

CHAPTER 1

InFocus

INTRODUCTION TO OFFICE 365

Office 365 is a subscription-based suite of applications and services with a focus on collaboration and productivity. It is completely cloud-based (aside from the desktop Office applications if they are included in your subscription plan), allowing you to easily access and edit your documents from a range of devices. This also has the added benefit of enabling you to easily communicate and work with others.

In this session you will:

- ✓ gain an understanding of the cloud
- ✓ gain an understanding of **Office 365**
- ✓ gain an understanding of the differences between **Office 365** and **Office 2013**
- ✓ gain an understanding of the subscription plans
- ✓ gain an understanding of the system requirements for **Office 365**
- ✓ gain an understanding of the services included in **Office 365**
- ✓ gain an understanding of the terms that are used commonly when describing how **Office 365** works
- ✓ gain an understanding of how desktop applications are used in **Office 365**
- ✓ gain an understanding of connected services
- ✓ gain an understanding of the devices you can use with **Office 365**.

WORKING IN THE CLOUD

Cloud computing, in very simple terms, refers to internet-based computing (**cloud** is a metaphor for the internet) where different services like storage and applications are provided to

computers and devices through the internet. Office 365 is a primarily cloud-based service allowing you to access your work from any compatible device with an internet connection.

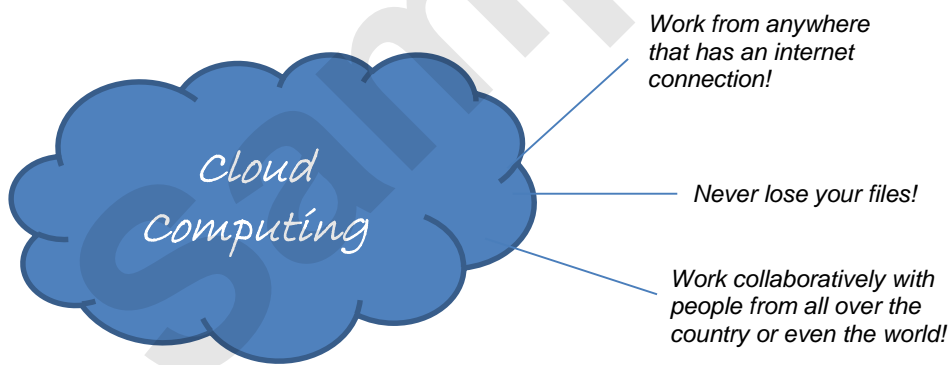
What Is The Cloud?

The **cloud** is a computer term for off-site storage and hosting. This means that files and software can be stored in another location (i.e. on Microsoft's servers), and you can access them online. An example of cloud storage is OneDrive, which allows you to store files online and access them from almost any device with an internet connection – your computer, tablet or even your smartphone.

Advantages Of Working In The Cloud

Working in the cloud means that you are able to save your files to the cloud (i.e. OneDrive) and you can access them from any compatible device as long as it has an internet connection. This saves you from relying on using USB drives, portable hard drives and email to transport files or share them with other people. Cloud sharing capabilities mean that several people can work on one file at the same time, eliminating issues that arise with having several versions of the same file. You can also save files to both the cloud and your hard drive, ensuring you have backup copies in case of emergencies such as computer failure.

Another advantage of working in the cloud is the unlimited storage space. If you run out of storage space on your computer, you need to either free up space by permanently deleting files or add more space by purchasing and installing additional hard drives. However, if you run out of storage space in your OneDrive you can simply pay an annual fee to receive more.



Disadvantages Of Working In The Cloud

There are some disadvantages to consider before you commit to working in the cloud, chiefly in the areas of security and reliability. While using cloud-based services means you can access your work from anywhere as long as you have an internet connection, it also means that someone else can too. Having all of your work online rather than on your company's server means that you need to be extremely careful to protect your login details, such as your password. You also need to be aware of the terms and conditions of using services such as OneDrive, and that your files may be scanned by Microsoft without your knowledge or consent.

Reliability is an aspect of working with the cloud that is largely out of your control. Office 365 comes with a 99.9% uptime guarantee, meaning that Microsoft has committed to ensuring you can access Office 365 at any time, with virtually no downtime or crashes. However, if a crash does occur you may lose access to your files and services until the problem is fixed. You also need to make sure your internet connection is reliable for the same reason; it is difficult and frustrating to work in the cloud if your connection drops in and out. If you are concerned about reliability, you might like to keep copies of the files you are currently working with on your hard drive so that you can access them without being connected to the cloud if need be.

WHAT IS OFFICE 365?

Office 365 is an online suite designed to allow you to access and edit your work from multiple devices and to quickly and easily share your work and collaborate with others. For a monthly or

annual subscription fee, you can access a range of applications and services, including Outlook email and OneDrive cloud storage.

Office 365

Office 365 is a subscription-based service which is run entirely from the cloud. This means that for a monthly or annual fee, you can access a range of applications and services which are hosted online by Microsoft, allowing you to access them from any compatible device with an internet connection – your computer, tablet or smartphone. Which services you have access to will depend on which plan you choose.

Office 365 is not a suite of desktop applications like Office 2013; however, many Office 365 subscription plans do include PC/Mac and tablet installs of the full desktop versions of Word, Excel, PowerPoint, OneNote, Outlook, Publisher and Access. You can also add Project and Visio to your applications for an additional subscription fee. Because all of these applications are the full desktop versions and are therefore the same as those included in the Office 2013 suites, you can use them without being signed in to Office 365 or connected to the internet.

Business Plans

Office 365 business plans are designed to be a central hub where you can share and connect with others. The Outlook email, calendar and people services enable you to communicate with others and share calendars to coordinate meetings and availability. Business plans also include SharePoint online, providing you with the means to create a public website for your business as well as internal team sites for collaboration and communication purposes, and Skype for Business for instant messaging and video conferencing. **Office on Demand** is a useful feature of business plans which include Office 2013 applications; it allows you to temporarily stream the applications to a computer without installing them. If you have an Office 365 business subscription, you can access your account with either your existing work email address or a new one, depending on how it has been set up by your administrator.

Home Plans

Office 365 home plans (Home, Personal and University) are aimed more at convenience than collaboration as they are intended to be used at home rather than in a business environment. Home plans do not include Outlook or SharePoint services; instead they include personal OneDrive cloud storage space and Skype world minutes. Office 365 home plans are accessed with a Microsoft account. You can choose to use your existing Microsoft account if you have one (for example, for Hotmail, OneDrive or Xbox Live) or you can create a new one.

For the purposes of this manual we will be focusing on using Office 365 in a business environment; specifically Office 365 Small Business Premium. Note that due to frequent upgrades the plans available are likely to change on a semi-regular basis, including the names of the plans and what is included in each.

OFFICE 365 VERSUS OFFICE 2013

You may be wondering what differences there are between Office 365 and Office 2013, and what advantages and disadvantages there are to subscribing to Office 365. While the basic

difference is that Office 365 includes Office 2013 and adds more services (unless you choose a plan without Office 2013), there are other aspects to consider.

Office 365 Includes Office 2013 Plus More

Office Professional 2013 is a Microsoft Office suite which includes Word, Excel, PowerPoint, Outlook, OneNote, Publisher and Access. If you purchase Office Professional 2013 outright, it costs several hundred dollars and you can only install it on one computer. Other Office 2013 suites are cheaper but do not include as many applications and are also limited to one computer.

Office 365 is a cloud-based service that, depending on your plan, provides Outlook and SharePoint online services, personal OneDrive or OneDrive for Business storage, Skype minutes and Skype for Business communication services. Some Office 365 plans include the desktop versions of the Office 2013 applications which are included in the Office Professional 2013 suite.

Advantages And Disadvantages Of Office 365

Advantages	Disadvantages
Cheaper initial payment.	Ongoing subscription fees will add up and could be raised in future.
You can choose to end your subscription before it gets too expensive.	When your subscription ends, your Office 2013 applications will only open in read-only mode – you will not be able to edit or create new documents. You will also lose access to the 1TB of OneDrive storage you received upon subscribing to Office 365, as well as any other services you received with your subscription.
Automatic upgrades – always have the latest software without paying extra.	You do not have the choice to refuse the upgrade; you will have to work with new, unfamiliar software which may have low compatibility with others.
Easily accessible – sign in and access from any compatible device with an internet connection.	Risk others learning your sign-in information and remotely accessing your files and services.
Cloud storage doesn't take up space on your computer.	Cannot access files without internet connection or if Microsoft's servers crash.
Some business plans include Office on Demand streaming.	You must have a strong internet connection to use the streaming service effectively.
	You may install applications you don't need and will never use.

CHOOSING THE RIGHT PLAN

Office 365 is available in several different subscription plans, allowing you to choose which plan best suits your needs. The home plans are suitable for personal use by individuals, families,

students and the like, while the business plans are designed for workplaces of varying sizes. It is recommended to look into what each plan includes before signing up for an Office 365 subscription.

Office 365 Home Plans

The **Home**, **Personal** and **University** plans are designed for non-commercial use by families, individuals and students. These plans all include the same services: smartphone access, OneDrive storage and monthly Skype credit. The only differences between them are the number of Office 2013 installs that are included, the pricing, and the fact that the **University** plan has eligibility criteria (proof of enrolment or employment at an accredited higher education institution). The **Home** plan includes five PC/Mac installs and five tablet installs of the Office 2013 applications, the **Personal** plan includes one PC/Mac and one tablet install, and the **University** plan includes two installs across both device categories.

Office 365 Business Plans

The business plans for Office 365 are quite different to the home plans, in that they are designed to be used in the workplace rather than at home. They do not include Skype minutes or space for your personal OneDrive; instead, they provide personal storage on OneDrive for Business, SharePoint services, and a range of other services designed to make it easy to share your work and communicate and collaborate with others. While the **Small Business**, **Small Business Premium** and **Midsize Business** Office 365 plans have all of these services in common, there are also several differences between the three plans. These differences are outlined below:

	Small Business	Small Business Premium	Midsize Business
Users	Up to 25	Up to 25	Up to 300
Business Class Email	✓	✓	✓
Online Conferencing	✓	✓	✓
Public Website	✓	✓	✓
File storage and sharing	✓	✓	✓
*Office Online	✓	✓	✓
Desktop versions of Office applications		✓	✓
Skype for Business (desktop)		✓	✓
InfoPath (desktop)			✓
Active Directory Integration			✓
Self-Service Business Intelligence			✓
Enterprise Social			✓
<i>*Free service available to anyone with or without an Office 365 subscription</i>			

Note that Office 365 plans are updated on a semi-regular basis, and the names of plans and the services that they include are very likely to change. The details described above are correct at the time of this manual's publication.

SYSTEM REQUIREMENTS

Office 365 is designed to be compatible with most current operating systems and internet browsers; however, there are some requirements and recommendations intended to ensure you

can use the applications and services to their maximum potential. Subscriptions that include Office 2013 applications have some requirements that other plans may not.

Web Browsers

Office 365 is designed to work with:

- **Internet Explorer** – the current or immediately previous version
- **Firefox** – the current or immediately previous version
- **Chrome** – the current version
- **Safari** – the current version

You may be able to use Office 365 with other browsers or older versions of the above browsers, but Microsoft will provide limited support, if any, in such a situation. It will also be unlikely that you will be able to use the services to their full potential.

Office 2013 Requirements

Most Office 365 subscription plans include Office 2013, which has the following system requirements:

Component	Requirement
Operating system	Windows 8, Windows 7, Windows Server 2012, or Windows Server 2008 R2
Computer and processor	1 GHZ or faster x86 or 64-bit processor with SSE2 instruction set
Memory	32-bit: 1GB RAM 64-bit: 2GB RAM (recommended)
Disk space	3 GB
Monitor resolution	1024 x 768

Using Office 365 With Older Versions Of Office

If you choose an Office 365 subscription plan that does not include Office 2013 and you already have an older version of Office installed, you will be able to use the version you have in conjunction with Office 365 as long as it is still covered by Microsoft's mainstream support. The versions of Office that are currently in mainstream support are Office 2010 (until October 13, 2015) and Office 2013 (until April 10, 2018).

Office 365 is not designed to work with Office 2007, as it is no longer covered by mainstream support. You should be able to use Office 2007 in conjunction with Office 365 to a certain extent; however, functionality will be limited and it is unlikely that you will be able to use Office 365 to its full potential. If you are still using Office 2007, Microsoft recommends that you upgrade to Office 2010 or Office 2013 in order to use Office 365.

OFFICE 365 SERVICES

The Office 365 for business plans include a range of features and services that are common to all of the subscription plans. It is useful when beginning to use Office 365 to have an

understanding of what these services are designed to do and how they will help you in the workplace.

Skype For Business

Skype for Business allows you to communicate quickly and easily with colleagues and clients using a range of different features such as instant messaging, voice calls and video conferencing. There are some parts of Skype for Business that are built into the Office 365 services you will use in the browser window (such as the ability to send instant messages in Outlook) and some that you will have to use in the desktop version of Skype for Business.

Before purchasing the Office 365 subscription you may have had the desktop version of Skype for Business or an earlier version (such as Lync 2013) installed on your computer. If so, you can continue using that desktop version with your Office 365 account, or you can install the Skype for Business desktop version that is included with your Office 365 subscription.

Newsfeed

The newsfeed is designed as a place where people can communicate with each other and receive updates about each other, sites and documents. It is similar to the newsfeed found in some social networking sites such as Facebook.

Office Online

Office Online is a term that refers to the suite of products that is comprised of Word Online, Excel Online, PowerPoint Online and OneNote Online. Formerly known as Office Web apps, Office Online allows you to view and edit different kinds of files in the browser rather than using the desktop versions of Microsoft Office. Office Online does not include as much functionality as the Microsoft Office desktop applications but it is still a very useful tool. The desktop versions of Microsoft Office are also included in Office 365 so that you can edit files offline.

Outlook

Outlook allows you to send, receive and work with emails. It is a major feature in Office 365 and as part of an Office 365 subscription you will have access to the Outlook desktop version (which may or may not already be installed on your device) as well as the online version of Office 365 known as the Outlook Web App (sometimes abbreviated to OWA).

Calendar

Whereas the desktop version of Outlook incorporates **Calendar**, the Office 365 in the browser window keeps **Calendar** separate. You can use the calendar to keep track of your schedule, organise events and much more.

People

Whereas the desktop version of Outlook incorporates **People** (your contacts), the Office 365 in the browser window keeps **People** separate. You can use **People** to add, organise and manage your contacts. You can even send emails or instant messages to people from the **People** screen.

Tasks

Tasks can be created from the task screen or within Outlook. It is designed to be an area where you can list all the things you need to do and keep track of which items you have and haven't completed.

Sites

Sites is designed as another tool for sharing documents and collaborating with colleagues. A site is often referred to as a **team site** and can be likened to a website that contains more than one page and a range of different elements. By default each site contains a newsfeed and a document library. You can upload documents to a site to share the document with anyone who is a member of the site. You can post to the newsfeed to communicate with other members of the site and you can add features such as task lists and timelines to keep track of projects that you and the members of the site may be working on. Office 365 for business subscriptions also come with the ability to set up a public site but you must have administrator permission in order to set it up and add content to it.

GLOSSARY OF COMMON OFFICE 365 TERMS

As part of this manual there may be some terms that are introduced that you have never heard of before or don't feel as if you have a thorough understanding of. When learning how to use

Office 365 it is useful to have a grasp of the terminology used in Office 365.

TERM	DEFINITION
<i>App store</i>	If you have Windows 8 or any version of Windows after Windows 8, you will have an App store on your computer. If you have a mobile device you will also have access to an App store. An App store is a program that connects to the internet and allows you to download applications (software programs) to your device.
<i>Application</i>	An application is a software program that runs on your computer; for instance, a web browser such as Internet Explorer , or a word processing program such as the desktop version of Microsoft Word.
<i>App</i>	An abbreviation for application. See Application .
<i>Browser</i>	A browser is also known as a web browser and is an application that connects to the internet and is used to access and view websites. Internet Explorer , Safari and Google Chrome are examples of popular browsers.
<i>Data</i>	Data is essentially information processed or stored by your computer or other device. It can be a range of different things such as documents, software programs, audio and much more.
<i>Desktop application/version</i>	The desktop is usually the screen that displays when you boot up your computer. A desktop application is a software program that is installed on your computer rather than in the cloud.
<i>Device</i>	In this manual the term device is used to describe a piece of electronic equipment such as a computer, tablet, iPad or mobile phone.
<i>Download</i>	Downloading refers to sending data to your computer. For example, you can download a software program from the internet to your computer.
<i>Install</i>	Usually you need to install things such as a software program. For example you must install the Microsoft Office desktop applications before you can use them. The process of installing refers to writing the data from the software program on to your hard drive. Once you have installed something it is then saved and stored on your hard drive.
<i>Server</i>	A server is a computer system that provides data to other computers. You can have different kinds of servers to perform different tasks.
<i>Service</i>	The term service can be used interchangeably with the word application though they describe different functions. A service is something that can be provided by an application but it is not an application itself. For example Outlook is an application as it is a software program but it also provides the service of storing emails and allowing users to send and receive emails. Therefore it can be described as a service but technically it is not a service, it is still an application.
<i>Software</i>	Software is a term that refers to any kind of computer program which is also synonymous with the term application. Software is literally 'soft' 'ware' – that is, a product that is virtual rather than physical.
<i>Sync</i>	Sync is an abbreviation for synchronise. It generally refers to the process of synchronising data from one device with another device so that both devices contain the same data. This generally involves uploading data from one device to another.
<i>Upload</i>	The process of uploading refers to sending data from your computer to another device or to the internet. For example, you can upload a file from your computer to OneDrive.

UNDERSTANDING DESKTOP APPLICATIONS IN 365

Office 365 desktop applications such as Word, Excel, PowerPoint, etc. are the same as those purchased in a non-Office 365 subscription. The difference is that when you sign in with your

Office 365 account you have the option of saving your files to OneDrive for Business or SharePoint. You can also open files from Office Online in the desktop applications.

Working With Desktop Applications

You can use the Office desktop applications in Office 365 in a number of different ways.

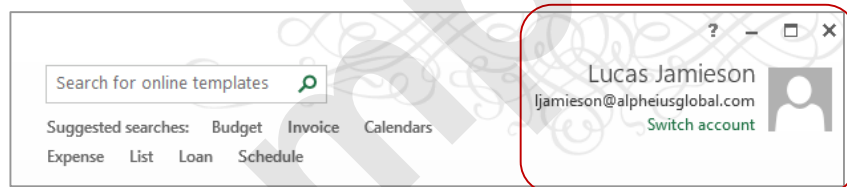
For instance, you may wish to create or open a document in Word Online, then choose to open it in the desktop application for further, more complex editing. You can then save the document to your computer, to your OneDrive for Business, or to a site.

Alternatively, you might create a document in a desktop application, save it to your OneDrive for Business, then open it in Office Online. You could also share the document via Skype for Business instant message or post it to your My Site blog.

Signing In To Desktop Applications

In order to use the desktop versions of Microsoft Office in Office 365 it is important that you sign in to the desktop applications using your Office 365 account. When you sign in, it ensures that the desktop versions of Office are linked to your Office 365 services online.

If you already have the latest version of Office installed on your device, chances are that you are already signed in. You can tell which account you are signed in with by checking the top right corner of the start screen in an office application.



If the account details (your user name and email address) are not that of your Office 365 account then you will need to add your account and sign in. If the account has been added previously then you will only need to switch accounts. To add or switch accounts click on **Account** in the Backstage, then click on **Switch account** below your user name in the top right corner of the screen.

Which dialog box appears next will depend on whether or not you have added another account. If the **Accounts** dialog box appears, click on the relevant account listed or click on **Add account** and follow the prompts. Alternatively if the **Sign in** window appears, fill in your Office 365 account details and follow the prompts to sign in and add your account.

Working With Your Account

You can work with your online Office 365 account by clicking on the links available under **User Information** on the **Account** tab of the Backstage. For instance clicking on **Change photo** or **About Me** will automatically open a new browser window displaying the **About Me** section of your Office 365 profile (if you are signed in to Office 365 in the browser). If you are not signed in to Office 365, clicking on **Change photo** or **About Me** will display a new browser window with the Office 365 sign in page displayed.

You can sign out of your Office 365 account by clicking on **Sign out** under **User Information**.

Changing The Office Background And Theme

You can change the background and theme of your Microsoft Office desktop applications. Note that any changes you make will not affect the online applications. To change the Office background click on **Account** in the backstage, then click on the drop arrow beneath **Office Background** and point to an option to see a live preview display in the top right section of the screen. Click on an option to select it and apply that background. To change the Office theme, click on the drop arrow under **Office Theme** and point to an option to view a live preview or click on an option to apply the theme.

CONNECTED SERVICES

You can connect a number of services to your Office desktop applications, including Facebook, YouTube and Twitter. Using these services, you can incorporate pictures and videos from your

social accounts in your Office files, and use your social accounts to share your Office files with others.

Connected Services

Connected services are services that you can connect to and use in conjunction with your Office desktop applications after you have signed in. Some services such as OneDrive for Business and Sites will be automatically connected when you sign in to Office 365, while others may require you to sign in with your Microsoft Account or choose to connect them manually. Using connected services, you can insert pictures, videos and files from your Facebook, Flickr and YouTube accounts into your Office files and share files on Facebook, LinkedIn or Twitter.

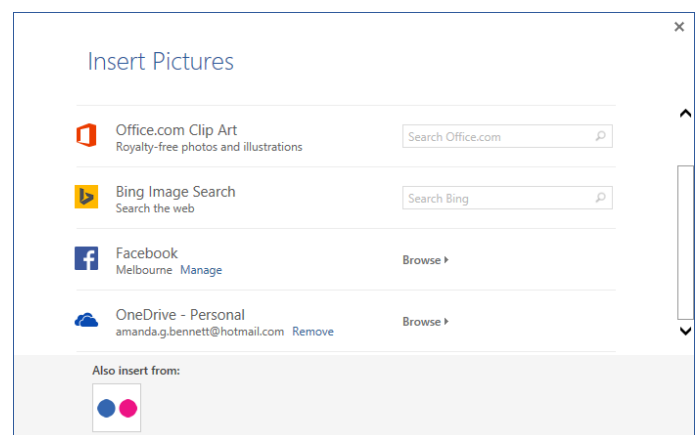
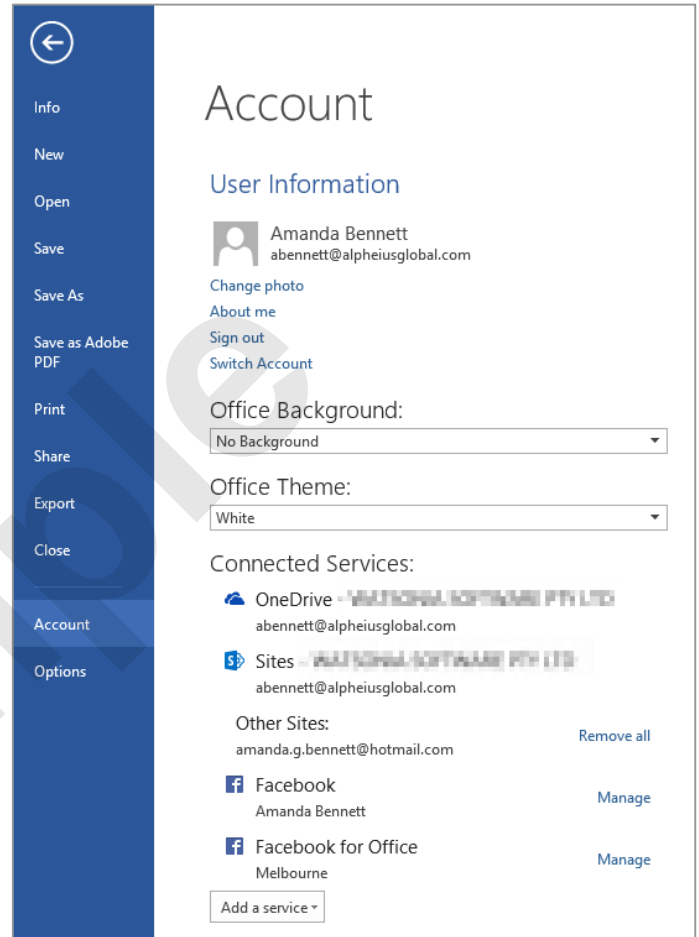
Connecting Services

To connect services to your Office desktop applications, open an Office application, click on the **FILE** tab to display the **Backstage**, then click on **Account**. If you are not already signed in to the Office desktop applications with your Office 365 account, you can do so by clicking on **Switch Account** and following the prompts.

Any services that you already have connected will be displayed under **Connected Services**. You can add more services by clicking on **Add a service**, pointing to a menu item, then selecting an option. To connect most services you must first add your Microsoft account; simply click on **Add a service**, point to **Other sites**, then select **Microsoft account** and follow the prompts. Once you have connected your Microsoft account, you can connect other accounts such as your Facebook, Flickr, LinkedIn, Twitter and YouTube accounts.

Using Connected Services

Connecting services such as your Facebook or YouTube account to the Office desktop applications allows you to insert pictures and videos straight from a website into an Office file. For example, you might like to insert a photo from one of your Facebook or Flickr photo albums into a Word document, or add a YouTube video to a PowerPoint presentation. After you have connected your accounts, the options to perform these actions are included in the relevant place on the ribbon – Facebook is included as an option when you choose to **Insert Online Pictures**, for instance.



DEVICES

Device is a broad term that covers a range of different electronic goods such as tablets, laptops, desktop computers and more. You can use any of these devices to work with Office 365

– as long as that device has an internet connection. Below is a list of devices you can use with Office 365 and a description of what the device does.

Common Terms

TERM	DEFINITION
<i>Android</i>	Android is an operating system designed by Google. Many smartphones and tablets use the Android operating system including devices made by Samsung, HTC and Sony.
<i>Apple</i>	Apple products are designed by the computer company Apple . Their products include the iPhone (smartphone) and iPad (tablet). Apple products use their own operating system called iOS.
<i>Mobile Device</i>	A mobile device is a device such as a tablet or smartphone that allows you to work on the go.
<i>Windows phone</i>	Windows phones are devices that run the Windows mobile operating system, such as Nokia smartphones.

Computers

You can use Office 365 and the associated desktop applications on any compatible computer that has an internet connection, including desktop computers, laptops, netbooks, PCs and Macs.

Tablets

Tablets are lightweight portable devices that make it easy to work on the go. They are primarily touchscreen devices, although many tablets now provide the option of a small detachable keyboard. There is a wide range of tablets available including Apple iPads, tablets that use the Android operating system such as Nexus and Samsung devices, and Microsoft Surface tablets which run Windows 8. Tablets are generally designed to access the internet through a Wi-Fi connection, although many include a sim card slot which allows mobile network access.

Most activities on tablets require the use of apps, which can be downloaded from the app store relevant to your device (i.e. the App Store for Apple users or the Play Store for Android users). There are several apps available that can be used in conjunction with Office 365; however, the apps available to you will depend on the device you are using. You can also use an internet browser on a tablet just as you would on a computer, enabling you to access your Office 365 account in the same way.

Smartphones

Smartphones are mobile phones with additional capabilities. These devices typically have touchscreens and built-in cameras and allow you to communicate in a variety of ways including calling, video calling, text messaging, emailing and social networking. There are also thousands of apps available for smartphones that enable you to do anything from finding out how to get somewhere and checking the weather forecast to playing games and managing your bank accounts. Popular smartphones currently on the market include the Apple iPhone, Android phones such as the Samsung range, and Windows phones which include recent Nokia models.

Similar to tablets, much of the functionality of a smartphone lies in the apps you choose to install on it. There are several apps available for smartphones that are designed to be used in conjunction with Office 365, allowing you to access some of your services on the go.

Sample