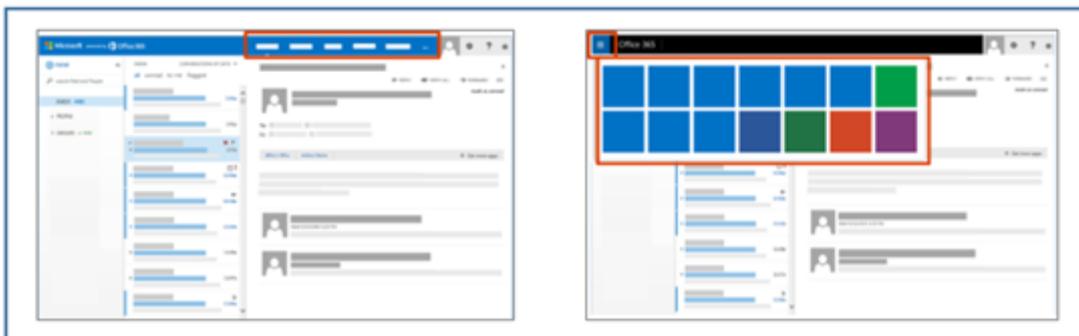
3. If you select **OneDrive**, for example, you'll see a convenient online place where you can work with any file you save to this location. Because files are in Office 365, you can access them from almost anywhere.
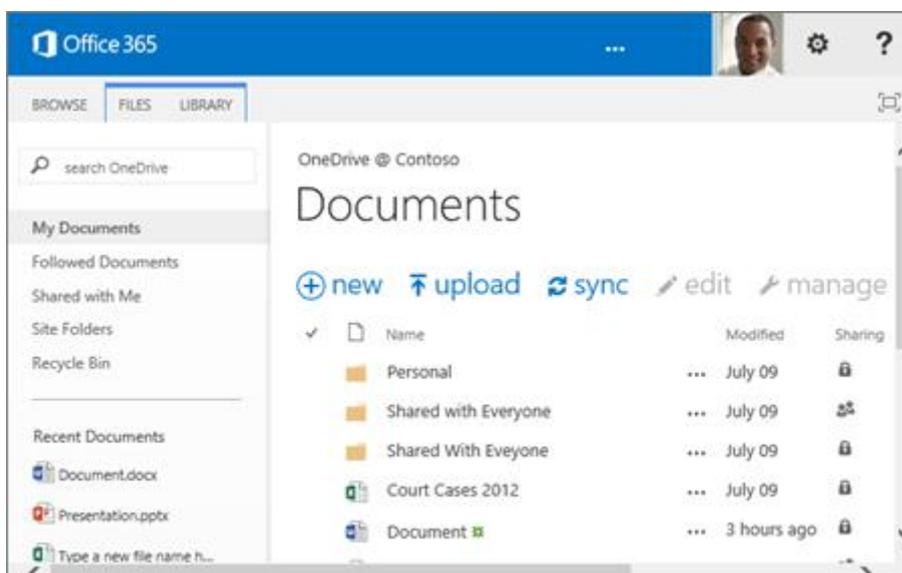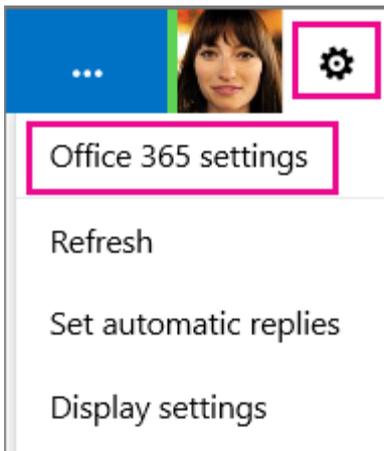
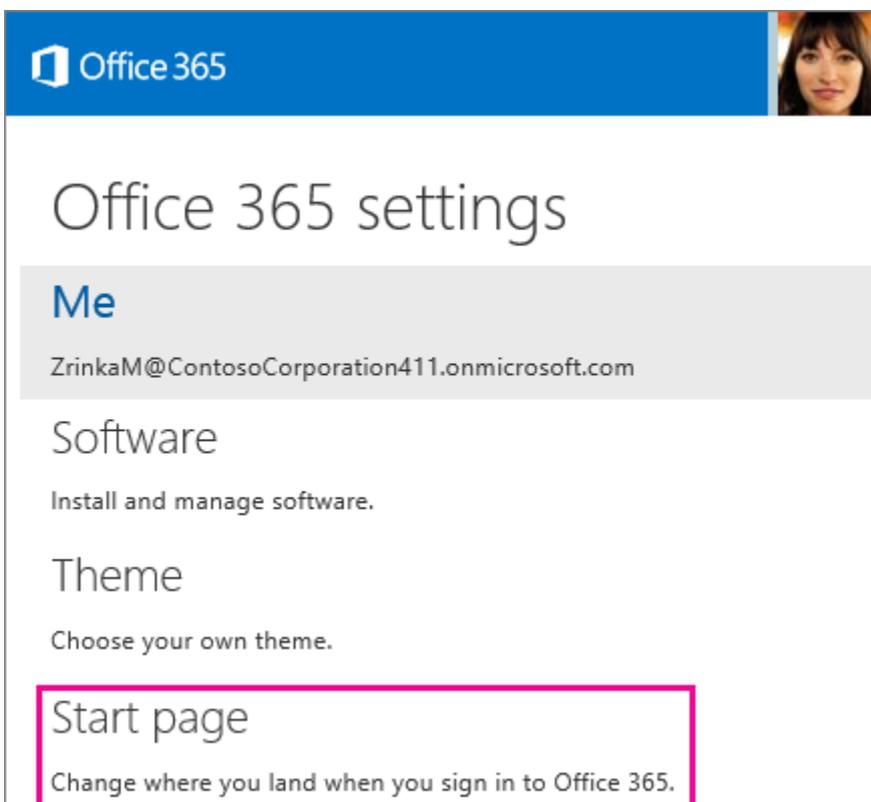# Change the page you see when you sign in to Office 365

You can choose what you see when you first sign in to Office 365. For example, if you frequently use email, you may want to set up Office 365 to show your email every time you sign in.
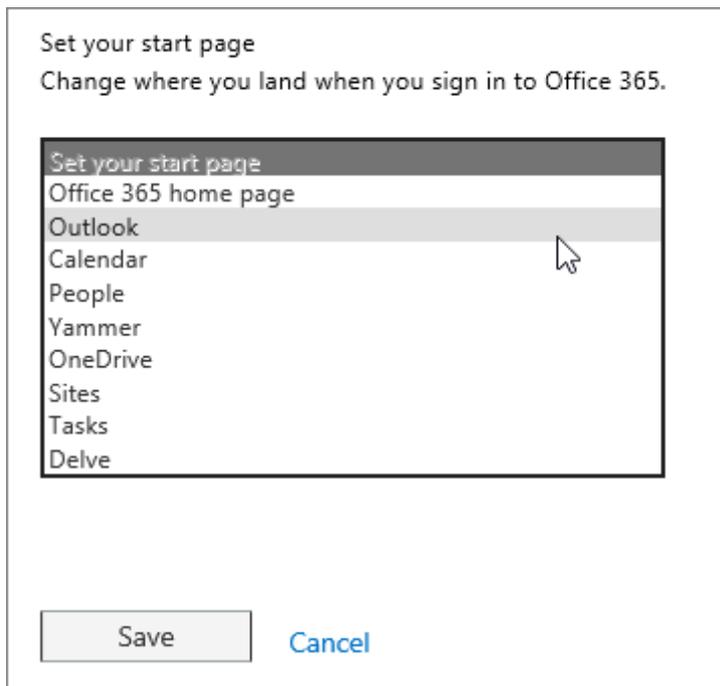
Set up your start page

1. Select **Settings** ⚙️> **Office 365 Settings**.

2. Select **Start page**.

3. In the **Set your start page** box, choose an option, and then select **Save**.

Working with your email, calendar, and contacts in a browser

You can quickly send and receive email, access your calendar, and manage your contacts in Office 365 for business and education by using most browsers.

View your messages and send email by using a browser

1. Sign in to Office 365 at http://portal.office.com with your work or school account. For example, ellen@contoso.onmicrosoft.com, ellen@contoso.edu, or ellen@contoso.com. If you're not sure what your work or school account is, check the welcome email message that asked you to sign in the first time.

   Tip If you're having trouble signing in, see How to sign in to Office 365.

2. At the top of the page, select **Outlook**. Or, select the app launcher , and then select **Outlook**.
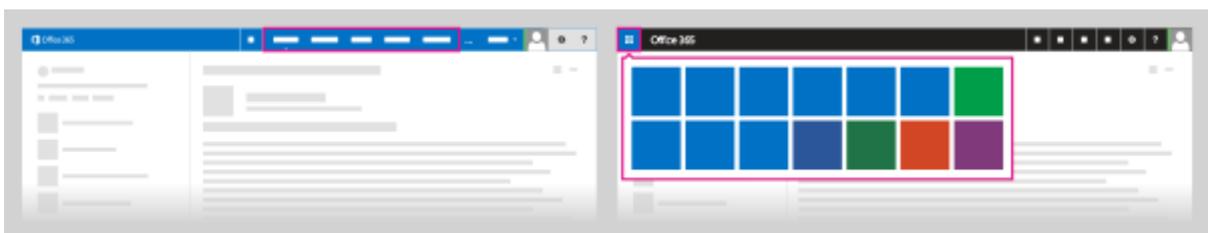
3. To start a new message, select **New mail**.
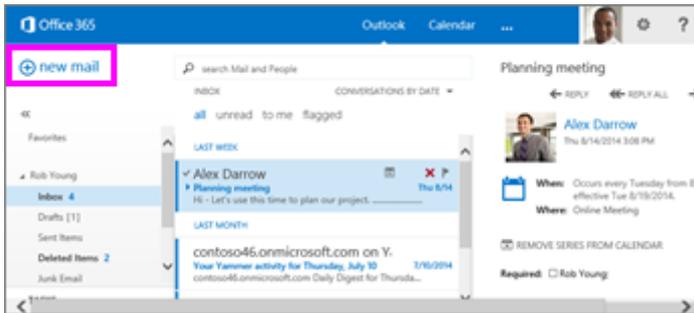
4. Add recipient names, a subject, and some text in the body of the message. Select **Send**.
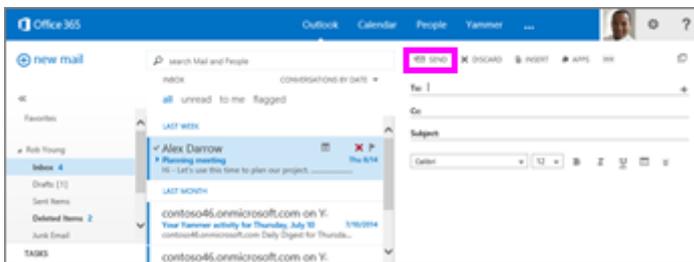
View your calendar and set up a meeting

1. Select **Calendar**. In this example, **Work week** is selected.
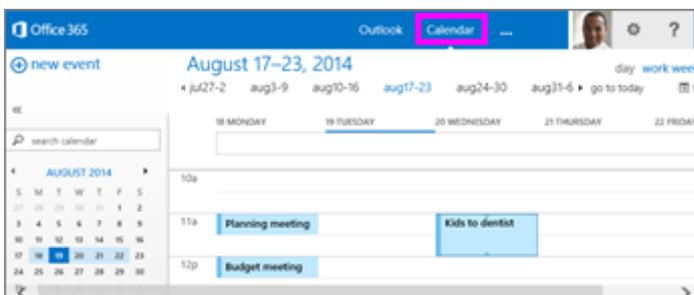
2. To set up a meeting or event, select **New event**.
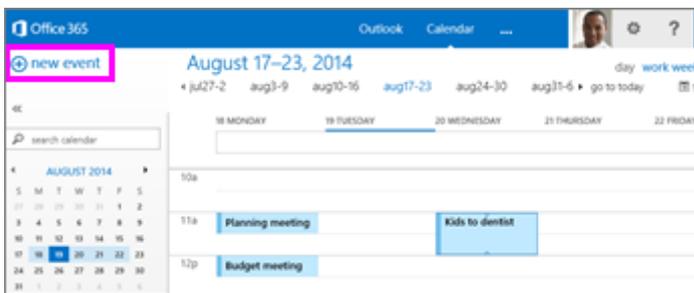
Add, edit, or delete your contacts

- Select **People**.
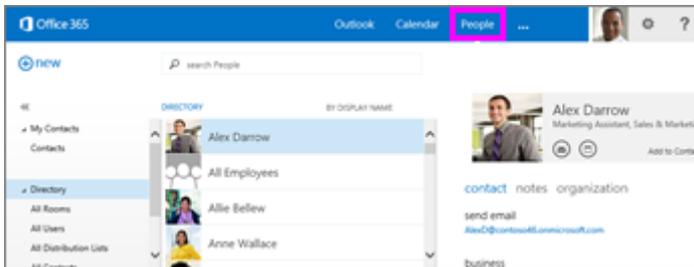
Working with Office documents in a browser

You can create, save, and edit documents in most browsers. OneDrive for Business in Office 365 for business is the cloud storage location for your work or school documents. It's the place where you can store, sync, and share your files across multiple devices with ease and security.

Create a new Office document in a browser

1. Sign in to Office 365 with your work or school account at http://portal.office.com. For example, ellen@contoso.onmicrosoft.com, ellen@contoso.edu, or ellen@contoso.com. If you're not sure what your work or school account is, check the welcome email message that asked you to sign in the first time.

   **Tip** If you're having trouble signing in, see How to sign in to Office 365.

2. At the top of the page, select **OneDrive**. Or, select the app launcher ⊞, and then select **OneDrive**.
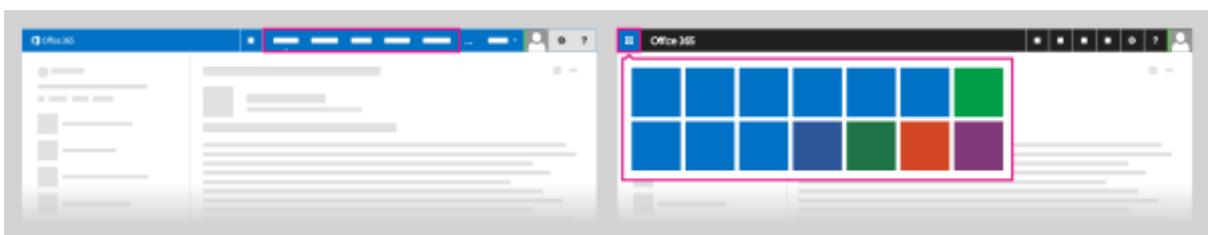
3. Select **New**, and then select the type of document, for example, Word, Excel, or PowerPoint, you want to create.
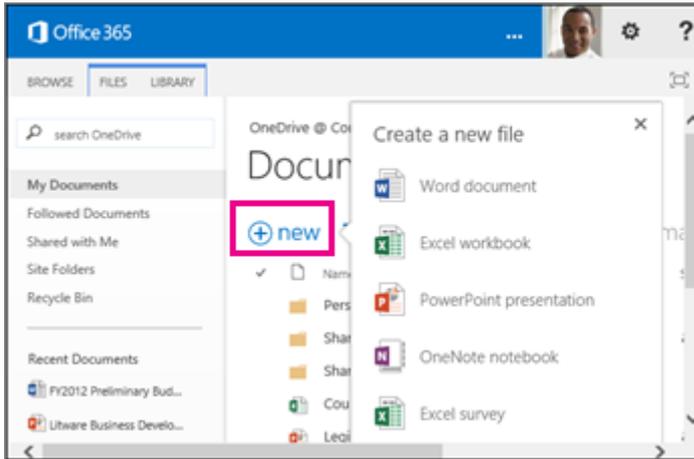
Save an Office document in OneDrive for Business by using a browser

1. When you create, open, or edit a document in OneDrive for Business, it's automatically saved to the same location.
2. To save new Office documents:

   In Word Online, select **Document**.

   In Excel Online, select **Book**.

   In PowerPoint Online, select **Presentation**.

3. Type the new name.

Edit documents in the browser

You can also edit documents you have saved to OneDrive for Business by using a browser.

1. To edit a document, next to the name of the file, select **More** ● ● ●.

2. In the preview window, select **More** ● ● ● > **Edit in browser**.

Want to learn more about working with Office?

You can find Help in Office applications in the **Tell me what you want to do** search box. Just type a word like "print" and you'll be offered assistance.
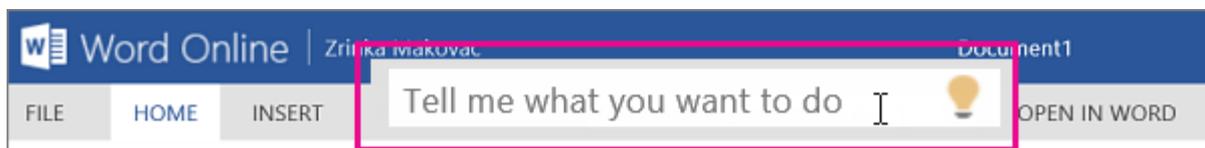
Working with your files in a browser

After working with Office documents in OneDrive for Business, you can work with them from just about anywhere.
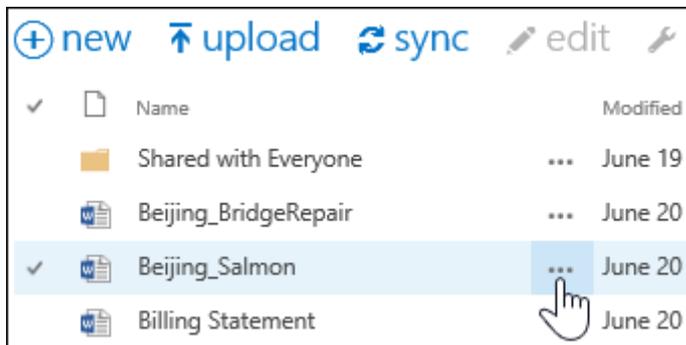
Access files by using a browser

1. Sign in to Office 365 with your work or school account at http://portal.office.com. For example, ellen@contoso.onmicrosoft.com, ellen@contoso.edu, or ellen@contoso.com. If you're not sure what your work or school account is, check the welcome email message that asked you to sign in the first time.

    Tip If you're having trouble signing in, see How to sign in to Office 365.

2. At the top of the page, select **OneDrive**. Or, select the app launcher ⊞, and then select **OneDrive**.
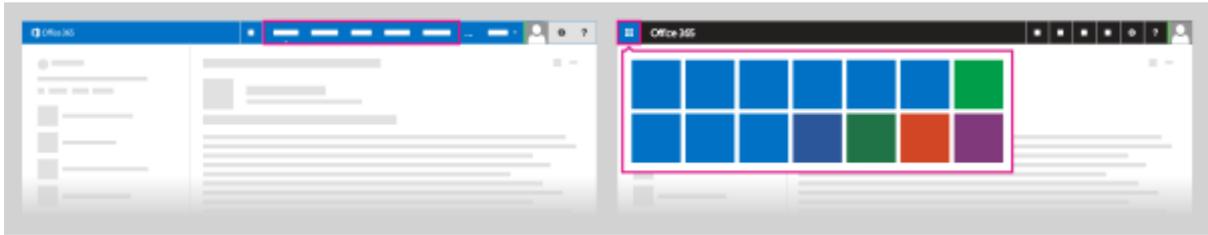
3. To open the file you want, select **More** ••• > **More** •••, and select what you want to do. For example, **View** or **Edit**.

Start using Skype for Business for IM and online meetings

Office 365 includes Skype for Business, which lets you have instant messaging (IM), audio and video conversations, and Skype meetings. To download Skype for Business, sign in to Office 365, then at the top of the page, click **Settings** > **Office 365 settings** > **Software** > **Skype for Business**.

Set up an online meeting using Outlook Web App

1. Sign in to Office 365 with your work or school account at http://portal.office.com. For example, ellen@contoso.onmicrosoft.com, ellen@contoso.edu, or ellen@contoso.com. If you're not sure what your work account is, check the welcome email message that asked you to sign in the first time.
2. In the Office 365 portal, click the waffle, then click Calendar to open the Calendar app.
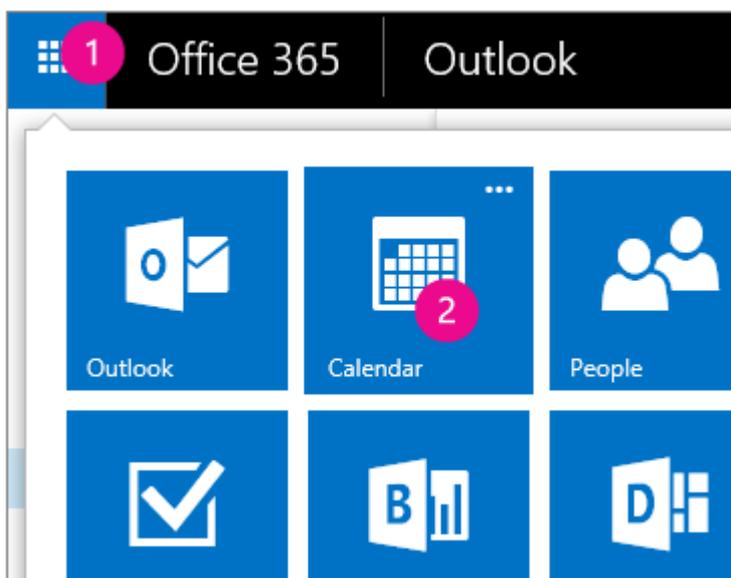
3. Click the plus sign or New just below the waffle, and fill in the meeting information as usual.
4. In the middle of the meeting window, above the message area, select **Online meeting**.

Repeat:

Never ▼

☐ Mark as private

⊕ Online meeting

Call-in details, like a **Join online meeting** link appear in the message area. If your account is configured for dial-in conferencing, you'll also see a **Find a local number** link.

5. Set up the meeting.
   o Name the event
   o Add or remove attendees
   o Choose a start time and set duration
   o Add other details as needed
6. Select **Send** when you're done.

Add a contact in Skype for Business

1. In the search box on the Contacts view of the Skype for Business main window, type a name, IM address, or desk phone number (if they are in your organization). As you type, search results will start appearing below the search box and the tabs will change from Groups, Status, Relationships, and New:

👤 🕐 ⠿ 🗒 ⚙▾

Find someone or dial a number 🔍

GROUPS STATUS RELATIONSHIPS NEW 👤+

to My Contacts and Skype Directory:

👤 🕐 ⠿ 🗒 ⚙▾

sally ✕

MY CONTACTS SKYPE DIRECTORY
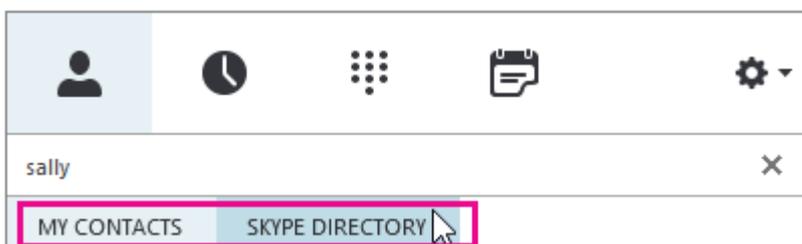
2. If the person you are searching for is in your organization, keep the My Contacts tab selected (that's the default). When My Contacts is selected, Skype for Business searches in your organization's address book.

If the person you are searching for is not in your organization but you know they have a Skype account, click the Skype Directory tab to search for them among the millions of Skype users out there. Knowing their Skype user name and location helps narrow the search quickly.

3. When you see the listing for the person you want to add, point at their picture (or picture display area).

   If they are in your organization (My Contacts), and you want to add them to one of your groups, click the**More Options** button, and then choose either **Add to Contacts List** (then select one of your groups) or **Add to Favorites**.

   If they are a Skype user, and you want to add them to one of your groups, click the **Add to contacts** button, then choose one of your groups or the favorites group to add them.

Send an IM in Skype for Business

1. Find the person you want to send an instant message to. Do one of the following:
   - Hover over their picture in the Contacts list and click the **IM** button.

   - Double-click anywhere on their contact listing.
   - Right-click their listing and select **Send an IM**.

2. Type your message at bottom of the conversation window.
3. (Optional) To send a file or image, do one of the following:
   a. Drag-and-drop a saved file into the text input area.
   b. Copy and paste a saved file or any image from an Office program into the text input area.
   c. Press PrtScn on your keyboard to capture an image directly from your screen, and then paste it into the text input area.
4. (Optional) To add an emoticon, change the font, or mark the message as Important, do any of the following:
   a. Add an emoticon by clicking the Emoticon ☺ icon, and then clicking the emoticon you want to add.
   b. Change the font or font size by clicking the More options (ellipsis) button.
   c. Mark your message high-priority by clicking the Importance ! icon.
   d. Send a file by clicking the paperclip and browsing to the file you want to send.
5. Press **Enter** on your keyboard to send the message.
6. (Optional) Add other people to the conversation by dragging their contact listing from your Contacts list into the conversation window.

## Staying connected with your network in a browser

Yammer is a private social network where you can collaborate, communicate, and share information at work or at school from anywhere. Here's how to get to your Yammer network by using a browser or by installing the mobile app for your device.

Sign in to the Yammer network in your browser

1. Sign in to Office 365 with your work or school account at http://portal.office.com. For example, ellen@contoso.onmicrosoft.com, ellen@contoso.edu, or ellen@contoso.com. If you're not sure what your work or school account is, check the welcome email message that asked you to sign in the first time.

   Tip If you're having trouble signing in, see How to sign in to Office 365.

2. At the top of the page, select **Yammer**. Or, select the app launcher , and then select **Yammer**.
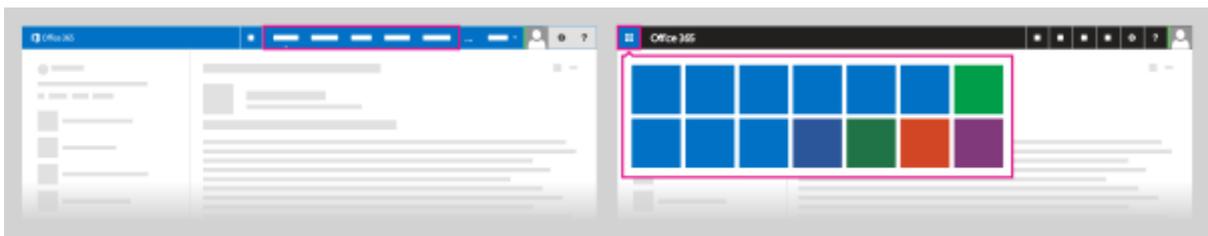
3. If you're new to Yammer, respond to the email message you receive after you sign in to activate the account.
4. If this is your first sign in, you may see a page to invite others to the network. Select **Go to your network**.
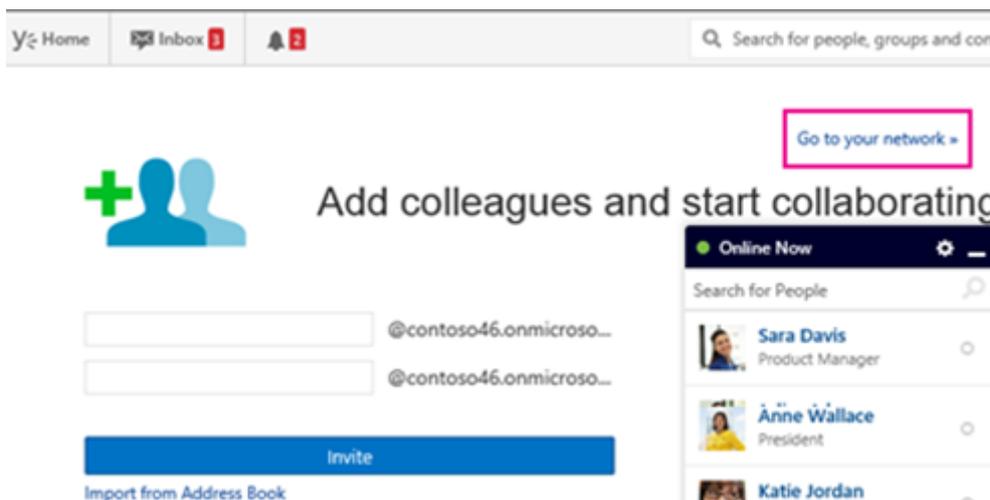
5. The next time you sign in, you'll go directly to your own company site.

You can now add yourself to groups, and can post messages and reply to ongoing conversations.