Office 365 User Guide

A comprehensive guide to increase collaboration and productivity with Microsoft Office 365



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Nikkia Carter

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BIRMINGHAM - MUMBAI

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I want to thank my editors and reviewers for helping me to finish this book, and to my readers for their patience.

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Preface

The purpose of this guide is to give the reader an understanding of the use of Office 365 from a beginner's perspective. This guide will focus on the main areas: email via Exchange, Team communication via Skype for Business and Microsoft Teams, Team collaboration via SharePoint, and Business document storage via OneDrive for Business. It will give you an understanding of how to perform the most common tasks, which will help you begin your journey into one of Microsoft's most popular cloud technologies.

Who this book is for

If you are an IT professional who wants to upgrade your experience to include Microsoft Office 365 and you are new to it, then this book is for you. New users looking to learn about the Office 365 environment in their organization will also find this book useful. Some understanding of the Microsoft Office suite and cloud computing basics will be beneficial.

What this book covers

Chapter 1, *Exploring Office 365*, looks at the background of Office 365 and goes through an overview of its major parts: Exchange, Skype for Business, Microsoft Teams, SharePoint, OneDrive for Business, Office desktop, web and mobile apps, and security. We'll also look at how to log in, and include an important word about browsers.

Chapter 2, *Understanding More about Office 365*, looks at the various parts of Office 365 Home and your personal settings. We'll also look at the difference between Office 365 Commercial and Consumer and their licenses.

Chapter 3, *Understanding Exchange*, explores the background and history of Exchange, arguably the world's most popular mail server. We'll also see how to get to Exchange Online and look at its parts.

Chapter 4, *Sending and Receiving Email*, introduces the different parts of the Outlook web app and Outlook on your desktop, and their functions.

Chapter 5, *Using the Exchange Calendar*, looks at the different parts of the Outlook calendar via the web app and via Outlook on your desktop, and their functions.

Chapter 6, *Using Contacts in Exchange*, explores the various parts of Outlook Contacts via the web app and via Outlook on your desktop, and their functions.

Chapter 7, *Getting Familiar with Other Exchange Settings*, covers the other settings of the Outlook web app and Outlook on your desktop, such as creating an email signature and creating email rules.

Chapter 8, *Understanding Skype for Business and Microsoft Teams*, looks at the background and history of Skype for Business and Microsoft Teams. We'll also look at how to get into Skype for Business and Microsoft Teams, the various parts of each, and their functions. Lastly, we'll point out the path that Microsoft is taking with Teams.

Chapter 9, *Using Skype for Business*, explores the functions of Skype for Business, such as presence settings, instant messaging, and working in meetings.

Chapter 10, *Using Microsoft Teams*, covers the functions of Microsoft Teams, such as presence settings, instant messaging, and working in meetings.

Chapter 11, *Understanding OneDrive For Business*, explores the background and history of OneDrive for Business. We'll also look at how to get to OneDrive for Business and examine its parts. Lastly, we will look at how OneDrive for Business is different from OneDrive.

Chapter 12, Working with Files in Your OneDrive for Business, looks at adding, editing, and deleting files using OneDrive for Business, and the parts of the Office Online file. We'll also look at sharing, moving, and copying files.

Chapter 13, *Understanding SharePoint*, goes into the background, history, and editions of SharePoint. We'll also look at how to get to SharePoint and the various parts of SharePoint Home. Lastly, we'll look at navigating SharePoint and the anatomy of a SharePoint page.

Chapter 14, *Working with SharePoint Lists*, explores what a list is and the different list types. We'll also explore list views, as well as how to work with them.

Chapter 15, *Performing Different File Operations on SharePoint*, explores what a library is and the different library types. We'll explore library views, as well as how to work with them. We'll also look at naming conventions, version history, coauthoring, and checking in/out, as well as sharing, copying, and moving files.

Chapter 16, *More on Using SharePoint*, covers other SharePoint functions, such as using the quick edit, creating and managing alerts, different ways to search, and the dangers of the share button.

To get the most out of this book

In order to walk through the examples in this book, you will need an Office 365 Business subscription, preferably Business Premium, E3, or E5.

Download the color images

We also provide a PDF file that has color images of the screenshots/diagrams used in this book. You can download it here: https://www.packtpub.com/sites/default/files/downloads/9781789809312_ColorImages.pdf.

Conventions used

There are a number of text conventions used throughout this book.

CodeInText: Indicates code words in text, database table names, folder names, filenames, file extensions, pathnames, dummy URLs, user input, and Twitter handles. Here is an example: "Via this tab, you can open a calendar file (.icsor .vcs), a .pst file, or a user folder shared with you."

Bold: Indicates a new term, an important word, or words that you see onscreen. For example, words in menus or dialog boxes appear in the text like this. Here is an example: "Click on the bell to open the **Notifications** panel and see what notifications you have."



Warnings or important notes appear like this.



Tips and tricks appear like this.

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Feedback from our readers is always welcome.

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1 Section 1: Understanding Office 365

In this section, readers will learn about Office 365 in general and will be given some information on how to make it more useful.

The following chapters will be covered:

- Chapter 1, Exploring Office 365
- Chapter 2, Understanding More about Office 365

Exploring Office 365

Office 365 is one of the many Microsoft cloud solutions, and it seems to be the most popular. Since its general release in June 2011 as the successor to **Business Productivity Online Suite (BPOS)**, Office 365 has grown to have over 120,000,000 active monthly commercial users and 28,000,000 active consumer users.

Since the start of Office 365, there has been a lot of confusion about what the difference is between Microsoft Office 365 and Microsoft Office. To add to the confusion, there are the Office 365 Commercial and Office 365 Consumer versions, and the Commercial version has many versions. Many business owners purchase the Consumer version and believe they have services available in the Commercial version. Because of this confusion, I believe it is imperative that you understand the different versions and what comes with each.

For starters, Office 365 has only been around since being beta-tested in 2010 and released in 2011, while Office had been announced in 1988 and was released in 1990.

In this chapter, you will learn about Microsoft Office, along with its different versions and the services provided by it. You will get a brief overview of all these services. You will also learn how to log into your Microsoft account.

In this chapter, the following topics will be covered:

- Microsoft Office and its versions
- Overview of the services of Office 365
- A word about supported browsers

Technical requirements

To follow along with the lessons in this book, you will need an Office 365 Business Premium, E3, or E5 subscription..

Microsoft Office and its versions

Microsoft provides different versions of its Office suite, which differ in the applications they include and are designed so that customers can buy only the applications that they need. Office has a few versions of its suite:

- Office Home & Student
- Office Home & Business
- Office Standard
- Office Professional
- Office Professional Plus
- Office Professional Academic

Programs, products, and features	Office Home & Student	Office Home & Business	Office Standard	Office Professional	Office Professional Plus	Office Professional Academic
Excel	Yes	Yes	Yes	Yes	Yes	Yes
OneNote	Yes	Yes	Yes	Yes	Yes	Yes
PowerPoint	Yes	Yes	Yes	Yes	Yes	Yes
Word	Yes	Yes	Yes	Yes	Yes	Yes
Outlook	No	Yes	Yes	Yes	Yes	Yes
Publisher	No	No	Yes	Yes	Yes	Yes
Access	No	No	No	Yes	Yes	Yes
Lync/Skype for Business	No	No	No	No	Yes	No
InfoPath *	No	No	No	No	Yes	No
SharePoint Workspace	No	No	No	No	Yes	No

Each version of Office includes the following programs, products, and features:

The previous table is referencing Office 2010 since it is the last version of the Office suite, before the cloud versions complicated things. Office, the non-cloud version, is purchased via a one-time fee of between \$60 to ~\$400 retail. When I say one-time, I mean one-time until you need to upgrade.

Conversely, Office 365 comes in a lot more versions than Office and, rather than paying a one-time price at retail or volume cost, you lease the software by paying a small sum monthly or annually. Office 365 can be Office only, Office with other products, or no Office included whatsoever.

The main versions of Office 365 are as follows:

- Consumer versions:
 - Home
 - Personal
 - Home & Student
- Commercial/business versions:
 - Business
 - Business Essentials
 - Business Premium
 - Pro Plus
 - Enterprise E1
 - Enterprise E3
 - Enterprise E5

Those are the core ones, but there are more versions for government, non-profit, and academic use, but they are very similar to the Business through E3 versions, aside from the cost and a few other particulars.

In Chapter 2, *Understanding More about Office 365*, we will discuss licensing in more detail. Just note that in this book, we will cover the Business version of Office 365.

Overview of the services of Office 365

Office 365 subscriptions vary, but the following are the services in Office 365 for most plans. There are more services than what I have listed here, and each of these services can be assigned to users individually with some exceptions. For more details, see the Business plans at https://products.office.com/en-us/compare-all-microsoft-office-products?tab=2 and the Enterprise plans at https://products.office.com/en-us/business/compare-more-office-365-for-business-plans.

Exchange

This is the engine behind Outlook. It supplies you with email, calendar, contacts, tasks, journaling, and notes capabilities. This portion of Office 365 gives an enterprise-grade, professional email with 50 GB of space using your company's custom domain. You also get the ability to share calendars with others in your organization. Exchange is included with the Business Essentials, Business Premium, E1, E3, and E5 plans. If you have an E3 or E5 plan, you will get a 100 GB mailbox with unlimited archiving.

Skype for Business

This application started as Lync in the first release of Office 365 and is different than Skype, which is the consumer service. With this service, each user has their own account where they can see the presence of people in their personal list and have the ability to instant message and schedule or initiate impromptu online meetings with audio or HD video conferencing for up to 250 participants. No more sharing meeting accounts! It also allows the host(s) to share surveys, polls, and whiteboards with the attendees, and attendees as well as the host(s) can share a meeting notebook or take notes on an individual basis via OneNote integration. Invited attendees do not have to have the Skype for Business application to participate in the meeting.

Skype for Business is included with the Business Essentials, Business Premium, E1, E3, and E5 plans, and were initiated after around 24 August 2018. Any plan initiated after this date will only have Microsoft Teams available, as Teams is replacing Skype for Business in purely cloud Office 365 tenants. Your organization will still have the ability to have a Skype for Business server on premises if desired and if the appropriate additional server (not Office 365) licenses are purchased and deployed. If you have an E5 plan, you may also get a phone number assigned to you from this service and have the ability to dial out and receive calls via this application.

Microsoft Teams

Microsoft Teams is one of Microsoft's newest services and a direct competitive service to Slack. It is a real-time and persistent collaborative work space that's easy to quickly set up and integrates instant messaging, meeting, notes capabilities, and file management, as well as the ability to easily integrate in other Microsoft and third-party apps. This service gives teams of people, internal and external, the ability to have their own work space and collaborate on a single source of truth. In organizations with purely cloud implementations of Office 365, users with Skype for Business and Microsoft Teams will eventually be migrated to Microsoft Teams only. Microsoft Teams is included with the Business Essentials, Business Premium, E1, E3, and E5 plans. If you have an E5 plan, you may also get a phone number assigned to you from this service and have the ability to dial out and receive calls via this application.

SharePoint

SharePoint is Microsoft's original collaborative work space and has been around even before its initial release as SharePoint in 28 March 2001. SharePoint was added as a service to Office 365 and renamed SharePoint Online. Since then, it has evolved into its own evergreen version during the life of SharePoint 2013 and on a life of its own, widely diverging its capabilities from the SharePoint on-premises versions of 2013, 2016, and 2019. Still, SharePoint Online has capabilities above and beyond those offered by Microsoft Teams and is the backbone for Microsoft Teams. This service gives you the ability to share documents and manage projects, like Microsoft Teams, but also to create online forms, dashboards, automated workflow, and much more.

In SharePoint, your organization starts off with 1 TB of storage space, which can be upgraded to as large as 25 TB. SharePoint Online is included with the Business Essentials, Business Premium, E1, E3, and E5 plans.

OneDrive for Business

This application started in Office 365 as SkyDrive for Business and is not the same as OneDrive, which is the consumer service. OneDrive for Business gives you your very own 1 TB of business file storage that can be synced with PC, Mac, and/or mobile devices. You have the ability to easily create and share files with internal and external people (depending on configuration) and control who can see and/or edit the shared documents. OneDrive for Business is included with the Business, Business Essentials, Business Premium, Pro Plus, E1, E3, and E5 plans.

Office Professional or Professional Plus applications for desktop

Plans offering gives you either licenses for Office Professional or Office Professional Plus. Each user with this license will have the ability to download Office on up to five mobile devices and five PCs/Macs. Office Professional Plus includes Outlook, Word, PowerPoint, Excel, Publisher, Access, Excel, and OneNote, and Professional offers all of these except Publisher. The version of Office in Office 365 is evergreen, much like SharePoint Online. InfoPath, which has been a part of Office Pro Plus since Office 2003, has been removed from the Office suite, but is still available for download separately via the Office 365 downloads. Office Pro is included in Business and Business Premium plans, and Office Pro Plus is included in Pro Plus and in all Enterprise plans.

Office web and mobile apps

The web app and mobile app versions of Office give you the ability to create, access, edit, and share Word, Excel, PowerPoint, and OneNote files through OneDrive for Business, SharePoint, and Microsoft Teams. You also get the ability to co-author documents with those who have edit access. Co-authoring is the ability to open and work on a document simultaneously with others. Office web and mobile apps are included in the Pro Plus plan, as well as all Business and Enterprise plans except E1. For E1, only the web apps are available.

Security, transparency, compliance, and privacy

In addition, Office 365 is security-hardened and compliant with a plethora of government and industry standards in the US and abroad. Your data is your data and it says private to you and your organization, and your organization has the ability to see where the data is and who has access to it. There are more measures and capabilities than what I have outlined here. You can read all of the details on Microsoft's privacy, compliance, security, and transparency measures via the Microsoft Trust Center: http://trustoffice365.com.

Logging in

You need to log into Office 365 to use all of its features. Once you have an Office 365 account, you can login using the following steps:

1. Go to https://www.office.com/ and click the Sign In button:



2. You will be taken to a page similar to the following, where you can enter your email address for your account and then your password:

Microsoft	
Sign in	
Email, phone, or Skype	
No account? Create one!	
Can't access your account?	
	Next

3. If you have logged in with different accounts before, you will see something similar to the following screen. Choose an account:

Microsoft				
Pick an account				
ß	Nikkia Carter			
	Connected to Windows			
Ř	Nikkia Car <u>te</u> r			
	Connected to Windows			
Ŕ	Nikkia T. Carter			
	Connected to Windows			
+	Use another account			

You can go directly to the sign-in page by going to https://portal.office.com instead of https://www.office.com/.

Now, let's look at the different browsers that you can use for Microsoft Office.

A word about browsers

Microsoft says that Office 365 works on all popular, up-to-date browsers, which is true, but not all work well. Here is the ranking from best to worse:

• **Internet Explorer 11 (IE11)**: This Microsoft browser is still the best for all features and functionalities of Office 365 and SharePoint. I realize that this browser is decrepit and mostly useless for anything else but this.



I have noted **IE11** since no other version of IE will work well, and any other version is no longer supported.

The first three browsers offer most of the features and functionality of Office 365 and SharePoint:

- **Edge**: Microsoft's newest browser, which was meant to eventually replace IE. The word on the street is that Edge should replace IE soon but, at the time of writing this book, there is no anticipated date.
- **Firefox**: This browser can actually work better than Internet Explorer in one regard: it can be easier to move things around in SharePoint when designing at times because it was designed for web development.
- Safari: This is the browser for Mac. On Mac, the user can get Firefox but not IE.
- **Chrome**: This browser, by Google, is a hugely popular one, but in the case of Office 365 and SharePoint, you should make this browser your last choice. Google does not readily share browser code changes with Microsoft, and those changes can happen at the drop of a hat and usually without warning. You could literally leave your desk for a few minutes or even go from one page to another and suddenly the screens may look different, have things missing, and/or look broken. The sudden code changes cause problems with SharePoint and Office 365.

Things could be different and, if you are not intimately aware of the environment, you may not even realize that you are missing possible valuable pieces of information. Due to this possible sudden issue, I highly advise you to use Chrome for everything else for Office 365 and SharePoint. If you do use Chrome for SharePoint and Office 365, note that you will be doing so at your own possible peril.

I would even go as far as to highly recommend that you set your default browser to any of the other browsers because some of my clients have had trouble launching Skype for Business meetings when clicking on the **Join Skype Meeting** link (and this may also be the case for Teams meetings). When the link is clicked, the user is first taken to the browser while the full Skype for Business or Teams application is searched for. If the application is not found, the user is offered the ability to use the web app version. The browser that's used when the meeting link is clicked is the default browser.

Summary

In this chapter, we discussed Microsoft Office and its versions, the services of Office 365, as well as important information about how to log in and an important note about browsers.

You learned about the history and different parts/services of Office 365, such as exchange, security, transparency, and the business services, such as Skype, teams, and One Drive. You also learned how to implement the login process in Microsoft Office and about how different browsers handle the features and functionality of Office 365 and SharePoint.

In Chapter 2, *Understanding More about Office 365*, we will go deeper into Office 365 by exploring the Office 365 Home page and setting your personal settings.

2 Understanding More about Office 365

Like any other cloud service, understanding Office 365's home page and how to use it is essential to making effective use of the service. The home page gives you access to all of the services that are available under your subscription plan, access to recent documents, and so on. It's a page you'll visit very often, especially when you first start using the service. A basic activity you need to learn about in Office 365 is setting up your personal settings. These settings help you accurately set your preferences and make your use of the service optimal. Finally, it's important to understand the various licenses for Office 365 and pick one that is appropriate for your needs.

In this chapter, you will explore your Office 365 Home page, learn how to set your personal settings, and examine the available licenses and what they offer. You will click through different sections of your home page to look at the features and actions that are available to you. You will change a few details such as your profile picture and update your security phone number. You will also learn about Office 365's background and the parts of Office 365 that make up this platform as a service.

In this chapter, the following topics will be covered:

- The home page
- Configuring your personal settings
- Licensing

The home page

Like any web-based service, Office 365 has a home page through which all subscribers can access all the essential services and features of their subscription. When you first log in to Office 365, you are greeted with the Office 365 Home page:

 Office 365			∠ Searc	h					Q \$	» ?	٢
Apps									Install Office $$		*
o		w	x	1	N	s	ជ្		A 33		
Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	Yammer	Admin		- 1
Explore all your	apps $ ightarrow$. 1
											- 1
Document	s						ר ע	Jpload and open.	New 🗸		

This home page may greet you every time, depending on what type of user you are. It may be replaced automatically if you are an admin, or manually if you change the settings yourself. We will look at how you can change your settings in a bit but, for now, let's explore the Office 365 Home page and the Office 365 suite bar. We'll start at the top, moving left to right, and work our way down the page.

The suite bar

The suite bar is the bar at the very top of the Office 365 screen in your browser. This bar is always there for you and can be accessed no matter where you go in Office 365, with the exception of Microsoft Teams. Microsoft Teams has its own suite bar of sorts, which will be discussed in Chapter 8, Understanding Skype for Business and Microsoft Teams:



In some Office 365 applications, some of the options may change, such as those under **Help**, while others such as the app launcher/switcher will always be present with the same options.

You can still get to the Office 365 Home page by clicking on **Office 365** in the suite bar, as shown in the following screenshot:



You can also get to Office 365 by going to https://www.office.com/?auth=2home=1 in a new tab or in the same tab in the browser that you are currently logged in to Office 365 within.

The app launcher/switcher

This is also known as the Waffle menu, and contains the applications that are available to you through the **Office 365** platform as per your **Office 365** license. Your license may be different than that of your peers, so you may have more or fewer applications than them. The Waffle, which travels from application to application, allows you to get around **Office 365** with ease. The following is a representation of what you may see in your Waffle, depending on the applications you have access to and your role in your organization:

	Office 365 \rightarrow					
Apps						
Outlook	CneDrive					
Word	X Excel					
P PowerPoint	OneNote					
S SharePoint	Teams					
Dynamics 365	Flow					
A Admin						
All apps \rightarrow						
Documents						
New ~						
	_					

[18]

As you can see, you get a truncated list of apps with an option to see your full list. After this list is a list of recently used documents.

The Office 365 link

The Office 365 link immediately follows the Waffle. This link allows you to get back to the Office 365 Home page if you ever want to go back to it for whatever reason. Most users decide to configure their settings to start the day in the portal at a different point than the Office 365 Home page, but they may need to get back to Home for several reasons. One reason could be to access software downloads easily as this is one of the elements that is easy to access from Home rather than from within an application.

Following the Office 365 link may be an indicator of where you are in Office 365:



For instance, in the previous screenshot, you are in **SharePoint**. After the words **Office 365**, you can see the words **SharePoint**. In SharePoint's case, this is clickable and will lead you to the **SharePoint** home page.

Notifications

The bell on the suite bar is where your notifications will show up. The notifications you can expect are for emails, as well as meeting and appointment reminders. To check these notifications, perform the following steps:

1. Click on the bell to open the **Notifications** panel and see what notifications you may have. You may not see any notifications for a while if you just turned **Notifications** on under **Settings** or if the notifications were turned off:


2. To change the settings for your notifications, click the **Notifications settings** link at the bottom of the panel or click on **Customize settings**:



3. In the **Notification settings** panel, you can toggle getting **New mail** notifications on and off, as well as the sounds for them, and the reminders for meetings and appointments and the sounds for them, too. You can also toggle notifications themselves on and off here, as well as under **Notification settings**:



Once you are done with these settings, whenever you get a new mail or reminder, you will receive a notification with a sound.

Settings

There are a lot of settings that you can control as an end user. There are so many to explore that I gave them their own section in this chapter. I will go into more detail about these settings in the *Configuring your personal settings* section of this chapter.

Help

The content of the **Help** menu you get in Office 365 can vary, depending on where you are in Office 365 and/or if your web page has fully opened or not. Clicking on the question mark icon will open the **Help** menu. If you open it from the Office 365 Home page and your page has fully opened, you have the ability to search through help topics and view the **Featured Help** topics. Also, at the bottom of the panel, you can click on links to the **Legal** | **Privacy & cookies** information:



If your page doesn't completely open or if you are in certain parts of Office 365, you may see the following **Help** menu. Notice that the search box is missing:



When in Outlook, you may get the following **Help** menu. Notice how the topics here are a bit different than those on the Office 365 Home page. Most of the topics here focus on email capabilities:



In other places in Office 365, the **Help** menu may be quite generic, such as in the following screenshot. There is a search box, but there aren't any links to articles pertaining specifically to the place where you are:



The **Help** menu in **Microsoft Teams** has a different location than most **Help** menus in Office 365:



It is actually at the bottom of the left navigation panel instead of on Office 365's suite bar.

Your profile picture

Also on Office 365's suite bar, to the far right, is your profile profile. This is an image of you, or an image representing a person or perhaps a bubble with your initials (depending on how your admin has set up your organization). The following is an example of what you may see if you have chosen an image of yourself:

	 Office 365	SharePoint		0	Ś	9
L						

Here are the examples of what you may see if you have not chosen an image of yourself:

• A generic silhouette:



• Your initials:

When	you click on your	persona anywhere i	n Office 365,	except for Microso	ft Teams, a side
panel	opens:				



In this panel, you can click on the links to view your profile, view your account, **Sign out**, or change your profile picture.

Changing your profile picture

One of the first things you may want to do is change your profile picture. In an organization, using a profile picture can help others identify you easily, especially in Microsoft Teams.

To change your picture, perform the following steps:

1. Hover over the profile picture bubble in the open panel and then click on the camera icon:



2. Another page will open, where you will be able to browse images and choose the one you want to display. This will give you a preview of the image:



3. Once done, click the **Save** button. Your picture should show up in the suite bar almost immediately after you save it. If you are using Skype for Business, it may take up to 15 minutes before it shows up there. For Microsoft Teams, you will have to change your picture in Microsoft Teams separately. Changing your persona picture in Microsoft Teams will be discussed in Chapter 10, Using Microsoft Teams.

My profile

My profile is a section of Office 365 that contains your basic information. Depending on the kind of organization that you are in, you can also see other members of your team and click through to their own profiles.

Clicking on the **My profile** link will take you to Delve.

You will be required to sign back in for security reasons.



From Delve, you will be able to see the details of your profile that you have already filled in and can choose to add more details or edit those details by clicking on the **Update profile** button:



You can also choose to click on the **Add about me**, **Add projects you are working on**, **Add skills and expertise**, or **Add schools and education** links to add details about those areas directly:



When you click on the **Update profile** button, you will be taken to a page where you can enter details for your contact info, projects, skills, education, interests, and/or give a summary about yourself:

Nikkia Carter > Update your profile					
Contact information	Contact information				
About me	Personal information	Contact me			
Projects	Nikkia Carter				
Skills and expertise		425000000			
Schools and education		Web links			
Interests and hobbies		My OneDrive			
	🛓 Add birthday	Add mobile			
	a Add home phone	lack Add fax			
	Why can't I edit my contact information? \odot				



Some of your details may be un-editable, depending on if and how your organization is managing those details for you.

Keeping this page updated will help people in your organization contact you efficiently as this is the information available to them through all Office 365 apps.

My account

Clicking on the **My account** link takes you to the **My account** page:

III My account		692639797979579
My account Personal info Subscriptions	↓ Install status Detected installs: 1 You can install Office on up to 5 PCs or Macs, 5 tablets, and 5 smartphones.	Subscriptions Verify what products and licenses you have.
🔇 Security & privacy	Manage installs	View subscriptions
 App permissions 	Security & privacy Protect your account and adjust important privacy settings to your preference.	App permissions Apps with access to your data: 29 Manage which apps have access to your data. You can revoke permission whenever you want.
	Manage security & privacy	Change app permissions
	Settings Customize your Office 365 experience to make it work for you.	
	Edit settings	

On this page, you can do the following:

- See the number of devices that you have Office installed on
- Manage a mini version of your profile
- See the products in Office 365 that you have access to
- Manage other settings for app permissions, security and privacy, and customization

Personal info

Personal info is another option that you can use to view your contact information. To view or edit your personal information, follow the steps:

1. Click on the **Personal info** link in the left navigation bar:

	<		
ŵ	My account	eq Install status	Subscriptions
8	Personal info	Detected installs: 1 You can install Office on up to 5 PCs or Macs, 5 tablets,	Verify what products and licenses you have.
	Subscriptions	and 5 smartphones.	
C,	Security & privacy	Manage installs	View subscriptions
₿	App permissions		
$\overline{\mathbf{h}}$	Install status	🛇 Security & privacy	App permissions
ŝ	Settings	Protect your account and adjust important privacy settings to your preference.	Apps with access to your data: 29 Manage which apps have access to your data. You can revoke permission whenever you want.
		Manage security & privacy	Change app permissions
		Customize your Office 365 experience to make it work for you.	
		Edit settings	
		<u>-</u>	

Once you click on it, you will be taken to a page where you can enter or edit some of your personal information and change your picture:

Nikkia Ca	arter		
About ^{First name} Nikkia	🖋 Edit	Contact details Email	🔊 Edit
Last name Carter Occupation		Alias nikkia Mobile	
Department		Phone 4250000000 Alternate email	
Address No information available	🖍 Edit		



The details that you can enter or edit here aren't as abundant as what you can add via the **My profile** link under your persona button in the suite bar. If you need to add or edit details, such as projects you have worked on, you will need to go to the **My profile** page instead. Some of your details may be un-editable, depending on if and how your organization is managing those details for you.

2. To edit any of the details in any of these sections, simply click on the **Edit** pencil in the upper right-hand corner of that section:



3. Click the **Save** button once you're finished:

About	
* First name	1
Nikkia	
* Last name	
Carter	
Occupation	
Department	
Save	Cancel

Once you click on this button, your personal information will be updated.



The **Save** button will not activate until you actually make at least one change. If you don't change anything, the button will remain grayed out.

Install status

The install status shows you how many installs of the desktop version of Office you have completed and how many you have left. You can see the number of installs you have completed in the **Install status** block of the **My account** page. You can click on the **Install status** link in the left navigation bar or click on the **Manage installs** button in the **Install status** block to get to the **Install status** page:





You must have a subscription that gives you a license to download the desktop version of Office.

Once you're on the **Install status** page, you will see a block for each installation of Office that you have completed. There will also be a link that you can use to install Office. You can see the device name and type from here. You also are able to **Deactivate** any installations that you are no longer using or no longer have access to:



You may find that you need to uninstall Office on a computer that was lost, stolen, or damaged. That way, when you get a new computer, you will have a license to install Office there.

Subscriptions

Subscriptions shows you what software you are licensed to access as per your subscription, and any add-ons that have been added to your user account. Click on the **Subscriptions** link in the left navigation bar or click on the **View subscriptions** button in the **Subscriptions** block to get to the page:



When you click on this option, you'll see the following page:



Once you're on this page, you will be able to see all of your licensed software.



Just because you have a license to access it doesn't mean you can access it easily or at all. If you don't see an application on your app switcher but you can see that you have a license to it, you should contact your Office 365 Administrator.

Security & privacy

Security & privacy gives you the ability to manage and change your security and privacy settings. You can click on the **Security & privacy** link in the left navigation bar or click on the **Manage security & privacy** button in the **Security & privacy** block to get to its page:

<		
My account	\pm Install status	□ Subscriptions
A Personal info	Detected installs: 1 You can install Office on up to 5 PCs or Macs, 5 tablets, and 5 smartphones	Verify what products and licenses you have.
Subscriptions	all a sherpholes	
🔍 Security & privacy	Manage installs	View subscriptions
App permissions		
↓ Install status	🖓 Security & privacy	App permissions
👸 Settings	Protect your account and adjust important privacy settings to your preference.	Apps with access to your data: 29 Manage which apps have access to your data. You can revoke permission whenever you want.
	Manage security & privacy	Change app permissions
	Settings Customize your Office 365 experience to make it work for you.	
	Edit settings	

Once you click this button, you will be taken to the **Security & privacy** page:



Once on the **Security & privacy** page, you will have options for changing your password, changing your contact preferences, and viewing your organization's privacy statement, and have access to security validation settings.

Password

It's always important to change passwords at regular intervals. Your organization may have a mandatory interval that you need to comply with in terms of keeping your password updated. It's also important to know how to change your password if you suspect that your information has been compromised or if Microsoft puts out a security warning about password security.

Let's look at how we can change our password in Office 365.

When you click on the **Change your password** link, it will open a new page where you can change your password:

change passwo	rd
Strong password required. Enter 8 include common words or names. letters, lowercase letters, numbers	3-16 characters. Do not . Combine uppercase s, and symbols.
User ID	
Old password	
Create new password	
Password strength	
Confirm new pa	

Remember to click the **Submit** button once you have finished.



Once you have changed your password, you will be logged out and will need to log back in with your new password. Changing your password may not be an option for you if your organization is managing your password for you.

Contact preferences

When changing your **Contact preferences**, you can choose whether you want to get helpful emails from Microsoft. If you are an admin for your organization, you will also be able to set your email and **Phone preferences** for communication with Microsoft partners, and other offers and tips about Office 365 from Microsoft:



Remember to click the **Save** button once you have finished editing your options.

Organization privacy statement

Privacy concerns is one of the most talked about topics in the always connected age that we live in. It's important to understand the privacy status of your information, even in your work accounts. Such information safeguards both the organization and the employee. You can access your organization's privacy statement by clicking on the **View your organization's Privacy Statement** link. It will open a new window where you will be able to read the notice to end users:



Make sure that you read this carefully and revisit it whenever you are notified that the privacy statement has been updated.

Additional security verification

When you click on this section, you will be able to update your phone numbers for account security and create or manage your app passwords:

Security & privacy		
Password Change your password.		
Contact preferences Manage how and why you are contacted.	On	
Organization Privacy Statement View your organization's Privacy Statement		
Additional security verification Your admin has turned on additional security verificati		
To sign in to Office 365, you need to enter a password Update your phone numbers used for account security	and reply back to the security message that is	is sent to your phone.
To sign into some apps installed on your computer or Create and manage app passwords	smart phone, you'll need to create an app pass	ssword. When prompted by the app, enter the app password instead of your work or school account password.

Let's begin by learning how to set and update security phone numbers for your account, which helps you add an additional layer of security, alongside traditional passwords.

Updating your account security phone numbers

Clicking on the **Update your phone numbers used for account security** link opens a new page and lands you in the **Additional security verification** tab. This is where you can set up security verification methods and choose your preferred method.

At a minimum, I highly suggest that you set up an authentication phone, preferably using your mobile (for text and voice message verification), and also set up an authenticator app. You can go to the Google Play Store or the Apple App Store and download your preferred authenticator app.

I highly suggest the Microsoft authenticator app. The authenticator app is more secure than text messaging your authentication phone, but you may need a backup method if your phone is lost, stolen, broken, or traded for a new phone and you need to set the app back up on a new phone, or if the app fails for some reason:

Additional security verification App Passwords				
When you sign in with your password, y View video to know how to secure your	rou are also required to respond from a account	registered device. This makes it harder fo	or a hacker to sign in with just a stolen password.	
what's your preferred option	1?			
We'll use this verification option by defa	ault.			
Notify me through app \sim				
how would you like to respo	nd?			
Set up one or more of these options. Le	arn more			
Authentication phone	United States (+1)]	
Office phone	Select your country or region 🗸	425000000]	
☐ Alternate authentication phone	Select your country or region]	
Authenticator app or Token	Set up Authenticator app			
Authenticator app - Nikkia's iPhone	Delete			
Save cancel				
Your phone numbers will only be used	for account security. Standard telephone	and SMS charges will apply.		

Remember to click on the **Save** button once you have finished adding or editing your options.

Managing app passwords

Clicking on the **Create and manage app passwords** link opens a new page and lands you on the **App password** tab. In this page, you can see the app passwords you have already created, delete any that you have previously created, and create new ones. When you create a new app password, remember to make note of it and keep it in a safe place.

You may find that you need an app password if your company has initiated **Multi-Factor Authentication** (**MFA**) and you find that your preferred authentication method doesn't fire you into certain applications, such as InfoPath:

additional security verifica	tion app passwords				
To sign into Outlook, Lync or other apps installed on your computer or smart phone, you'll need to create an app password. When prompted by the app, enter the app password instead of your work or school account password.					
You can use the same app password with multiple apps or o	create a new app password for each app. How do I get my apps working with app passwords?				
Note: If you are an admin of a Microsoft service, we recomm	nend not using app passwords.				
Bookmark this page					
create					
NAME DATE CREATED					
Initial app password20181008173924	10/8/2018 Delete				

If you lose your app password, you cannot retrieve it from this page. You can only delete it and create a new one, so don't forget to note down your password when you create it and keep it in a safe place:

Additional security verification
Your admin has turned on additional security verification to better secure your account.
To sign in to Office 365, you need to enter a password and reply back to the security message that is sent to your phone. Update your phone numbers used for account security.
To sign into some apps installed on your computer or smart phone, you'll need to create an app password. When prompted by the app, enter the app password instead of your work or school account password. Create and manage app passwords
^

Click the up arrow on the bottom-right corner of **Settings** when you wish to collapse it.

App permissions

App permissions shows you how many app have permission to your Office 365 data and allows you to revoke permissions. You can see the number of apps that have permission in the **App permissions** block on the **My account** page. You can click on the **App permissions** link in the left navigation bar or click on the **Change app permissions** button in the **App permissions** block to get to its page:

	<		
ሴ	My account	ightarrow Install status	Subscriptions
8	Personal info	Detected installs: 1 You can install Office on up to 5 PCs or Macs, 5 tablets,	Verify what products and licenses you have.
	Subscriptions	and 5 smartphones.	
Q,	Security & privacy	Manage installs	View subscriptions
A	App permissions		
$\overline{\mathbf{h}}$	Install status	🖓 Security & privacy	App permissions
ېنې د	Settings	Protect your account and adjust important privacy settings to your preference.	Apps with access to your data: 29 Manage which apps have access to your data. Y u can revoke permission whenever you want.
		Manage security & privacy	Change app permissions
		Settings Customize your Office 365 experience to make it work for you.	
		Edit settings	

Once you're on this page, you can see the apps that are available to you. For some apps, you will be able to revoke permission and, for others, you will not be able to:

ŵ		App permissions Some apps use user data to customize the experience. If you don't want to allow an app to access your data, you can revoke permission. To grant permission again later, go to your My apps page and launch the app. You can revoke permission for these apps		
8				
ି ୧୦%	Subscriptions Security & privacy	MS Tech Comm	Sessionize.com	SedX.org
A	App permissions	Revoke ODetails	Revoke ODetails	Revoke ODetails
$\overline{\uparrow}$	Install status	You can't revoke permission for these apps		
্টে		You can't revoke permission because this has been assigned to you as part of a subscription or an admin role.		
		Mail	Calendar	People
		• Details	Details	Details

You will be able to see the **Details** for any of the apps, regardless of whether you can revoke permission.

Settings

Settings gives you the ability to customize parts of your user experience in Office 365. You can click on the **Settings** link in the left navigation bar or click on the **Edit settings** button in the **Settings** block to get to the **Settings** page:

My account	ightarrow Install status	Subscriptions
A Personal info	Detected installs: 1 You can install Office on up to 5 PCs or Macs, 5 tablets,	Verify what products and licenses you have.
Subscriptions	and 5 smartphones.	
🔍 Security & privacy	Manage installs	View subscriptions
✓ Install status	🖓 Security & privacy	App permissions
ĝ Settings	Protect your account and adjust important privacy settings to your preference.	Apps with access to your data: 29 Manage which apps have access to your data. You can revoke permission whenever you want.
	Manage security & privacy	Change app permissions
	Settings Customize your Office 365 experience to make it work for you.	
	Edit settings	

The settings that you can see on the **Settings** page are the same ones you can see under the gear icon, which is also a **Settings** menu:

ŵ	< My account	Settings •Looking for Security & Privacy settings? They've moved up a bit. Show me		
8	Personal info			
	Subscriptions	Theme Choose your favorite theme.	Super Sparkle Happy	
C,	Security & privacy	Start page Change where you land when you sign in.	Set your start page	
≙	App permissions	Notifications Decide which notifications you need.	On	
$\overline{\uparrow}$	Install status	Software Install software.		
ŝ	Settings	Language and time zone Choose your language, time zone, and date and time format.	English (United States)	

The gear has these and more options, so we will cover these options in the *Configuring your personal settings* section later in this chapter.

Profile picture for Microsoft Teams

When you click on your profile picture anywhere in Microsoft Teams, a side panel opens. On this panel, you get some of the same options that you do in Office 365, such as **Change picture**, as well as some different options, such as **Settings**:



We will discuss these options for Microsoft Teams in chapter 10, Using Microsoft Teams.

Configuring your personal settings

The **Settings** we will look at in this section pertain to the settings you get when you click on the gear from the Office 365 Home page. The gear menu changes as your make your way through the different applications in Office 365:



The following screenshot is just a portion of the **Settings** that you can configure for yourself as an end user. Let's walk through each of these options:

0	<u>ل</u> 22	ŝ	?
	Settings		×
	Search all settings		Q
	Theme Super Sparkle Happy	`	~
	Start page Set your start page		
	Notifications On		`
	Software Install software.		
	Password Change your password.		

Some sections can be expanded by clicking on the down arrow to the right of them. For example, if you click the down arrow next to **Themes**, you will get a list of themes you can choose from. If you click on the down arrow next to the **Start page**, you will see a dropdown of start page options.

Some of the options that are available through the gear menu are redundant links to settings we have covered in the previous section; for example, we have already learned how to change our passwords and to view our organization's privacy statement. Since we've already learned these skills, we won't revisit them in this section.
The search box

You may not always know the exact option for a setting that you may be looking to configure. This box allows you to search the settings that are available to you:

	Settings	×
	Search all settings	Q
\mathbb{P}		

As you start to type into the box, you will start getting options:

Settings ×
not I ×
Notifications - Calendar Set up your calendar notifications.
Offline settings Use this computer when you're not connected to a network.
Notifications On V
Notifications - Voice mail Use your phone to access your voice mail, email, calendar, and contacts.
Automatic processing - Calendar Control how invitations, responses, and notifications are handled.
Text messaging Set up text messaging notifications to be sent to your mobile phone.

If you don't see the option that you are looking for, try using other words that describe the setting.



You will get options that are in the **Settings**, as well as others. Some settings may not apply to you, depending on what software licenses you have available to you through your subscription.

Themes

You have the ability to choose a color theme that you would like to use to customize your Office 365's look. Simply click on the down arrow next to **Themes** and choose from the available themes.

New themes are added all the time. Some even have animation! Remember to click the **Save** button once you have chosen your theme or your theme will return to the previous one as soon as you close **Settings** or navigate away from the page:





If your organization has created a theme for your organization and has chosen to make it an overriding theme, you will not be able to choose your own.

Click the up arrow in the bottom-right corner of the **Theme** page's **Settings** when you wish to collapse it.

Start page

When you first enter Office 365 and every time after that (except if you are an admin), Office 365 will start on the Office 365 Home page, unless you choose a different start page. Click on the down arrow to expand this section, and then click on the dropdown menu and choose where you want to start when you log into Office 365:

Start page				
Set your start page				
Mail				
✓ Set your start page				
Office 365 home page				
Office 365 admin center				
Mail				
Calendar				
People				
Newsfeed				
OneDrive				
SharePoint				
Tasks				
Delve				

Remember to click the **Save** button after making your choice! Once saved, the next time you log into Office 365, you will land on the starting page that you chose:

Start page Set your start page					
Set your s	Set your start page 👻				
Save	Cancel				

Click the up arrow in the bottom-right corner of the **Start** page's **Settings** when you wish to collapse it.

Software

In this section, you are able to access any software that you have available through your subscription:

Software
Install software.

Clicking on the **Software** link takes you to a page where you can download available software. If you don't have the desktop version of Office available in your subscription, you should have access to all of the tabs in the left navigation, besides the **Office** tab.



This page will automatically detect where you are on a Windows machine or on a Mac and give you access to the appropriate downloads:

Software					
Office	Office				
Tools & add-ins	Manage installs				
Phone & tablet	Want to deactivate Office on one computer and install it on another? Go to My account > Install status.				
	Install Office 365 ProPlus				
	Note: Your admin has enabled First Release, so you get early access to the latest Office features. If you have feedback or problems, please contact your admin.				
	🛯 🗐 📳 🕼 🗗 😒 🐔				
	Word Excel PowerPoint Access Publisher Outlook Skype for OneDrive Business for Business				
	Language: Version:				
	English (United States) 32-bit Advanced				
	Don't see the language you want? Install one of the languages in the list above and then install a language accessory pack. Additional languages and language accessory packs don't count against your install limit.				

If you are on a Windows machine, you will need to determine whether you need to download a 32-bit or 64-bit version of Office. Most people use 32-bit, even if they are using a 64-bit machine.



To get back to the previous page, click on the back arrow in the upper left-hand corner.

Language and time zone

This section allows you to configure the language you want for Office 365 and to set the time zone, as well as set the formatting of the date and time. You have a choice of a few different standard and military formats:

Language and time zone				
Your choice of language helps us provide the right date and time format options. Learn more				
Language				
English (United States)				
Current time zone				
(UTC-05:00) Eastern Time (US & Cai ▼				
Date format (For example, September 1, 2016 is displayed as follows)				
9/1/2016 🗸				
Time format				
1:01 AM - 11:59 PM 🔹				
Save Cancel				

For the current time zone, you should choose the one that you are in for accurate timestamps. The default is US Pacific Time.

Your app settings

In this section, you are able to open pages that will have settings for each area that the link is named after. For example, clicking on the **Office 365** link will take you to additional Office 365 settings. Let's look at the Office 365 app settings. We will explore the links and their settings in the following chapters:

Your app settings	
Office 365	
Mail	
Calendar	
People	
	~

When you click on the **Office 365** link in the **Your app settings** section, you are taken to a new page, where you will see a search box and some of the settings that we have previously gone over from the gear.

Licensing

There are many different full and add-on subscriptions available in Office 365. They give you access to different cloud software applications. Let's look at these options in more detail to see what the different subscriptions are and what they mean to you as an end user.

Office 365 consumer

The consumer version of Office 365 is generally referred to as Office 365 Home or Office 365 Personal.

The Personal and Home versions contain the following:

- Office Professional
- Cloud benefits, such as OneDrive cloud storage
- Apps for mobile devices
- 60 minutes of Skype calling

It is evergreen, which means that you will always have access to the most up-to-date version of Office and OneDrive, as long as you keep paying for your subscription. The key differentiating factor between Home and Personal is that Personal gives you a single license for PC/Mac for \$6.99 monthly and Home gives you six licenses for \$9.99 monthly, at the time of publishing this book. The Home licenses can be used by one person or shared among six people.

Office 365 commercial

This version of Office 365 is generally just referred to as Office 365 for Business or just Office 365, which tends to cause confusion for those who are not familiar with the different versions of Office 365.

Business plans

There are three levels on the Business side. Each includes integration for Active Directory, a 99.9% uptime guarantee, IT-level online support, and 24/7 support for critical issues by phone, as well as superior data security. The following is a breakdown of each Business subscription:

	Business Plan			
Services	Business Essentials	Business	Business Premium	
Office desktop applications	No	Yes	Yes	
Office mobile apps	Yes	Yes	Yes	
Office web apps	Yes	Yes	Yes	
Mailbox (50 GB)	Yes	No	Yes	
OneDrive for Business (1 TB)	Yes	Yes	Yes	

Skype for Business (not available for any new subscriptions since early this year)	Yes	No	Yes
Microsoft Teams for Business	Yes	No	Yes
SharePoint	Yes	No	Yes
Costs	\$5 per user monthly or free for nonprofits at the time of publishing	\$8.25 per month	\$12.50 per user monthly or \$3 per user monthly for nonprofits

These plans can cover a maximum of 300 users. You can see more details here: https://products.office.com/en-US/compare-all-microsoft-office-products?activetab=tab:primaryr2.

Enterprise plans

At the Enterprise level, there are also a few levels similar to the Business plans. The Enterprise plans include integration for Active Directory, a 99.9% uptime guarantee, IT-level online support, and 24/7 support for critical issues by phone, as well as superior data security. The following is a breakdown of each Enterprise subscription:

	Enterprise Plan			
	Pro Plus	E1	E3	E5
Services	This plan has a focus on Office Professional Plus	This plan also includes Enterprise-level benefits such as a Microsoft Stream corporate video portal, Compliance Center tools, and more	This plan blends E1 and Pro Plus and adds in unlimited email archiving and more	This is Microsoft's newest plan option that contains all of E3's features, plus analytics tools, advanced security, Skype for Business meeting PSTN conferencing, and Cloud PBX for cloud-based call management
Office desktop applications	Yes	No	Yes	Yes

Office mobile apps	Yes	No	Yes	Yes
Office web apps	Yes	Yes	Yes	Yes
Mailbox	No	Yes (50 GB)	Yes (100 GB)	Yes (100 GB)
OneDrive for Business (1 TB)	Yes	Yes	Yes	Yes
Skype for Business (not available for any new subscriptions since early this year)	Yes (will require purchase of a separate Skype for Business subscription for service)	Yes	Yes	Yes
Microsoft Teams for Business	No	Yes	Yes	Yes
SharePoint	No	Yes	Yes	Yes
Costs	\$12 per user monthly	\$8 per user monthly or free for nonprofits	\$20 per user monthly or \$4.50 per user monthly for nonprofits	\$35 per user monthly or \$15 per user monthly for nonprofits

These plans can cover unlimited users. You can see more details here: https://products. office.com/en-us/business/compare-more-office-365-for-business-plans.

In this book, we will cover the Business version of Office 365.

Summary

In this chapter, we discussed the Office 365 Home page, setting your personal settings, the available licensing, and what this all means.

You learned about the different options that are available on the Office 365 Home page and how to change your personal settings, such as changing the theme, changing the font, and making new folders in a personal email file. You also learned about the differences between the licensed version and the free web version of Office 365.

In Chapter 3, *Understanding Exchange*, you will learn about Exchange in general and how to make it useful.

Further reading

- For more details on the Office 365 Home, Personal, and Home and Student plans, check out the following link: https://products.office.com/en-us/compare-microsoft-office-products
- For more details on the Office 365 Business plan, check out the following link: https://products.office.com/en-us/business/compare-office-365-for-business-plans

2 Section 2: Managing Microsoft Exchange

In this section, readers will learn about Exchange in general as well as getting some specific information on making.

The following chapters will be covered:

- Chapter 3, Understanding Exchange
- Chapter 4, Sending and Receiving Email
- Chapter 5, Using the Exchange Calendar
- Chapter 6, Using Contacts in Exchange
- Chapter 7, Getting Familiar with Other Exchange Settings

3 Understanding Exchange

Microsoft Exchange is the engine behind your email client. Most people think of Exchange as Outlook since that is the mail client that they use to view the email served up from Exchange. Others use **Outlook Web Access** (**OWA**) to access their email from Exchange and may think of their Exchange service as OWA.

In this chapter, you will learn about Exchange in general. We will look at the background and history of Exchange, how you can get into Exchange Online, and parts of Exchange Online.

The following topics will be covered in this chapter:

- Background and History of Exchange
- History of Exchange
- Getting into Exchange Online
- Parts of Exchange Online

Background and History of Exchange

Microsoft's Exchange is more than just email. Although most people only think of it in those terms, it is actually a collection of multiple applications that coalesce into a platform used for digital messaging. Those applications include services for mail, contacts, a calendar, tasks, notes, and journaling (which no longer exists). We will discuss these in more detail later in this chapter.

Traditionally, this platform has also been used for collaborating with coworkers and colleagues, such as partners, vendors, and volunteers. With the advent of collaborative platforms, such as SharePoint, BaseCamp, Lotus, WebEx, Google Apps, and Zoho, email applications such as Exchange have been relied on a little bit less but still form an integral part of the collaborative process. With the release of Office 365 and its more intricate collaborative platform, Microsoft Teams, use of email for collaboration is on a slow decline.

History of Exchange

Microsoft first released Exchange to the public in March 1996. This first version was named Exchange Server 4.0 and it was released as the replacement for Microsoft Mail 3.5. There have been 10 releases of new versions of Exchange, starting with 4.0 and continuing through to the present-day version of Exchange Server 2019, which was released in October 2018. Here is a brief timeline of the Exchange releases:

• **1996**: The first version of Microsoft Exchange, Exchange Server 4.0, is released as a replacement for Microsoft Mail 3.5:

🕘 Inbox - Microsoft Exchange		
<u>File E</u> dit <u>V</u> iew <u>T</u> ools Co <u>m</u> pose <u>H</u>	elp	
🗈 🖬 😹 😹 🔤 🖻 🛛	» 💀 🖻 🍎 💦	
Microsoft Exchange	I 🖾 🛛 From	Subject
📄 🚑 Personal Folders	🖂 Microsoft	Welcome!
📄 📄 Deleted Items		
🛁 Inbox		
Outbox		
Sent Items		
		=
	4	
<u> </u>		
1 Item, 1 Unread		//

- **1997**: Exchange 5.0 is released with an admin console and SMTP network access. Also released was Microsoft Exchange Client 5.0.
- **1997**: Later 1997, Exchange Server 5.5 is released in Standard and Enterprise versions. Also released is Microsoft Outlook, as a replacement for Microsoft Exchange Client, and OWA.
- **2000**: Exchange Server 2000, otherwise known as Exchange Server 6.0, was released as the first version to be fully reliant on Microsoft's Active Directory. This release also had support for an instant-messaging utility, which later became Microsoft Office Live Communications server:



• **2003**: Exchange Server 2003, otherwise known as Exchange Server 6.5, was released with features such as multiple filtering methods and improved disaster recovery:

🛚 Inbox - Microsoft Outlo	ok 2003		
Eile Edit View Go Tools Ac	tions <u>H</u> elp		Type a question for help
🕄 🖓 New 📲 🎒 🎽 🗙 🖓 Reply 🉈	Reply to All 🙈 Forward	🚰 Send/Receive 🍰 F	ind 🛄 Type a contact to find 🔄 🦻 📲
Mail	Inbox	\$	
Favorite Folders	Arranged By: Conversation	Newest on top 🛛 🔺 🔼	Q4 Highlights
🗀 Schedules (5) 🛱 Unread Mail (36)	Weekly Meeting 🖂 Anu Deshpande	11:49 AM 🕎	
All Mail Folders	Vacations Marc Faerber RE: Seminar Update	11:28 AM 👻	To: 'Gytis Barzdukas'; 'Catherine Boeger'; 'Anu Deshpande'; 'Guy Gilbert'; Cc: 'Marc Foerber' Attachments: To medokingt (1.MB)
Drafts [2]	 Bharat Mirchandani Kirk Gregersen Hi 	10:44 AM 😵 10:44 AM 👻	As you know, this quarter our team launched two new products. The products were met with surprising enthusi-
Newfetters (10) Schedules (5) Weekly Reports Junk E-mail Outbox	Pedro Gutierrez C 4 Highlights C 4 Highligh	9:59 AM 🕅	asm and were covered broadly in the news. Sales were forecast to be relatively flat this quarter due to plans for a smaller than usual launch. Instead of invest- ing heavily in advertising, the emphasis was placed on physician contact through sales calls and invitations to
 Gent Items Gearch Folders For Follow Up [10] Large Messages (5) Unnoved Mail (26) 	Anu Deshpande Schedules	9:42 AM 😵 6:01 AM 😵	regional launch events. Sales proved to be higher than expected primarily due to significant positive press and public relations response to the new drugs.
	Article for Presentations	5/13 🕅 =	Jeune
Calendar	Catherine Boeger Welcome back Q Gytis Barzdukas	4:52 AM 🕅	From: Gytis Barzdukas Sent: Tuesday, January 07, 9:30 AM To: Jeune Ji; Catherine Boeger, Anu Deshpande; Guy Gilbert; Pedro Gutierrez
Tasks	New Web site	Tues 5:10 PM 👻	Cr: Marc Faerber; Bharat Mirchandani; Kelly Weadock; Congratulations to the team for a successful quarter! Great work!
🖳 Notes 🗀 🖉 🤻	Marc Faerber	5/13 🕅 5/22 🕅 🗸	-Gytis
568 Items		100.00	

_ 0 Bob Kelly - Outlook - Windows Internet Explorer X https://mail.contoso.com/owa/ 🕶 🔒 🛶 🗙 🔎 Bing ρ. Favorites 🛛 😥 Bob Kelly - Outlook 🐴 🕶 🖑 🔝 👻 🖃 👘 💌 Page 🕶 Safety 🕶 Tools 🕶 🔞 🕶 Bob Kelly 🔵 -Outlook Web App Sign out Options 🔝 Find Someone Inbox (38 Items, 32 Unread) . 🖌 New * X * Move * Favorites Filter * View * 🖸 Newest on Top Q . 8 4 🛞 Bob Kelly Inbox (32) **Review Proposal for Tailspin Toys** Arrange by: Date • Newest on Top 🔻 Amo (6) Recreation Description of the second s Mon 12:45 PM a 🍋 Review Proposal for Tailspin To... (6) 🌒 90 Shane! (1) 📲 🖌 😔 Arlene Huff 📜 Tailspin Toys (3) Tomás Navarro Mon 12:45 PM Actions • (78) Friday, July 24, 2009 8:35 PM Drafts · 🖂 Arlene Huff 7/24/2009 To: Bob Kely; Dil Shrader; Todd Meadows; Tallspin Toys Project C Sent Items Bob Kelly 7/24/2009 8 Cc: Legal; Executives; 🐵 Elsabetta Scotti; 🐵 Evgeny Kulkov Notes a Bob Kelly Sent Items Junk E-Mai 🙈 Jil Shrader 3/12/2009 @ 8 Deleted Items (32) The document looks fine to me, no changes here. 🖂 Jill Shrader 3/12/2009 RSS Feeds E Todd Meadows Deleted Ite... 8 🖌 🖌 🥑 Bob Kelly Search Folders 10 Elisabetta Scotti 3/12/2009 Friday, July 24, 2009 2:09 PM Inbox, Sent Items Online Archive - Bob Kelly 🖂 Elisabetta Scotti Tailspin Toys 🛛 Evgeny Kulikov 3/12/2009 I think we're close to finalizing. Attached is the near final version of this Contact List proposal document. I need to sign off for all segment owners. 🖂 Evgeny Kulikov Business and Marketing 3/12/2009 Fabrice Canel 😸 Elisabetta Scotti Tailspin Toys 🕨 👌 Bob Kelly I think we should meet to discuss this proposal. I'll ... 7/20/2009 Todd Meadows 🛛 🔁 Company Football Team (4) 17 👂 🙈 Jil Shrader 4 Legal It looks pretty good: Ladded a few more thin... 3/12/2009 Tomás Navarro; Shane Kim; Arlene... Mon 12:43 PM Arlene Huff Dia Come One, Come All (13) Product Group 🖌 🖂 🔾 Jill Shrader Tomás Navarro; Samantha Smith; ... Mon 12:39 PM Other Contacts Thursday, March 12, 2009 2:45 PM Noice Mail from Shane Kim (20 ... No contacts in this group Shane Kim Mon 12:22 PM Can I please get a copy of the proposal? Add contact... 🛛 😂 Hiring ▷ M Fodd Meadows Whoops - 38, clmb-on-board 3/12/2009 JI Shrader Mon 11:31 AM In response to the message from Evgeny Kulikov, 3/12/2009 2 8 7 Elizabetta Contti Internet | Protected Mode: On

The **Outlook Web App** 2003 looks as follows:

- **2006**: Exchange server 2007 released Standard and Enterprise editions with new features, such as voice mail integration, more filtering capabilities, and a new OWA interface. Standard and Enterprise editions began to be released with every version of Exchange from this point forward.
- **2009**: Exchange Server 2010 was released, with features such as support for multi-tenancy personal archiving, moderated distribution groups, administration delegation, boosted compliance and legal search, and OWA enhancements:



The first version of Outlook in Office 365 looks as follows:

Understanding Exchange



- 2011: Office 365 was released with a version of Exchange called Exchange Online.
- 2012: Exchange Server 2013 was released with features such as offline support for OWA, public folders, site mailboxes (bringing together mail and SharePoint), data-loss prevention, fast search, and the Outlook Web App for desktop, tablet, and mobile. The following screenshot shows the Outlook desktop application:

New Email	Search Current Malibox (Otri+E)	Current Malibor +	A REMY AREPLYAL A FORWARD
FAVORITES	All Unread By Date (Conversations)	* Newsit 4 🔺	Thu 5/31/2012 8:27 PM
Inbox 1	# TWO WEEKS AGO		Bonnie Kearney
Sent Items	Project Eagle	10.000	RE: Review Proposal for Tailspin Toys
Deleted items 2	The 'Project Eagle' team marbox has been	6/6/2/12	To Azz Hassouriets Suni Uppel; Moly Dempory: Sara Davis; Katle Jordan; Tailapin Toys
SARADBCONTOSO COM	THREE WEEKS AGO		Cc Rena Cabatana; Luka Abrus; Legal Team; Executives
Inbox 1	Bonnie Kearney; Aziz Hassouneh;	0	
Drafts [3] Sent Items	Review Proposal for Tailspin Toys Bonnie Kearney, Adiz Hassouneh; Sunii Up Which is the latest version of the Tailspin Toys	a	Which is the latest version of the Tailspin Toys proposal?
Deleted items 2 Conversation History	Katie Jordan It looks pretty goot; I added a few more things	0	Thanks
4 June 2012 4 SU MO TU WE TH FR SA 27 25 29 50 31 1 2 3 4 5 6 7 8 9	Kobe Jardan; Sunit Uppal Drank; Uka Ahrui Ive seen this and an going foilhold back on Sunit Uppal Yer see noise note that a partnerpho with	0	From: Arz Hassounch Sent: Thursday, May 31, 2012 8:26:46 PM Too Sunii Uppal; Moly Dempsey; Sara Davis; Katle Jordan; Tailspin Toys Ce: Reira Cabatrac, tuka Annu; Legal Team; Decodves Subject: RE: Review Proposal for Tailspin Toys You're welcome!
10 11 12 13 14 15 16 17 15 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3 4 3 6 7 100 PM Saw/Garth trl Saw/Garth trl	Reina Cabatana; Janet Galore; Mol Company Sector Team In Tooks like on 'er deoded on a Catestame. Molly Dempsey Livnon! Where Colcum. every Friday from 12:00 FM to	5/31/2612 # 🔀 5/31/2612	From: Sunil Uppal Senit: Thursday, May 31, 2012 5:31:46 PM To: A Jaz Hasseunich, Möly Dempsey: Sara Davis; Katie Jendan; Tailspin Toys CC: Reina Cabatina; Lick Arbury, Legal Team, Executives Subject: RE: Review Proposal for Tailspin Toys
400 PM 3 Triday Unwinder 5 Cafeteria	Aziz Hassounelt: Bonnie Kearney; _ Come One, Come All Could you all please remember not to reply all	5/31/2012	Tranks for revenuing:
	Reina Cabatana	-	wanter featured in street

[75]

The Outlook Web App is as follows:

Office 365 Outlo	ok	9	Q	٢	1	1975-
Search Mail and People 🛛 🔎	⊕ New Y 📋 Delete 🗧 Archive Junk Y Sweep Move to Y Categories Y •••					
∧ Folders	Focused Other Filter - Welcome to MyAnalytics					Í
Sent Items Deleted Items	Other: New conversations 10 Microsoft Planner 10	١	*	Reply	all ∨	·
More Groups * New	MyAnalytics Welcome to MyAnalytics 12/17/2018 Hi Megan Bowen, Welcome to MyAnalytics. Did you This message is from a trusted sender.					
X1050 Launch 10 Research And 1	Lucerne Publishing Events Upcoming events at Lucerne Publishing 12/15/2018 Found out what's going on at Lucerne Publishing				Ô	
Electronic Ever 1	Fourth Coffee Hot Deals Uquidation sale on cool cups 12/15/2018 Plenty left, get your's now before we throw them out					
Marketing 1	Blue Yonder Airlines Blue Yonder Airlines Carve out fall travel time from \$59 one way. 12/15/2018 Abundant flight deals right now					
Legal 1	TopSpin Toys T-mines 50 points until lift off 12/15/2018 Celebrate World Space Week					
Sales 1 More	Woodgrove Diamond Preferre You're covered if there's fraud on your accoi 12/15/2018 Your security is important to us.					
Marka 🖬 💒 🗹	Did you know?					

- **2013**: An updated version of Office 365 with an updated version of Exchange Online was released.
- **2015**: Exchange Server 2016 was released with features such as the ability for hybrid deployment with Office 365 through a configuration wizard and changes to OWA, which was renamed Outlook on the Web.
- **2018**: This is the release of present-day Exchange Server 2019 with new features for security and performance. The feature of unified messaging has been removed from this version.
- **2018**: Later 2018, the newest version of Outlook on the Web was released. This version is available via an opt-in toggle. A simplified ribbon as well as new colors and icons are just a few of the improvements made. Here's Outlook 2019:

Chapter 3

Understanding Exchange



The newest version of Outlook on the Web, formally known as Outlook Web App, is as follows:



With each new release, Microsoft added more and more features and capabilities to make Exchange the application it is today. In this chapter, we will focus on Exchange Online, which is the offering for Exchange via Office 365.

Getting into Exchange Online

Once you log in to Office 365, you can get to Exchange Online, which is denoted as Outlook, in one of two ways: via the Office 365 Home or via the app launcher. Of course, you can also get access to Exchange Online via the Outlook desktop application or via the Outlook mobile app on your phone or tablet.

Outlook via the Office 365 Home

When you log in to Office 365, you will be able see all of the applications that are included in your subscription plan.



From the Office 365 Home, you can click on the Outlook icon to go to Outlook:

You can also right-click on the **Outlook** icon and choose **Open in new tab**, **Open in new window**, or **Open in new InPrivate window** from the drop-down:

Goo	d afternoon		
Apps			
0	a 🖉 🚺	x	P
Outo	Open in new tab	Excel	PowerPoint
Evolora	Open in new window		
Explore	Open in new InPrivate window		
	Save target as		
Docu	Copy link		
Docu	Add to reading list		
Recom	Ask Cortana about "Outlook"		

In IE, Chrome, Firefox, and Edge, you should at least have the choice to **Open in a new tab**. If you do not have this choice, you may want to check with your admin. The other choices may depend on your browser.

Outlook via the app launcher

Outlook can also be opened through the app launcher, which includes all of the applications in your plan.

From any area of Office 365, go to the upper-left corner and click on the app launcher. Once the app launcher is open, you can click on **Outlook** to open the application:



You can also hover over Outlook on the app launcher, then click on the open menu ⁱⁱ that appears:

	Office 365 \rightarrow
Apps	
og Outlook	: 🌰 OneDrive
Word	Open in new tab
PowerPoint	Learn more
SharePoint	📑 Teams

On the menu, choose **Open in new tab** to open **Outlook** in a new tab.

Parts of Exchange Online

Exchange is a platform made up of many different applications, and the online version of Exchange is no different. Unlike **Exchange Online** via the **Outlook** desktop application, **Exchange Online** via **Outlook for the web** has only four applications available, but rest assured that they are the ones most people use every day. Those applications can be easily accessed once in **Outlook** via the icons on the bottom-right:



Here is a brief synopsis of each of the applications in **Outlook for the web**. We will go into more detail later in this section of this book.

Email

When you first enter **Outlook**, you land in the email application. This is where you can see all of your emails and create new ones. The Outlook inbox is shown in the following screenshot:



No matter which **Outlook** application you are in, you can always get back to your email by clicking on the mail icon on the bottom-left.

Calendar

This portion of Outlook allows you to manage your calendar. You can see all of your calendar events and invitations, as well as create new ones and edit existing ones. The following screenshot shows you the events and invitations of the selected month:

Understanding Exchange

r								
Office 365 Cale	ndar							s c © ? 🎆
Search Calendar	⊕ New ∽ 📑	Add calendar 🗸	Interesting calendar	rs 🔇 Share 👋	Print 1			Try the new Outlook
< 7 February 2019 >	< > Februa	ary 2019 🗸 👱						4 Day Work week Week Month Today
S M T W T F S	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Monday, February 18, 2019 >>>
27 28 29 30 31 1 2	27 3	28	29			Feb 1	2	9:00a Sales Team Meeting
3 4 5 6 7 8 9		9a Sales Team Meetin	10a Weekly call with 5	8:30a Company Meeti	8a Project Team Meet	8:30a Legal and Execs		1 hour Conterence Room - Adams
10 11 12 13 14 15 16		1p Weekly check-in w	2p Tailspin Toys Propr		10a Tailspin Project D	12p Lunch?		1 hour 30 minutes Engineering lab C
17 18 19 20 21 22 23		4p Weekly call with Fi	3p Project Tailspin		12p Weekly Marketin +1	1p Lidia/Isalah 1:1 +1		4.00p Weekly call with French Subsidiary
24 25 26 27 28 1 2	3	4	5	6	7	8	9	Finds online meeting
		9a Sales Team Meetin	10a Weekly call with !	8:30a Company Meeti	8a Project Team Meet	8:30a Legal and Execu		
A 14		1p Weekly check-in w	2p Tailspin Toys Prope		10a Tailspin Project D	12p Lunch?		
▲ Your calendars 8		4p Weekly call with Fr	3p Project Tallspin		12p Weekly Marketin	1p Lidia/Isaiah 1:1		
Calendar	10	11	12	12	14	15	16	
	10	9a Sales Team Meetin	10a Weekly call with 1	8:30a Company Meeti	Ba Project Team Meet	8:30a Legal and Exers	10	
Other calendars		1p Weekly check-in w	2p Tailspin Toys Prope		10a Tailspin Project D	12p Lunch?		
Deceleix coloridari		4p Weekly call with Fr	3p Project Tailspin		12p Weekly Marketin	1p Lidia/Isaiah 1:1		
People's calendars					+1	+1		
A Groups	17 🛆	18 🦽	19 🝚	20 🝚	21 🌟	22	23	
Citotps		9a Sales Team Meetin	10a Weekly call with !	8:30a Company Meeti	8a Project Team Meet	8:30a Legal and Execs		
Product Launch E		1p Weekly check-in w	2p Tailspin Toys Propr		10a Tailspin Project D	12p Lunch?		
Video Production		4p Weekly call with Fr	3p Project Tailspin		12p Weekly Marketin +1	1p Lidia/Isaiah 1:1 +1		
~	24	25	26	27	28	Mar 1		
X1050 Launch Tea		9a Sales Team Meetin	10a Weekly call with 5	8:30a Company Meeti	8a Project Team Meet	8:30a Legal and Execu		
Marketing ~		1p Weekly check-in w	2p Tailspin Toys Prope		10a Tailspin Project D	12p Lunch?		
a 🗖 🛤 🖂 9		4p Weekly call with Fr	3p Project Tailspin		12p Weekly Marketin	1p Lidia/Isaiah 1:1		

No matter which Outlook application you are in, you can always get back to your calendar by clicking on the calendar icon on the bottom-left.

Contacts

This portion of Outlook allows you to manage your contacts as well as see your company's global address book and contacts for the company. You can see all of your contacts and create new ones:



No matter which **Outlook** application you are in, you can always get back to your contacts by clicking on the contacts icon on the bottom-left.

Tasks

This portion of Outlook allows you to manage your personal tasks as well as assign tasks to others. You can see all of your tasks as well as create new ones and edit existing ones. No matter which **Outlook** application you are in, you can always get back to your tasks by clicking on the tasks icon on the bottom-left.

Summary

In this chapter, we discussed Exchange in general. We looked at the background and history of Exchange, how you can get into Exchange Online, and the parts of Exchange Online.

You learned about the background of Exchange and to how to get into Exchange via OWA and Outlook. You also learned about email, calendar, contacts, and tasks, which are the different parts of Exchange.

In Chapter 4, Sending and Receiving Email, you will learn about communicating using mail in Exchange.

4 Sending and Receiving Email

Exchange, the engine that serves your email and other functionalities, such as calendar, contacts, and tasks, can be accessed through your browser, through the Outlook desktop application, and through Outlook mobile apps. Most of the functionality is the same via both platforms, but there are some differences for each as well.

In this chapter, we will look at the parts of mail in OWA and the parts of mail in Outlook on your desktop.

The following topics will be covered in the chapter:

- Parts of Mail in OWA
- Parts of Mail in Outlook

Parts of Mail in OWA

Accessing email using OWA, renamed Outlook on the web, is done through your web browser. You will need to log in to Office 365 and click on the **Outlook** block on Office 365 Home or in the app launcher:



Once you get into Outlook on the web, you will have access to your email. Here are the parts of the interface:

Chapter 4

Sending and Receiving Email



#1 The list of your emails

In this section, you can see your emails based on the way you filtered them (see #4 in the preceding screenshot).

#2 Displaying an email message

When you click on an email, it displays in this section so that you can read it. Once open, you will have some other options available via the **Reply all** menu:

You have upcoming tasks due.	
Microsoft Planner < noreply@Planner.Office365.com>) 🖢 🖏 Reply all 🗸
Today, 9:19 AM Megan Bowen V	Reply
	Reply all
To help protect your privacy, some content in this message has been blocked. To re-enable the blocked features, dick here.	Forward
	Change default >
Io always show content from this sender, click here.	Reply all by meeting
	Reply by IM
	Reply all by IM
_{Mic} Hi Megan,	Delete
You have a task due in Microsoft Planner.	Delete all messages from Microsoft Planner
8	Mark as junk
Upcoming	Mark as phishing
2/11/2019 Book your own flights	Mark as unread
Event Plan	Flag
	Assign policy >
	Print
This notification is sent by Microsoft Planner.	Show in immersive reader
To change your notification settings, go to Planner for web, choose the gear icon in the top right, and then select Notifications. Learn more	e View message details
	Open in a separate window
Get the Planner app for <u>iPhone</u> or <u>Android</u>	

You will also have the ability to **Like** the selected email and, depending on your subscription, may have also have access to **MyAnalytics**:



#3 Focused and other filters

The **Focused** filter shows you emails that you read and respond to the most. The **Other** filter shows emails that aren't labeled as junk but that you don't read and respond to often, if at all. The system learns, as time goes on, which emails should be focused on or not focused on.

#4 Filter

The Filter gives you the ability to filter and sort your email in different ways:

Filter	
√ All	
Unread	
To me	
Flagged	
Mentions	
Sort by	>
Show as	>
✓ Show Focused Inbox	

#5 Action bar

The action bar starts with the **New** menu when no email is selected (see the following screenshot). Once an email or multiple emails are chosen, the action bar adds more options for **Delete**, **Archive**, the **Junk** menu, the **Move to** menu, the **Categories** menu, and the open menu (...):

🕂 New 🗸	前 Delete	Archive	Junk 🗸	Sweep	Move to 🗸	Categories 🗸	



Having trouble keeping your inbox clean? Use the **Sweep** option on the action bar to sweep away emails from the same sender as the email you selected.

Outlo	ok						
Q	⊕ New ∽ 🛅 D	elete 🧧 Archive	Junk 🗸	Sweep	Move to 🗸	Categories 🗸	
	Focused Ot Next: No events for th	For email from Microsoft Planner (nore	eply@Planner.	Office365.co	om)		
16	Other: New conversat Microsoft Planner	 Delete all mes 	sages from the	e Inbox folde	er er and any future	messages	
	Microsoft Planne You have late tasks! Hi Megan, You have 2	Always keep the lat	est message a messages olde	nd Delete 🔪 er than 10 da	the rest	Cancel	
	Last week	view rules	_	_	Sweep	Curren	
	Microsoft Planner						

This **Sweep** option is not available in the desktop version of Outlook.

We'll now look at the different menus in the action bar.

The New menu

The **New** menu gives you the ability to create a new **Email Message**, but you also get the ability to create a new **Calendar event** or a new Office 365 **Group** (depending on configuration and permissions):



You can create the new event or Group without leaving your email. Side panels will open for each and you will be returned to your email once closed.
The Junk menu

The options here will allow you to mark one or multiple emails as Junk or as Phishing:



Junk email will be moved to the **Junk** email folder now and emails from that sender will be routed to the **Junk** folder automatically thereafter. You can also chose to report the email to Microsoft to help to improve the system's ability to catch this sort of mail as junk:



Emails marked as phishing will be deleted, and you have the option to report them to Microsoft:

Report as phishing	
Phishing email is designed to obtain your personal information to steal from you. This is don by impersonating popular website: malicious links in the body of a message. Learn more about phishing	s or including
Do you want to send a copy of this message to Microsoft to help the research and improvement of email protection technologies	s?
Report	Don't report

The Move to menu

This menu gives you option to move selected email(s) to any folder you desire:



The Categories menu

This menu allows you to categorize your selected email(s) into categories with names and color indicators. You can create new ones as well as manage them:



When managing them, you can change the color of an existing one. Since you cannot rename them, you can delete one and add a new one to replace it:



The open menu

This menu, denoted as ..., gives you a lot of other options for your selected email(s). When you click on ..., you'll get the following list of options:

🕀 New 🗸	前 Delete	Archive	Junk∣∨	Move to 🗸	Categories 🗸		
E Focused	Other		Filter 🗸			Ma Ma	rk as unread rk as read
Meet Focused	d Inbox	d upder Ferur	ad and			Pin	
the rest under	Other.	a under Focus	eo, ano			Un	pin
Got it Le	arn more					Flag	9
						Cle	ar flag
Next: Sales Tear	m Mee Tomor	row at 9:00 AM	💾 Agenda			Ma	rk complete
Microsoft P	lanner		Í			lgn	ore
You have upcon Hi Megan, You h	n <mark>ing tasks due.</mark> ave a task due in	Microsoft Planne	9:19 AM :r			Ass	ign policy >
			_				

#6 Mark all as read

Clicking this button will mark all of your messages as read in the **Focused** filter or in the **Other** filter, depending on which you happen to be in. Once clicked, you can revert one or multiple emails to a non-read state by selecting the read email(s), opening the email's options menu by right-clicking on the selected email(s), and choosing **Mark as unread**:

Last month	Delete	
Blue Yonder Airlin	Archive	
Carve out fall travel time	Mark as unread)19
Abundant flight deals rig	Pin	
TopSpin Toys T-minus 50 points until 1	Flag)19
Celebrate World Space V	Mark as junk	
✓ Woodgrove Diam	Ignore	
You're covered if there's Your security is importan	Move to Other inbox)19
	Move 2	>
Eat like a local! Top 10 n	Categorize 2	>)19
Memorable spots. Down	Assign policy 2	
Patti Fernandez (C	CEO)	•
Mark 8 Plans Needed Fa You don't often get emai	st 1/18 I from pattif@gmail.com, whi	8/2019
🗌 Joni Sherman		Ψ

You can also change email(s) back to unread, clicking on the open menu (...) on the action bar, and choosing **Mark as unread** or clicking on **Mark as unread** in the section where emails are displayed:



#7 Search

This allows you to search by mail or people so you can search by keywords in the email, subject line, the person who sent the email, and so on.

#8 Folders

This section allows you to see the folders that come with your email out of the box and any custom folders you may have created. To see your folders, click on **More** to expand the section:

^	More I'S		+
	More		>
^	Groups	* New	+

To collapse the section, click on the back arrow:



#9 Groups

In this section, you can see all of the Office 365 Groups you have access to. You may even have the ability to create Groups, depending on how your environment is set up and the permissions you have.

#10 Outlook apps

The buttons in this bar give you the ability to switch back and forth between the Outlook applications of mail, calendar, people, and tasks.

Email options

Email option is not numbered in the screenshot provided at the beginning of this chapter, but you can see it in the following screenshot. Here are the options you get when you right-click on an email:

Microsoft Planner		
You have upcoming tasks Hi Megan, You have a task	Reply	
last week	Reply all	ľ
	Forward	ŀ
Microsoft Azure Your Azure AD Identity Pro	Delet	
See your report. Your Azur	Archive	
Microsoft Planner	Mark as unread	
You have upcoming tasks	Pin	ŀ
Hi Megan, You have a task	Flag	
Microsoft Planner	Mark as junk	
You have late tasks! Hi Megan, You have a task	lgnore	
Three weeks ago	Move to Other inbox	
MuApphytics	Always move to Other inbox	ľ
Welcome to MyAnalytics	Move >	-
Hi Megan Bowen, Welcom	Categorize >	
Last month	Create rule	
Lucerne Publishing	Show in immersive reader	
Upcoming events at Lucer	View message details	
Found out what's going on	Assign policy >	

Parts of Mail in Outlook

You can access your Office 365 email through Outlook on your desktop. This is the most popular method of interacting with email. If your subscription has the download of Office available, you may want to take advantage of it. One way you can tell whether you have the Office licenses is by logging in to the Office 365 portal, going to **Office 365 Home**, and clicking on the **Office installs** drop-down menu:



The other way is to click on your profile | **My account** | **Install status** | **Install desktop applications**:



If you need more help, cannot download Office, or need to add Office, talk to your company administrator.

The Outlook desktop application has a lot of the same parts as Outlook on the web, but the Outlook desktop application has more. Here are the parts of its interface:



#1 List of emails

In this section, you can see your emails based on the way you filtered them (see #4 in the preceding screenshot).

#2 Display of email

The email you select will be displayed here.

#3 Focused and other filters

The **Focused** filter shows you the emails that you read and respond to the most. The **Other** filter shows emails that aren't labeled as junk but that you don't read and respond to as often, if at all. The system learns, as time goes on, which emails should be focused on or not focused on.

If you don't have these filters (you are seeing **All** and **Unread** instead), you can turn them on via the **View** ribbon:



#4 Filters

The **Filter** gives you the ability to filter and sort your email in different ways:



#5 Search

You can use this to search your email by keywords or phrases, by people's names, or a combination of all of these. You can also choose where you search, such as in the current mailbox, current folder, or all mailboxes:



#6 The tabs

There are six tabs that are always present in Outlook, and they each have their associated ribbon (with the exception of **File**). When you click on **File**, you are taken to what is referred to as the backstage of this Office program. We will look at the ribbons in *The ribbons* section. As for the backstage of **File**, let's look at that now.



It is important to note that, depending on other portions of Outlook that you may have clicked on, there may be additional contextual ribbons that appear.

The Outlook backstage

When you click on the **File** tab, you are taken to the backstage instead of opening a ribbon. This reaction to clicking on the **File** tab is the same for all Office applications. For the most part, the options in Outlook are the same for all Office applications. Here are the options available in Outlook's backstage.

Info

This is the tab you start on when you go to the backstage. On this tab, you can see your accounts and add new ones, manage account and mailbox settings, set automatic replies, manage your rules and alerts, and manage add-ins:



Open & Export

Via this tab, you can open a calendar file (.icsor .vcs), a .pst file, or a user folder shared with you. This is also the place you would go to export a .pst or other files from Outlook:



Save As

Clicking on this tab opens the **Save As** dialog box in order to save the message you were in when you clicked on **File** and then **Save As**:

Info	Ac			
Open & Export	2 Save As		×	30.0nMicrosoft.com - Outlook
Save As	← → ✓ ↑ 🔮 > This PC > Docum	nents v Ö Sea	arch Documents 🔎	
Save Attachments	Organize 👻 New folder		8== - ?	To ↑ Reverse S
Di-t	Pictures 🖈 ^ Name	Date modified	Type Size	Flag: Start Date マ +- Expand/
Print	Videos	No items match your search.		
Office	03 Microsoft Outlook			ward
Account	🖀 Contoso			er <norepiy@planner.offic asks!</norepiy@planner.offic
	a OneDrive			res. To help protect your privacy,
	🝊 OneDrive - Conto			
	This PC			
	Network			>
	Save as type: Outlook Message For	nat - Unicode		due in Microsoft Planner.
	∧ Hide Folders	Tools 👻	Save Cancel	
	Sent Items	Microsoft Planner You have upcoming tasks 1/29/2019	2/5/2019 Draft pre	esentation
	🖂 📰 22 ili		Marketing	Campaigns

Save Attachments

Clicking on this tab gives the ability to save any and all attachments attached to the message you were in when you clicked on **File** and then **Save Attachments**:



Print

Clicking on this tab gives you the ability to print the message you were in when you clicked on **File** and then **Print**. You can send it to a printer that your computer is connected to, either directly or via a network, or to file formats such as PDF and OneNote:

\bigcirc		inber - MeganB@M355622880.0nMicrosoft.com - Outlook
Info Open & Export	Print Specify how you want the	
Save As	item to be printed and then click Print. Print	Nach Mar Mar San
Print	Microsoft Print to PDF	Without Without Without Without Without Without Without
Office Account	Ready	A A
Feedback	Settings	Let for a film and
Options	Table Style	La calificación este está de de la companya de la compa
Ext	Memo Syle	

Office Account

On this tab, you can see details about your Office product as well as your user information. You can switch accounts, see your connected services (such as your Office 365 account), and change your Office background and theme:



[110]

You can also use *Add a service* here. This gives you the ability to add in another Office 365 or OneDrive-Personal account. Adding a connected service gives your Office the ability to access the services and information in that account with respect to the Office application. For example, adding a connect service through Word will give Word the ability to access Word files in those connected accounts.

In Outlook, this function is not as obvious as in the other Office applications, but it gives you the ability to more easily access files from your OneDrive—personal and Office 365 accounts to be added as attachments into an email message:

About me	Subscrin	tion [Product
Sign out	Microsoft	Office	265 BroD
Switch account	WICIOSOIL	Once	303 FIOF
Office Background:	Belongs to: I This product	vleganB(contain	©M365: s
Clouds		02 🛛	
Office Theme:	Manage A	count	Change
Colorful			offico
Storage Store your documents in the cloud and get to them from almost anywhere		↓ Up	odates
Other Sites Sign in with your Microsoft account to insert images and videos from your f	avorite sites.	•	
Office Store		A	bout
Sign in with your Microsoft account to use apps from the Office Store.		Le	arn more
Add a service ~	Outlook	Ve Of	rsion 1902 (fice Insider
	Ň	V	/hat's
	What's	Se	e the most

To add an Office 365 account or a OneDrive - Personal account to your Outlook, click on **Add a service**, followed by **Storage**, and then on either **Office 365 SharePoint** or **OneDrive**:

Circuit	🕼 💶 🚯 💶 🛙	2	a a	
Office Theme:	Manage Account		Change License	
Colorful 👻				
Storage Store your documents in the cloud and get to them from almost anyo	where	>	Office 365 SharePoint d and	installed.
S in in with your Microsoft account to insert images and videos from) your favorite sites. e.	>	Out Outlook n more about Outlook, Support, Produc	ct ID, and Copyright
Add a service ~	About V Outlook 0	/ersi Offic	on 1903 (Build 11406.20002 Click-to-Rur e Insider	in)



Choosing Office 365 SharePoint gives Outlook the ability to access SharePoint *and* OneDrive *for Business* files via that Office 365 account. Choosing OneDrive is the personal version of OneDrive connected to your Microsoft account.

Feedback

Clicking on this tab gives you the ability to submit feedback to Microsoft and to get the latest news about Outlook:



Options

Clicking on **Options** opens the **Outlook Options** window, where you can configure lots of options:



Exit

This will close Outlook as soon as you click on it:



#7 The ribbons

There are five main ribbons that are associated with tabs. Let's take a look at these in the following subsections.



Sometimes you may encounter contextual tabs and ribbons that pop up when needed. You may also notice that your ribbon has more, less, or different buttons than the ones shown here. The ribbons may vary depending on the subscription, add-ins, or other factors.

Home

On this tab's ribbon, there are lots of functions that most people use every day. You have options for creating, deleting, and archiving email as well as for responding to, moving, tagging, and finding email. You also have options for browsing Office 365 Groups and contacts, and for creating Quick Steps for managing your email:

File	Hom	e Send / Receive Folder	View Help Q Tell me what	you want to do					😵 Coming Soon \tag	in D
New Email I	New Items *	© Ignore I Clean Up ∗ Sunk ∗	Reply Reply Forward II More -	Image: Book of the second	 Move ▼ Rules ▼ OneNote 	Assign Policy * Policy *	양 New Group 양 Browse Groups	Search People	Read Get Aloud Add-ins	
Ne	w	Delete	Respond	Quick Steps	G Move	Tags	Groups	Find	Speech Add-ins	~

Using the **New Items** drop-down button, you can create other Outlook items without leaving email:





If you have Skype for Business and/or Microsoft Teams turned on in your organization but you don't see them in this list, you or your administrator will need to turn the add-in on in your Outlook **Options** (in the **File** backstage).

Did you know that you can change any email into a meeting or appointment? Just select the email you want, then click on the **Reply with Meeting** button in the **Respond** section of the **Home** tab and a meeting invite is created. You will then have the option to change the meeting to an appointment by clicking the **Cancel Invitation** button or prevent forwarding the meeting using the **Response Options** button. Both are in the **Attendees** section of the **Meeting** tab:

Reply Reply Forward Con-	To tak Team Email Dove Reply & Delete From Could Steps Meeting (Chri-Nit R pro- enting request from this pro- enting request from this pro- team Could Steps	ou want to do		왕 Coming Soon 💿
rs New message (5)		nal Screens → To Manager n Email ✓ Done	□ ひ C ↑ ↓ ■	Copter Sales vs Camera Sales - Meeting
a recentlessages (2)	All Kard Co - Co Repl	y & Delete 🦻 Create New	File Meeting Insert Format Text Review Help	Tell me what you want to do
	Respond	Quick Steps	Appointment (S)	Buny C Recurrence
	Search Current Mailbox , O Current Mailbox -	Reply Reply All Sorr	Delete → ↓	cel D IS minutes D Room Ender
	Focused Other By Date 🗸 🕆	Lee Gu Mega	Actions Show Skype Meeting Meeting Notes At	tendees Options 5
	Other: New cessages (5) Microsoft Planer	Copter Sales Vs C	You haven't sent this meeting invitation yet.	Response Options Choose the kind of responses you
	Patti Fernan ez (CEO) Se Mark 8 Plans Ne ded Fast 1/28/2019 You do 1 often get	Hey Megan, I was looking at the Co	Send Location	Want to allow for this meeting. If you turn off Request Responses, you will not receive any responses
	MyAnalytics 🔤	products are increasing	Start time Sat 2/23/2019 🔂 2:00 PM 👻 🗆 All da	they plan to attend or not.
	Welcome to My/Falytics 1/28/2019		End time Sat 2/23/2019 C 2:30 PM V	If you turn off Allow New Time
	Joni Sherman Sports statistics Do you LOVE sports? If so,	Thanks, Lee		Proposal, attendes cannot proposal a new time for this meeting.
	Lee Gu Copter Sales vs Camera Sales 1/28/2019 Hey Megan,		From: Lee Gu <leeg@m365x859713.onmicrosoft.com> Sent: Monday, January 28, 2019 7:45 AM To: Megan Bowen :MeganB@M365x859713.OnMicrosoft.com></leeg@m365x859713.onmicrosoft.com>	attendees cannot forward this meeting to invite other people.
	Jordan Miller Expense reports 1/28/2019 Hi Megan, Have you		Subject: Copter Sales vs Camera Sales Hey Megan,	

Send/receive

This ribbon has options for manually forcing Outlook to send and receive email and update folders:





Have you had an issue with Outlook not connecting? If so, sometimes clicking the **Work Offline** button in the **Preferences** section to force Outlook to go offline and then clicking it again to go back online can prompt Outlook to refresh the connection.

Folder

The options on this ribbon can help you to create, manage, and search folders:



View

The options on this ribbon help you to manage your view of Outlook:



If you prefer to show your emails as **Conversations** (emails from the same person with the same subject line are grouped together), you can turn it on by clicking on the **Show as Conversations** checkbox in the **Messages** section. The first time you click it, you will have an open prompt to apply this setting to all mailboxes or just this folder:



Help

On this ribbon, you have multiple help options, such as getting self-serve support, contacting support, and running diagnostics:



Tell me what you want to do

If you have ever wondered whether there was a command for something you wanted to do, or were having trouble finding the button for the command, this box is for you! Simply type what you want and get options:



You even get some suggested options by simply clicking in the box:



Favorites

This section starts with the **Inbox**, **Sent Items**, and **Deleted Items** of your main mailbox. You may also see Office 365 Groups that you are a member of. You can add to the **Favorites** section by dragging and dropping from anywhere, such as the Inbox of other mailboxes or Office 365 Groups, if any, listed in the **List of email accounts** (#10) section:



You can also remove a portion of a mailbox by right-clicking on it and choosing **Remove from Favorites**:





The line between this section and the list of emails section can be dragged to give more or less space to the viewable portion of the section.

List of email accounts

This is the list of all of your mailboxes and Office 365 Groups. You can see the parts of your mailboxes by clicking on the down arrow beside it in this list:





The line between this section and the **Favorite** section can be dragged to give more or less space to the visible portion of the section.

Outlook apps

This is the section where you can move between the applications inside of Outlook. You can also set which ones you see, hide the ones you don't want to see, and arrange them in the order you like:

A	Navigation Ontions
Drafts	Notes
Sent Items Deleted Items	E Eolders
<u>∽</u> 28 🗇 ••	Shortcuts Quick Steps Nove Navigation Options X
	Maximum number of visible items: Compact Navigation Display in this order Mail Calendar People Tasks Notes Folders Shortcuts
	Reset OK Cancel

Depending on how many items you want to be visible, you may need to adjust the width of the section by dragging the line between the side panel and the email list:



Email options

Right-clicking on any email message will give you a drop-down menu of functions that can be performed on that specific email:

Delete Arch	nive Reply F		<u>C</u> opy Ouick Print		Interna ☐ Team E → Reply 8	Il Screens Email & Delete	→ To Manage ✓ Done
Delete S	earch Current Ma	ي ج ج	<u>R</u> eply Reply <u>A</u> ll For <u>w</u> ard		ilbox ▼	Quic	k Steps ly 🛱 Reply All Microsoft I
▲ Today		$\hat{\Box}$	Mar <u>k</u> as Read			Click h	You have
	Microsoft Pla You have late tas	PD	Ca <u>t</u> egorize Follow <u>U</u> p	> >			
▲ Last Week			Assign <u>P</u> olicy	>			• Diabh-click
	Microsoft Pla You have late tas	⊠ ∳	<u>F</u> ind Related <u>Q</u> uick Steps	>	-1	×	
	Microsoft Pla You have tasks d	₽ ₽	Rule <u>s</u> <u>M</u> ove	> >)	Late	2
	Two Weeks Ago	N	One <u>N</u> ote			2/10/	/2019
	Microsoft Pla You have upcom	<u>8</u>] 8	<u>lg</u> nore Junk	>)	2,10,	
	Microsoft Pla		<u>D</u> elete <u>A</u> rchive				

Summary

In this chapter, we explored Outlook for the web and the desktop Outlook application from the email perspective. We looked at the different parts of each and their functions. You can learn more about each of these by going to https://support.office.com and clicking on Outlook. From there, you will be able to choose Outlook for the web or on the desktop.

In Chapter 5, *Using the Exchange Calendar*, we will look at using the Exchange calendar via Outlook for the web and via the desktop Outlook application.

5 Using the Exchange Calendar

The calendar in Exchange is another part that most users use. This and all parts of Exchange can be accessed through your browser and through the Outlook desktop application. Most of the functionality is the same via both platforms but there are some differences for each as well.

In this chapter, the following topics will be covered:

- Parts of the calendar in OWA
- Parts of the calendar in Outlook

Parts of the calendar in OWA

Accessing your calendar using Outlook on the web is done through your web browser. You will need to log into the Office 365 portal and click on the **Outlook** block on the Office 365 Home or in the app launcher:



Once you get into Outlook on the web, you first land in your email. You can access your calendar by clicking on the calendar icon:

Office 365					
Search Mail and People 👂	⊕ New ✓				
← Folders	Focused Other Filter 🗸				
Favorites	Next: No events for the next two days. 💾 Agenda				
∧ Megan Bowen	Other: New conversations				
V Inbox 16	Microsoft Planner 3				
Drafts	Microsoft Planner				
Sent Items	You have late tasks! Mon 10:44 AM				
Deleted Items	Hi Megan, You have 2 tasks due in Microsoft Planner				
Deleted items	Last week				
Archive	Microsoft Planner				
Clutter	You have late tasks! Fri 2/15				
Conversation History	Hi Megan, You have 2 tasks due in Microsoft Planner				
Junk Email	Microsoft Azure				
Notes	Your Azure AD Identity Protection Weekly D Tue 2/12				
In-Place Archive -Megan Bow	See your report. Your Azure AD Identity Protection W				
in the megan bon	Microsoft Planner				
∧ Groups	You have late tasks! Tue 2/12				
Product Launch E 43	Hi Megan, You have a task due in Microsoft Planner. L				
Video Production 1	Microsoft Planner				
X1050 Launch Tea 2	You have tasks due today! Mon 2/11				
Marreting 36	Hi Megan, You have a task due in Microsoft Planner				
Mark 8 Project Te 2	Microsoft Planner				
in Koriojectie Z	You have upcoming tasks due. 2/10/2019				
tectronic Events 1	Hi Megan, You have a task due in Microsoft Planner				
🞽 📠 💒 🗹					
Let's look at the parts of this interface:

Office 365 Calenda	ar						os o 💿 ? 🎆
Search Calendar 6	⑦ New ♥	Interesting calendars	i 🗘 Share 👋 I	Print ┨			Try the new Outlook
< 7February 2019 >	< > February 2019 > 👱						4 Day Work week Week Month Today
SMTWTFS S	unday Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Monday, February 18, 2019
27 28 29 30 31 1 2 2	27 328				Feb 1	2	9:00a Sales Team Meeting
3 4 5 6 7 8 9	9a Sales Team Meetin	10a Weekly call with 5	8:30a Company Meeti	8a Project Team Meet	8:30a Legal and Execu		1 hour Conference Room - Adams
10 11 12 13 14 15 16	1p Weekly check-in w	2p Tailspin Toys Propr		10a Tailspin Project D	12p Lunch?		1 hour 30 minutes Engineering lab
17 18 19 20 21 22 23	4p weekly call with H	sp Project taitspin		12p Weekly Marketin +1	1p Lidia/Isaiah E1 +1		4:00p Weekly call with French Subsidiary
24 25 26 27 28 1 2 3	3 4	5	6	7	8	9	Thus online meeting
	9a Sales Team Meetin	10a Weekly call with !	8:30a Company Meeti	8a Project Team Meet	8:30a Legal and Exect.		
A Your calendary	1p Weekly check-in w	2p Tailspin Toys Propr		10a Tailspin Project D	12p Lunch?		
H Your calendars	4p Weekly call with H	3p Project Tallspin		12p Weekly Marketin +1	1p Lidia/Isalah 1:1 +1		
Calendar 1	10 11	12	13	14	15	16	
Other calendars	9a Sales Team Meetin	10a Weekly call with !	8:30a Company Meeti	8a Project Team Meet	8:30a Legal and Execu		
Other Calendars	1p Weekly check-in w	2p Tailspin Toys Prope		10a Tailspin Project D	12p Lunch?		
People's calendars	4p Weekly call with Fr	3p Project Tallspin		12p Weekly Marketin	1p Lidia/Isalah 1:1		
1	18 🐣	19 🗢	20 🖨	21 🐇	22	23	
▲ Groups	9a Sales Team Meetin	10a Weekly call with !	8:30a Company Meeti	8a Project Team Meet	8:30a Legal and Execs.	2.5	
Product Launch E	1p Weekly check-in w	2p Tailspin Toys Propr		10a Tailspin Project D	12p Lunch?		
	4p Weekly call with Fr	3p Project Tailspin		12p Weekly Marketin	1p Lidia/Isaiah 1:1		
video Production	26	26	27	+1	•1		
🚺 X1050 Launch Tea 🧉	29 ZS	∠D 10s Weekly call with f	E1 R30s Company Meeti	20 Ra Brainet Team Ment	IVIAL I		
Marketing	to Weekly check-in w	20 Tailspin Toys Props	company meet	10a Tailspin Project D	12p Lunch?		
	4p Weekly call with Fi	3p Project Tallspin		12p Weekly Marketin	1p Lidia/Isaiah 1:1		

In the previous screenshot, you can see the events for the month of February.

#1 Action bar

On the action bar, you have options for creating a new calendar event or email, adding another calendar, configuring an interesting calendar overlay, sharing your calendar, or printing it.

New

This option allows you to create a new calendar event or email message without leaving your calendar:

🕀 New 🖌	🗄 Add —
Calendar event	:
Email message	
Sunday	Monday

When creating a new event or an appointment, you have all the usual suspects. You can also add a Skype for Business meeting:

Save 🚺 Discard 🧯	Attach 🔕 A	dd Skype meeting	Charm ⊻ 🌖 🕼							6
etails		0		Feedback	People	яΞ	Sche	edule		
dd a title for the event					Required 🗸 Add people		< >	Mon 2/18 ¥	30 minutes	Ŧ
ldd a location or a room					Megan Bowen					\sim
et.							8a	×		1
on 2/18/2019		8.00 AM	▪ All day				54	Sales Team Meeting		
1 fon 2/18/2019		8:30 AM	▼ Private						2	
Time zone 💙							10a			
ez		Save to calendar					114			Ł
over	*	Calendar	-							L
ninder Ione		Show as					12p			L
it so amail comindar										
an eman reman							1p	Weekly check-in with Engineer	8	L
🔺 🥚 в г 🙂	A A ½	▲ ☷ ☷ ☶	<u>→</u> ∨				2p		5	а.
Aake this event meaningfu	I. Add an agenda									
							3р			

Although the **Add Skype meeting** button says **Skype**, it is really Skype for Business and not the consumer version of Skype.

Add calendar

With this option, you can add many different calendar types as overlays on your main calendar:

🗄 Add calendar 🗸	ę
Secondary calendar	
Birthday calendar	
Holiday calendar	
From file	
From Internet	
From directory	

Once you add a calendar, the events in it will be shown alongside any previous calendars you have added.

Interesting calendars

As the title suggests, this is an interesting option indeed. This gives you the ability to add one of many **Bing calendars** as an overlay. Click on interesting calendars and a side panel opens:



Using the example of **Football**, you can click on it or one of your own choice:



You can then drill down to the team you want. I would choose the **NFL** team, the **Baltimore Ravens**:



Once the choice is made an overlay is added and all events related to that calendar will be colored to match the tab:



To remove any interesting calendar(s) that are no longer wanted, click on **Manage** then click the **X** next to the unwanted calendar(s):



Share

Clicking on this option opens a side panel where you can see who you are currently sharing your calendar with. You also get the ability to share your calendar with new people, change the level of access that those people have, and/or remove access:





Everyone in your organization gets access to your calendar by default to be able to see when you are busy. This is so that, when trying to schedule a meeting the Scheduling Assistant and other capabilities are able to see when you and others may be available. I highly recommend that you do not turn this access off. You can share your calendar by entering a name or email in the **Send a sharing invitation in email** box. As you start typing, the system will start suggesting people and places:

🗸 Done				
Share th	his calendar: Calendar ng invitation in email.			
ad				Share
	Conf Room Adams .dams@M365x423875.onmicrosoft.com			
E e	mployee Advocacy mployeeadvocacy@M365x423875.onmicrc		Can view when I'm busy	•
	dele Vance deleVM365x423875.OnMicrosoft.com	×		
MA Ma	IOD Administrator dmin@M365x423875.OnMicrosoft.com			
🔎 s	earch Directory			

Once the person or place is chosen, you will be able to choose the level of access you wish to grant and then click the **Share** button or abort the operation by clicking on the trash can icon:

✓ Done							
Share this calendar: Calendar							
Send a sharing invitation in email.							
Adele Vance AdeleV@M365x423875.OnMicros	Can view all details 🔹	Share	Ì				
	Can view when I'm busy						
People inside your organization	Can view titles and locations						
	✓ Can view all details						
My Organization	Can edit	-					
	Delegate						

Any time you wish, you can come to this panel and choose to change the level of access or delete access for any in your list that you wish:



Clicking the **Done** button closes the panel.

Print

Clicking on this button opens a wide side panel where you can preview what you have selected to print, configure your print options such as which calendar or calendar view you would like to print, and choose to print or cancel the operation:

Calendar:	Preview						
Calendar 👻							
View:	February 2019				February 201	9	March 2019
Month -	🗂 Calendar				5 M T W T	FS SM	TWTFS
					34567	89 34	5 6 7 8 9
Print from:					10 11 12 13 14 17 18 19 20 21	15 16 10 11 22 23 17 18	12 13 14 15 16 19 20 21 22 21
8:00 AM					24 25 28 27 28	24 25	26 27 28 29 30
0.00 Am	Sunday	Monday	Turnity	Wednesday	Thursday	31 1 Friday	2 3 4 5 6 Seturday
Print to:	27	28	29	30	31	Feb 1	2
5:00 PM		Se Sales Team Meer	10a Weekly call wit	830a Company Me	8a Project Team Me	830a Legal and Exe	
5.00 PM		1p Weekly check-in 4n Weekly call with	2p Tallspin Toys Prc 3n Project Tallspin		10a Tallspin Project 12n Weekly Market	12p Lunch? In Lidia/Isalah 11	
		ay many car and	ap regist sample		3p Project Talbain	4p Friday Unwinder	
Print detailed agenda and calendar							
	3	4	5	6	7	8	9
		So Sales Team Meer	10a Weekly call wit	830s Company Me	& Project Team Me	8:30s Legal and Exe	
		1p Weekly check-in	2p Tailspin Toys Prc		10a Tailspin Project	12p Lunch?	
		4p Weekly call with	3p Project Tailspin		12p Weekly Market	1p Lidia/Isaiah 11	

Clicking the **Print** button from here opens your computer's **Print** dialog box with all of the normal options:

Calendar - MeganB@M365x423875.OnMicrosoft.com	n - Print							×
Printer								
$$ Microsoft Print to PDF \checkmark		4	- 1	/ 1	\rightarrow [
Let the app change my printing preferences	February	2019			February 201 S. M. T. M. T.	9 F 5 5 M	March 2019 T W T F S	
Orientation					17 10 19 10 11 3 4 5 6 7 10 11 12 13 14 17 18 19 20 21	1 2 8 9 3 A 15 16 10 11 22 23 17 16	1 2 5 6 7 8 9 12 13 14 15 18 19 20 21 22 23	
Portrait ~			Tamity	Networky	24 25 26 27 28 Tunity	24 25 31 1 Frange	26 27 28 29 30 2 3 4 5 6 5monthy	
Pages	27	28 Sir Sales Team Meer 1p Waekly check-in 4p Weekly call with	29 10a Waekty call eit 2p Tailipin Toys Pro 3p Project Tailipin	30 835a Company Me	31 Ba Project Team Mr. Via Talapin Project Via Talapin Project Ja Project Talapin	Feb 1 835a Lasol and Esc. Ngi Lasoh? Ngi Lidla/halah 11 Agi Friday Unwinder	2	
All pages 🗸	3	4	5	6	7	8	9	
Scale		its Sales Team Mear 1p Weekly check-in 4p Weekly call with	The Weekly call with An Selbasin Teys Pro Jp Project Talkain	830a Congany We	Ba Project Team Me Yan Talapin Project Yap Hookly Mantat Jap Project Talapin	Ellia Leopi and lise Nat Leoch? Nat Leoch? National III Ap Friday Unwinder		
Shrink to fit V	10	11 In Sales Team Meer 1p Weekly check-in 4p Weekly call with	12 10a Minelety call with 2p Tailopin Texn Pro 2p Project Tailopin	13 830a Company Ma	14 Its Project Team Me 10a Talbain Project 10p Headsy Market 3p Project Talbain	15 830s Lansel and Ease 12p Lansel M 1p Lindes/halain 11 4p Friday Unwinder	16	
Normal ~	17	18 In Sales Tourn Meer 19 Weekly call with 49 Weekly call with	19 13a Minakiy call wit 3p Talapin Teon Pro 3p Project Talapin	20 835a Company Me	21 Da Project Team Mr. 10a Talapin Project 10a Heakly Market Tap Project Talapin	22 B3De Lensel and Eve. Stip Lanch? Sp Gidle/Nalah 11 Ap Frides Unwinder	23	
Off V Clutter-free printing	24	25 Se Sales Team Maer Sp Weekly call with	26 10a Minekly call wit 2p Taliquin Teys Pro 2p Project Taliquin	27 135a Garegary Me	28 In Project Team Me 10a Saltajin Project 10a Mentily Market Igo Project Talkarin	Mar 1 835e Level and Sec 12p Level* 1p Cidle/holeh 11 4p Friday Unwinder	2	
Off ~								
Print Cancel								

#2 Month/year navigation

This navigation gives you the ability to use the < and > buttons to move backward and forward through the months, respectively. You can also click on the down arrow near the month and year to get a dropdown for navigating through the years as well as the months:



This navigation changes based on the view your calendar is in (see the #4 *Calendar views* section for more on views).

#3 Calendar

This section shows your calendar as well as any other calendar overlays that may have been chosen.

#4 Calendar views

These options allow you to change the view of your calendar to the **Month**, which is usually the default, or to the **Week**, the **Work Week**, or the **Day**.

#5 Selected day's events

This section is only visible in the **Month** view. In this section, you can see all of the events for any date you click on.

#6 Search

The search helps you to search events on your calendar.

#7 Month calendar navigation

This navigation allows you to navigate by clicking on days or using the < and > buttons to move backward and forward by month:



You can also click on the month/year to open the navigation by months and years.

#8 Calendars and groups

In this section, you can see all of your calendars and calendars you have been given access to as well as any Office 365 groups that you may be a member of:

Product Launch Ev	/ent					
Conversations Files Caler	idar Notebook	Ente	ring via Ema	<u>il</u>		
⊕ New \$ Reply all → Forward			_			
Last month	^				a	
Product Launch Event	m .	(➔ New ❤ 🖪	Add calendar ∨	Interesting calendar	rs 😲 Share 🖷	Print
Forecasting No preview is available.	1/16/2019	< > Febru	ary 2019 🗸	En	tering via Ca	lendar
Product Launch Event	F S	Calendar	Product Launch Even	N	ote: There is no Grou	p menu
Usability Reporting Review	1/16/2019 1 2			-		
	3 9	Sunday	Monday	Tuesday	Wednesday	Thursday
	5 16	27	28	29	30	31
	5 10		9a Sales Team Meetin	10a Weekly call with §	8:30a Company Meeti	8a Project Team Meet
	2 23		1p Weekly check-in w	2p Tailspin Toys Prope		9:30a Market Segmen
			4p Weekly call with Fr	3p Project Tailspin		10a Tailspin Project D +2
		3	4	5	6	7
	^		9a Sales Team Meetin	10a Weekly call with 5	8:30a Company Meeti	8a Project Team Meet
			1p Weekly check-in w	2p Tailspin Toys Prope		9:30a Market Segmen
			2:30p International Pr +2	3p Project Tailspin		10a Tailspin Project D +2
		10	11	10	12	1./

Getting into a group through the calendar can be confusing because the group calendar comes in as an overlay and you don't have access to the menu that you would have if you go through email or people. I recommend that you enter a group through email or people.

#9 Outlook apps

The buttons in this bar give you the ability to switch back and forth between the Outlook applications of mail, calendar, people, and tasks.

Parts of the calendar in Outlook

You can also access your Office 365 calendar through Outlook on your desktop. This is the most popular method of interacting with the calendar. If your subscription has the download of Office available, you may want to take advantage of it. One way you can tell if you have the Office licenses available to you is by logging into the Office 365 portal and going to the Office 365 Home and clicking on the **Install Office** dropdown:



The other way to get to your desktop installs is to click on your persona, then on **My account**, then on **Install status**, then on **Install desktop applications**:



If you need more help, cannot download Office, or need to add Office, talk to your company admin.

The Outlook desktop application has a lot of the parts that Outlook on the web has and more. To get to Contacts in Outlook, open Outlook on your desktop and click on the calendar icon:



The parts of the calendar in Outlook are very similar to Outlook on the web with a few exceptions:

09=			Calendar - MeganB@M365x37	8646.OnMicrosoft.com - Outlook			⊞ - 8 ×
File Home 1 Send / Receive	Folder View Help V Tell View Art	me what you want to do Week Month Schedule Month Schedule View View Galendar - Calen Manage Galend	가 New Group Search Peo are 뷰 Browse Groups 원 Address dar ~ ars Groups Find	ple Book			🕏 Coming Soon 💿
SU MO TU WE TH FR SA 27 28 29 30 31 1 2	♦ February 2019 ³	Washington, D.C. 🗳 🌁 Today 47°F/31°F		Search Calendar 5			Q
3 4 5 6 7 8 9	SUNDAY	MONDAY	TUESDAY	WEDNESDAY 6	THURSDAY	FRIDAY	SATURDAY
10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 March 2019	Jan 27	28 9:00am Sales Team Meeting: Conferenc 1:00pm Weekly check-in with Engineer 4:00pm Weekly call with French Subsidi	29 10:00am Weekly call with Subsidiary Le 2:00pm Talispin Toys Proposal Review + 3:00pm Project Talispin; Conference Ro	30 8:30am Company Meeting: Christie Cline	31 8:00am Project Team Meeting: Confere 10:00am Talispin Project Discussion; My 12:00pm Weekly Marketing Lunch; TBD,	Feb 1 830am Legal and Executives Bi-Weekly 21200pm Lunch?; 180; lymne Robbins 1:00pm Lidia/Isalah 1:1; Lidia's Office; Li	2
SU MO TU WE TH FR SA 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23	3	4 9:00am Sales Team Meeting, Conference 1:00pm Weekly check-in with Engineer 4:00pm Weekly call with French Subsidie	5 10:00am Weekly call with Subsidiary Le., 2:00pm Tailspin Toys Proposal Review +., 3:00pm Project Tailspin; Conference Ro.,,	6 8:Diam Company Meeting: Christie Cline	7 8:00am Project Team Meeting: Confere 2 10:00am Tailspin Project Discussion; My 12:00pm Weekly Marketing Lunch; TBD;	8 830am Legal and Executives BI-Weekly, 212:00pm Lunch?; TBD; Lymne Robbins 1:00pm Lidia/Isalah 1:1; Lidia's Office; Li	9
31 1 2 3 4 5 6	10	11 9:00am Sales Team Meeting; Conferenc 1:00am Weekly check-in with Engineer	12 10:00am Weekly call with Subsidiary Le., 2:00am Talispin Toys Proposal Review +	13 8:30am Company Meeting: Christie Cline	14 8:00am Project Team Meeting: Confere 10:00am Tailspin Project Discussion: My	15 8:30am Legal and Executives BI-Weekly, 7 12:00em Lunch?: TBD: Lynne Robbins	16
▲ ☑ My Calendars 8 ☑ Calendar		4:00pm Weekly call with French Subsidi	3:00pm Project Tailspin; Conference Ro		12:00pm Weekly Marketing Lunch; TBD;	1:00pm Lidia/Isaiah 1:1; Lidia's Office; Li	
 Team: Miriam Graham Other Calendars 	17	18 9:00am Sales Team Meeting: Conferenc 1:00pm Weekly check-in with Engineer 4:00pm Weekly call with French Subsidi	19 10:00am Weekly call with Subsidiary Le 2:00pm Talispin Toys Proposal Review + 3:00pm Project Talispin; Conference Ro	20 8:30am Company Meeting: Christie Cline	21 8:00am Project Team Meeting: Confere 2:00:00am Tailspin Project Discussion; My 12:00pm Weekly Marketing Lunch; TBD;	22 8:30am Legal and Executives Bi-Weekly, 212:00pm Lunch?; TBD; Lymne Robbins 1:00pm Lidia/Isalah 1:1; Lidia's Office; LL.	23
All Group Calendars X1050 Launch Team Mark 8 Project Team	24	25 9:00am Sales Team Meeting; Conferenc 1:00pm Weetly check-in with Engineer 4:00pm Weetly call with French Subsidi	26 10.00am Weekly call with Subsidiary Le., 2:00pm Tailspin Toys Proposal Review + 3:00pm Project Tailspin; Conference Ro	27 Bi30am Company Meeting: Christle Cline	28 8:00am Project Team Meeting: Confere 10:00am Taitspin Project Discussion; My 12:00pm Weekly Marketing Lunch; TBD;	Mar 1 B30am Legal and Executives BI-Weekly, 21200pm Lunch1; 180; Lymne Robbins 1:00pm Lidia/Isalah 1:1; Lidia's Office; Li	2
Items: 75				All fol	ders are up to date.	Connected to: Microsoft Exchange	■ ₩+ 100%

Let's explore this version of your calendar.

#1 The tabs

There are six tabs that are always present in Outlook and they each have their associated ribbons with the exception of **File**. When you click on **File**, you are taken to what is referred to as the backstage of this Office program. We will look at the ribbons in the following section. As for the backstage of **File**, let's look at that now:

C 9	÷					Search Tools		Inbox - Meganl	B@M365x022680.On	Microsoft.cor	m - Outlo	ook
File H	Home	Send / Receive	Folder	View	Help	Search	Q Tell	me what you w	ant to do			
All (Mailboxes M	Current Mailbox] Current Folder] Subfolders 췁 All Outlook Items	Include Older Res	e Fr	om Subjec	U t Has Attachments	Categorized	This Week	 ✓ P Flagged ↓ Important + More ✓ 	Recent Searches ~	Search Tools ~	Close Search
	Sco	ope	Results	;			Refine			Optio	ns	Close

It is important to note that, depending on other portions of Outlook that you may have clicked on, there may be additional contextual ribbons that appear.

The Outlook backstage

When you click on the **File** tab, you are taken to the backstage instead of opening a ribbon. For more details on the backstage, see #6 *The tabs* in Chapter 4, *Sending and Receiving Email*.

Home

On this ribbon, you can create a new meeting or appointment, arrange the view, browse Office 365 groups, add and share calendars, and search the address book:



If you have Skype for Business and/or Microsoft Teams turned on in your organization but you don't see them in this list, you or your admin will need to turn the add-in on in your Outlook's **Options** (in the **File** backstage):



Using the **New Items** dropdown button, you can create other Outlook items without leaving email.

Send/receive

This ribbon has options for manually forcing Outlook to send and receive emails and update folders:



Have you had an issue with Outlook not connecting? If so, sometimes clicking the **Work Offline** button in the **Preferences** section forces Outlook to go offline; clicking it again to go back online can prompt Outlook to refresh the connection.

Folder

The options in this ribbon allow you to create a new calendar, share and add calendars, copy, rename, and view the properties of a selected calendar:



Under your calendar's properties is where you can add, edit, and revoke permissions to your calendar:

Calendar Properties		2	ĸ						
General AutoArchiv	e Permissions	Synchronization	_						
Currently sharing w	Currently sharing with:								
Name Permission Level									
My Organization	Can view when	l'm busy							
		Add Remove							
Permissions									
Changes you make your organization.	to these permis	sions will apply to all users in							
O None									
Can view when	l'm busy								
🔿 Can view titles a	nd locations								
Can view all det	ails								
🔿 Can edit									
			_						
	OK	Cancel Apply							

Calendar Properties also has the **AutoArchive** and **Syncronization** tabs, which allow you to modify the archiving and synchronization settings for a calendar.

View

On this tab's ribbon, change the view and view its settings, color code the calendar events, and add various panes such as the **People** pane:

File Home Send / Receive Fo	der View Help Q Tell me	what you	want to do			
$ \hookrightarrow \bigotimes \mathcal{O} \stackrel{!}{\boxplus} \stackrel{!}{\boxplus} \stackrel{!}{\boxplus} \stackrel{!}{\boxplus} $	Time Scale *	5.			Д 🗄 🗖	
Change View Reset Day Work W	eek Month Schedule	Color	Daily Task Folder Reading To-Do	People	Reminders Open in New Close	
view - Settings view week	View EG working Hours	Ť	List * Pane * Pane * Dar *	Pane *	window window All items	
Current View	Color	Layout	People Pane	Window		

Help

On this ribbon, you have multiple help options such as getting self-service support, contacting support, and running diagnostics:



#2 Tell me what you want to do

If you have ever wondered if there was a command for something or were having trouble finding the button for the command, this box is for you! Simply type what you want and get options:

Inbox - MeganB@M365x850467.OnMicrosoft.com - Outlook							
View Help	Q save	×					
y ∰ y All vard ∰ × 10 spond Q	Actions Save As Change View Save Attachments	>	iroup e Groups ups	Search Peo Addres Filter El Finc			
Current Mailbox 🔎 Unread	Help		<noreply@planner.< td=""></noreply@planner.<>				
^{Week} osoft Planner nave late tasks!	⑦ Get Help on "save" Smart Lookup on "save"		s. To help protect your pr				

You even get some suggested options by simply clicking in the box:

		Inbox - MeganB@	M365x4	33810.OnMicros
Help	₽			
	Suggested			- Move
	戌 [→] Language		×.	Rules
ll	🖹 Signature		×.	🔨 🚺 OneN
tespond	Drafts			г <u>я</u> Move
ox D	Current Mailbox 🔻	🗣 Reply 🛛 🛱 Reply All	🕒 Forw	ard
	By Date 🗸 🏠	Microsoft	Planner	<pre><noreply@f< pre=""></noreply@f<></pre>

These options include some commonly used actions and frequently searched options, such as **Language**, **Signature**, and **Drafts**, as can be seen in the preceding screenshot.

#3 Calendar navigation

You can navigate through the months, weeks, or days using the < and > buttons, depending on your calendar's view at that moment.

#4 Weather

This section shows you the weather for the place you set. The default is normally **Redmond**, **Washington** (Microsoft headquarters). You can add a new place by clicking on the dropdown next to the current place:



Type in the place you want to add and hit *Enter* or the magnifying glass that will appear in the box:



The weather will switch to the place you added but all your locations will be available under the dropdown as well as the ability to add another location.

#5 Search

You can use this box to search your calendar's events.

#6 Calendar

This is the area for your calendar. The view of your calendar will be based on the one you choose from the **Arrange** section of the **Home** tab:



You can choose from **Day**, **Work Week**, **Week**, **Month** (usually the default), and **Schedule View**.

#7 Another calendar navigation

You can navigate through the months, weeks, or days using the < and > buttons as well as the days showing on the current and next month's calendars. You can also skip ahead in the months by clicking and holding down the left mouse button on the first calendar's month/year.

#8 List of calendars

This section has a list of your calendar and any other calendars shared with you. Office 365 group calendars also show up here.

#9 Outlook apps

This is the section where you can move between the applications inside of Outlook. You can also set which ones you see or hide and arrange them in the order you would like:

Inbo	ox 46				Navigation Options				
Dra	fts			P	Notes				
Sent	t Items			P	- Folders				
Dele	eted Item	s			rolders				
\sim		్టిపి	Ś	 С	Shortc <u>u</u> ts		Quick steps		THOVE
14 4	0		_			-	Navigation Options		×
							Maximum number of visib	le items: 🚺 🚔	
							Compact Navigation		
							Display in this order		
							Mail		Move Up
							Calendar People		Maria Davia
							Tasks Notes		Move Down
							Folders		
							Shortcuts		
							Dec. 1	01	Const
							Reset	OK	Cancel
								_	

You can determine the visible and invisible items in Navigation Options.

Summary

In this chapter, we explored Outlook on the web and Outlook, the desktop application, from the calendar perspective. We looked at the different parts of each and their functions. You can learn more details about each of these by going to https://support.office.com and clicking on Outlook. From there, you will be able to choose Outlook on the web or on the Outlook desktop application.

In Chapter 6, *Using Contacts in Exchange*, we will look at using exchange contacts via Outlook on the web and Outlook, the desktop application.

Using Contacts in Exchange

Exchange, the engine that serves your contacts as well as your email, calendar, and tasks, can be accessed through your browser and through the Outlook desktop application. Most of the functionality is the same via both platforms but there are some differences for each as well.

In this chapter, we will cover the following topics:

- Parts of people (contacts) in OWA
- Parts of contacts in Outlook

Parts of people (contacts) in OWA

Accessing your contacts using Outlook for the Web is done through your web browser. You will need to log in to the Office 365 portal and click on the **Outlook** block in Office 365 Home or in the app launcher:



Once you are in Outlook, click on the people icon:

Office 365					
Search Mail and People	⊕ New ✓ Mark all as read				
🕒 Folders	Focused Other Filter V				
Favorites	Next: No events for the next two days.				
∧ Megan Bowen	Other: New conversations				
V Inbox 16	Microsoft Planner 3				
Drafts	Microsoft Planner				
Sent Items	You have late tasks! Mon 10:44 AM				
Deleted Items	Hi Megan, You have 2 tasks due in Microsott Planner				
Archive	Last week				
Clutter	Microsoft Planner				
Conversation History	You have late tasks! Fri 2/15 Hi Megan, You have 2 tasks due in Microsoft Planner				
Lunk Email					
Notos	Microsoft Azure				
Notes	See your report. Your Azure AD Identity Protection W				
In-Place Archive -Megan Bow	Microsoft Planner				
∧ Groups	You have late tasks! Tue 2/12				
Product Launch E 43	Hi Megan, You have a task due in Microsoft Planner. L				
Video Production 1	Microsoft Planner				
X1050 Launch Tea 2	You have tasks due today! Mon 2/11				
Marketing 36	Hi Megan, You have a task due in Microsoft Planner				
Mark 8 Project Te 2	Microsoft Planner				
Electron Events 1	You have upcoming tasks due. 2/10/2019				
M 🖬 💒 🔽	HI Megan, You have a task due in Microsoft Planner				

The following is a screenshot of people, otherwise known as contacts, where you will first land. You can think of this page as a home page whose main section (#2) changes based on things you click on. Let's take a closer look:



#1 The action bar

This bar starts with drop-down menus for **New** and **Manage** and an option for **Edit Favorites** when on the home page for people, but these options change when you select things from the left navigation:



The following is an example of the action bar when you click on **Your contacts** and then click on one of the **Contacts** from the list. At this point, you get actions that correspond with what is chosen:



#2 The main window

This section changes based on what is clicked on in the left navigation. It starts with the home page, which shows people you frequently contact, events in your calendar today, your favorites, and people you may want to follow up with. You can pin any of them to your page by clicking on **Pin this view**:



#3 Search

You can use this box to search people, whether by contacts, rooms, equipment, or an Office 365 Group.

#4 Left navigation

On the left navigation, you can navigate to **Featured people**, **Your contacts**, **Directory**, and **Groups**:



#5 Outlook apps

The buttons in this bar give you the ability to switch back and forth between the Outlook applications for mail, calendar, people, and tasks.

Parts of contacts in Outlook

You can also access your Office 365 contacts through Outlook on your desktop. This is the most popular method of interacting with contacts.

If your subscription has the download of Office available, you may want to take advantage of it. You can tell whether you have the Office licenses available by logging in to the Office 365 portal, going to Office 365 Home, and clicking on the **Office installs** drop-down menu:



The other way to get to your desktop installs is to click on your profile, then on **My account**, **Install status**, **Install desktop applications**:



If you need more help, cannot download Office, or need to add Office, talk to your company admin.

The Outlook desktop application has a lot of the parts that Outlook on the Web has but the Outlook desktop application has more. To get to **Contacts** in Outlook, open Outlook on your desktop and click on the people icon:



Let's look at the parts of **Contacts**.

#1 The tabs

There are six tabs that are always present in Outlook, and they each have their associated ribbon (with the exception of **File**). When you click on **File**, you are taken to what is referred to as the backstage of this Office program. We will look at the ribbons next. As for the backstage of **File**, let's look at that now:
0 % =		Search Tools	Contacts - Megan8@M36	5x388861.OnMicrosoft.com - Outlook	· □ ×
File Home Send / Rec	eive Folder View Help	Search	♀ Tell me what you wat you	vant to do	👸 Coming Soon 💁
All Contact Items Scope	Categorized Has Phone Has N Number * Address * Refine	tore * Cop	t Search Close Tools V Search tions Close		~
My Contacts	م ا	All Outlook Iter	ns •	Alex Wilber	

0

Depending on other portions of Outlook that you may have clicked on, additional contextual ribbons may appear.

The Outlook backstage

When you click on the **File** tab, you are taken to the backstage instead of opening a ribbon. For more details on the backstage, see #6 *The tabs* section in Chapter 4, *Sending and Receiving Email.*

Home

On the **Home** tab, you have the option to create new items, delete items, share, tag, and more:



One of the most popular functions is creating new emails, calendar items, contacts, and so on. Using the **New Items** drop-down button, you can create other Outlook items without leaving email:



Send/receive

This ribbon has options for manually forcing Outlook to send and receive email and to update folders:

File Home	Send / Receive	Folder	View	Help	♀ Tell r	me what
Send/Receive All Folders	late Folder d All d/Receive Groups ~ Receive	Show Progress	Cancel All	Downlo Preference Prefe	ad Work es ~ Offline	



Have you had an issue with Outlook not connecting? If so, sometimes clicking the **Work Offline** button in the **Preferences** section, to force Outlook to go offline, then clicking it again, to go back online, can prompt Outlook to refresh the connection.

Folder

This tab's ribbon has options for creating new, renaming, and copying folders, sharing and opening shared contacts, and viewing folder permissions and properties:



View

The options on this ribbon help you to manage how Outlook looks:



Help

On this ribbon, you have multiple help options, such as getting self-serve support, contacting support, and running diagnostics:

File	Home	Send / Receive	Folder	View	Help	Õ	Tell me what
?	8 (3	E P	E P		
Help	Contact Feed Support	lback Suggest Sho a Feature Traini	w What's ng New	Support Tool	Get Diagnostic	s	
		Help			Tools		

#2 Tell me what you want to do

If you have ever wonder whether there was a command for something, or you were having trouble finding the button for the command, this box is for you! Simply type what you want and get options:

	Inbox - MeganB@M365x850467.OnMicrosoft.com -	Outlo	ook
View Help	Q save	×	
/ Intervention of the second	Actions Save As Change View Save Attachments Add Table Help	>	iroup e Groups Ups Search Pe @ Addre Filter E Fin <noreply@planner< th=""></noreply@planner<>
/eek	Get Help on "save" Smart Lookup on "save"	>	s. To help protect your p

You even get some suggested options by clicking in the box.

#3 Left navigation

This portion of the interface helps you to navigate to your contact lists. When you start, you may only have one, but if you add other email accounts, you will have their contact lists show up here as well.

#4 Search and filtering

You can use the search box to search your contacts. The filter drop-down menu lets you control the scope of your search:



#5 List of contacts

This is the list of contacts contained in the contact list you have clicked on. You can use its navigation to quickly get to subsets of contacts:



You can also right-click on a contact to get a drop-down list of operations you can perform on the contact:



#6 Contact details pane

Once you choose a contact by clicking on it, the details of that contact will be shown in this pane. You will be able to show more details, email the contact, instant message them, and use other options via the open menu (...):

Alex Wilbe	er	
Contact >	Edit Outlook Contact Link Contacts Schedule a Meeting View Profile	Outlook (Contacts)
		\leftarrow Alex Wilber
		Contact Contact Alex@FineArtSchool.net

#7 Outlook apps

This is the section where you can move between the applications inside of Outlook. You can also set which ones you see and hide the ones you don't want to, and arrange them in the order you like:

	•		
SInbox 46	Navigation Options		
Drafts	D Notes		
Sent Items Deleted Items	Eolders		
	♂ Shortcuts	Quick Steps	Move
		Navigation Options	×
		Maximum number of visible items: Compact Navigation Display in this order Mail Calendar People Tasks Notes Folders Shortcuts Calendar	dove Up ove Down
		Reset OK	Cancel

Summary

In this chapter, we explored Outlook for the Web and the desktop Outlook applications from the contacts perspective. We looked at the different parts of each and their functions. You can learn more about each of these by going to https://support.office.com and clicking on Outlook. From there, you will be able to choose Outlook for the Web or the desktop.

In Chapter 7, *Getting Familiar with Other Exchange Settings*, we will look at other settings in Outlook for the Web and the desktop Outlook application.

7 Getting Familiar with Other Exchange Settings

In this chapter, you will learn about the other settings that you can set in Exchange. You will learn how to set up an auto-forward setting in Office 365. You will also learn how to input a signature in the outline app and the web version so that it will display at the end of every email that's sent to the receiver. There are lots more options in Outlook, but we'll cover a few that you need to know about as an end user.

In this chapter, we will cover the following topics:

- Creating an email signature
- Setting an out of office reply
- Creating email rules
- Setting a forwarding email

Creating an email signature

Your organization may have a standard email signature they would like you to use, or you may wish to set up your own. Let's look at where we can get to this setting.

Creating an email signature via Outlook on the web

To get to this option on the web, click on **Settings** (the gear icon), and then on **Email signature** in the **Mail** | **Layout** section of the left navigation:



Creating an email signature via Outlook

There are two ways you can get to this option. We will look at both.

Create a new email, or reply or forward to an email. Then, on the Message tab in the **Include** section, click on the **Signatures** drop-down button. This will open the **Signatures** and Stationary window, where you can then create, edit, and delete signatures, as well as assign them to any email account:

Clean Up* Delete Archive Reply Reply Forward Patter Patter Patter Patter Patter Patter Patter Basic Rest Basic Rest Chennel Tan- East Rest Chennel Tan- Cc.	Image: Second secon	ules v Assign B Cotegorize v Assign Cotegorize v Assign Cotegorize v Assign Cotegorize v Assign Cotegorize v Assign Cotegorize v Assign Cotegorize v Cotegorize v Assign Cotegorize v Cotegorize v Voice v Add Add Vite v Filter v MyAnalytics V MyAnalytics v My restrict v My	ess Book Re Email ~ Alo pe Perecent ~ Alo pe Perecent ~ Alo pe
And D unch Te M365 M365 Comparison Co	Image: Second	Imove Moreau nead A recovery Addition	7 X Choose default signature E-mail gacount: Mergan@M3555506442.OnMicrosoft.com V Hery gessages: [Prond] Replet.formatic: [Prond] Replet.format



You may have noticed the **Stationary** tab. The options there will add a background color, pattern, or image to your email. This is not recommended and is is not designed well for accessibility.

Chapter 7

Option 2 – creating an email signature in Outlook via the file backstage

Click on **File** to get to the backstage and then click on **Options**. This will open the **Options** window. From there, click on the **Mail** tab and then on the **Signatures** button, which will open the **Signatures and Stationary** window (see the screenshot in the Option 1 – creating an email signature in Outlook via a new, forward, or reply email section):



Setting the out of office reply

When you are out of the office, you may want to set an automatic reply to notify people that you are out and possibly give them additional instructions. Let's look at where we can get to this setting.

Setting an out of office reply via Outlook on the web

To get to this option on the web, click on **Settings** (the gear icon) and then on **Automatic Replies**, where you will have the option to configure the automatic replies for emails you receive from internal and external people:



Setting the out of office reply via Outlook

To set the **Out of Office** (**OOO**) reply in Outlook, go to the **File** backstage. This option is on the **Info** tab and labeled **Automatic Replies** (**Out of Office**). Click on the **Automatic Replies** button and the **Automatic Replies** window will open. Here, you will have the option to configure the automatic replies for emails you receive from internal and external people:



Creating email rules

In Exchange, you can create alerts and rules to do things such as route emails from a certain person to a certain place. Let's look at where we can get to this setting.

Creating email rules via Outlook for the web

To get to this option on the web, click on **Settings** (the gear icon) and then click on **Inbox and sweep rules** in the **Mail** | **Automatic processing** section of the left navigation:

	Office 365	Outlook	Automatic replies
€ 0	ptions		Create an automatic reply (Out of office) message.
SI • G	nortcuts eneral	Save X Discard	Display settings Choose how your Inbox should be organized.
⊿ M	ail	Inbox rules	
1	Automatic processing Automatic highligh	Choose how email will be handled. Click the "+" icon below to create a new rule.	Manage add-ins Turn add-ins from your favorite app vendors on
	Insights Settings		and off.
	Automatic replies		
	Inbox and sweep n	les Un Name	Manage connectors
	Junk email reportir	g	Connect Outlook to your favorite services.
	Mark as read		
	Message options		Theme
	Read receipts		Default theme
	Reply settings		
	Retention policies		Notifications
	Suggested replies		On 🗸
	Undo send		
•	Accounts		Your app settings
•	Attachment options		Office 365
•	Layout	Sweep rules	Mail
	S/MIME		
	Clean up mailbox	These rules run at regular intervals to keep your inbox clean.	
→ Ca	alendar	÷	
► Pe	eople		
		On Name	

You also can delete sweeping rules that you've created from the action bar in your email.

Creating email rules via Outlook

In the **Move** section on the **Home** tab in your email, you will find the option to create new rules and alerts, as well as manage them:

File Home Send / Rec	eive Folder	View Help Q Tell	me what you want to do			
New New Email Items ~	Delete Archive	Reply Reply Forward and All	Internal Screens → Team Email ✓ Reply & Delete ✓	To Manager ^ Done ~ Create New \overline{v}	Move ~ Image: Categorize ~ I	Se R
New De	lete	Respond	Quick Step	ps 🕞	Create Rule	
 Favorites 	< Search	Current Mailbox D Current	Mailbox - Q Reply	Reply All	🐑 Manage Rules & Alerts	
Sent Items	Foc	used Other By Date	× ↑ LP L	ucerne Publishing Ev	ents <info@lucernepublishing.com> Megan Bowen</info@lucernepublishing.com>	
Create Rule	N	×	Rules and Alerts Email Rules Manage Alerts		X ken Ho	
	45°		Mew Rule Change R	tule + 🗄 Copy 🔀 Delete 🔺	Run Rules Now Qptions G	
when I get email with all of	the selected condi	tions	Rule (applied in the order	r shown) Select the "New Rule" button to ma	Actions	7.
From Lucerne Publishing	Events	area Bubliching	ite		Rules and Alerts X	i dei
	ming events at Luc				New Alert Alert Properties X Delete Create Rule	
Sent to me only					Alert Source Alert Description Received As	G
Do the following			Rule description (click an ur	nderlined value to edit):	Manage alerts from any Microsoft Office compatible alert source, such as Microsoft SharePoint Server.	:gi
Display in the New Item A Play a selected sound: Move the item to folder:	Windows Notify Select Folder	Em Browse	3/2 1/2	2	Create an alert by clicking New Alert.	_
	ОК Са	Advanced Options	Enable rules on all mess	ages downloaded from RSS Feeds 🧧		
			va	[⁴	м	
				z	OK Cancel Apply	

Setting a forwarding email

You may need to forward emails to another mail box, especially if you have more than one. Let's look at where we can get to this setting.

Setting a forward email via Outlook on the web

To get to this option on the web, click on **Settings** (the gear icon) and then on **Forwarding** in the **Mail** | **Accounts** section of the left navigation bar. Along with forwarding the email, you can choose to keep a copy of the email in the original inbox by checking the box:



You can only set one forwarding email address.

Setting a forward email via Outlook

In order to set a forwarding email address in this version of Outlook, you will need to create a rule (see *Creating email rules* section). On the **Create Rules** window, click the **Advanced Options...** button and then choose a condition for what emails are to be forwarded from the **Rules Wizard** window:

Home Send / Receive Folder Vie	w Help Q Tell me	Rules Wizard	×
Image: Second condition New Image: Second condition Image: Second conditity Image	Reply Forward Reply Forward All X Select Folder Select Folder Your past w 1/28/2019 CS X MyAnalytics 1/22/2019	Rules Wizard Which condition(s) do you want to check? Step 1: Select condition(s) from MxAnalytics with MyAnalytics I Your past week in the subject sent to Megan Bowen with MyAnalytics I Your past week in the subject or body through the specified account sent only to me where my name is in the To box marked as importance marked as centitivity flagged for action where my name is in the Cc box where my name is in the To or Cc box where my name is in the To box with specific words in the message header with specific words in the recipient's address with specific words in the sender's address assigned to category category Step 2: Edit the rule description (click an un erlined value) Apply this rule after the message arrives	×
الله الله الله الله الله الله الله الله	ublishing E	Cancel < Back Next > Finish	 ז

If you want all emails to be forwarded, do not check any conditions and click **Next**. You will be asked to verify your choice to not select any conditions:

Microsoft	t Outlook	\times
* 1	This rule will be applied to every message you receive. Is this co	rect?
	Yes No	

Check the box next to **forward it to people or public group** or **forward it to people or distribution list**. In the **Step 2** pane, click on the **people or public group** or **people or distribution** list:

Rules Wizard	×
What do you want to do with the message? Step 1: Select action(s)	
 move it to the <u>specified</u> folder assign it to the <u>categ</u> attegory delete it permanently delete it 	^
move a copy to the <u>specified</u> folder	
forward it to people or public group as an attachment	
redirect it to people of public group	
have server reply using a specific message	
reply using a specific t mplate	
flag message for follow up at this time	
clear the Message Flag	
clear message's catego les	
mark it as importance	
print it	
play a sound	
mark it as read	
stop processing more les	~
Step 2: Edit the rule description (click an underlined value)	
Apply this rule after the ussage arrives	
forward it to people or public group	
Cancel < Back Next > Fin	ish

In the **Rule Address** window, you can choose people from the address book by doubleclicking on each, and/or typing in addresses on the **To** line, and then clicking the **OK** button. Remember to separate each address with a semicolon (;) if you are typing addresses in:

Rule Address)
Search: Name only OMore	columns Address Book			
	Go Offline Global Ad	dress List - MeganB@M	I36 ∨ Advanc	ed Find
Name	Title	Business Phone	Location	
🛛 Adele Vance	Retail Manager	+1 425 555 0109	18/2111	^
Alex Wilber	Marketing Assistant	+1 858 555 0110	131/1104	
2 ^Q All Employees				
Q Allan Deyoung	IT Admin	+1 262 555 0106	24/1106	
Bob Kelly (TAILSPIN)				
Q Brian Johnson (TAILSPIN)				
Q Christie Cline	Buyer	+1 858 555 0111	131/2105	
Q Conf Room Adams				
Q Conf Room Baker				
Q Conf Room Crystal				
Q Conf Room Hood				
Q Conf Room Rainier				
Q Conf Room Stevens				
Q Debra Berger	Administrative Assistant	+1 425 555 0105	18/2107	
DG-2000 Feedback				~
<				>
To Adele Vance				
		_		
			OK C	ancel

Once the **Rule Address** window closes, click the **Next** button if you want to add any exceptions, or the **Finish** button to set the rule:

☐ play <u>a sound</u> ☐ mark it as read				
stop processing more rules				
Step 2: Edit the rule description (click an underlined value)				
Apply this rule after the message arrives forward it to <u>Adele Vance</u>				
Cancel < Back Next >	Finish			

Summary

In this chapter, we explored the other settings that are available in Outlook for the web and the desktop Outlook application. We looked at the different parts of each and their functions. You can learn more about each of these by going to https://support.office. com and clicking on **Outlook**. From there, you will be able to choose Outlook for the web or desktop.

In Chapter 8, *Understanding Skype for Business and Microsoft Teams*, we will look at using the Exchange calendar with Outlook for the web and the desktop Outlook application.

3 Section 3: Skype for Business and Microsoft Teams

In this section, readers will learn about Skype for Business and Microsoft Teams in general and will be given some specific information on how to make it useful.

The following chapters will be covered:

- Chapter 8, Understanding Skype for Business and Microsoft Teams
- Chapter 9, Using Skype for Business
- Chapter 10, Using Microsoft Teams

8 Understanding Skype for Business and Microsoft Teams

Skype for Business and Microsoft Teams are great platforms for communication. Microsoft Teams takes things a step further and adds in the power of collaboration. In this chapter, we will learn about what Skype for Business and Microsoft Teams are and how they're related. We will start with the history and background of Skype for Business and the history and background of Microsoft Teams. Then, we will look at the parts of Skype for Business and of Teams and how to get into each. Finally, we will look at the way forward as Microsoft Teams takes the place of Skype for Business.

We will cover the following topics in this chapter:

- History and Background of Skype for Business
- History and Background of Microsoft Teams
- The parts of Skype for Business
- The Parts of Teams
- How to get into Skype for Business
- How to get into Teams
- The Way Forward with Teams

History and Background of Skype for Business

When Office 365 first came on the scene, it made its debut with Lync, which was the successor of Office Communicator. Lync was an online communicator that gave users the ability to instant message, see your contacts' online presence and share your presence, audio and video call, and transfer files, as well as hold online meetings where you could share screens, whiteboards, specific files, polls, and surveys.

In November 2014, Microsoft announced that Skype for Business would replace Lync. Skype for Business was a great improvement on connectivity and reliability. It was built on the backbone of Skype. Skype has been around for many years, has been used by people around the world, and has consistently been a reliable platform.

History and Background of Microsoft Teams

The next generation of Skype for Business is **Microsoft Teams**. Teams will be the replacement for Skype for Business but, as of writing this book, it is not yet a full replacement. Most users will still need to use Skype for Business as well. We will explore this further in *The Parts of Skype for Business* section.

Before the development of Teams, Microsoft had seriously considered buying Slack, which is now the direct competitor to Microsoft Teams. The news broke on March 4th 2016 about Microsoft's consideration, which was opposed by Bill Gates. He thought that Microsoft should focus on improving Skype for Business instead. The **Executive Vice President** (**EVP**) of Applications and Services at the time, who wanted to purchase Slack, left Microsoft later that year and Teams was born. Teams was announced on November 2nd 2016 and launched worldwide on March 14th 2017.

The parts of Skype for Business

In this section, we will look at the parts of Skype for Business. In the following screenshot, you can see that I have numbered different parts, such as calendar and settings:



Let's explore!

#1 Personal note

When a note in the What's happening today? section is filled in, the note appears under the person's name in the list of contacts for those connections who have a **Privacy Relationship** of friends and family, workgroup, or colleagues.

#2 Presence, location, and photo

This section consists of three parts. Let's look at each in detail.

Presence

Presence, the colored indicators of your online presence, is indicated by color and text. In general, these indicators can be set manually by you or by the system automatically. The list of your presence options is as follows:



Let's now explore the description of each.

Green/available

This indicator shows that a person is online and available to contact.

Red/busy

This indicator shows that you are online but not available to contact. This presence does not prevent people from contacting you. It only tells people that you are busy and probably should not be disturbed. This indicator can also be red/in a meeting or red/in a call.

The red/in a meeting is automatically set for you when your Office 365 calendar in Exchange says you are in a meeting. The red/in a call shows automatically when you are in an audio or video call via Skype for Business. All automatically-set indicators will unset once the trigger is over. For example, once your meeting time is over, your presence will go to green/available or to one of the yellow indicators, such as yellow/away.

Red with dash/do not disturb

This indicator doesn't just let people know that you are unreachable, it actually *prevents* people from contacting you, unless the **Privacy Relationship** is set to **Workgroup**, until the indicator is changed to something else. It can be set for you when you start presenting your screen during an online meeting. As soon as you stop presenting, your presence will be changed to something else.



If you set yourself to this presence, you must remember to set yourself to something else when you are ready to be contacted again.

Yellow/be right back

This indicator shows people that you are away but should be back shortly. When you set this for yourself, your presence will revert to the previous presence or your automatically-set presence once you move your mouse or type on the keyboard.

Yellow/off work

When you set this presence, it lets people know that you are not working and not available for contacting.

Yellow/appear away

When you set this presence, people see yellow/away which indicates that you are away from your computer. This indicator can also be automatically set for you when you stop moving the mouse and typing. First, the indicator will get set to yellow/inactive, and then it will set to yellow/away after five minutes or more, depending on your settings.

Reset status

When you chose this option, your presence will be reset to green/available.

Sign out

Signs you out of Skype for Business but does not close the application.

Exit

Signs you out of Skype for Business and closes the application.

White with question mark/unknown

This indicator is not shown in the list of presences that you can choose for yourself, but can be automatically chosen for you. This presence that is shown when your organization prevents your presence from being seen by others, you no longer have a license for Skype for Business, or you no longer have your account.

White/offline

This indicator is not shown in the list of presences that you can choose for yourself, but can be automatically chosen for you. This is a presence that is shown when you are offline, signed out, or have exited from the application.

Location

This section allows you to set your location. To set or edit your location, simply click on the area and a textbox will open where you can type in or edit your location. Some examples you may want to set are working remotely, building 1, or Office 3:

Available	•	
I		•

You can choose whether others will see your location by clicking the dropdown and checking or unchecking **Show Others My Location**:



When you set a location, the system will remember your location and automatically reset it based on the IP address of the internet you are connected to. For example, if you are working at home and set your location to Teleworking, the next time you are at your home, your location will be automatically set as Teleworking.

Photo

If you don't have a picture or want to change your picture, click on your picture or the picture icon to be taken to the page in Office 365 where you can add a picture or modify your picture.



You may have to sign in to change your picture.

#3 The contacts, conversations, and meetings tabs

These are the three main tabs, which may have sub-tabs. Let's look at these tabs and what you get by clicking them.



For more details, see the #7 *Sub-tabs* section.

Contacts

On this tab, you can see all of your contacts. You can add contacts via the **Find someone** box and/or the people, or use the sub-tabs to see your contacts categorized in different ways:

\$		Skype for B	Business	– 🗆 ×
What's hap	opening toda	y?		
	Nikkia Carto Available ▼ Set Your Locatio	er on 🔻		
•	\bigcirc			₹
Find someone	•			Q
GROUPS	STATUS	RELATIONSHIPS	NEW	°0*
ONLINE				^
Q -				
.				
۰.				
G -				
AWAY				
UNKNOWN	1			
e-				
e				
e				
e -				
 				•

You will also be able to see unknown contacts under your contacts.

Conversations

In this tab, you can see the conversations you have had via Skype for Business:



Through the sub-tabs, you can see all of your recent conversations, missed conversations, and audio/video calls.

Meetings

On this tab, you can see all of your upcoming meetings for today. Skype for Business reads your Outlook calendar and displays all of your events for today. Any Skype for Business and Microsoft Teams meetings will include a button for joining the meeting:

S What's happening today?	Skype for Business	- 🗆 ×
Nikkia Carter Available Set Your Location	•	
<u> </u>		© . ≁
Meet Now TODAY Project Discussion 18:30 - 19:00 I Microsoft Teams M	eeting	Join
Discuss sales funnel 19:00 - 19:30 Skype Meeting		Join

The events you see will be your events that are upcoming for today only.

#4 Settings

This button will open a dropdown of setting options for Skype for Business. You can do things such as access **File**, **Tools**, and **Help** as well as being able to start an online meeting immediately via **Meet Now**. Under **File**, you can do things such as **Sign Out**, change your status, **View Received Files**, and **Exit** Skype for Business:



Under Tools, you can do things such as open the **Recording Manager** and go to specific settings for audio, video, and dial-in conferencing calls:



Under Help, you can access help, the Privacy Statement, and the about section:



Let's now learn how to find your business friends and colleagues on Skype.

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#5 Finding someone

You can find contacts to add to your Skype for Business contacts list by clicking in the find someone box and typing in a name or email address. Once you press *Enter*, Skype for Business will search your Outlook contacts and all of the Skype and Skype for Business users:

bob		×
MY COI	NTACTS SKYPE DIRECTORY	
Search fo and loca	or Skype contacts by name, Skype Name, email address, phone number, tion.	?
	Bob	
	Bob .	
	BOB . constantine, Algeria	
	Bob	
?	Bob Canada	
?	bob	
9	bob	
	Bob	
•	bob Russian Federation	
•	BoB دمياااط, Egypt	
•	Bob	¥
We fou	nd too many matches to show them all. Refine your search.	
■		

It is OK to use a name for a person in your organization or in your Outlook contacts, but it is best to use email addresses to look up people outside of your organization due to the sheer number of results you may get.

#6 The add people button

You can use this button to clarify your search to contacts that are internal or external to your organization, allow you to create a group to categorize your contacts, or display your contacts options:



Here are the display options for your contacts:

Skype for Business - Options		\times
General Personal Contacts List Status My Picture Phones Alerts IM Ringtones and Sounds Audio Device Video Device File Saving Recording Skype Meetings	My Contacts list Display my contacts with: Contact name and picture (two lines) Contact name only (one line) Order my list: By name By availability Show this information: Contact name (instead of email address) Contact status Show contacts with away, offline and unknown presences in a separate group Favorites group	
	OK Cancel Help	

Click on $\mathbf{O}\mathbf{K}$ to complete the setup.

#7 Sub-tabs

These are the tabs that are described in #3 The Contacts, conversations, and meetings tabs.

Contacts

These sub-tabs allow you to see your contacts categorized in different ways: by groups, status (which is presence), and relationship. You can choose whether to add these people to your contacts or to block them:


You can also see any potential contacts, that is, people who have added you as a contact in their Skype for Business, under **New**.

Conversations

These sub-tabs allow you to see all recent conversations, any missed conversations, and all calls, whether video or audio. You can re-enter any conversation by double clicking on it. From there, you can read what was typed and/or re-initiate the conversation:



You can double-click on any calls but be aware that this may re-call the person or people, or may just open the IM window with all people attached. I have seen it happen both ways over the years:



A record of all of your conversations via Skype for Business is retrievable by your organization as well as by you. If you are looking for a conversation that is not showing under the **Conversations** tab or you need to search your conversations, you can click on **View More in Outlook...** at the bottom of the Conversations tab, then Skype for Business will attempt to open the Conversation History folder in your desktop Outlook application.

#8 The main section

What you see in this section will be which tab, and possibly sub-tab, you are in. For example, if you are in the Contacts tab and the Status sub-tab, you will see your contacts categorized by their current presence.

#9 Selecting primary device

Clicking on this button will open a dropdown where you can see your default setup, set your audio settings, and check your call quality if you have a license that allows you to make calls:



Clicking on the your computer's default setup will open the audio options:

Skype for Business - Options			Х
General Personal Contacts List Status My Picture Phones Alerts IM Ringtones and Sounds Audio Device Video Device File Saving Recording Skype Meetings	Audio device Select the device you wan PC Mic and Speakers Your computer's defau Customize your device (ch Speaker Microphone	t to use for audio calls: It setup anges will apply to your next call): Speakers (Realtek High Definition Audio(SST)) Microphone Array (Realtek High Definition Audio(SST)) Speakers (Realtek High Definition Audio(SST)) Speakers (Realtek High Definition Audio(SST))	Learn More
	Secondary ringer Also ring: Unmute when my pho Stereo audio playback	ne rings yback when available	~
		ОКСа	ancel Help

Click on **OK** to complete the setup.

The Parts of Teams

In this section, we will look at the parts of Microsoft Teams. As you can see, I have marked some important parts of Teams that you should learn about in the following screenshot:



Let's explore different parts of Microsoft Teams.

#1 Search box

This search box lets you search all the Teams data you have access to. It also allows you to execute the Teams commands. For a list of commands, type in @, as in the following screenshot:

	@ <u>I</u>	
D	Adele Vance (ADELEV) Retail Manager	
	Alex Wilber (ALEXW) Marketing Assistant	
	Allan Deyoung (ALLAND) IT Admin	
	Brian Johnson (TAILSPIN) BRIANJ	
	Christie Cline (CHRISTIEC) Buyer	
	@News	Stay on top of the latest news
	@Places	Get info about different places
	@Stocks	Get real-time stock quotes
	@Weather	Get the latest weather report
	@Wikipedia Search	Share articles from Wikipedia
	@YouTube	Search for videos on YouTube
	🕆 More apps	

You can get a list of different options even if you don't type @.

#2 Your profile picture

Click on your picture and a dropdown opens with options for changing your presence, changing your settings, and signing out:



#3 The minimize, maximize, and close buttons

These buttons allow you to minimize, maximize, and close the desktop application.

#4 New chat button

By clicking this button, you can initiate a chat message:



#5 Back and forward buttons

Once you have navigated around in Teams, you can use these buttons to move back to a previous page and move forward to pages you have moved back from.

#6 Left navigation

The upper half of the left navigation has buttons to help you see any new activity, initiate new chats, and see your contacts, see all Teams you are a member of, view all meetings on a daily basis, and view all files you have access to. Depending on your subscription, you may also have a button to make calls via Teams. The lower half of the left navigation has buttons to download the app (desktop if via the online Teams and mobile if via the desktop), to access the Store, and to get help.

#7 Location and menu

These items show when you are in a Team and they show you where you are in the Team, which Team you're in, and which channel you're in:



The menu allows you to do things such as get the email address of the Team and open the SharePoint site collection behind the scenes.

#8 The tabs

These tabs help you to navigate between the applications within the Team, such as getting to files.

#9 Adding a tab

You may be able to add more applications to the Team, if you are an owner. Simply click on the + and then search for or navigate to the app you want to add. You can see more apps by clicking the **More apps** button at the bottom of the screen:



You may need to set some settings and/or give the chosen app a title.

#10 Public/private indicator

This indicator lets you know whether the Team is a private or a public Team.

#11 The main app screen

This main screen of the app will show items based on what is chosen from the left navigation panel. Choose **Meetings**, and you will see the meeting for today plus the details of the default selected meeting.

How to get into Skype for Business

You can get into Skype for Business in two ways: via the Office 365 or via the Skype for Business desktop app. Let's look at both ways in detail.

Getting into Skype for Business via Office 365

When you log into Office 365, you are automatically logged into the online version of Skype for Business. People can see your presence and contact you:





It may take a minute or so before your presence updates. There may be times where you are signed out and will need to sign in. Click on your persona to log in and/or change your presence.

You can see your contacts and IM them when you go to **Outlook** and click on **Skype for Business** in the suite bar.

Getting into Skype for Business via the app

Once you download the app, you can sign in. Once you sign in, until you have to change your password, the application will remember your credentials and log you in automatically. If you log out and attempt to log back in with the same email, you will only need to enter your email:



The system will remember your password and sign you in the rest of the way.

How to get into Teams

You can get into Microsoft Teams in two ways: via the Office 365 or via the Microsoft Teams desktop app. Let's look at both ways in detail.

Getting into Teams via Office 365

When you log into Office 365, you are automatically logged into the online version of Microsoft Teams. Others can see your presence and contact you:



You can see your contacts and IM them when you go to Microsoft Teams via the app launcher, or on Office 365 Home.

Getting into Teams via the app

Once you download the app, you can sign in. You can download the app from Microsoft Teams online from the left navigation panel:



Once you sign in, until you have to change your password, the application will remember your credentials and log you in automatically. If you log out and attempt to log back in with the same email, you will only need to enter your email:





There have been times where automatic logging in has not worked for everyone. You may have to enter your password.

The system will remember your password and sign you in the rest of the way.

The Way Forward with Teams

Microsoft Teams will be the replacement for Skype for Business eventually, but the time frame for that is not clear. The Microsoft Teams team is working on achieving feature parity with Skype for Business but, as of writing of this book, they still have a ways to go. Just know that Microsoft Teams will fully replace Skype for Business one day, and be the way of future unified communications in Office 365.

Summary

In this chapter, we learned about Skype for Business and Microsoft Teams and how they're related. You learned about the background and parts of Skype for Business and Teams. You should now be able to easily get into Skype for Business and Teams.

In Chapter 9, *Using Skype for Business*, we will dive deeper into Skype for Business, and you will learn how to use Skype for Business to facilitate communication.

9 Using Skype for Business

When using Skype for Business, there are a number of things that you should know about. In this chapter, you will learn about presence and how to update the Skype for Business contact list for users who are not in the same organization. You will also learn how to use Skype for Business to set up and work in meetings with other users.

In this chapter, the following topics are covered:

- Knowing the presence settings
- Working with contacts
- Instant messaging
- Initiating calls
- Working in meetings
- Sending a meeting invite

Knowing the presence settings

Presence is an indicator color that lets you know if the contacts in your list are online, or busy, or doing something else. The same applies to contacts that have added you to their list. They can see your presence:



These presences can be set by you manually by clicking on the dropdown under your name or they may be set automatically by the system. Since, everything in Office 365 is tied together, Skype for Business can read your Outlook calendar and know when you are in a meeting and it will change your presence for you when the time comes as well as when the meeting is over. It will also change your presence when you start and end an audio or video call and when you start and stop sharing your screen.



When you set your presence manually, it will stay that way unless an automatic change happens such as a meeting time.

It is important that you understand what presence is and what the indicator lights mean. Let's explore them.

Available

This presence is the green indicator. It means "I'm online and available".

Busy

This presence is the red indicator. It means "*I'm busy. Please do not disturb me*." This presence does not prevent people from being able to ping you. It is just an indicator. If you set it, the description, that is, the words following the color indicator, will say **Busy** but if it is set automatically, the description will describe what you are doing. If you are in an audio or video call, it will say **In a Call**. If you are in a meeting according to your calendar, it will say **In a Meeting**.

Do not disturb

This is the red indicator with the dash through it. It means exactly as it says and will prevent people from being able to ping you unless that person has a privacy relationship of workgroup. If you are sharing your screen, your presence will be auto-set and the description will say **Presenting**.



If you set this presence manually, you need to remember to set it back to something else when you are ready for your contacts to be able to ping you again. Otherwise, they will have to try to reach you some other way.

The aways

There are three different types of away and each one of them is yellow. Even though they all share the same color, they react a little differently.

Be right back

When you set this one, you will return to your previous presence or automatic presence when you wake your computer or move your mouse. It can be set for you automatically when you have not touched the mouse in a while or when you lock your computer. The description in this case will say **Inactive**.

Off work

This is one that you set manually and lets your contacts know that you are gone for the day.

Appear away

This is one that you can set when you want to look like you are away but it will also be set for you when you have been inactive for a longer period of time.

Offline

This isn't a setting that can be set under the presence dropdown but it is automatically set when you are offline. The indicator color is white.

Unknown

This isn't a setting that can be set under the presence dropdown, but it is one that is seen when your contact has either lost their license (for example, if they left the organization they were with) or the organization has blocked presence to others outside of their organization for the entire organization or maybe just for that one individual. The indicator color is gray.

Working with contacts

When working with your contacts, you have some options you need to be aware of. You can get options in two ways: through the dropdown and by hovering over the person's picture icon.

Options by hovering

When you hover over the person's picture icon, you get options for instant messaging and audio or video calling that person:



You can see their contact card and get to more options like those on the more options dropdown (see the *Options by dropdown* section that follows).

Options by dropdown

When you right-click on one of the contacts in your list, you will get a dropdown menu of options you can perform on that contact:

- Available - External	Send an <u>I</u> M				
	<u>C</u> all ▶				
Available - E	Start a <u>V</u> ideo Call				
▲ AWAY	Send an <u>E</u> mail Message				
	Schedule a Meeting	_			
Away - External Networ	Сорұ				
	Find Previous Conversations				
- Away - External	Remove from Contacts List				
	Tag for Status Change Alerts				
- Away - Exterr	Change Privacy Relationship 🕨				
	See Contact Card				
- Away - External Network					

Most of these options are obvious but we will look at the ones you are most likely to use.

Instant messaging, calls, emails, and meeting invites

You can **Send an IM** (instant message) or start a video or audio call. You can send an email or set up a meeting with that person via your default mail application such as Outlook or Microsoft Mail.

Removing a contact

Using **Remove from Contacts List** will remove the contact from your Skype for Business. If you are on the **GROUPS** sub-tab, under either the **FAVORITES** group or any other group, you will have more removal options such as adding to or removing from the **FAVORITES** group or any other group:



This removal will not remove the contact from Skype for Business although, if they were only in a group, you will not be able to see that person anymore.

Copying and moving contacts

These options allow you to copy and move contacts to different groups in your list:

	···	5
way - External Network	Send an <u>E</u> mail Message Schedu <u>l</u> e a Meeting	
	Add to Favorites	
- Presence unknown	Copy Contact To	Other Contacts
	Move Contact To	
way - External Network	Remove from <u>G</u> roup	
	Remove from Contacts List	
Away - External Network	Iag for Status Change Alerts	

Copying means that the contact will be in its original place as well as copied to the other group you choose. Moving means that the contact will be removed from the original place and placed in the group you choose.

Tag for status change alerts

When you click on this option, you will get a popup notification that will appear in the bottom right-hand corner of your screen that will let you know when that person goes on and offline. This effectively ties a bell around their neck.

Change privacy relationship

The privacy relationship you set for each contact affects what info of yours they can see as well as whether they can ping you when you are in **Do not disturb** mode:



You can also block people through this setting.



By default, people internal to your organization are added as **Colleagues** and people outside are added as **External Contacts**.

Working with groups

You can create, move up or down, and rename groups by going to the **GROUPS** sub-tab and right-clicking on one of the groups:

GROUPS	STATUS	RELATIONSHIPS	NEW				
> FAVORITES							
> OTHER CON	ITACTS (8)						
NEW GRO	Send ar	n <u>I</u> M					
To add cor	Start a (Conference <u>C</u> all	▶ d from				
	Start a <u>V</u> ideo Call						
	Send ar						
	Schedu <u>l</u> e a Meeting						
	Сор <u>у</u>						
	Find Previous Conversations						
	Move Group <u>U</u> p						
	Delete Group						

You will also see the option for deleting a group if the group you click on is empty.

Instant messaging

To instant message any of your contacts, you can either hover over your contact's picture and click on the IM button (see the following screenshot) or simply double-click on your contact:



Either way, an instant message window will open and you will have lots of options including instant messaging:



Let's cover the functionalities of each option.

#1 Text box

In this area (1), you can type your message.

#2 Message area

In this area (2), you can see all messages for all participants.

#3 Message options

Here (**3**) you have options for adding an attachment, a link, and/or emoticons to your message. You can also denote your message as important by clicking on the !. Normally, you can type your message and hit *Enter* to send your message but sometimes you may find that doesn't happen. In that case, you can use the blue button with the paper airplane to send the message.

#4 IM button

Clicking this button (#4) toggles open/closed the instant message text box (#1).

#5 Call buttons

Click on the button with the video camera on it to initiate a video call or click on the button with the phone on it to initiate an audio call (5).

#6 Presentation button

There are a lot of cool options available via this button (6)! You can choose to share a PowerPoint file, a certain window, or your entire desktop (or multiple desktops if you have them and would like that). You can add attachments, share notes, or take notes of your own via OneNote, and/or co-author a Microsoft Office document:

Share your <u>D</u> esktop	
Share a <u>W</u> indow	
Share PowerPoint <u>F</u> iles	
Co-Author Office Doc	
Add <u>A</u> ttachments	
Shared Notes	
My <u>N</u> otes	
<u>M</u> ore	
Manage <u>C</u> ontent	

Under **More...**, there are options for creating a poll, a **Q&A** board, or starting a whiteboard. Once these options are used, there is an option to save them via the **Manage Content** option as follows:



Clicking the **Manage Content** option opens the **Content** window where you can see the content you loaded up in your presentation session. Through this window, you can switch which piece of content you want the participants to see. You can set the permission on the content or remove any piece of content. You can also see other options under the more options icon depending on the content's type:



When you are presenting your screen, you can click on the more options button in the lower right hand of the window. This will give you options such as recording the session.



If you record the session, make sure you follow the laws for recording in your state.



You can see all the participants by clicking on the people icon. It opens the **PARTICIPANTS** list where you can right-click on a participant to promote them to becoming a presenter or demote a presenter to being an attendee:



Clicking on the **Participant Actions** button pops open a window with options such as preventing attendee video:



Clicking on the **Invite More People** button opens a window where you can choose other people to join the meeting.



Inviting a potential attendee this way brings them into the conversation immediately. The intended additional participants must already be in your contacts list.



When you are presenting, you will have the button to **Stop Sharing** at the top of the window:



If you are presenting your desktop, you will also have one on a dropdown bar on the top of your screen.

#7 More options button

If you click this button when you aren't presenting your screen, you get the options seen in the following screenshot:





If you are presenting your screen, you will have more options:

When you're presenting your screen, the **Start Recording**, **Manage Recordings**, **Meeting Entry Info**, **Skype Meeting Options**, and **End Meeting** options are available, which help you manage recordings and meetings.

#8 Participants list

Clicking on this button will open the list of participants where you can right-click on a participant to promote a participant to becoming a presenter or demote a presenter to being an attendee.

#9 Add more participants button

Clicking on this button opens a window where you can choose other people to join the conversation:



Inviting a potential attendee this way brings them into the conversation immediately. The intended additional participants must already be in your contacts list.

Initiating calls

You can initiate a call by hovering over the contact's picture and choosing the audio or video call button:



If you are already in an instant message with the contact you want to call, click on the audio or video call button at the bottom of the window:



Working in meetings

You can initiate a meeting in two ways: on demand or via invitation. When you are in an instant message with someone, you can easily turn that instant message into a meeting by sharing and/or adding audio or video conferencing.



For more details, see the *#6 Presentation button* section earlier in this chapter.

You can also set up a meeting in a more formal way by sending an invitation. For more details, see the *Sending a meeting invite* section next.

Sending a meeting invite

You can send a meeting invite in two ways. One way is via the calendar in Outlook online or on your desktop.

Sending via Outlook online

If you choose online, click on the Add Skype meeting button to add it to your meeting:

🕀 New 👻 🛱	Add calen						
Calendar event							
Email message	Calendar					-	
Birthday event	irc Discord O All	Add Church	nanting Channe			A 314	
	En save Discard B Att	tach 👩 Add Skype i	neeting Charm	• 🖬 🖬 9			
	Details			Feedback	People	RE	Schedule
м	Add a title for the event				Required V Add people		< > Sun 3/24 ~ 30 minutes ~
35 4					Nikkia Carter		^
11	Add a location or a room				Free		1a
18	Start						×
25	Sun 3/24/2019	1:30 AM	*	All day			2a
	End						
	Sun 3/24/2019	2:00 AM	*	Private			3a
	Time zone						
	Repeat	Save to cale	ndar				4a
	Never	♥ Calendar		-			
	Reminder	Show as					Sa
	2 weeks	▼ Busy		-			
5	Add an email reminder						6a
₽€							
	🔤 🤤 🛛 в г <u>и</u> Ад	A A 🗄	i i i i i i i i i i i i i i i i i i i	·			7a
اد	Make this event meaningful. At	dd an agenda					
							8a
							9a

The link will not be added so you can see it, but it will be there once sent:

Your Skype meeting has been created. We'll add joining details after the invitation is sent.
Send via Outlook on your desktop

In Outlook on your desktop, click on the **New Items** button on the **Home** tab and then click on **Skype Meeting**:



When the meeting invite window opens, fill out the invite with the pertinent information and attendees and send as you would any other meeting invite via Outlook:

8 90) ↑ ↓ ₹		Untitled - Meetin	9		• • • ×
File Mee	ting Insert Format Text R	eview Help Q Tell me what	you want to do			
$\begin{array}{c} & & \\ \hline \\ Delete \\ Actions \end{array}$	Cheduling Assistant	Online Meeting Detring Detring Meeting Notes	Address Book Check Names Response Options * Attendees	Show As: Busy Control Recurrent Control Reminder: 15 minutes Control Recurrent Options	ice Time Room Categor Zones Finder *	ize ↓ View Templates gs My Templates
(i) You haven't s	ent this meeting invitation yet.					Room Fin 💌 🗙
From To:	jordinad@packt.com					▲ April, 2019 ▲
Send Subject	tt				Rooms	Mo Tu We Th Fr Sa Su 25 26 27 28 29 30 31 1 2 3 4 5 6 7
S <u>t</u> art ti	ime Sat 27-04-2019	08:00 💌 🗌 All day eyen	nt			8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28
En <u>d</u> tir	me Sat 27-04-2019	08:30 💌				29 30 1 2 3 4 5
						Good Fair Poor Show a room list: Choose an available room:
						Suggested times:
						Loading suggestions

Summary

Skype for Business is very reliable when it comes to having a conversation within the same organizations. In this chapter, we discussed how to use Skype for Business to facilitate communication. You learned about the presence settings and working with contacts. You also learned about the things you can do in a meeting and how to send a meeting invite.

In Chapter 10, *Using Microsoft Teams*, you will learn how to use Microsoft Teams to facilitate communication.

10 Using Microsoft Teams

Microsoft Teams is one of Microsoft's newest additions. It is a great collaboration and unified communication platform that will take the place of Skype for Business. Teams is similar to Slack. When using Microsoft Teams for Business, there are several things that you should know about.

In this chapter, you will learn to understand the presence settings and how they work, how to work with your contacts, how to initiate instant messaging and meetings, and how to set up a meeting with other users.

In this chapter, the following topics will be covered:

- Exploring presence settings
- Working with contacts
- Instant messaging
- Initiating calls
- Working in your Teams
- Working in meetings
- Sending a meeting invite

Exploring presence settings

These presence settings are like those in Skype for Business. Presence is an indicator color that lets you know if the contacts in your list are online, busy, in a meeting, and so on. This applies to contacts that have added you to their list. They can see your presence status, as well:



These presences can be set by you manually, by clicking on the drop-down menu under your name, or automatically by the system. Since everything in Office 365 is tied together, Teams can read your Outlook calendar and know when you are in a meeting, and will change your presence for you when the time comes, as well as when the meeting is over. It will also change your presence when you start and end an audio or video call and when you start and stop sharing your screen.



When you manually set your presence, it will stay that way unless an automatic change happens, such as for a meeting.

It is important that you understand what presence is and what the indicator light means. Let's explore them.

Available

This presence is the green indicator with a tick mark. It means *I'm online and available*. By default, Teams will display this presence when you are not in a meeting or on an audio or video call.

Busy

This presence is the red indicator. It means *I'm busy. Please do not disturb me*. This presence is just an indicator and does <u>not</u> prevent people from being able to ping you. If you set it, the description – the words following the color indicator – will say **Busy**, but if it is set automatically, the description will describe what you are doing. If you are in an audio or video call, it will say **In a Call**. If, according to your calendar, you are in a meeting, it will say **In a Meeting**.

If you have desktop notifications enabled on Teams, you will not receive any while your presence is set to busy. This helps keep away the distraction of receiving messages, especially if you are using your computer in a meeting.

Do not disturb

This is the red indicator with the dash through it. It lets people know that you do not want to be disturbed and will prevent people from being able to ping you. If you are sharing your screen, your presence will be auto-set and the description under the indicator will say **Presenting**.



If you manually set this presence, you need to remember to set it back to something else when you are ready for your contacts to be able to ping you again. Otherwise, they will have to try to reach you some other way.

The aways

There are three different types of presences to reflect being away and each is demarcated with yellow. Even though they all share the same color, they each react a little differently.

Be right back

When you set this one, you will return to your previous presence or automatic presence when you wake your computer or move your mouse. It can be set to activate automatically when you have not touched the mouse in a while or when you lock your computer. The description in this case will say **Inactive**.

Appear away

This is one that you can set when you want to look like you are away, but it will also be set for you when you have been inactive a longer period of time.

Offline

This isn't a setting that can be set under the presence drop-down menu, but it is automatically set when you are offline. The indicator is white.

Unknown

This isn't a setting that can be set using the presence drop-down menu, but is one that is seen when your contact has either lost their license (for example, if they left the organization they were with) or the organization has blocked presence appearing to others outside of their organization. This could be policy for the entire organization, or maybe for just that one individual. The indicator is gray.

Working with contacts

Before you can message anyone, you need to know how to access them. As with all messaging services, each user becomes a contact that you can message depending on the settings in your organization. You can get to your contacts in two ways: through the **Chat** button or through the **Calls** button. Both are on the left-hand navigation pane:

Using Microsoft Teams





Depending on your license, you may also have **Make a call** section, where you can initiate video or audio calls to your contacts.

Depending on what you want to do, you can locate your contact here and call them or initiate a text-based chat.

Adding chat contacts to groups

To add a new chat contact, click on the more options menu of the group you want to add them to, then choose **Add a contact to this group**:

Recent Contacts		🚱 Adel
Favorites		Conversation
My Group	շիդ	
🅼 Adele Vance	⊖ ⁺ Add a contact to th	is group
Alex Wilber	- T - D	
Christie Cline	Rename this group	
🔋 Isaiah Langer	iii Delete this group	_



Add people from inside your organization using their name and people outside using their email address.

Once the contact is added, you will have some options. If the person is in your organization, you will be able to do the following:

- Remove them from the group
- Get notified when they are online
- See information related to them, such as conversations and files
- Be able to chat with them or start a call or meeting where you could also invite more people

You can see some of these options in the following screenshot:

Recent Contacts		Adele Vance		
Favorites	··· Convers	ation Files Organization Activity		
 My Group 				
🧑 Adele Vance				
Alex Wilber	Remove from this group			
Christie Cline	🗞 Notify when available			
🔋 Isaiah Langer				
Lynne Robbins			2	
Miriam Graham				
			2	
			•	
		Υοι	re starting a new conversation	
			type your first message below.	
		Type a new message		
දීරී [*] Create a new contac	ct group	A≠ ∥ ∵ @ ₽ ₽		⊳

If the person is not in your organization, you will be able to remove them from the group and chat or call with them:

Speed dial	Speed dial	
Contacts	Speed dial	
() History	ిరే [*] Add speed dial కిరే* New	group
	 Favorites 	
	Away	
	C Chat More actions	
	☆ Add to speed dial	
	St Remove from this group Alex Wilber Christie Cline	
Make a call	Offline Marketing Assistant Buyer Offline Offline Offline	

- [244] –

However, all other options will not be available to you.

Adding call contacts

To add a call contact, click **Contacts** then the **Add Contact** button, then fill in the pop-up box with a name. The **Add** button will light up. Click on it, then you will get another popup, where you can add more information to the contact. Click the **Add** button to add them to your list:

📞 Speed dial	Contacts				
E Contacts	contacts				
	Find a contact Q			. ^{©*} Add contact	
			Phone		
	Adele Vance		+1 425 555 0109	E 🛛 🛯 🐛	
	Alex Wilber		+1 (858) 555-0110		
	Alex Wilber		355 0110	E 🛛 🔍	
	Angel Garcia	to contacts	2) 555-0104		
	Antonio Bermejo	a name or number	2) 555-0107		
Make a call	Aubury Smith	Cancel	2) 555-0177		
	Bharat Mirchanda	\ \	2) 555-0101		
Suggested					
Miriam Graham & 🗖	Christa Geller		Add to contacts		2,
			Full name*		2,
			Nikkia Carter		2)
			Company	Title	2]
					2
			Phone*		
					55
				Cancel	Add (2)

If the person is not in your organization, you may see a message that there are no matches in your organization. Simply click elsewhere on the box and you will see the **Add** button:

Add to contacts							
Nikkia Carter <u>T</u>							
We didn't find any matches.							

When you add a chat contact, they will appear under **Contacts** and under **Speed dial** with some options:



If the person is in your organization, you will be able to see their contact info and contact them with chat, email, or audio or video call. You will also be able to remove the contact, add that person to speed dial, and search for contacts:

Contacts			
Find a contact Q			.⊖* Add contact
Name	Title	Phone	
Kale Vance	RETAIL MANAGER	+1 425 555 0109	⊑ ⊠ □4 % …
llex Wilber	MARKETING ASSISTANT	+1 (858) 555-0110	☆ Add to speed dial
Alex Wilber	MARKETING ASSISTANT	+1 858 555 0110	

If the person is not in your organization, you will be able to see their contact info. You will also be able to add them to speed dial, edit or remove the contact, and block the contact:

Name	Title	Phone	
Nikkia Carter	WW MODERN WORKPLA	CE +1555555555	
Ge Adele Vance	RETAIL MANAGER	+1 425 555 0109	\therefore Add to speed diar
llex Wilber	MARKETING ASSISTANT	+1 (858) 555-0110	Remove Contact
Alex Wilber	MARKETING ASSISTANT	+1 858 555 0110	Ø Block

If you added the person via **Chat**, you will also have some contact and other options for that contact:

🧑 Miriam Graham	DIRECTOR	+1 858 555 0109	
🤪 Vivian Atlas		(425) 555-0103	☆ Add to speed dial 前 Remove Contact
🤪 Wendy Kahn		(480) 555-0112	

You will also have contact card options depending on the type of contact:

	Adele Vance	
Nikkia Carter	Retail Manager	KPL
Adele Vance	Retail 18/2111 +1 425 555 0109 AdeleV@M365x423875.OnMicro	
Alex Wilber	E 🖂 🖧 🗗 🖌	ΤΑΝΤ
Alex Wilber		
Angel Garcia	Message Adele Vance	
	Lynne Robbins	PRODUCT MANAGER
	Lynne Rodded via Chat	External N 1 91 Available
	L 🚱 Miriam Graham	nikkia@nikkiatcarter.me 185
	🤪 Vivian Atlas	Message >
	😜 Wendy Kahn	
		ame I Title
		Nikkia Carter WW Modern Workplace Tech Le
		Adele Vance

Just double-click on the contact to open the contact card and see the available options.

Instant messaging

To instant message, otherwise known as chat, with your contacts or others in your organization, you can use the **Chat** button or choose a contact via your **Chat Contacts** or **Call Contacts** where you will see the option (see the **Working with Contacts** portion of this chapter).

The **Chat** button is at the upper-center portion of the Teams window, right next to the search box. Clicking on it opens a chat window where you can type the names of the people you want to chat with:

< >	ď	Search or type a command
 Activity	Recent Contacts	To: adel
E Chat	Recent	Adele Vance
10000000	New chat	(Province of Process Process Process
Teams	You: Test	
	Suggested	
Meetings		

If the person you want to chat with isn't in your organization, you must use their email address. You can only chat with one external person at a time and not with any internal people, but you can send a meeting invite where you can chat with more than one external person along with internal people.

Initiating calls

To call your contacts or others in your organization, use **Chat Contacts** or **Call Contacts**, where you will see the options for video and audio calls (see the *Working with contacts* section of this chapter).

Working in your Teams

When you click on **Teams** on the left-hand navigation bar, you will see all of the Teams you have access to:



Let's look at Teams in some detail.

The Teams and channels panel

In this section, you can see all of the Teams you have access to. In order to expand the Team to see the channels or collapse to hide the channels, simply click on the **Team**. You can favorite any of your teams by clicking on more options (see the *Using more options for Teams and channels* sections).

Privacy indicator

This indicator lets you know if the Team is a **Private** or **Public** Team.

Using more options for Teams and channels

Clicking on the more options menu for the Team or the channel will give you a drop-down menu of options. If you own the group, you will have options to add a channel and manage, edit, and delete the Team, and add connectors to a channel:

	X1050 Launch Team	•••	Option	s for the Team		
	General Design	*	Remove favorite			
1	Digital Assets Web Go to Market Plan Launch Event Legal and Compliance Web and Social Trends Business Development General Knowledge Share		Manage team Add channel Add member Leave the team Edit team Get link to team Delete the team			
	Opportunities Disoling			X1050 Launch Team	•••	
	Options for	the	Channel (General Design	••••	
				Digital Assets Web Go to Market Plan Launch Event Legal and Compliance Web and Social Trends	₽ 40 Ē	Get email address Get link to channel Connectors Follow this channel

Connectors are services you can add in to bring in pertinent information and capability into your Team's channel:



Besides other Office 365 applications, connectors lets you connect third-party apps as well.

More options for the selected Team's channel

There is a more options menu next to the Teams' channel in the main window:



You get a few options here; for example, if you need to get the SharePoint site collection behind the Team, click on **Open in SharePoint**.

The tabs

Each Team's channels automatically come with **Conversations** and **Files** tabs when created. Others can be added if you are an owner:



Click on the + to add tabs that can bring in additional information and/or functionality into your Team.

The main window

This window shows whatever tab is clicked on:



Join or create a Team

Click on this button to create a new Team or join an existing one by searching for it or using a Teams code:





Team creation may be restricted by your organization's Office 365 administrator.

If you do not have a code for the Team that you want to join, you should ask for one from the Team's creator.

The manage Teams settings

Clicking the gear button at the bottom-left of the window opens settings through which you can manage the Teams you own:

C	Search or type a	command		(e –	٥	×
	Manage teams		_	→ 8°	Create a t	team	
	 Active (7) 						
•••	Name 🗠	Description	Membership	People	Туре		
	Business Development	Business Development	Owner	ះ ព ័រ 22	\oplus	*	<i>.</i>
	C0 Contoso #02	Contoso #02	Owner	ະຕິ 7	\oplus	*	•
1	🙀 Mark 8 Project Team	Mark 8 Project Team	Owner	ზ ევ 23	\oplus	*	•
	NY New York #03	New York #03	Owner	ະຕິຳ 8	\oplus	*	•
	Sales	Sales	Owner	ະຕິ\$ 23	\oplus	*	•
	wo Warehouse #02	Warehouse #02	Owner	දී 7	\oplus	*	•
	X1050 Launch Team	X1050 Launch Team	Owner	 Manage f Add char Add men 	team 🤙 nnel nber		•
				総 Leave the C Edit team の Get link t 回 Archive te	e team o o team eam		
Ö Ma	nage teams			n Delete th	e team		

You can search for Teams, create Teams, see information about each Team, mark the Team as a favorite for easier access, and use other options.

Working in meetings

When it's meeting time, click on the link in the invite or in your calendar and the online meeting window will open.

Once you click on the link, a browser window using your default browser will open and you will be given the option to join on the web or via the Teams desktop application. If you plan to use the browser option, you should have your default browser set to anything other than Chrome. This browser has been historically problematic with Office 365 at random times in the past:



You will have options to turn on your camera and mic. If you turn on your camera, you will also have the option to blur your background:



Once you click on the **Join now** button and you are in the meeting, you can hover your mouse over the screen to see your meeting options. The main options you will use are at the bottom. You can toggle your camera and mic on or off, or start recording:



If you record the meeting, remember to follow the recording laws in your country and state.

To share your screen or other items, click on the **Share Tray** button to open the tray and choose what you want to share. Click on the button again to close the tray:

			Close share tray		
Desktop	Window		PowerPoint	Browse	Whiteboard
Screen #1	Meeting Microsoft Teams	O365UserGuideSection3	No files available		in Freehand by InVision
	Deleted Items - nikkia@n	S Skype for Business			

The upper options allow you to go into fullscreen, open the notes area, open the chat window, open the settings pane, or get information about the meeting. Clicking on the gear opens the settings pane where you can do things such as change your audio or video device:

🛱 🕄 🛱	(
Device settings	tings pane
Audio devices	
PC Mic and Speakers	\sim
Speaker	
Speakers (Realtek High Definition Au	. ~
Microphone	
Microphone Array (Realtek High Defi	. ~
Camera	
Microsoft Camera Front	\sim
Meeting settings	
Private viewing On	D
Allow participants to move through sha presentations on their own	ired

You have the ability to take notes directly in your Teams meeting. Start by clicking on the note icon, then click on the **Take notes** button:





The Notes options does not connect to OneNote.

When the meeting ends, you will be able to rate the meeting's call quality. This rating is shared anonymously with Microsoft's Teams team:

< >	Ľ	Search or type a command
Activity	Recent Contacts	(no title) Saturday, March 9, 2019 @ 6:03 PM 1 participant Conversation Files Meeting Notes
Chat	New chat	et Meeting started 7:43 PM
Teams	(no title) 8:04 PM You: Created meeting notes for this meeting	
E Meetings	nikkia@nikkiatcarter External 2:00 PM You: Test	

The notes, chat, and files from the meeting will be kept in **Chat**.

Sending a meeting invite

You can send an invite via Teams or Outlook on your desktop. Let's look at how we can send one using Teams.

Sending a meeting invite via Teams

Go to **Meetings** on the left-hand navigation bar, click on the **Schedule a meeting button** on the bottom-left, then fill out the popup:

Using Microsoft Teams

Activity	All day events (0)	New meeting \smallsetminus				
	11am	Title				Select a channel to meet in
		1				None (optional)
	12pm	Location				Invite people
Meeting		Microsoft Teams Meeting	g		\sim	Invite someone
Calls	10m	Start		End	Repeat	Organizer
4		Mar 24, 2019	5:30 PM	Mar 24, 2019	6:00 PM	Megan Bowen MeganB@M365y423875 OnMicrosoft
					③ Scheduling assistant	- meganogrados i goris en merosona
	3g h 4pm 5pm	B I ⊍ ∀ Type details for this n	A A ⊨ ⊟ ew meeting	Ε '' θ	Paragraph ∨	
	6pm 7pm ₿ Schedule a	meeting				Close Schedule

If any of your invitees are not in your organization, use their email address. Also, make sure you click on the drop-down menu in order to add the person:

Invite people									
email@email.com									
Invite email@email.com to the meeting MeganB@M365x423875.OnMicrosoft									

You will have the ability to use the **Scheduling assistant** and can assign the meeting to a specific group or channel:





You can only assign the meeting to a Team or channel when all of the invitees are participants in the Team.

You will be able to cancel meetings where you are the organizer:

< >	ß	Search or type a command	🖷 🖷
Activity	< > Today ∷ All day events (0)	Sales Team Meeting	
Chat Teams	8am	Monday, April 29, 2019 9:30 PM - 10:30 PM (1 hours) Conference Room - Adams	Organizer Lidia Holloway Organizer
Calendar	9am	You're viewing a single occurrence of a series. View series	Attendees Megan Bowen
Calls Files	10am	You are the organizer.	Isaiah Langer Unknown
	llam		Johanna Lorenz Unknown Joni Sherman
	12pm		Unknown Irvin Sayers Unknown
	lpm		
	2pm		
	Зрт		

Once the meeting is cancelled, the people you invited will receive a cancellation notification via email that is similar to the one they would get for cancellation of Outlook meetings.

Sending a meeting invite via Outlook on your desktop

In Outlook on your desktop, click on the **New Items** button on the **Home** tab and then on **Teams Meeting**:



When the **Meeting Invite** window opens, fill out the invite with the pertinent information and attendees and send it as you would any other meeting invite via Outlook:

8	୨୧↑	↓ Ŧ					Untitled - Me	eting			8	a –	đ >	x
File	Meeting	Insert Form	at Text 🛛 Re	eview He	elp Q T	Tell me wha	t you want to do							
Delete Acti	iter in the second sec	Appointment Scheduling Assistant Show	Skype Meeting Skype Meet	Online Meeting TeamViewer	Meeting Notes Meeting No	Cancel Invitation	Address Book	Show As:	Busy • to 5 minutes • Recu Options	rrence Time R Zones Fi	oom nder r _s Tags	View View Templates My Templates) Insights	~
(i) You	haven't sent ti	his meeting invitation y	et.									Doom Fin	v >	×
Send	From To ₂ Subject Location Start time En <u>d</u> time	meganb@M365x8104	77.onmicrosoft	08:00 08:30	v [All day ego	ent				▼ Rooms	April, 2C Mo Tu We Th 25 25 27 28 1 2 3 4 8 9 10 11 15 16 17 18 22 23 24 25 29 30 1 2 Good Fa Show a room list: None Chose an availa None Suggested times: Suggested times Suggested times	not have been as a set of the se	

Accordingly, you can still use your Teams on Outlook to send a meeting invite.

Summary

In this chapter, you learned about using Microsoft Teams to facilitate communication. You can now add and chat with or call people within and outside of your organization. You learned how to create and manage teams and how to use various options to enhance the Teams experience. Finally, you can invite people in your Team to meetings via Teams and Outlook. You can now efficiently use Teams to ensure effective communication within your team and with external stakeholders.

In Chapter 11, *Understanding OneDrive For Business*, you will learn about OneDrive for Business: what it is, some history about it, and how it is different from OneDrive.

4 Section 4: OneDrive for Business

In this section, readers will learn about OneDrive for Business in general and will be given specific information on how to make it useful.

The following chapters will be covered:

- Chapter 11, Understanding OneDrive For Business
- Chapter 12, Working with Files in Your OneDrive for Business

11 Understanding OneDrive For Business

OneDrive for Business is the main place that individual users can store their personal work files. To reiterate, these are the work files that you work on as an individual in your organization. It is important to remember that these files belong to your organization and your organization will have access to them. Do not save your personal documents and files here; use OneDrive for that. In this chapter, you will learn about the history and background of OneDrive for Business, how to get to it, and its parts.

The topics covered in this chapter are as follows:

- History and background of OneDrive for Business
- Getting into OneDrive for Business
- Parts of OneDrive for Business
- How is OneDrive for Business different from OneDrive

History and background of OneDrive for Business

OneDrive for Business, not to be confused with OneDrive, is the business version of OneDrive that is connected to or purchased via Office 365. It is the replacement for Microsoft's SharePoint Workspace. It was released in the first version of Office 365 and has continued to evolve like the rest of Office 365.

Like OneDrive, OneDrive for Business is a file-hosting and sync service created by and hosted by Microsoft. Both have a sync app that allows you to sync your documents to your computers and a mobile app for accessing your files on your mobile device. Unlike OneDrive, OneDrive for Business can only be accessed online via the Office 365 portal. OneDrive is accessed via the consumer portal of https://www.msn.com/en-in/, https:// outlook.live.com/owa/, https://outlook.live.com/owa/, and so on. Both were formally named SkyDrive and SkyDrive for Business until a lawsuit forced a renaming to OneDrive and OneDrive for Business in 2014.

Getting into OneDrive for Business

Once you are logged into the Office 365 portal, you can get to OneDrive for Business. You have two options for accessing it: via the Office 365 Home or via the app launcher.

On the Office 365 Home, locate and click on the **OneDrive** button. I know it says **OneDrive** but it is really OneDrive for Business:



If you happen to be in a different part of Office 365, you can click on the app launcher then on the **OneDrive** button. You can open it in a new tab, instead of the current tab, by hovering over the **OneDrive** button, clicking on the open menu, then on **Open in new tab**:


Either way you go, you will land in your **Files** in your OneDrive for Business:

	OneDrive						¢	٢	?	6
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6	Files	Files								
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0	Discover		Notebooks	April 8	Megan Bowen		Private			
0	Recycle bin		Private Info	March 19	Megan Bowen		Private			
Con	itoso +									- 1
10	X1050 Launch Team	<u>.</u>	Annual Financial Report (DRAF	March 19	Megan Bowen	22.2 KB	9 ⁴ Shared			. 1
50 7	Mark 8 Project Team	×	Audit of Small Business Sales.x	March 19	Megan Bowen	21.0 KB	۹ ^۹ Shared			- 5
2	HR	×	Book.xlsx	Tuesday at 5:38 AM	Megan Bowen	7.76 KB	Private			
Co	Contoso #02		BrokenPipe.jpg	March 18	Megan Bowen	5.21 KB	R ^R Shared			
Wo	Warehouse #02		Business Card.pdf	March 19	Megan Bowen	846 KB	Private			-
NY (G)	Marketing		Contoso Patent Template.docx	March 19	Megan Bowen	83.6 KB	Private			
	Product Launch Event	×	Contoso Purchasing Data - Q1	March 19	Megan Bowen	21.5 KB	Private			
	More sites		Contoso Purchasing Permissio	March 19	Megan Bowen	24.7 KB	Private			-

Parts of OneDrive for Business

Just like every other part of Office 365, each application has a few parts:

	OneDrive							Q	۲	?	6
Q	Search everything	+ New \sim	↑ Upload ∨ 🖋 Flow ∨ 😌 Sync	5					6	=	0
Me	gan Bowen			č							
ß	Files	Files									
3	Recent	Ľ	Name $^{\smallsetminus}$	Modified \smallsetminus	Modified By \smallsetminus	File Size \vee	Sharing	7			- 1
Å	Shared		Contoso Electronics	January 17	Megan Bowen		Private				
8	Kecycle bin		Microsoft Teams Data	March 24	Megan Bowen		Private				
Cor	Contoro Inridor		Notebooks	March 7	Megan Bowen		Private				·
10	Mark 8 Project Team	○ ■	Private Info 🔄 :	January 17	Megan Bowen		Private				
0	Contoso Marketing Centre	٩	Annual Financial Report (DRAFT	January 17	Megan Bowen	22.2 KB	ደ ^ቢ Shared				` I
80	Business Development	8	Audit of Small Business Sales.xlsx	January 17	Megan Bowen	21.0 KB	प्र ^{9,} Shared				
4	HR	2	BrokenPipe.jpg	January 17	Megan Bowen	5.21 KB	प्र ^{9,} Shared				
C0	Contoso #02	8	Business Card.pdf	January 17	Megan Bowen	846 KB	Private				
NY	New York #03		Contoso Patent Template.docx	January 17	Megan Bowen	83.6 KB	Private				
	More sites		Contoso Purchasing Data - Q1	January 17	Megan Bowen	21.5 KB	Private				
	Create new	Ð	Contoso Purchasing Permission	January 17	Megan Bowen	24.7 KB	Private				
On	eDrive admin	٦	Contoso Purchasing Permission	January 17	Megan Bowen	28.8 KB	^{R^R Shared}				
Ge Ref	t the OneDrive apps	đ	CR-227 Product Overview.docx	January 17	Megan Bowen	1.62 MB	Private				

Let's look at those parts in detail.

#1 Search box

Start typing in the box and the system will start offering you some preliminary results:



Click on the **See more results** link at the bottom of the preliminary results dropdown and the main window portion of the page will show more results. The **Filters** pane will also open on the right side with options for filtering down your search results by the modified date, the file types, and/or by author(s)/contributor(s). If you want to search in SharePoint, there is a link at the very bottom of the main window that will allow you to do just that!

,∽ te		= ∇ Ο
Megan Bowen	Search results for "te"	Filters 😨
ී Recent ද ^A Shared ම Recycle bin	Name Modified By Date modified Location Image: TeamsNotebook(Shared) Megan Bowen 23 days ago Notebooks Image: Microsoft Teams Data Megan Bowen 6 days ago Documents	Modified anytime Oldest Today Tues
Contoso Contoso Insider Mark 8 Project Team	Image: Notebooks Megan Bowen 23 days ago Documents Image: TeamsNotebook(Shared).onetoc2 Megan Bowen 23 days ago Documents	Word Excel
Contoso Marketing Centri Business Development	Private Info Megan Bowen 1/17/2019 Documents Contoso Electronics Megan Bowen 1/17/2019 Documents Documents	PowerPoint OneNote B PDF
Contoso #02 Warehouse #02	X1050 Launch Team.pbix Megan Bowen 1/1/2019 Sales Invoice Template.docx Rudy Dam 3/3/2015 Documents Contoso Patent Template.docx Lisa Choi 8/13/2014 Documents	Photos and videos Text Zip
More sites Create new	Marketing Term Successes International.xlsx Denis Dehenne 10/23/2012 Documents Meeting - eb6a5cb1cf8fbc1a57e9a67ec38d030ec Megan Bowen 6 days ago Wiki	People
OneDrive admin Get the OneDrive apps Return to classic OneDrive	Création du contoso Mark 8,pptx Jack Elmore 12/4/2017 Documents	Enter a name or email address

To clear the search box, click in the search box then on the **X** on the right-hand side of the box:

te	Ĭ	
W	Sales Invoice Template.docx Documents · Mar 2, 2015	^
w	Contoso Patent Template.docx Documents · Aug 12, 2014	- L
	\mathcal{P} See more results	~
		Microsoft Teams

Before you click on the search box, there is text in it that says **Search everything**. Everything means all of your files and folders. This does not include results from SharePoint:

Search everything	
Megan Bowen	

The search capability is very powerful. So powerful, in fact, that you may get back too many results. The search will search the title of the file, web page, or site, the URL, the text contained within, and any attached metadata.



To help with getting more precise results when searching, you can use phrases and the logical operators, AND, OR, and NOT, to search just like you can with a search on the web. For example, you can search test in sequence not January, which would return results containing test in sequence but will exclude any results with the word January. There are query syntaxes you can use that are more advanced. For more information, see https://docs.microsoft.com/en-us/sharepoint/dev/ general-development/keyword-query-language-kql-syntax-reference.

#2 Your OneDrive navigation

Clicking on these opens the selected option in the main window. **Files** shows all your files and folders and is the default landing location when you enter OneDrive for Business.

Recent

Recent shows all your recent file activity:

Megan Bowen		
🖆 Files	Recent	
🕚 Recent	ি Name	Last accessed
g ^Q Shared		
S Discover	This week	
ම Recycle bin	Book Megan Bowen's OneDrive for Business > > Documents	Tue at 6:08 PM
Contoso +	Document 2 :	Tue at 6:07 PM
🕷 X1050 Launch Team	Megan Bowen's OneDrive for Business > > Documents	Tue at 0:07 PM
Mark 8 Project Team	Création du contoso Mark 8	Tue at 6:06 PM
😃 HR	Miegan bowen's OneDrive for business 7 7 Documents	
co Contoso #02	Document 1 Megan Bowen's OneDrive for Business > > Documents	Tue at 5:32 PM
Wo Warehouse #02		
New York #03	Two weeks ago	
Marketing	European Expansion	Apr 10
N Product Launch Event	megan bowen's OneDrive for Business 7 7 Documents	-
More sites	Document Megan Bowen's OneDrive for Business > > Documents	Apr 10

You don't need to search a document you were recently working on. You can go to it using the **Recent** tab.

Shared

Shared shows files shared with you and by you. Files that were shared with you (see the **Shared with me** tab) will not show in your **Files**:

Search everything	Shared with me Shared by me		
Megan Bowen	17		
🖻 Files	Shared by me		
S Recent	Name	Location	Activity
g ^R Shared	a Annual Financial Report (DRAFT)	Documents	Megan Bowen modified 1/17/2019
Recycle bin	Audit of Small Purineer Sales view	Documente	Magan Rowan modified 1/17/2019
Contoso	Audit of small business sales.xisx	Documents	wegan bowen mounied 1/17/2019
Ontoso Insider	🖾 BrokenPipe.jpg	Documents	Megan Bowen modified 1/17/2019
Mark 8 Project Team	O 🜒 Contoso Purchasing Permissions	Documents	Megan Bowen modified 1/17/2019
O Contoso Marketing Centra	Employee Health Accounts - Q3	Documents	Megan Bowen modified 1/17/2019
Business Development	Employee Travel - Q3.xlsx	Documents	Megan Bowen modified 1/17/2019
HR .	Fabrikam.one	Documents	Megan Bowen modified 1/17/2019
Contoso #02	International Marketing Strategy	Documents	Megan Bowen modified 1/17/2019
New York #03	RD Expense Report.pptx	Documents	Megan Bowen modified 1/17/2019

Seeing files called out as being shared by you (see the **Shared by me** tab) is useful when you need to remember who you shared what with and in situations where you need to remove or modify those permissions.

Recycle bin

The **Recycle bin** shows files that were deleted by you. Files stay here for 30 days, unless you decide to delete the file or empty the recycle bin, then they are moved to the second-stage recycle bin where they stay for another 30 days unless they are manually deleted. After that, they may not be recoverable unless your organization has a backup solution in place. You can go to the second-stage bin by clicking on the **Second-stage recycle bin** link at the bottom of the main window:

Chapter 11

Megan Bowen					
🖆 Files	Recycle bin				
🕥 Recent	🗅 Name 🗸	Date deleted \downarrow \checkmark	Deleted by \smallsetminus	Created by \smallsetminus	Original location
x ^R Shared	CR-227 Product Overview.docx	4/26/2019 11:46 PM	Megan Bowen	Megan Bowen	personal/meganb_m365x810477_onmicrosoft uments
ि Recycle bin	Business Card.pdf	4/26/2019 11:46 PM	Megan Bowen	Megan Bowen	personal/meganb_m365x810477_onmicrosoft uments
Contoso + * X1050 Launch Team	Contoso Purchasing Permissions	4/26/2019 11:46 PM	Megan Bowen	Megan Bowen	personal/meganb_m365x810477_onmicrosoft uments
👐 Mark 8 Project Team					
🚨 HR	Can't find what you're looking for? Check the Second-stage	recycle bin			

Click on the link next to the file you want and choose Restore or Delete from the action bar:

							Ω			
1	Delete	5 Restore						1 selecte	ed 🗙	
_	_									
Rec	ycle	bin								
	D	Name \checkmark	Date deleted $\downarrow\smallsetminus$	Deleted by \smallsetminus	Created by \smallsetminus	Original location				
2		CR-227 Product Overview.docx	3/31/2019 9:39 PM	Megan Bowen	Megan Bowen	personal/meganb_m365x423875_c	nmicro	soft_com/l	Docum	
		Contoso Purchasing Permissions	3/31/2019 9:39 PM	Megan Bowen	Megan Bowen	personal/meganb_m365x423875_c	nmicro	soft_com/	Docum	
	a	Business Card.pdf	3/31/2019 9:39 PM	Megan Bowen	Megan Bowen	personal/meganb_m365x423875_c	nmicro	soft_com/	Docum	
Can	Can't find what you're looking for? Check the Second-stage recycle bin									

You can restore or delete individual files in this way.

#3 Sites navigation

This section gives you options for seeing files from whichever site you select. You can also see more sites if you don't see the site you want listed and/or create a new site using the links at the bottom of the section.



You must have permissions to see the site, to see the files in that site, and you will only be able to see the files in that site that you have permission to see. You may not have permission to see every site and/or everything in the sites you can see.

To create a site, you must have the appropriate permission level to do so.

#4 Extra options

The links here take you to different places to do different things. The first link opens a new tab in your browser and takes you to the Admin Center for OneDrive for Business.



This link will only work for you if you have OneDrive for Business or global administration permission.

The second link opens another tab where you can get apps for Windows and your devices, even Xbox One!



The last link returns you to the classic look and feel of OneDrive for Business:

::: OneDrive		D ©	?	٢
Search OneDrive Documents Recent	OneDrive @ Contoso Documents		District	Î
Shared with me Followed Site folders	Welcome to your Oneonee for Business, the place to store, sync, and share your work. Documents are private until shared, team	n more ner	e. Dismiss	1
Recycle bin	✓ Name Modified Sharing Modified By			
∧ Groups	Contoso Electronics March 19 Dony you Megan Bowen Notebooks April 8 Dony you Megan Bowen			
Business Development	Private Info March 19 Only you Megan Bowen			
Contoso #02	Alindar mancai neport (DAPF) ···· March 19 ··· Stated ··· Megan bowen Megan bowen			
Contoso #02	Book Tuesday at 5:38 AM 🔒 Only you 🗆 Megan Bowen			
DG-2000 Feedback	Business Card March 19 B Only you D Megan Bowen			
7 = T More	 Contoso Patent Template March 19 Only you Megan Bowen Contoso Purchasing Data - Q1 KJ copy March 19 Only you Megan Bowen 			

#5 Action bar

This bar is subject to change. It shows options based on where you are in your OneDrive and based on whether you have chosen an item or not. Here are some examples.

If you haven't clicked on anything, you get actions you can perform on the entire library:



If you clicked on a file or folder, you get options based on what you selected:

년 Share 🐵 Copy link 🛓 Download	🔋 Delete 🗈 Move to 🗋 Copy to 🖉 R	lename				
Files	🜒 Open 💛 🖻 Share 🔏 Copy link		📋 Delete 🗄 Move t	o 🗈 Copy to 🥒 R	ename 💅 Flow 🗠	Version history
Contoso Electronics	Files					
	🗅 Name 🗠		Modified \smallsetminus	Modified By \smallsetminus	File Size \smallsetminus	Sharing
	Contoso Electronics	10	January 17	Megan Bowen		Private
	Microsoft Teams Data		March 24	Megan Bowen		Private
	Notebooks		March 7	Megan Bowen		Private
	Private Info		January 17	Megan Bowen		Private
	Annual Financial Report (DR/	AF 🖻 :	January 17	Megan Bowen	22.2 KB	я ^R Shared
	Audit of Small Business Sales.	xlsx	January 17	Megan Bowen	21.0 KB	я ^R Shared

The files have three options more than the folders.

#6 View options and detail pane

View Options gives you choices for how you want files to be displayed. You can look at your files in the **List** (which is the default view), **Compact list**, or **Tiles** views:



What you see in the details pane depends on whether you have not chosen anything, have chosen one file, or folder, or chosen multiple files.

If you have not chosen anything, you can see the **Activity** in this library:

							Q	ø	?
+ New $\scriptstyle{\smallsetminus}$	$\overline{\uparrow}$ Upload \checkmark $_{\rm e}$ / ^a Flow	🗸 🔒 Sync							=
					^	Files		/	
Files					- 11	Activity	\sim		
Ľ	Name \checkmark	Modified \vee	Modified \vee	File Size \smallsetminus	- 8	Today			
- 11	Contoso Electronics	March 19	Megan Bowen			D 4	ou deleted CR-22 verview.docx minutes ago	7 Product	
	Notebooks	April 8	Megan Bowen		- 1	- V	- ou deleted Conto	so Purchasi	na
	Private Info	March 19	Megan Bowen		- 1	Pe 24	ermissions.docx	so r archas	g
	Annual Financial Repo	March 19	Megan Bowen	22.2 KB	- 1	i≣ Ye	ou deleted Busine	ess Card.pd	f
X	Audit of Small Busines	March 19	Megan Bowen	21.0 KB	- 1	24	minutes ago		
×	Book.xlsx	Tuesday at 5:38 AM	Megan Bowen	7.76 KB		This week	u aditad Paak v		
~	BrokenPipe.jpg	March 18	Megan Bowen	5.21 KB		Tu	esday at 5:38 AM	58	

If you chose one file, you can see details for that file, including a preview of the file, the file's permissions, properties, and so forth. You may be able to change the properties in the **Properties** section if you have at least contributing permission for the file. If you have full control permission over the file, then you will be able to change the file's permission via the **Manage access** link in the **Has access** section:

								д 🍭 ? 👹
🗐 Op	en 🗸	🖻 Share 🔏 Copy link 🛓 Download	d 📋 Delei	e 🗈 Move to	Copy to	🖉 Rename 🖋 Flow 🗸	Sersion history	1 selected × 0
Files								Annual Financial Report (DRAFT).d
	ß	Name \checkmark	Modifi	ed \checkmark	Modified By $^{\smallsetminus}$	File Size \smallsetminus	Sharing	
	нî,	Contoso Electronics	January	17	Megan Bowen		Private	Annual Financial Re
	Ш,	Microsoft Teams Data	March 2	24	Megan Bowen		Private	Under Budget, High Costs Avoided in
	Ш,	Notebooks	March	,	Megan Bowen		Private	Expected throughout next year. Rec
+	нî,	Private Info	January	17	Megan Bowen		Private	Has Access
•		Annual Financial Report (DRAF	January	17	Megan Bowen	22.2 KB	R ^A Shared	
\circ		Audit of Small Business Sales.xlsx	January	17	Megan Bowen	21.0 КВ	R ^A Shared	Manage access
	~	BrokenPipe.jpg	January	17	Megan Bowen	5.21 KB	R ^R Shared	Properties
		Contoso Patent Template.docx	January	17	Megan Bowen	83.6 KB	Private	
	۵	Contoso Purchasing Data - Q1	January	17	Megan Bowen	21.5 KB	Private	Name * Annual Financial Report (DRAFT).docx
		Contoso Purchasing Permission	January	17	Megan Bowen	28.8 KB	R ^R Shared	Apply retention label
		Création du contoso Mark 8.pptx	January	17	Megan Bowen	827 KB	Private	Choose a label
	۵	Employee Health Accounts - Q3	January	17	Megan Bowen	21.5 KB	R ^R Shared	Title
	8	Employee Travel - Q3.xlsx	January	17	Megan Bowen	20.7 KB	R ^R Shared	Enter value here
		European Expansion.pptx	January	17	Megan Bowen	3.41 MB	Private	Activity
	۵	Expense Insights.xlsx	January	17	Megan Bowen	398 KB	Private	There is no recent activity for this item,
	٦	Fabrikam.one	January	17	Megan Bowen	54.5 KB	R ^R Shared	

To see more details, click on the **More details** link at the bottom of the pane. To collapse this section, click on **More details** again:

	1 selected $ imes$	0
^	🖂 BrokenPipe.jpg	
	^{Type} JPG Image	
	Dimensions 260 x 183	
	Modified January 17 Path Megan Bowen > Files > BrokenPipe.jpg	
	Size 5.21 KB	

If you choose a folder, you can see details for that folder, the folder's permissions, properties, and so forth. You may be able to change the properties in the **Properties** section if you have at least contributing permission for the folder. If you have full control permission over the folder, then you will be able to change the folder's permission via the **Manage access** link in the **Has access** section:

🖻 Sha	are	🔁 Copy link 🞍 Downloa	ıd 🗎	Delete 🖻 Mo	ove to 🛛 🚺 Copy	to 🖉 Rename		1 selected \times (i)
							Ĵ.	Contoso Electronics
Files								Has Access
	P	Name \sim		Modified \vee	Modified \vee	File Size \smallsetminus		8
•	нî,	Contoso Electronics	:	March 19	Megan Bowen			A This item is not shared
		Notebooks		April 8	Megan Bowen		÷	Manage access
	if.	Private Info		March 19	Megan Bowen			Properties
		Annual Financial Repo		March 19	Megan Bowen	22.2 KB		Name *
	×	Audit of Small Busines		March 19	Megan Bowen	21.0 KB	з.	Contoso Electronics
	×	Book.xlsx		Tuesday at 5:38 AM	Megan Bowen	7.76 KB		Apply retention label
	~	BrokenPipe.jpg		March 18	Megan Bowen	5.21 KB		Choose a label

To see more details, click on the **More details** link at the bottom of the pane:

									ņ	۵	?	C
🖻 Sha	are	👁 Copy link 🛓 Download	📋 Delete 🕄 N	Nove to 🗈 Cop	oy to 🛛 🖉 Rename					1 select	ed 🗙	(i)
Files						Î	Co	ontoso Ele	ectronic	s		-
	ľ	Name \checkmark	Modified \vee	Modified \vee	File Size \vee		8					
0		Contoso Electronics	March 19	Megan Bowen			A This it	em is not sh	ared			
		Notebooks	April 8	Megan Bowen		E	violitige	access				
	1	Private Info	March 19	Megan Bowen		F	proper	ties				
		Annual Financial Repo	March 19	Megan Bowen	22.2 KB	Ι.	Name	*				
	×	Audit of Small Busines	March 19	Megan Bowen	21.0 KB	1.	Contos	o Electror	nics			
	×	Book.xlsx	Tuesday at 5:38 A≬	Megan Bowen	7.76 KB		Apply	retention	label			
	\sim	BrokenPipe.jpg	March 18	Megan Bowen	5.21 KB	1	Choose	a label				
		Business Card.pdf	March 19	Megan Bowen	846 KB	ŀ	Activity	,				
		Contoso Patent Templ	March 19	Megan Bowen	83.6 KB	L	.ast moi	nth				
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		CR-227 Product Overv	March 19	Megan Bowen	1.62 MB			March 19	•			
	P	Création du contoso	March 19	Megan Bowen	827 KB		+	You create	d Conto	so Electron	nics	
		Document 1.docx	Tuesday at 5:02 AM	Megan Bowen	10.8 KB				—	taile		

If you choose multiple files and/or folders, you only see that you selected multiple things but no details.

#7 Main window

This part of the page shows whatever is clicked on from the **OneDrive** or **Sites** navigation or shows the search results if the **See more results** link at the bottom of the preliminary search box is clicked.

How is OneDrive for Business different from OneDrive

As mentioned earlier in this chapter, OneDrive for Business and OneDrive are different in a few ways. Let's look at those differences in more detail.

The biggest difference is where you log in. OneDrive is a consumer product which is linked to your Microsoft account, formally known as Live, and OneDrive for Business is linked to Office 365, the Business version, not the Home version.

Logging into OneDrive for Business must be done through the Office 365 portal. Logging in to OneDrive is done through a Microsoft consumer page such as https://www.msn.com/en-in/. You can sign into your Microsoft account or choose OneDrive to sign into OneDrive faster:



The one place where you can get into either is via the OneDrive site:



The look and feel of OneDrive is also different than that of OneDrive for Business. Here is what OneDrive looks like as of April 2019:

III OneDrive				ę	Ļ	ø	?	-		
✓ Search everything	+ New \checkmark $\overline{\uparrow}$ Upload \checkmark							↓≓ Sort ∨	⊞	()
OneDrive Files	Files									*
Recent Photos Shared	12	٥	6							
Recycle bin PCs	Documents Jul 19, 2015	Email attachments Jan 19, 2017	Pictures Nov 4, 2015							
	Document1.docx	Hello World								
7.57 MB used of 5 GB	5	2								
Go premium Get 1 TB (1000 GB) of storage and the new Office 2016 apps. Learn more. Get the OneDrive apps										-

Also, the sync clients for each are two different colors. There is blue for OneDrive for Business and white for OneDrive:



The last difference you should know about as an end user is that there is no way to log into one from the other. They are separate now and more than likely, they will always be separate, which makes sense if you really stop and think about it. You really wouldn't want your personal files mixed up with your business files that your organization has the right to access at any time.

Summary

In this chapter, you learned about the history and background of OneDrive for Business. We also looked at how to get to OneDrive for Business and its parts. For more details, go to https://support.office.com/ and click on OneDrive.

In Chapter 12, *Working with Files in Your OneDrive for Business*, you will learn about working with files in your OneDrive for Business.

12 Working with Files in Your OneDrive for Business

OneDrive for Business gives you the ability to work with your files as well as files that are shared with you. In this chapter, we will look at how you can add, edit, delete, copy, move, and share files. We will also look at the parts of an Office online file.

The topics covered in this chapter are as follows:

- Adding new files
- Editing files
- Deleting files
- Parts of the Office Online file
- Sharing files
- Move to
- Copy to



The options in this chapter are described from the point of view of working with your files. Some of these options may not be available when working with files shared with you or files from SharePoint.

Adding new files

You can add new files in two ways: by creating them new or by uploading them.

Creating new files

:::: OneDrive	
✓ Search everything	+ New \checkmark $\overline{\uparrow}$ Upload \checkmark \mathbf{p}'^{a} Flow \checkmark \mathbf{G} Sync
Megan Bowen	Folder
🖆 Files	Word document
🕚 Recent	Excel workbook
x ^R Shared	😰 PowerPoint presentation 🦿 .
🗟 Recycle bin	OneNote notebook
Contoso +	Forms for Excel s Data
O Contoso Insider	© Link
👾 Mark 8 Project Team	Private Info

To create a new file, click on the New dropdown on the action bar:



As soon as you click on **Word document**, **PowerPoint presentation**, or **Excel workbook** and the new document opens, that document will be saved automatically to your OneDrive for Business with its default name. For example, Excel files are named Book (followed by a number if this one isn't the first one). If you rename it, it will be renamed during the next autosave.

You can also create a new folder or a link using any URL:





Using links is a great idea for adding access to a file that needs to be in multiple places. Using a link instead of adding that file to multiple places ensures that you have the single source of truth. Remember that adding a link to a document to multiple places does not mean that everyone with access to the library will have access to the file via the link. In order for a person to access the file via the link, they must have permission to, at least, view the file. When you click on one of the Office file types, it opens a new file in the browser. If you need to open this file in the full version of Office, click on the **Open in Word** link before the ribbon. In this example, **Word Online** is open so you would click on **Open in Word** to open the file in the full version of Word on your desktop. In the browser, the file will autosave as you are typing, so there is no save button:



Clicking on the **Open in Word** link, will open the file in the full version of the Office app on the computer that you are working on. If you are on a computer with Office 2010, it may or may not open since Office 2010 is on the brink of reaching the end of its life as of April 2019:

AutoSav	re On 💿	<u>1</u>	5 6) =	-	- Sa	ved 🔻
File	Home	Insert	Draw	Design	Layout	References Mailing	s
Paste	X Cut E Copy ≪ Forma	at Painter	Calibri B	(Body) I <u>U</u> -	• 11 ab x ₂	$ \mathbf{A}^{*} \mathbf{A}^{*} \mathbf{A}\mathbf{a}^{*} \mathbf{A}\mathbf{a}^{*$	

Office versions older than 2010 most likely will NOT open. Office 2013, 2016, and 2019 (depending on the build version) will open, but you may not have access to features such as **AutoSave**.

Uploading files

Click on the **Upload** dropdown on the action bar and you get the choice to upload files or folders:



Using the **Files** action will only allow you to upload files but not folders. The **Folder** action allows you to upload a folder with its contents.



It will copy subfolders if those folders contain files. If the subfolder is empty, it will NOT be copied.

Editing files

To open a file, click on it. If it is an Office file that you own, it will open in edit mode. If it is a file that is shared with you and you have not been given permission to edit the file, it may open in **READ ONLY** mode or in view mode. You can't edit the file in this mode but you can open it in the full Office version of Word, PowerPoint, or Excel:



When editing a file in the browser, the file will autosave:

AutoSav	e On 🌒	E3	୬ ୯				- Sav	ved 🔻
File	Home	Insert	Draw	Design	Layout	References	Mailings	5
	χ Cut		Calibri	(Body)	• 11	• A^ A A	a∙ Aç	Ξ.
Paste •	Sorma	ıt Painter	В	<i>Ι</i> <u>υ</u> -	ab X ₂	x² 🛕 - 🖉	· A ·	

If you have the most current version of Office and you open the file in the full version of Word, PowerPoint, or Excel, it will autosave as long as the file is connected to a OneDrive or SharePoint location and **AutoSave** is turned **On**.

Deleting files

Select the file(s) and/or folder(s) you want to delete then choose **Delete** from the action bar. The deleted file(s) and/or folder(s) will go to the **Recycle Bin**:

					Delete	1					
Q 0	pen \checkmark	🖻 Share 🛛 Copy lin	nk 🛓 D	ownload	Delete	🗈 Move to	Copy to	🖉 Rename	✓ ^a Flow \	🗸 🕒 Version hist	
					0						
Files	5										
		Name \checkmark			Delete	1					
		Contoso Electronics	∳ Do	wnload	Delete	Move to	Copy to				
		Microsoft Teams Data			0						
		Notebooks	Files								
1		Private Info		Ľ	Name \checkmark			Modified	~	Modified By \smallsetminus	File Size \smallsetminus
0		Annual Financial Repor			Contoso Elect	tronics		January 17		Megan Bowen	
		Audit of Small Business			Microsoft Tea	ims Data		March 24		Megan Bowen	
			1	н.	Notebooks			March 7		Megan Bowen	
			0	н.	Private Info		:	January 17		Megan Bowen	
			•		Annual Finan	icial Report (DR	AF :	January 17		Megan Bowen	22.2 KB
					Audit of Sma	ll Business Sales	.xlsx	January 17		Megan Bowen	21.0 KB
			0	~	BrokenPipe.j	pg	:	January 17		Megan Bowen	5.21 KB
					Contoso Pate	nt Template.doo	x	January 17		Megan Bowen	83.6 KB
				8	Contoso Purc	hasing Data - Q	1	January 17		Megan Bowen	21.5 KB

More on this in Chapter 13, Understanding SharePoint.

Parts of the Office Online file

When using Office Online for Word, PowerPoint, Excel, or OneNote, you can sometimes forget that you are in the online version of the file. There are some key differences you should be aware of and some things you should keep in mind.

Open in the full desktop version

There is a link at the top of each Office Online version that will open the file in the **Open in Word** link next to the tabs:

	Word	Megan Bov	ven > Doci	uments			Document1 - Saved								• Simplified Ribbon				legan Bowen	
File	Home	Insert	Layout	References	Review	View	He	lp	Ope	n in Word	d	♀ Tell me	e what you	want to	o do			🖻 Share		Comments
5.	Ê ~ 🚿	Calibri (Body) 🔨	✓ 11 ✓ A	A	B I	U	<u>~</u> ~	<u>A</u> ~	A _o	•••	: ∃~	≡~ ₹)	≣∽	 A ∕∽	Q	Find \backsim	Ļ	Dictate 🗸
																_				
				I																

For example, if you are in Word Online, the link will be Open in Word.



Clicking on the **Open in Word** link, will open the file in the full version of the Office app on the computer that you are working on. If you are on a computer with Office 2010, it may or may not open since Office 2010 is on the brink of reaching the end of its life as of April 2019. Office versions older than 2010 most likely will not open. Office 2013, 2016, and 2019 (depending on the build version) will open, but you may not have access to features such as **AutoSave**.

AutoSave

The file automatically saves as you are working on it! Because of this, there is no save button:



There is an indicator that lets you know if the file is saved or being saved.

Easy way to rename file

You can go the backstage of the file via the **File** tab to rename the document but there is an easier way:

	Word On	line N	legan Bowe	n > Documents				_	→ N's Dod <u>I</u>
File	Home	Insert	Layout	References	Review	View	Help	Open in Word	$\ensuremath{\mathbb{Q}}$ Tell me what you want
	-0-				×	_			

Simply click on the name in the title bar, type the name you want, and press *Enter*.



Renaming the file is not the same as using **Save As**. If you want to use the current document as the base document for another document, use **Save As** in the backstage via the **File** tab (see *The backstage* section in this chapter).

The simplified ribbon

This ribbon style is very new and can be confusing when it first gets rolled out to your environment. You can toggle it off and on by using the toggle button in the upper right of the file:



By default, the ribbon will be simplified once it is rolled out to you.

The tabs and ribbons

In the online version of the Office file, you will have access to most or all of the tabs you would have in the full desktop version. The tabs and ribbons for Word Online and PowerPoint Online are nearly identical to the tabs in Word and PowerPoint. There is a huge hole you should be aware of for Word, though. That hole is **Track Changes**. If you need **Track Changes**, you will have to open the file in the full version of Word:



Due to the extra-special stuff that Excel does, formulas and such, Excel Online's tabs have two big holes in them. The online version is missing the tabs for **Draw** and **Formulas**. If you need those tabs, you must open Excel in its full desktop version by clicking the **Open in Excel** link:

	Excel Online Megan Bowen > Documents Book - Seved Megan											legan Bowen																
File	Home Ins	ert Da	ita R	eview	View	Help	Tel	l me wha	t you want	to do	Open in	n Excel											🖻 Sha	are [[Comments			
5	Peste	at Painter	Calibri B	I U	~ 11 D	→ A*	۸° د <u>م</u> د	<u>A</u> -		*	Gener	°	- 18 -8	Conditional Formatting	Format • as Table •	Insert	Delete	Format	∑ AutoSum →	Sort &	Find & Select -	% Ideas						
Undo	Ciptord				For				Align	vent		Number		14	Ues		Cells			diting		Ideas			^			
_		AutoSave	On D									2	Search													8 –		×
		File	Home	Insert	Draw	Page	Layout	Formu	las Dat	a Revi	iew Vi	ew He	slp												년 Share	Com	nents	٢
		Û	Ă Da -	Calibri	_	- 11	A* A	- =	-	₽.	わ	Airap Text		8	General			E		I		=	Ē	Σ.	₽ ,0	4		
		Paste -	4	В	ΙU	· · · ·	<u>~</u> - <u>A</u>	•		•	20 A	Aerge & C	enter *	Protect	\$ - %	, ,	8 48	Condi Format	tional Format as tting * Table *	Cell Styles •	Insert *	Delete	Format	<i>Q</i> -	Sort & Find & Filter * Select *	Ideas		

OneNote Online's tabs look like those in the Windows 10 version of OneNote but not like OneNote on the desktop.



As of April 2019, the desktop version of OneNote is no longer available for download in the Office download from the Office 365 portal.

Getting back to your OneDrive for Business

Sometimes, when you click on a document, it may open in the same tab instead of opening in a different tab:

🖾 Ini	Private		/licrosoft	Office	попе	File	es - On	eDrive			🗖 An	nual Fina	ancial Re	port ×	(+	- ~	
\leftarrow	\rightarrow	Ö	ŵ	A													
	Wo	ord O	nline	Me	gan Bower	n > Docun	nents							An	nual	Financia	ıl
File	ŀ	lome	Inse	rt	Layout	Referen	ces	Review	N	View	He	lp	Oper	n in Wo	rd	♀ Tell r	me what
5	< Ê	~ <	3 Ca	libri Li	ght (Hea \sim	28 ~	A	A	В	Ι	<u>U</u>	<u>₽</u> ~	Av	A	•••	=~	$\frac{1}{2}$

If the document opens in a different tab, look at the previous tabs. One of them will contain your files:

🖾 InF	Private		Microsof	t Office Home	6	🗖 Files	5 - On	eDrive			🗖 An	nual Fina	ncial Re	port >	< +	- ~	
\leftarrow	\rightarrow	U	命	A '	\wedge												
	Wo	ord C	nline	Megan B	owen	> Docum	ents							An	nual	Financial	
File	ł	lome	Inse	ert Layou	ıt	Reference	es	Revie	w	View	He	lp	Oper	in Wo	ord	♀ Tell me wł	nat
5	~ Ê	~ <	Sý Ca	alibri Light (H	ea∨	28 ~	A^	A	В	Ι	<u>U</u>	<u>~</u> ~	<u>A</u> ~	A	•••		~

If your document opened in the same tab, click on your name, **Documents**, or, if you are in a document inside a folder, the name of the folder.



Clicking on your name or on **Documents** both take you back to **Files** in your OneDrive for Business.

The backstage

The backstage is what you see when you click on the **File** tab in any Office document, online or on the desktop:



There are a few things that you need to keep in mind here, so let's look at them.





Save As

Remember that the file autosaves, so there is no save button. Also, **Rename** is not the same thing as using **Save As**. If you want to use the current document as the base document for another document, use **Save As**:

		N's Doc - Saved
\leftarrow	Save As	Edit in Word
Info	Save As Save a copy online.	
Open	Rename	
Save As	Rename this file.	
Transform	Download a Copy Download a copy to your computer.	
Print Share	Download as PDF PDF Download a copy of this document to your computer as a PDF file.	
About	Download as ODT Download a copy of this document to your computer as an ODT file.	
	Where's the Save Button? There's no Save button because we're automatically saving your document.	

If you simply want to rename the current document, then use **Rename**.

Print

Remember that the print options you get will be dependent on the computer you are using and if that computer is hooked to a network with printers. If you are on your home computer, you may have different options for printing than those you get on your work computer:



You will always have options such as **Print to PDF** or **Send to OneNote** since those options don't require a physical printer.

Sharing files

In your OneDrive for Business, you have the ability to control the access you give to others. In other words, you can give access to others at the levels of access, view, or edit, as you prefer and can remove or edit that access at any time you wish as well. Depending on the way your organization sets up your account, you may also have the ability to give access to others outside of your organization.

Giving access

You can share a file via the **Share** button inside or outside of the file itself:



If you are outside the file, you need to select the file first.

Any way that you go, you will get the same popup. Through this popup, you can choose the way you want to share. Let's look at the options at the bottom of the popup first:

Send Link Annual Financ(DRAFT).docx		×
Anyone with the link can edit	>	
Enter a name or email address		
Add a message (optional)		
		Send
Copy Link Outlook		

One option is to click on **Copy Link**. This will automatically copy the link to the file, which you can paste anywhere, such as in an email.



The person receiving the link must have permission to access the file, or the link will not work for them.

The other option is to click on the **Outlook** button at the bottom which will open a new email via Outlook, or your default email app, with the file automatically attached.

Now, let's look at the main options at the top. You can see all of the options available by clicking on the bar that says **Anyone with the link** can edit. Once you choose your options, click the **Apply** button and it will take you to the first screen where you can add the name(s) (if internal to your organization) and/or email(s) (if external to your organization) and an optional message, then click the *Send* button:



Once sent, the person(s) you listed will get an email from the system that they can use to access the file.

Editing or removing access

Once access is given, you can see which files are being shared and which aren't by looking at the **Sharing** column:

Files								
Ŀ.	Name \sim			Modified \smallsetminus	Modified By \smallsetminus	File Size \smallsetminus	Sharing	
-	Contoso Electronics			January 17	Megan Bowen		Private	
	んご Microsoft Teams Data			March 24	Megan Bowen		Private	
	Notebooks			March 7	Megan Bowen		Private	
	Private Info			January 17	Megan Bowen		Private	
	Annual Financial Report (DRAFT			January 17	Megan Bowen	22.2 KB	ନ୍ ^R Shared	
	Audit of Small Business Sales.xlsx			Thursday at 9:41 PM	Megan Bowen	21.8 KB	ନ୍ ^ୟ Shared	
0	Book.xlsx	È	:	About an hour ago	Megan Bowen	7.76 KB	Private	
	BrokenPipe.jpg			January 17	Megan Bowen	5.21 KB	^{ନ୍ଦ} Shared	
	Contoso Patent Template.docx			January 17	Megan Bowen	83.6 KB	Private	
The easiest way to see who the access has been given to is to click on the **Shared** link next to the file whose access permissions you want to review. This will open the **Manage Access** side panel for that file where you can see who has direct access and any access links:

Ор	en ∨	🖆 Share 🐵 Copy link 🛓 Download	📋 Delete 🗈 Move t	o 🗋 Copy to 🧷	Rename 💅 Flow 🗸	Version history	ピ Share 名。Grant Access
							Annual Financial Report (DRAFT).docx
							Manage Access
	•	Name \checkmark	Modified $^{\smallsetminus}$	Modified By $^{\smallsetminus}$	File Size \smallsetminus	Sharing	Stop sharing
	10	Contoso Electronics	January 17	Megan Bowen		Private	
	10	Microsoft Teams Data	March 24	Megan Bowen		Private	Links Giving Access
	нî.	Notebooks	March 7	Megan Bowen		Private	There are no sharing links for this item.
	нî,	Private Info	January 17	Megan Bowen		Private	[₽] Direct Access ^①
0		Annual Financial Report (DRAF	January 17	Megan Bowen	22.2 KB	R ^R Shared	Megan Bowen
		Audit of Small Business Sales.xlsx	Thursday at 9:41 PM	Megan Bowen	21.8 KB	R ⁹ Shared	 Marketing Manager
		Book.xlsx	About an hour ago	Megan Bowen	7.76 KB	Private	Allan Deyoung
	~	BrokenPipe.jpg	January 17	Megan Bowen	5.21 KB	R ^A Shared	Enrico Cattaneo
		Contoso Patent Template.docx	January 17	Megan Bowen	83.6 KB	Private	Attorney
	8	Contoso Purchasing Data - Q1	January 17	Megan Bowen	21.5 KB	Private	Alex Wilber Marketing Assistant
		Contoso Purchasing Permission	January 17	Megan Bowen	28.8 KB	я ^{9,} Shared	O Daha Barra
	2	Création du contoso Mark 8.pptx	January 17	Megan Bowen	827 KB	Private	Administrative Assistant
		Employee Health Accounts - Q3	January 17	Megan Bowen	21.5 KB	R ^A Shared	Patti Fernandez
	8	Employee Travel - Q3.xlsx	January 17	Megan Bowen	20.7 KB	я ^A Shared	President.
	2	European Expansion.pptx	January 17	Megan Bowen	3.41 MB	Private	Accountant
	8	Expense Insights.xlsx	January 17	Megan Bowen	398 KB	Private	Joni Sherman
		Fabrikam.one	January 17	Megan Bowen	54.5 KB	R ^A Shared	Paralegal



You can also share with more people via this panel using the **Share** or **Grant Access** buttons at the top.

For any links in the **Links Giving Access** section, you can see the type of link it is. Click the **Copy** button to copy the link or click the more options (...) button to get options for deleting the link by clicking on the **X** button or setting an expiration on the link:

Manage Access		
Stop sharing		
© Links Giving Access ①		
https://m365x4238 Anyone with the link can edit	Сору	
	🖻 Share 🖓 Grant Access	\times
	← Manage Access	
	Image: https://m365x4238 Copy Anyone with the link can edit	$\langle $
	Link settings	
	🖉 Can edit	()
	Set expiration date	\times
	Save Discard	



As of April 2019, you cannot edit the link's access once created. You can only delete the link and then create another.

For those people you have given access to in the **Direct Access** section, you can see their access level via the picture indicator:



Clicking on the dropdown next to the indicator gives you options for editing or removing that person's access:



You can remove all access at one time by clicking on the **Stop sharing** link at the top of the side panel.

Things you should consider

Just like any other power, you should try your best to use it wisely. Consider using the least needed access rule. This is where you give the least amount of access needed. When determining the access you should give, ask yourself a lot of questions such as these:

- Does the person you wish to share with need to edit the file or just view the file?
- If the person(s) only needs to view, should they be able to download as well, or should that ability be blocked?
- Does that person need access for a long time or would it be better to set an expiration date on the file?
- If you created an anonymous link, would bad things happen if the link were to be shared with unintended parties or somehow get out into the wild?

Besides questioning yourself when giving access, you should also periodically review the access you have given out to determine if the access needs to change. I suggest reviewing at least monthly, but weekly would be best.

Move to

This is a fairly new capability that has been a great help to many users. This capability allows you to move files and/or folders from place to place. Once you chose the file(s) and/or folder(s) you want to move, click on the **Move to** button on the action bar. A side panel will open where you can choose to where you want to move your file(s) and/or folder(s):

🚽 Download 📋 Delete 🗈 Move to 🗋 Copy to	Move 2 items			
Files				
🗅 Name y	Modified \smallsetminus	Modified \vee	File Size $ imes$	Places
Contoso Electronics	March 19	Megan Bowen		Choose a destination
Notebooks	April 8	Megan Bowen		🍊 Your OneDrive
Private Info	March 19	Megan Bowen		Contoso
Annual Financial Report (DRAF	March 19	Megan Bowen	22.2 KB	Electronic Events
Audit of Small Business Sales	March 19	Megan Bowen	21.0 KB	Wark 8 Project Team
🕑 📓 Book.xlsx 🗄	Tuesday at 5:38 AM	Megan Bowen	7.76 KB	🕷 X1050 Launch Team
Book1.xlsx	22 minutes ago	Megan Bowen	7.76 KB	Contoso Marketing Central
	March 18	Megan Bowen	5.21 KB	Business Development
🔒 Business Card.pdf	March 19	Megan Bowen	846 KB	New Hires
Contoso Patent Template.docx	March 19	Megan Bowen	83.6 KB	Browse sites

You can move files to another folder in your OneDrive or even move them to SharePoint.

Remember, this is a move, not a copy. After the operation is completed, the file(s) and/or folder(s) will no longer exist in their original place. If moving to SharePoint, you must have at least Contribute-level access permission in order to complete this operation.

In order to see a list of available SharePoint sites, you must be following that site. If you have access to the site but are unable to follow the site, contact your SharePoint administrator to see if that feature can be turned on.

Copy to

Like **Move to**, this is a fairly new capability and has been a great help to many users. This capability allows you to copy file(s) and/or folder(s) to other places. Once you have chosen the file(s) and/or folder(s) you want to copy, click on the **Copy to** button on the action bar. A side panel will open where you can choose to where you want to copy your file(s) and/or folder(s). You can copy them to another folder in your OneDrive or even to SharePoint.

Remember, this is a copy, not a move. After the operation is completed, the file(s) and/or folder(s) will exist in the original place as well as the place that you copied them to.



If copying to SharePoint, you must have at least Contribute-level access permission in order to complete this operation.

In order to see a list of available SharePoint sites, you must be following that site. If you have access to the site but are unable to follow the site, contact your SharePoint administrator to see if that feature can be turned on.

Summary

In this chapter, you learned how to add, edit, delete, copy, move, and share files. We also looked at the parts of an Office Online file. For more details, go to https://support.office.com/ and click on **OneDrive**.

In Chapter 13, Understanding SharePoint, you will learn about SharePoint.

5 Section 5: Collaboration Using SharePoint

In this section, readers will learn about SharePoint in general and will be given specific information on making it useful.

The following chapters will be covered:

- Chapter 13, Understanding SharePoint
- Chapter 14, Working with SharePoint Lists
- Chapter 15, Performing Different File Operations on SharePoint
- Chapter 16, More on Using SharePoint

13 Understanding SharePoint

SharePoint is one of Microsoft's most widely used collaboration platforms and is both loved and hated. The reasons for the strong feelings tend to be based on how SharePoint is set up and run by any given organization.

In this chapter, we will mainly look at SharePoint Online, the version of SharePoint available via Office 365. We will also look at getting to SharePoint, navigating the SharePoint home, getting around in SharePoint, and the anatomy of SharePoint's classic and modern pages.

This chapter will cover the following topics:

- Background and history
- Editions of SharePoint
- Getting into SharePoint Online

Background and history

SharePoint is a Microsoft technology that enables content management and file sharing between users. Unlike file servers where file management is very flat, SharePoint utilizes browsers to store all the files on a centralized web location which is easily accessible by any computer by entering the site URL in an internet browser as well as the appropriate login credentials. Microsoft Office is integrated with SharePoint. This greatly assists users in viewing and editing files directly in the browser.

Out of the box, SharePoint has many templates that can be implemented. Collaborative sites can be used to share information, manage documents, publish reports, and more. One of the most used templates is the Team Site.

Let's look briefly at a timeline of SharePoint from its birth to the present day:

- **2000**: Microsoft releases the first version of SharePoint called SharePoint Portal Server 2001. It was mainly for document management and enterprise search.
- 2003: Microsoft releases Office SharePoint Portal Server 2003 and its underlying service, Windows SharePoint Services (WSS).
- **2006**: Microsoft releases SharePoint 2007 adding in new capabilities such as InfoPath Form Services and Business Data Catalog. This version was called Microsoft Office SharePoint Server 2007 or MOSS for short.
- **2010:** Microsoft releases SharePoint 2010 which included big improvements to Excel Services, InfoPath, workflows, business data services, and managed metadata. Many other features were also added.
- **2012**: Early in 2012, Microsoft released the first technical preview of SharePoint 2013 to an exclusive group of Microsoft partners. In July, the publicly available beta was released and then the final version was generally released in October. This version had a much updated look and feel, with the added-in ability to add apps from a SharePoint Store, and more.
- 2013: The first online version of SharePoint, called SharePoint Online, was released at the end of February via Office 365. At first, it looked the same as SharePoint 2013 but, behind the scenes, there were many differences from its on-premises server sibling. Over time, SharePoint Online, or SPO, has morphed into its own product that is "evergreen" with mostly small, and sometimes large, but frequent releases. In 2015, Microsoft Office 365 Groups was released to Office 365 followed by Microsoft Teams in 2017, both of which have a SharePoint site collection behind them.
- **2016**: SharePoint 2016 was released in May 2016 with significant enhancements, such as better navigation on mobile devices, hybrid mode, expanded support for filenames special characters, support for large files, and data loss prevention capabilities identical to those in Office 365.
- **2018**: Later in the year, Microsoft released SharePoint 2019, finally bringing many of the modern interface improvements seen in SPO to the on-premises version of SharePoint.

Editions of SharePoint

SharePoint comes in a few different editions: SharePoint Foundation, SharePoint Standard, SharePoint Enterprise, and **SharePoint Online** (**SPO**). All, except SPO, are on-premises server editions and SPO is, of course, online. Each edition builds on the next, adding more capability and functionality. Since Microsoft is now thinking in a cloud-first mentality, SPO has the most capabilities and features of any of its on-premises counterparts.

Getting into SharePoint Online

Once you are logged into Office 365, you can get to SharePoint Online in two ways: via the Office 365 Home and via the app launcher. Either way you choose, you will be taken to the SharePoint home page to start.



If you choose the app launcher, you can click on the open menu and choose **Open in new tab** to open it in a new tab.

Office 365		,∕⊂ Search		L 🔍 ? 🍪
				-
	Apps		Install Office \vee	
	Outlook OneDrive Word Explore all your apps →	Escel PowerPoint OneNote	Vanmer Admin	
	Documents			
	Recommended		$\langle \rangle$	
	You edited this Yesterday at 1:09 PM	You recently opened this Vou edited this Yesterday at 3:24 PM Thu at 9:41 PM	You recently opened this Thu at 10.23 PM	
		Annual Financial Report	NOVELINED	
	III Office 365 →			
	Apps			
	outlook 🌰 OneDrive			
	Word K Excel	OneD		
	PowerPoint Note OneNote	iur apps →		
	SharePoint :			
	Yammer Open in new tab	nts		
	All apps → Learn more	ded		
	Documents	idited this inday at 1.09 P		

Let's look at SharePoint home in detail.

The SharePoint home

When you click on the **SharePoint** button on the Office 365 Home or on the app launcher, the SharePoint home is where you land. You can navigate from there. Let's look at the parts of this page:



Let's look now at the components of the SharePoint home.

#1 Search

Located in the top left-hand corner, to use search, start typing in the box and the system will start offering you some preliminary results:



Click on the **See more results** link at the bottom of the preliminary results dropdown and you will be taken to a search page showing more results:

SharePoint		
X Exit search		
	te	٩
	All Files Sites People News	∀ Filters
	From board room to game room Electronic Events > Electronic Articles Isaiah Langer modified on February 28, 2017	
	Stand-out trends from NYFW Electronic Events > Electronic Articles Patti Fernandez modified on September 20, 2016	
	Eco-logical tech Electronic Events > Electronic Articles Isaiah Langer modified on September 20, 2016	EUDUDOWNOU MEDIDOWNOU MANAGAMANA MANAGAMANA MEDIDOWNOU
	C From your OneDrive	More in OneDrive
	TeamsNotebook(Shared) You modified 19 days ago	
	SINGLAUNCH Team You modified on March 19	
	You modified 19 days ago	
	Clean power Electronic Events > Electronic Articles Isaiah Langer modified on September 20, 2016	

The **Filters** at the top will help to minimize your result by only showing you results of a certain type and the **Filters** button will also open a panel on the right side with options for filtering down your search results by the modified date:

te	Q	Filters	×
All Files Sites People News	∀ Filters	Last modified time Any time 	
From board room to game room Electronic Events > Electronic Articles Isaiah Langer modified on February 28, 2017		Older than a year	
Stand-out trends from NYFW Electronic Events > Electronic Articles Patti Fernandez modified on September 20, 2016	BYmonora BYmonora Bymonora Bymonora Bymonora		

You may even encounter an option to search your OneDrive for Business:

r V	~	Chinese technology's scale of impact On the site Electronic Events Modified by Isaiah Langer on September 20, 2016	RCB/ICALORY Incomparison Incomparison Incomparison Incomparison Incomparison Incomparison		
		From your OneDrive Image: Contoso Patent Template Modified by you on August 13, 2014	More in OneDrive		
	V	2017 Energy Star Awards On the site Electronic Events Modified by Isaiah Langer on September 20, 2016			

Each result has a drop-down arrow. When clicked, it will expand or collapse a section where you can see more details about that result:

Results from your organization	
te	Q
All Files Sites People News	∀ Filters
2017 Mobile Electronics Industry Awards On the site Electronic Events Modified by Isaiah Langer on September 20, 2016 Lorem ipsum dolor sit amet, an solum volutpat sit, pro percipit Te gubergren constituam pri Vix ne cibo homero omnesque, ex ius dignissim deseruisse, ius te populo diceret	
☐ Open in new tab	
Stand-out trends from NYFW On the site Electronic Events Modified by Patti Fernandez on September 20, 2016	SSMALLER SSMALLER SSMALLER SSMALLER SSMALLER
Chinese technology's scale of impact	HIDGERSTREAM

To leave the search page, click on the **X Exit search** button on the left-hand side of the page:

	SharePoint	
× Ex	it search	
		Results from your organization

Before you click on the search box, there is text in it that says **Search in SharePoint**. This means that the search will occur in SharePoint but you will only see results that you have permission to see. So, for example, if a document meets your search criteria but you don't have permission to see it, it will not even show in your search results.

When you exit search, you will be taken back to the home page:



The search capability is very powerful. It is so powerful, in fact, that you may get too many results. The search will search the title of the file, web page, or site, the URL, the text contained within, and any attached metadata.



To help with getting more precise results when searching, you can use phrases and the logical operators, AND, OR, and NOT, to search just like you can with a search on the web. For example, you can search Test in Sequence NOT January which would return results containing Test in Sequence but will exclude any results with the word January. There are query syntaxes you can use that are more advanced. For more information, see https://docs.microsoft.com/en-us/sharepoint/dev/ general-development/keyword-query-language-kql-syntax-reference.

#2 Left navigation

On this navigation panel, you can see any sites you are following, any recent sites you have been to, and any link that you have added.

Following

You can set sites you want to follow by clicking on the stars next to them on their site cards, or on the sites themselves:



The ability to follow sites must be turned on. If you don't see the option to follow, ask your SharePoint administrator to turn it on.

To stop following a site, click on the star again:



Once the star is clicked, the site will disappear from this list.

Recent

Not to be confused with frequent sites on the page, the sites listed are those that you have been to recently.

Featured links

The URLs can be any that you wish to add. Simply click on the pencil to add links to anything you would like:



The links can be internal or external to your Office 365.

#3 Creation options

The first creation option, **+ Create site**, may not be available if the feature is not turned on and/or if you don't have the permission level needed to create a site:



The **+ Create site** option creates modern site collections: **Communications site** and the modern **Team Site**.



Communications site collections can only be created here and in the new SharePoint Admin Center.

The modern **Team site** is not the classic site collection that is connected to an Office 365 Group. As of April 2019, modern site collections do not have all of the features and functionality of classic site collections.

The second option is + Create news post, which allows you to publish a news post:

+ Create news post					×
sites			_	Choose where to publish news	
				Frequent sites	
			Contraction of the second	<u>IR</u>	
- Behind the	Electronic Events New York Launch - Highlights	Electronic Events Contoso Cares - Show For Charity	Electronic Events Fall Launch - Pari:	Electronic Events Contoso Insider	
	MB Megan Bowen 1/16/2019	DB Debra Berger 1/16/2019	MB Megan Bowen 1/16/2019	Business Development	
				Show more	
	۵	Д	D	Following	
				CO Contoso #02	
sites				Research And Development	
\$	⊘ *	*		Marketing	
vents	Contoso Insider	Mark 8 Project Team	Contoso Marketiu	Product Launch Event	
i cinto	contoso insuel	Group	contoso Marketi	Sales	
				Show more	

Click on the SharePoint site that you want your news post to be published to.

#4 Message

There may be a message here:



[327]

To close it, click on the **X** in the upper right.

#5 News from sites

This section shows news from **News** apps on different sites and site collections that you have access to. You can click the card to go to the article or click on the ribbon at the bottom to save the article for later:



To see more news, click on the **See all** link on the left-hand side.

#6 Frequent sites

Not to be confused with **Recent** on the left navigation, this shows the sites you go to frequently.

#7 Site card

This card shows details about your most recent activity on each site listed:



It can be helpful to see when you were last on the site or if a certain item or file on the site is getting a lot of attention.

#8 Get the mobile app

Clicking on this button will take you to a page to get the app:



You can type in your mobile number to get a text with a link to where you can download the app.

Navigating SharePoint

Once you choose a SharePoint site to go to from the SharePoint home, click on it and you will land on the site. As you move around in your site, it is important to know how to navigate. There are five options:

• **The browser's back button**: There will be times when the use of this button is a necessity:



• **Global navigation (also known as the top link bar)**: Mostly used for getting around to site collections or sub-sites, usually only links to other sites and site collections are here, but there may be links to other things as well:

Home Communities CONTOSO Home

• **The tiles and links**: These help you to get to other parts of the site, to other site collections, and to any other places:



• Left navigation (also known as the quick launch): This helps you move around the areas of the current site you are in. Normally, this navigation only contains links to parts of the site you are in at that moment, but sometimes links to other things and places are placed there as well:



• **The breadcrumb**: This helps you to navigate up the hierarchy from where you are. Usually, you see the breadcrumb when you are in a library and have gone down a level or more into folder(s):

OD Office 365 Demos							
✓ Search	+ New \checkmark ↑ Upload \checkmark 🖻 Share 🐵 Copy link	G Sync ⊥ Download	Export to Excel	∎⁄ª Flow ≻ ····			
Home Notebook	Site Assets > SitePages > fiufroin						
Documents	🕒 Name 🗁	Modified \smallsetminus	Modified By \searrow	+ Add column			
Pages	20560-8-Ways-to-Create-Great	≭ 21 minutes ago	Megan Bowen				
Site contents							

Remember, for navigation, all options are on the table but its best to avoid using Option #1 unless it's necessary. It's best to use any of the other options first. Use option #1 when none of the others will work for you.

The anatomy of the SharePoint page

The home page of a SharePoint site has different parts. In the following screenshots, we will look at the parts of a classic page and also of a modern SharePoint page.



Your organization may have only classic or only modern site pages or it may be using a mix of both. Each site can have the home page that comes with the site as well as one or more other site pages set up for different reasons.

The classic page anatomy

The classic SharePoint page has been around longer than the modern page. You may have seen some of them in your organization's SharePoint so let's look at the parts of the classic SharePoint page:



Now, we will look at the parts of the page as they are numbered.

#1 Office 365 suite bar

This is the suite bar for Office 365 which is ever-present with the same parts but sometimes the functions of those parts change depending on where you are in Office 365. The changes on the bar in SharePoint are:

- The link to SharePoint following the app launcher
- The options under settings (gear)
- The option under help

#2 Settings

Settings change based on where you are in Office 365. When you click on the gear in SharePoint, you will see settings based on the permission where you are at that moment and what permission level you have at that place. For example, if you are in a list or a library, you will have different options than if you were on a site page. Also, you may have a lot or a smaller number of options depending on your permission level:



You may also have settings for Office 365 in general here or you may not depending on if you have received the latest roll-out of the **Settings** menu shown in the preceding screenshot.

#3 Help

Help changes based on where you are in Office 365:



The Help here will be based on SharePoint since you are in SharePoint.

#4 Promoted actions bar

The bar is similar to the quick actions bar in Office which is in the upper left corner of Office applications. Instead of options like **Save**, **Undo**, **Redo**, and **Print**, you get options for sharing the site, following the site, editing the page, and full-screen mode.



Seeing the sharing and following options depends on whether the feature is enabled in the site. Seeing the edit option depends on your permission level.

#5 Search

This search box will search based on your term(s)/phrase(s) and the scope that it is set to. Its default scope is stated in the box (for example, in the box it says **Search everything**) and the scope can be changed by clicking on the drop-down arrow and choosing a different scope:

	😲 Share	C LOLLOW	
Search everythi	na		Q
Everything			
People			
Conversation	IS		
This Site			

Everything searches everything in the site collection you are in, **People** searches profiles of people in your organization, **Conversations** searches all discussion boards and news feeds, and **This Site** only searches the site you are currently in.

Once you have the scope that you want, type in your term(s) and/or phrase(s) and click the magnifying glass or press *Enter*. You will be taken to a page showing your results:



On the **Search** results page, you can see your results, refine your search by typing in a new or additional term(s) and a phrase(s), refine your search using the refiners on the left, and/or change your search scope by clicking on the drop-down arrow. At the bottom of the page, you can also see the number of results, the number of pages of results, and the arrow(s) for navigating back and forth among the pages. If you hover over a result, you get a preview popup with some actions you can do based on the type of result it is.



The search capability is very powerful. It is so powerful, in fact, that you may get back too many results. The search will search the title of the file, web page, or site, the URL, the text contained within, and any attached metadata. To help with getting more precise results when searching you can use phrases and the logical operators, AND, OR, and NOT, to search just like you can with a search on the web. For example, you can search Test in Sequence NOT January, which would return results containing Test in Sequence but will exclude any results with the word January. There are query syntaxes you can use that are more advanced. For more information, see https://docs.microsoft.com/en-us/sharepoint/dev/general-development/keyword-query-language-kql-syntax-reference.

#6 Tabs

The tabs for a page are different than those in a list or library but they all have associated ribbons with options for the place you are in except **Browse**. For example, the **Page** tab has options for working on the page:



Clicking the **Browse** tab closes any ribbons you have open so you can see the top of the page.

#7 Logo

When clicked on, the **Logo** usually takes you to the top of the site collection you are in. Sometimes, people reprogram it to take users to the home of the site they are in. The **Logo** starts as a generic logo but can be changed to use a different logo based on a picture of choice.

#8 Global navigation

The global navigation, also known as the top link bar, helps you with getting to other sites or site collections. Usually, only links to other sites and site collections are here, but there may be links to other things as well.



The **Edit** button is only visible if you have the permission level needed to be able to edit the navigation.

#9 Left navigation

The left navigation, also known as the quick launch, helps you move around the areas of the current site you are in. Normally, this navigation only contains links to parts of the site you are in at the moment but sometimes links to other things and places are placed there as well.



The **Edit** button is only visible if you have the permission level needed to be able to edit the navigation.

#10 Breadcrumb

When you are on a page, the breadcrumb may or may not be clickable. It may just be a title. If it is clickable, it will just take you back to the same page.

#11 Web parts and app parts

Web parts and app parts are parts that you see on the main part of the SharePoint page. They are both modular and reusable components that can be placed into any SharePoint web page. A web part can be added from the web part gallery, from a code module, or from the SharePoint Store. An app part is a display part showing a list or library.

The modern page anatomy

The classic SharePoint page has been around longer than the modern page but your organization may already be embracing the modern look for SharePoint:



Let's explore the parts of the modern SharePoint page.

#1 Office 365 Suite Bar

This is the suite bar for Office 365 which is ever-present with the same parts but sometimes the functions of those parts change depending on where you are in Office 365. The changes on the bar in SharePoint are:

- The link to SharePoint following the app launcher
- The options under settings (gear)
- The option under help

#2 Settings

Settings change based on where you are in Office 365. When you click on the gear in SharePoint, you will see settings based on the permission where you are at the moment and what permission level you have at that place. For example, if you are in a list or library, you will have different options than if you were on a site page. Also, you may have a lot or a small number of options depending on your permission level:



You may also have settings for Office 365 in general here or you may not depending on whether you have received the latest roll-out of the **Settings** menu shown in the preceding screenshot.

#3 Help

Help changes based on where you are in Office 365:



The help here will be based on SharePoint since you are in SharePoint.

[342]

#4 Promoted actions bar

The bar is similar to the quick actions bar in Office, which is in the upper left corner of Office applications. Instead of options like **Save**, **Undo**, **Redo**, and **Print**, you get options for following the site and sharing the site.



Seeing the sharing and following options depends on whether the feature is enabled in the site.

#5 Page actions bar

These are actions you can take on the page if you have the permission level to allow it. If you don't, you won't even see this bar.

#6 Global navigation

The global navigation, also known as the top link bar, helps you with getting to the other sites or site collections. Usually, only links to other sites and site collections are here but there may be links to other things as well.



The **Edit** button is only visible if you have the permission level needed to be able to edit the navigation.

#7 Logo

When clicked on, the **Logo** usually takes you to the top of the site collection you are in. Sometimes, people reprogram it to take users to the home of the site they are in. The **Logo** starts as a generic logo but can be changed to use a different logo based on a picture of choice.
#8 Breadcrumb

When you are on a page, the breadcrumb may or may not be clickable. It may just be a title. If it is clickable, it will just take you back to the same page.

#9 Search

Before you even start typing in the box, the system will start offering you some preliminary options based on who you are and what you have been working on:

✓ Search this site					
News					
	Event Planning - Behind the Scenes Published by Lynne Robbins on January 16				
	New York Launch - Highlights Published by Megan Bowen on January 16				
	Contoso Cares - Show For Charity Published by Debra Berger on January 16				
	Fall Launch - Paris Published by Megan Bowen on January 16				
	Listening To Our Firstline Workers Published by Patti Fernandez on January 16				
Files					
S	SharePoint Home On the site Office 365 Demos				
S	Home On the site Office 365 Demos				

Choose one of the choices from the list or enter a term(s) and/or phrase(s) that you want to search on.



The search capability is very powerful. It is so powerful, in fact, that you may get back too many results. The search will search the title of the file, web page, or site, the URL, the text contained within, and any attached metadata. To help with getting more precise results when searching, you can use phrases and the logical operators, AND, OR, and NOT, to search just like you can with a search on the web. For example, you can search Test in Sequence NOT January, which would return results containing Test in Sequence but will exclude any results with the word January. There are query syntaxes you can use that are more advanced. For more information, see https://docs.microsoft.com/en-us/sharepoint/dev/general-development/keyword-query-language-kql-syntax-reference.

#10 Left navigation

The left navigation, also known as the quick launch, helps you move around the areas of the current site you are in. Normally, this navigation only contains links to parts of the site you are in at the moment but sometimes links to other things and places are placed there as well.



The **Edit** button is only visible if you have the permission level needed to be able to edit the navigation.

#11 Page header

The page header contains the banner and the title of the page or site. The banner may contain a picture but it can be blank.

#12 Web parts and app parts

Web parts and app parts are parts that you see on the main part of the SharePoint page. They are both modular and reusable components that can be placed into any SharePoint page. A web part can be added from the web part gallery, from a code module, or from the SharePoint Store. An app part is a display part showing a list or library.

#13 Feedback

Click this button and a side panel will open where you will have the option of giving Microsoft feedback or suggestions concerning SharePoint:



When you are giving feedback or a suggestion, remember to give as many details as you can. Try to answer the following what, when, where, how, and why questions:

- What is my feedback/suggestion? How will implementing it make a difference?
- Why am I giving this feedback/suggestion?
- Where was I and what was I doing when I encountered the issue, or where is the place that I am making a suggestion about?
- When did I experience the issue?

Giving as much detail as possible will keep Microsoft from throwing out your suggestion or feedback. It also helps others to vote your feedback or idea up. They are posted on Microsoft UserVoice for SharePoint and once 50 people vote it up, Microsoft will look at implementing it. If you can locate your feedback or idea on Microsoft SharePoint UserVoice directly, or simply post it directly on UserVoice, you can give the link to others and encourage them to vote your idea or feedback up!

Summary

In this chapter, we got a glimpse of what SharePoint is and discovered some of its history. We also looked at getting to SharePoint, navigating the SharePoint home, how to get around in SharePoint, and the anatomy of the SharePoint classic and modern pages. For more on SharePoint, go to https://support.office.com and click on SharePoint.

In Chapter 14, *Working with SharePoint Lists*, we are going to look at lists in SharePoint. We will look at what they are and how you can work with them.

14 Working with SharePoint Lists

SharePoint has some pretty cool ways of helping you to manage different types of data, not just files. In this chapter, we will look at the lists for managing data, the lists end uses are most likely to use that come out of the box with SharePoint, and the most-used functions you need to know about as an end user.

In this chapter, the following topics will be covered:

- What are Lists?
- The different List types
- What is a List View?
- How to add, edit, and delete list views

What are Lists?

When you think of a list, think of a spreadsheet. You can think of the **Lists** in SharePoint as spreadsheets that you and your co-workers can simultaneously use on the internet. Like a spreadsheet, the focus of the list is the data. It has columns and rows and you fill in data line by line. Each row of data in a SharePoint list is called an *item*. Unlike a spreadsheet, you can attach a file to each line of data.



Attaching a file to a line of data in a SharePoint list is not a best practice. It can lead to a multitude of problems down the road. It is very difficult to get those files back out of the list when that data needs to be moved or the files removed from the items in the list and placed somewhere else. The best practice is to use a library (discussed in Chapter 15, Performing Different File Operations on SharePoint).

Like a spreadsheet, a list can be filled cell by cell using a mode called *Quick Edit*. Quick Edit will be discussed later in this section. Unlike a spreadsheet, the list also comes with a form to fill the data columns via fields. Each form of data entered is one line of data in the list:

::: SharePoint				<i>۵</i>	۲	? (
OD Office 3	65 Demos			Edit all So Copy link Tax Day is Coming!		
,Ϙ Search	+ New 🖉 Quick edit 🟮 Export to Exce	el ₀⁄ª Flow ∨ 🌼 PowerApps ∨ …				
Home	Announcements			Title * Tax Day is Coming!		
Documents	Title 🗸	Body \sim	Expires \checkmark	Apply retention label		
Pages	Tax Day is Coming!	Don't forget to do you taxes this weekend (o get an extension)!		Choose a label		
Site contents				Body Don't forget to do you taxes this weekend (or get an extension)!		1
Recycle bin				Expires		
Edit				Enter value here		
				Attachments		
				Add or remove attachments		

Fields with an asterisk (*) are required fields and the form cannot be saved until all required fields are filled in.

The different List types

Out of the box, SharePoint comes with lists in a few different categories. The following lists are some of the lists that you should be familiar with as an end user.



All list types are not outlined here, only the ones you are most likely to use.

Communications

There are a few types of communications lists in SharePoint. The ones you are most likely to use are as follows:

• **Announcements**: This list type is used in classic SharePoint experiences to post announcements on the home page of a site. In the Modern Experience, the SharePoint News webpart is used instead.

- **Contacts**: This list is for keeping contact information, whether business or personal. It comes with fields for entering a person's name, addresses, company name, phone numbers, and so on.
- **Discussion board**: In this type of list, users can have an online forum, such as experience, where questions can be asked and answered in discussion threads.

Tracking

There are a few types of tracking lists in SharePoint. The ones you are most likely to use are as follows:

- Links: This type of list is used to track links. There are columns for putting in a title of the link (called *Description*) and for putting in the URL.
- **Calendars**: This type of list is for tracking events. There are views that look like the rest of the lists, and spreadsheet-like views, but there's also a view that looks like a calendar on this type of list. Views are explained in the *Custom lists* section. There are columns for the title of the event, start and end times, and so on.
- **Tasks**: This type of list is for tracking tasks. There are columns for the title of the task, task description, assignee, start date, task progress, and so on.
- **Survey**: This type of list, in the classic SharePoint experience, is used to track survey results. In this list, each survey question is created before the survey is opened for users. In the Modern Experience, Microsoft Forms is now the replacement for the Survey.

Custom lists

There are a few types of custom lists in SharePoint. The ones you are most likely to use are as follows:

- **Custom list**: The custom list is a list that comes with only one column, called **Title**, and the rest of the columns are added to make any type of list you want.
- **Import spreadsheet**: Historically, using this type of list was to be avoided. This list gives you the ability to import a spreadsheet and let the system create the list for you, but it was problematic. There have been improvements made to this list type and the problems may have all been resolved. If you were ever able to use this list type to create your own list, be warned that you may experience a number of issues.

What is a List View?

A view is the way you see details in the list or library. You can create multiple views on a list or library based on the different ways you would like the data to be presented.

In a view you can do the following:

- Choose the columns you want to appear
- Increase or decrease the number of columns displayed
- Choose the columns by which the information will be sorted, filtered, and/or grouped
- Add a button that enables team members to edit
- Display check boxes next to individual items so that members can select multiple items
- Add totals for items in the columns
- Apply a style
- Choose whether items are displayed in folders
- Set a limit for the number of items that can be displayed
- Set the way you want the list or library to appear when viewed on a mobile device

The most commonly-used views look like a spreadsheet with or without the lines. There are also views that make your list look like a calendar or a Gantt chart.

Adding items to any list using a list view

In a list, you can add items in two ways: through the form and through **Quick Edit** mode. Let's look at both of those ways in the Classic and Modern Experiences.

In the Classic Experience, either click on the **Items** tab and then click directly on the **New Item** button or on its dropdown, then choose **New Item** or click **+New Item** link:

BROWSE ITEMS LIST					
New New Folder View Edit Item	C Version History	Attach File	Alert Me 🗸	Tags & Notes	Workflows
New Item	anage	Actions	Share & Track	Tags and Notes	
Add a new item to this list. Home	+ new a	annou	ncement	or <mark>edit</mark> thi	s list
NOLEBOOK	All items	•••	Find an item		Q
Documents Pages	✓ Title			Body	
Recent	Tax Da	ay is Con	ning! 🗱 👘	Don't for	get
Calendar					



The tab or new link may be named something else, depending on the list you are in. For example, the following diagram is of the **Announcements** list and its new link is labeled **+new announcement** instead of **+new item**.

The form opens. Fill it in and click on the **Save** button:

BROWSE	ті		
Save Cancel	Paste Cut	Attach File	ABC Spelling
Commit	Clipboard	Actions	Spelling
Home		Title	*
Notebook		Body	
Documents		,	
Pages			
Recent			
Calendar			
Custom			
Tasks			
Contacts			
Announce	ements		
Site contents		Expire	es
Recycle Bin			
🖍 EDIT LINK	S		



Fields marked with an asterisk (*) are required fields; the form cannot be saved until all required fields are filled in.

In the Modern Experience, there are no tabs. Actions are performed through the actions bar. Click on the **New** button and the form will open in a side panel. Fill in the form and click the **Save** button:

65	Demos			Save	X Cancel 🐵 Copy link	×
-	New 🖉 Quick edit 🚺 Export t	to Excel ${}_{\sigma}{}^{\prime \alpha}$ Flow \lor \Leftrightarrow PowerApps \lor \cdots		New it	tem	
	Announcements			Title *	value here	
	Title \checkmark	Body \searrow	Expires \searrow	Body		0
	Tax Day is Coming!	Don't forget to do you taxes this weekend (or get an extension)!		Expires		
				Enter a	a date	ίπ.
				Attachm	nents	
				Add att	tachments	
				Save	Cancel	

You can add new items via **Quick Edit** mode. In the Classic Experience, click on the **List** tab and then on the **Quick Edit** button, which will put the list in spreadsheet mode and you can add line by line. To stop editing, click the **Stop** link:

BROWSE IT	EMS LIST	
View Quick Edit	Image Views Current View: Image Views Current Page Image Views Tags & Notes Image Views Tags and Notes	
Home Notebook Documents Pages	Stop editing this list All items ···· Find an item	
Recent	Tax Day is Coming! 🗱 🛛 🚥	
Calendar Custom		

In the Modern Experience, click on the **Quick Edit** link in the action bar, which will put the list in spreadsheet mode and you can add line by line:

+ New 🖉 Quick edit 💶 Exp	port to Excel 🖉 🖉 Flow 🗸 🔅 PowerApps 🗸				
Announcements					
~ 1	Exit quick edit				
N	✔ Title	Body	Expires	Modified	+
	Tax Day is Coming! 🕱	Don't forget to do you taxes this weekend (or get an extension)!		About an hour ago	
	· · · · · · · · · · · · · · · · · · ·				

To stop editing, click the **Exit quick edit** link.



Sometimes the list's view you are editing may not have all rows showing. If all required rows are not filled in, the row will not save.

Editing items using a list view

In a list, you can edit items in two ways: through the form and through **Quick Edit** mode. Let's look at both of those ways in the Classic and Modern Experiences.

In the Classic Experience, you can reopen the item for editing in three ways. One way is to click on the **Title** of the item and when it opens, click the **Edit Item** button to go from **View** mode to **Edit** mode:

BROWSE VIEW				
Edit Item Delete Item	Alert Me Workflows Actions			
Home Notebook Documents	Т	Fitle Body	Tax Day is Coming! Don't forget to do you taxes this weekend (or ge extension)!	et an
Pages Recent Calendar Custom	E	Expires Created at 4/11/2019 .ast modified at 4/11,	10:05 PM by 🗌 Megan Bowen /2019 10:06 PM by 🗌 Megan Bowen	Close

Another way is to click on the open menu next to the item and then click on **Edit Item**:

Announcements							
hew announcement All items	or <mark>edit</mark> this list						
✓ Title	Body	Expires	Modified				
✓ Tax Day is Coming! ¥	Don't forget to do you taxes this weekend (or get an extension Share Edit Item Delete Item View Item Advanced)!	Yesterday at 10:06 PM				

The last way is to click the checkbox next to the item and then click the **Edit Item** button on the ribbon in the **Items** tab:

BROWSE ITE	IIST								
	6	Version History				i			
New New Item - Folder	View E Iten It	dit em 🗙 Delete Item	Attach File	Alert Me -	Tags & Notes	Workflows Approve/Reject			
New		Manage	Actions	Share & Track	Tags and Notes	Workflows			
Home Notebook Documents	Home Home new announcement or edit this list Notebook All items ··· Find an item								
Pages		🗸 🗸 Title			Body			Expires	Modified
Recent		V Tax Da	ay is Con	ning! 🗱 🚽	Don't forg	get to do you taxes this w	veekend (or get an extension)!		Yesterday at 10:06 PM
Calendar									

In the Modern Experience, you can reopen the item for editing in four ways. One way is to click on the *Title* of the item and, when the form opens, click the **Edit all** button to go from **View** mode to **Edit** mode:

Edit all 🐵 Copy link		×
Tax Day is Coming!		
Title * Tax Day is Coming!		
Apply retention label Choose a label		
Body Don't forget to do you taxes this weekend (or get an extension)!	0	
Expires Enter value here		
Attachments Add or remove attachments		

Another way is to click on the checkbox next to the item and then on the **Edit** button in the action bar to go directly into **Edit** mode:

sa 26E Damas		🗟 Save 🗡 Cancel 📀 Copy link	×
ce 365 Demos		Tax Day is Coming!	
🖉 Edit 🖻 Share 📀 Copy link 🗎 Di	elete oʻ ^a Flow \vee …		
Arnouncements		Tax Day is Coming!	
S Title V	Body 🗠	Expires V Apply retention label	
Tax Day is Coming!	Don't forget to do you taxes this weekend (or get an extension)!	None	~
		Body Don't forget to do you taxes this weekend (or get an extension)!	0
		Expires	-
		Enter a Gate	
		Attachments Add attachments	
		Save Cancel	

The third way is to click on the checkbox next to the item and then on the **Show actions** menu; then click on **Edit** from the dropdown to go directly into **Edit** mode:

Anr	nouncements							
ø	Title \checkmark	Show action	ns ody \searrow		Expires \searrow	Modified \searrow	+ Add column	
0	Tax Day is Coming!	¢ :.	Don't forget to do you get an extension)!	taxes this weekend (or		About an hour ago		
		Open						
		Share						
		Сору	link					
		Сору	field to clipboard					
		Delete	ż					
		Flow	>					
		Alert	me					
		More	>					
		Detail	S					

The last way is to click on the checkbox next to the item and then on the **Details Pane** icon; then click on the *Edit all* link in the **Properties** section:

🖉 Edit 🖻	Share 📀 Copy link	📋 Delete 🛯 🖌	Flow $\checkmark ~ \cdots$				Open the details pan 1 selected × Y
Annou	Incements						1ax Day is Coming!
🔿 Title	· v		Series -	Expires \checkmark	Modified \checkmark	+ Add column	Has Access
0	Day is Coming!	:	Don't forget to do you taxes this weekend (or get an extension)!		About an hour ago		A A R R R A A A A Manage access
/							Properties Edit all
							Title *
							Tax Day is Coming! Apply retention label
							Choose a label
							Body Don't forget to do you taxes this weekend (or get an extension)!
							Expires Enter value here
							Attachments
							Add or remove attachments

The section will then become editable.

Deleting items in a list view

In the Classic Experience, you can delete an item by clicking the checkbox next to the item, click on the **Items** tab, and then click the **Delete Item** button on the ribbon or click the open menu next to the item; then click on **Delete Item** from the dropdown:

BROWSE ITEMS LIST							
New New Folder	Version History Shared With Collete Item	Alert Me +	Tags & Notes	Workflows Approve/Reject			
New Mana	age Actions	Share & Track	Tags and Notes	Workflows			
Home Notebook	H new annou All items H	ncement Find an item	or <mark>edit</mark> this	s list			
Documents	🗸 Title		Body			Expires	Modified
Pages		ningl #	Don't for	net to do you taxes this w	veekend (or get an extension)		Vesterday at 10:06 PM
Recent	lax Day is Col	ning: *	Share		reckend (or get an extension).		restered y at 10.001 m
Calendar	1		Share				
Custom			dit Item				
Tasks			Delete Iter	n			
Contacts			View Item				
Announcements							
Site contents			Advanced				
Recycle Bin							

In the Modern Experience, you can delete an item by clicking the checkbox next to the item and then clicking the **Delete** button on the action bar:

🖉 Edit 🖻 Share 🐵 Copy link	🗓 Delete 🖉 Flow \vee \cdots			
Announcements	Show actions ody ~	Expires \checkmark	Modified \checkmark	+ Add column
Tax Day is Coming!	E Don't forget to do you taxes this weekend (or get an extension)!	or	About an hour ago	
	OpenE itS areC py linkC py field to clipboardDeleteFlowAlert meMoreDetails			

You can also delete the item by clicking on the **Show actions** menu next to the item and then clicking on **Delete** from the dropdown.

Adding/editing/deleting items in the calendar view

One of the views that can be implemented on any list or library is the **Calendar view**. The **Calendar list** automatically comes with a **Calendar view** when it is created:

BROWSE EVENTS CALENDAR		🔾 SHARE 🟠 FOLIC	ow (t
New View Edit View Delete Event	Artuch Aler Mer Mer Mer More More		
Central rates matching, deadline or other Central rates matching, deadline or other Apr Any Any Any Any Any Any Any Sep Cet Nov Dec Today is Thursday, Appl 11, 2019 Cetendar Calendar in View Calendar Calendar Custom Tasks Contacts Anouncements Site contents	April 2019 MONDAY TUESDAY 1 2 + Age 8 9 14 15 16 21 22 23 28 29 30	Calendar - New Item X Extra construction All of the second se	

This calendar view works just like the calendar in Outlook except the form is different.

Summary

In this chapter, we learned about lists, list views, and how we can add to lists in the Classic and Modern Experiences in the lists themselves. There are more ways to enter data through the webparts on a Modern SharePoint page and these methods are in flux at the time of writing. To see the latest and greatest in the Modern Experience, go to https://support.office.com and click on *SharePoint*.

In Chapter 15, *Performing Different File Operations on SharePoint*, we are going to explore libraries in SharePoint. We will look at what they are and how you can work with them.

15 Performing Different File Operations on SharePoint

SharePoint started life as a file server and now has much improved its functionality to work with files. In this chapter, we will look at the libraries that you get out of the box with SharePoint and the functions you need to know about as an end user. We will discuss how to add, edit, delete, and check files.

In this chapter, the following topics will be covered:

- What are libraries?
- The different library types
- What are library views?
- Using the document library
- Sharing files
- Moving and copying files

What are libraries?

One of the most compelling and popular features that SharePoint provides is libraries. Libraries are a great place to efficiently store and organize documents or forms. Office is tightly integrated into the SharePoint document library, adding even more functionality. Using SharePoint libraries, you can filter and group documents as well as view metadata (added as columns) for documents stored in the library.

The different library types

Out of the box, SharePoint comes with a few different types of libraries. The following are some of the libraries that you should be familiar with as an end user.



All library types are not outlined here, only the ones you are most likely to use.

Document

Use a document library to store, organize, sync, and share documents with people. With the integration of Office, you can edit Office and PDF documents in the browser. You can co-author documents with your colleagues or check out a document to work on it one person at a time. Since all of your documents are in the same place, the latest versions of each document will be available to everyone when needed and versions will be automatically checked. Your documents can be synced to your computer so that you can access them offline.

Form

This library is home to online InfoPath forms, which are only available when the library is using the Classic Experience. If in modern, the online forms of choice are power apps, which will not work with this library.

Wiki page

This library is actually a set of easy-to-edit web pages that can be built using images, web parts, and text (these are explained in *The Classic Page Anatomy* section of Chapter 14, *Working with SharePoint Lists*).

Picture

This library gives you a place to upload and share pictures.

What is a library view?

A view is the way you see details in the list or library. You can create multiple different views on a list or library based on the different ways you would like the data to be presented.

In a view, you can do the following:

- Choose the columns you want to appear
- Increase or decrease the number of columns displayed
- Choose the columns by which the information will be sorted, filtered, and/or grouped
- Add a button that enables team members to edit
- Display check boxes next to individual items so that members can select multiple items
- Add totals for items in the columns
- Apply a style
- Choose whether items are displayed in folders
- Set a limit for the number of items that can be displayed
- Set the way you want the list or library to appear when viewed on a mobile device

The most-commonly-used views look like a spreadsheet with or without the lines. There are also views that make your list look like a calendar or a Gantt chart, and can be applied to a library as long as you have a date for the start date and a date for the end date.

Using the document library

The following will show you how to carry out common tasks using the document library, because this is the library you will spend the most time with. All functions described here can be done in any library unless otherwise noted.

Adding files

In the Classic Experience, you can add new files by creating them using the Office Web Apps (see more details in the Modern Experience explanation next) or by uploading them. When uploading, you cannot upload an entire folder or multiple files at one time:

SharePoint				
BROWSE FILES LIBRARY				
New Upload New Document - Document - Document - Document - Document - Folder Document -	Edit Edit Open & Check Out Open & Check Out	ersion History Shared With Delete Document Share & Trends Share & Track	Follow Download a Go To Source Copies	wws Publish Approve/Reject Workflows Tags
Home	🕂 New 🚹 Upload 💋 Sync 📢	🜍 Share More 🗸		
Notebook	All Documents ···· Indexed	Q		
Documents				
Pages	V 🗋 Name	Add a document		×
Recent	Gastess Duschasing Demissions	Choose a file		
Calendar	Contoso Purchasing Permissions			Browse
Custom	Document 🕱		Add as a new version to existing files	
Tasks	IMrktStrategy	Destination Folder	10401	
Announcements	Marketing Strategy Future		/CAS/	Choose Folder
Site contents	MrktPrinciples			
Recycle Bin	NWCustData	Version Comments		
EDIT LINKS	Pre-release Memo			
Exit classic experience				OK Cancel

In the Modern Experience, you can add new files by creating them using the Office Web Apps or by uploading them. When adding new, you can even use a link to the file instead of having the file in multiple places:

365 Demos								
+ New ~	🖉 Quick edit 🖻 Shar	e 📀 Copy link	记 😳 Sync 🞍 Download	01				
Folder								
Word document								
Excel workbook		Title 🗸						
PowerPoint presentation OneNote notebook Excel survey	iew.docx asing Pe	65 Demo	os					
Uink	docx	+ New \sim	↑ Upload ✓ Ø Quick e	dit 🖆 Share	👁 Copy link 🧔 Synd	± Download	Export to Excel	_ Flow \checkmark
 Edit New menu + Add template 	tegy Fut .pptx	Docume	Files Folder					
NWCustData.	xlsx	۵	Template		Title \checkmark		Modified \smallsetminus	
		Blog Post preview.docx					January 17	
	nts		Contoso Purchasing Permis	sion			January 17	

When uploading, you can choose to upload an entire folder.

Creating new files in the Modern Experience

To create a new file, click on the **New** dropdown in the action bar:

365	5 Demos								
	+ New ~ 🕂 Upload ~	🖉 Quick edit	🖻 Share	🕲 Copy link	G Sync	↓ Download	x		
	Folder								
	Word document								
	Excel workbook		Title \checkmark						
	PowerPoint presentation	iew.docx							
	🗊 OneNote notebook	asing Permission	F						
	Excel survey			lata a sti sa st	Markin - Ct				
	🕀 Link	docx	8 :	International	Marketing St	rategy			
	🖉 Edit New menu	tegy Future.docx							
	+ Add template	.pptx		Contoso Mar	keting Princip	oles - Confidential			

As soon as you click on **Word document**, **PowerPoint presentation**, or **Excel workbook** and the new document opens, that document will be automatically saved to SharePoint with its default name. For example, Excel files are named Book (followed by a number if this one isn't the first). If you rename it, it will be renamed during the next autosave.



Using links is a great way to add access to a file that needs to be in multiple places. Using a link instead of adding that file to multiple places ensures that you have the single source of truth. Remember, adding a link to a document to multiple places does not mean that everyone with access to the library will have access to the file via the link. In order for a person to access the file via the link, they must have permission to, at least, view the file.

 □
 Image: Create link to

 Create link to
 ×

 Enter the link to the webpage or file

 Recent
 Image: Checklist for Litware Legal Analysis

 Image: Image: November-December Ad Proposals

 Image: Contoso Patent Template

 Image: Audit of Small Business Sales

You can also create a new folder or a link using any URL:

When you click on one of the Office file types, it opens a new file in the browser. If you need to open this file in the full version of Office, click on the **Open in word** link above the ribbon. In this example, **Word Online** is open so you would click on **Open in Word** to open the file in the full version of Word on your desktop. In the browser, the file will autosave as you are typing so there is no save button:

	Word Onl	Word Online Office 365 Demos > CAS												
File	Home	Insert	Layou	t 🍃 R	eference	es	Revie	w	View	He	lp	Open	in Wo	ord
9~	Ê~ 💖	Calibri	(Body)	~ 1	1 ~	A^	Ă	в	Ι	U	₽v	<u>A</u> ~	Aç	

Clicking on the **Open in word** link, will open the file in the full version of the Office app on the computer that you are on. If you are on a computer with Office 2010, it may not open since Office 2010 is on the brink of reaching the end of its life (as of April 2019):



An Office version older than 2010 most likely will not open. Office 2013, 2016, and 2019 (depending on the build version) will open but you may not have access to features such as **AutoSave**.

Uploading files in the Modern Experience

Click on the **Upload** dropdown in the action bar and you get the choice to upload files or folders:



Using the **Files** action will only allow you to upload files but not folders. The **Folder** action allows you to upload a folder with its contents.



It will copy subfolders if those folders contain files. If the subfolder is empty, it will not be copied.

Editing files

In a library, you can edit items in two ways: through the form and through **Quick Edit** mode. Let's look at both of those ways in the Classic and Modern Experiences.

In the Classic Experience, you can edit the file or its properties in two ways. One way is to click on the checkbox next to the file and then, on the **Files** tab, choose **Edit Document** to edit the document or **Edit Properties** to edit the metadata of the file. The other way is to click on the more options menu next to the file and then on the next one on the preview window and choose either **Open in Word**, **Open in Word Online**, or **Properties**:





Properties are another word for metadata or columns. Some of the metadata/columns, such as **Modified**, may be system-created and cannot be modified; only user-created metadata/columns can.

In the Modern Experience, you can edit the file in three ways. One way is to click on the checkbox next to the file and then either click on the **Open** dropdown for options to **Open in Word or Open in Word Online** on the action bar. Alternatively, click on the **Details Pane** icon and then on **Edit all** in the **Properties** section. Click the **Edit all** button to go from **View** mode to **Edit** mode:

365 Demos						☆ Not following 🖻 Share
Copy link ↓ Download	B Delete p ^r ^a Flow ∨ −	😂 Pin to top 📑 M	ove to 🔹 Copy to	🖉 Rename 🛛 …	^	1 selected X 👽 🛈
Name Blog Post preview.doc-	Title 🗸		Modified >> January 17	Modified By \checkmark MOD Administrator	+ Add co	February 15
Contoso Purchasing Permission	Open > Preview	Open in Word Onlin Open in Word	ne nutes ago ago	Megan Bowen Megan Bowen		This letter is to convey permissions for the fol account for purchases of less than \$100.0 . Katie Jordan
IMrktStrategy.docx Marketing Strategy Future.docx	Share Copy link Download	15/	2 hours ago January 17	Megan Bowen MOD Administrator		4 Views Has Access
MrktPrinciples.pptx NWCustData.xlsx	Delete Flow >	Confidential	2 hours ago 2 hours ago	Megan Bowen Megan Bowen		C C C C C C C C C C C C C C C C C C C
Pre-release Memo.docx	Pin to top Move to		January 17	MOD Administrator		Properties Edit all
	Copy to Rename Version history					Name * Contoso Purchasing Permissions.docx
	ilert me					Apply retention label Choose a label
× .	Details		0	365UserGuideSection5SP - Wo	rd] > ´ <	More details

The other way is to click on the open menu next to the file and then on the next one on the preview window; then, either hover over **Open** for options to **Open in Word** or **Open in Word Online.** Alternatively, click on **Details** further down the drop down which will open the **Details** pane where you cannot **Edit all** in the **Properties** section.

Deleting files

In the Classic Experience, you can delete an item by clicking the checkbox next to the item, clicking on the **Items** tab, and then clicking the **Delete Item** button on the ribbon or clicking the open menu next to the item, and then on **Delete Item** from the dropdown:



In the Modern Experience, you can delete an item by clicking the checkbox next to the item and then clicking the **Delete** button in the action bar:

🖉 Edit 🖻 Share 🔏 Copy link 📋 Dele	ete 💅 Flow 🗠 \cdots		
Announcements	show actions $_{ m ody}$ \sim	Expires \checkmark	Modified ─ + Add column
📀 Tax Day is Coming! ビ	E Don't forget to do you taxes this weekend (or get an extension)!		About an hour ago
	Open E lit S are Copy link Copy field to clipboard Delete Flow > Alert me More > Details		

You can also delete an item by clicking on the **Show actions** menu next to the item and then clicking on **Delete** from the dropdown.

Naming conventions

Best practice is to keep the file's **Name** as short as possible and then have the **Title** as the long, descriptive name. When you upload a document, it may already have a long name. The easiest way to implement best practice is to put the library in **Quick Edit** mode after uploading the file, drag the dot in the lower-right corner over to the **Title** field, and then restructure the **Name** field:

~	D	Name	Title			
	1	Blog Post preview				
	P	Contoso Purchasing Permissions	\triangleright			
		Document 🗱				
	۲.	IMrktStrategy	International Marketing Strategy			

The reason for the best practice is because the **Name** field is tied to the URL of the file and, traditionally, the URL path could not go beyond 255 characters or all types of problems would occur. Older SharePoint had no way to mitigate the issue, so it was up to the users to do so. Present-day SharePoint has some safeguards and improvements to help mitigate the issue, but the best practice is still best practice.



Although the **Title** field comes with every library, by default, the **Title** field is not in the view. If it is missing, ask your SharePoint admin to add the field to the view right after the **Name** field, as shown in the preceding screenshot.

Version history

Nowadays, by default, SharePoint libraries track version history automatically, which means the following is true:

- No more saving the same file that you modified with a different name; simply save a modified file with the same name
- Past versions can be viewed and restored, if needed
- Up to a certain number of versions of each document will be tracked



If you are concerned that version history has not been turned on or are double-checking because your SharePoint is a bit older, talk to your SharePoint administrator. To see the version history of a file, click on the open menu next to the file and choose **Version History** from the dropdown:



From there, you may, depending on your permission level, be able to **View**, **Restore**, and **Delete** previous versions of a file.

Checking files in or out

This feature allows users to check in/check out files so that only the person who has it checked out can edit the file. When this feature is turned on, it is on for the entire library and every file can only be edited by one person at a time.

It is important for you to remember to check the files back in once you are finished working, so others can work on them when necessary. The SharePoint admin can check in files for you but you should not rely on them.



Checking out

In the Classic Experience, click on the more options menu next to the item, and then on the next more options menu on the preview window; then, hover over **Advanced** at the very bottom of the dropdown, and click on **Check Out**, or click on the checkbox next to the file, and then on the **Files** tab; then, click on **Check Out**:



In the Modern Experience, click on the checkbox next to the file; then click on the more options menu in the action bar, and then click **Check Out** from the dropdown:

🗱 Open 🖂 🖄 Share 🗣 Copylink 🗼 Download	d 🚺 Delete 🖉 Flow 🗸	-19 Pin to top 📑 N	Nove to 🜓 Copy to	🖉 Rename \cdots				
Documents > CAS								
D Narie V	$\tau \kappa_{e} \vee$		Modified V	ModiFied by ∨ + J	Add column			
Blog Post preview.docx			January 17	MOD Administrator				
😆 🤹 Contoso Purchasing Permission	Open	>	January 17	MOD Administrator				
Document.docx	Preview		• 35 minutes ago	Megan Bowen				
IM/ktStrategy.docx	Share 🦢	в	• 45 minutes age	Megan Bowen				
Marketing Strategy Future.docx	Devnload		January 17	MOD Administrator				
2 MrktPrinciples.pptx	Deute	Confidential	 45 minutes age 	Mogan Bowen				
NWCustDataxisx	Haw	>	 45 minutes ago 	Megan Bowen				
Pre-release Memo.docx	Pin to op		January 17	MOD Administrator				
	Move to							
	Copy to							
	Version history							
	Alertme	Properties						
	More	Workflow						
	Details	Compliance detail	s					
		Check out	¢	Open 🌱 네 Share 🤏 C	opylink 🛓 Download 🕅 Del	iete 🖉 Flow 🗸 🖘 Pin to top	🖪 Move to 🔹 Copy to	Ø Rename
			0	Documents > CAS				Version history
				Namo ∨			Modified \vee	Medified By
				Blog Post preview			January 17	MOD Admin
				🛛 💽 Contoso Purchasi	ing Permission		January 17	M00 Administrator

You can also click on the **Show actions** menu next to the file, hover over more at the very bottom of the dropdown, and then click on **Check Out**:



Checked-out files in the Classic and Modern Experiences are denoted with a green box with a white arrow.

Checking in

In the Classic Experience, check the box next to the file; then, on the **Files** tab, click on **Check In** or click on the more options menu; then, on the next one on the preview window; then hover over **Advanced** at the bottom of the dropdown and click on **Check In**:



You can also **Discard check out** but be aware that it will delete the file if it is a newly-uploaded file.
Choose whether you want to retain the check out so you can keep working, but check in your changes; then type in your comments about your change(s) and SharePoint will do the rest!

əəheck in		×
Retain Check Out Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.	Retain your check out after checking in?	
Comments Type comments describing what has changed in this version.	Comments:	

It is best practice to be descriptive in your comments. Those comments can be seen in **Version History** and can help a person determine what is different in that version, instead of having to view the version itself.

In the Modern Experience, click on the checkbox next to the file; then click on the more options menu on the action bar, and then click **Check In** from the dropdown or click on the **Show actions** menu next to the file; hover over more at the very bottom of the dropdown, and then click on **Check In**:



Type in your comments about your change(s) and SharePoint will do the rest:

₽	ß	Name 🗸	Title \vee			Modified >
	٥	Blog Post preview.docx				January 17
•	6	Contoso Purchasing Permission	Open	>		January 17
	Ð	S Document docx	Preview			About an P
		bocamentatica	Share			
	۵	IMrktStrategy.docx	Copy link		17	About an P
	۵	Marketing Strategy Future.docx	Download			January 17
	R	MrktPrinciples.pptx	Pelete		Confidential	About an F
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			Move to			
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			Version history	r	Properties	
			Alertme		Workflow	
			More	>	Compliance details	
			Details		Discard check out	
					Check in	
	_	ر	טווושע כט	>		
			🕼 Open 🗸	🖻 Share	👁 Copy link 🛓	Download
			Documer	nts > CA	S	
				Name V		
			Q.]	Blog Post p	preview daws	
			0 -5	Contoso Pu	urchasing Permission.	

Whether you are in the Classic or Modern Experience, you may be asked to choose whether you want your version to be a major or a minor version. This will only occur if the library is configured for major and minor versions or just major versions.

Coauthoring

Coauthoring is how you and your colleagues can work on the same document at the same time. Coauthoring is awesome when you are in a work environment where everyone can collaborate in such a manner due to the collaborative culture of your organization. Also, requirements play a part in whether coauthoring is a good solution. There are times when a document is so sensitive that only one person should edit it at a time. If you find that coauthoring may be a great way to work, you and your organization should be aware of the following:

- It is recommended that no more than 10 concurrent users edit at a time. The absolute max is 99.
- If 99 coauthors have opened a single document to edit at the same time, each user after that will see a **File in use** error and the file will only open as read-only.
- More than 10 co-editors will lead to a gradually-degraded user experience with more conflicts, and users might have to go through more iterations to successfully upload their changes to the server.
- Excel is a special application and has more restrictions than other applications, so you will not be able to do some things when coauthoring.
- Coauthoring is on when **Check in/Check out** is off. **Check in/Check out** is an allor-nothing capability. If it is on, then it is on for the entire library, but that is not so for Coauthoring. If Check in/Check Out is off, then Coauthoring is on but users can still **Check in/Check out** single files as necessary.
- You can coauthor in Word, PowerPoint, Excel, and OneNote, as well as in their online versions.

Sharing files

In SharePoint, you may have the ability to share a file with others. In others words, you would be giving access to others at the level of access, view, or edit, that you choose, but you might not have the ability to remove or edit that access once set. Depending on the way your organization set up your account, you may also have the ability to give access to others outside of your organization.



File sharing is not a best practice and should be used with care. See the warning about *The Danger of the Share Button* in Chapter 17, More on Using SharePoint.

Giving access

You can share a file via the **Share** button inside or outside of the file itself:

	Comment Copy link Download Delete of How V Documents > CAS Ecompetities Image: State Name V Title V Image: State Title V Title V Image: State Image: State Title V Image: State Title V Title V Image: State </th
Comparison Name Open Save As Transform Print Stare About	Document Swed Smplified Ribbon Megan Bowen 7 Tell me what you want to do Share Comments Image: Share Image: Share Comments Image: Share Image: Share Comments Image: Share Image: Share Image: Share Image: Share Image: Share Image: Sh

If you are outside the file, you need to select the file first.

Any way that you go, you will get the same popup. Through this popup, you can choose the way you want to share. Let's look at the options at the bottom of the popup first:



One option is to click on **Copy Link**. This will automatically copy the link to the file, which you can paste anywhere, such as in an email.



The person receiving the link must have permission to access the file or the link will not work for them.

The other option is to click on the **Outlook** button at the bottom, which will open a new email via Outlook, or your default Mail app, with the file automatically attached.

Now let's look at the main options at the top. You can see all of the options available by clicking on the bar that says **Anyone with the link** can edit. Once you choose your options, click the **Apply** button and it will take you to the first screen where you can add the name(s) (if internal to your organization) and/or email(s) (if external to your organization) and an optional message, and then click the **Send** button:



Once sent, the person(s) you listed will get an email from the system that they can use to access the file.

Editing or removing access

Once access is given, you may not have the ability to pull it back unless you have the necessary permission level. You may be able to see the permission by clicking the check box next to the file, then on the **Details** pane icon, and looking in the **Has Access** section. You may even be able to click on the **Manage Access** link to see more details:

회 Open 🗸	🖻 Share 👁 Copy link 🞍 Download 🚺	🗓 Delete 🖉 Flow 🗸 - 🏳 Pin to top 📑	Move to 🚺 Copy to	🖉 Rename 🛛 …		1 selected X Y 🛈
D					^	Contoso Purchasing Permissions.dorx
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Ľ	Name \checkmark	Title \vee	Modified \smallsetminus	Modified By \smallsetminus	+ Add co	
٦	Blog Post preview.docx		January 17	MOD Administrator		February 15
0 -	Contoso Purchasing Permission		January 17	MOD Administrator		This letter is to convey permissions for the fol account for purposes of less than \$100.00.
٦	Document.docx		* 35 minutes ago	Megan Bowen		Katle Jordan
۵	IMrktStrategy.docx	International Marketing Strategy	★ 45 minutes ago	Megan Bowen		
a)	Marketing Strategy Future.docx		January 17	MOD Administrator		Has Access
	MrktPrinciples.pptx	Contoso Marketing Principles - Confidential	# 45 minutes ago	Megan Bowen		e & & 🔍 🔍 🐐 👁 ጰ
۵	NWCustData.xlsx	Northwind Customer Data	★ 45 minutes ago	Megan Bowen		This item has been shared with guests Manage access
۵	Pre-release Memo.docx		January 17	MOD Administrator		R
						Properties Edit all

Editing and removing permissions in SharePoint is the responsibility of a person at the level of power user and up, which is outside of the scope of this book.

Move to

This is a fairly new capability that has been a great help to many users and is only available in the Modern Experience. This capability allows you to move files and/or folders from place to place. Once you have chosen the file(s) and/or folder(s) you want to move, click on the **Move To** button in the action bar. A side panel will open; here, you can choose where you want to move your file(s) and/or folder(s) to:

Demo	S				_	Move 1 item × © Contoso Purchasing Permissions.docx Places
🕼 Open 🗸	🖻 Share 🐵 Copy link 🛓 Download 🧯] Delete ⊿ ^a Flow ∨ -⊐ Pin to top 📑 N	love to 🛁 Copy to	🖉 Rename \cdots		Choose a destination
Docume	ents > CAS					Current Library Your OneDrive
D	Name 🗸	Title \checkmark	Modified \smallsetminus	Modified By \smallsetminus	+ Add o	Contoso
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0	Contoso Purchasing Permission		January 17	MOD Administrator		Office 365 Demos
	الح Document.docx		★ 35 minutes ago	Megan Bowen		AdvancedeDiscoveryDemo
٥	IMrktStrategy.docx	International Marketing Strategy	* 45 minutes ago	Megan Bowen		Electronic Events
5	Marketing Strategy Future.docx		January 17	MOD Administrator		Contoso Insider
Ø	MrktPrinciples.pptx	Contoso Marketing Principles - Confidential	★ 45 minutes ago	Megan Bowen		Contoso Marketing Central
8	NWCustData.xlsx	Northwind Customer Data	★ 45 minutes ago	Megan Bowen		Business Development
۵	Pre-release Memo.docx		January 17	MOD Administrator		Browse sites

You can move to another folder in the library you are in, other places in SharePoint, or even to your OneDrive for Business.



This is a move, not a copy. After the operation is completed, the file(s) and/or folder(s) will no longer exist in the original place.

You must have access permission of at least Contribute level to complete this operation. In order to see a list of available SharePoint sites, you must be following that site. If you have access to the site but are unable to follow the site, contact your SharePoint Administrator to see whether that feature can be turned on.

Copy to

Like move to, this is a fairly new capability and has been a great help to may users, but it is also only available in the Modern Experience. This capability allows you to copy files and/or folders to other places. Once you chose the file(s) and/or folder(s) you want to copy, click on the **Copy To** button on the action bar. A side panel will open; here, you can choose where you want to copy your file(s) and/or folder(s) to:

365 Demos				Copy 1 item × Contoso Purchasing Permissions.docx Places
🕼 Open 🖂 🖻 Share 🔏 Copy link 🛓 Download 🖡	🗊 Delete 👦 Plow 🖂 🕫 Pin to top 📑	Move to Copy to	0 Rename ···	Choose a destination
Desumente > CAS				Current Library
Documents > CAS				lour OneDrive
🗅 Name 🗠	Title \sim	Modified \vee	Modified By \searrow + Add o	Contoso
Blog Post en view.docx		January 17	MOD Administrator	00 Office 365 Demos
Contoso Purchasing Permission		January 17	MOD Administrator	oo Office 365 Demos
Document.docx		* 35 minutes ago	Megan Bowen	 AdvancedeDiscoveryDemo
IMrktStrategy.docx	International Marketing Strategy	* 45 minutes ago	Megan Bowen	Electronic Events
Marketing Strategy Future.docx		January 17	MOD Administrator	Contoso Insider
MrktPrinciples.pptx	Contoso Marketing Principles - Confidential	* 45 minutes ago	Megan Bowen	Mark 8 Project Team
NWCustData visx	Northwind Customer Data	* 45 minutes ago	Megan Bowen	Contoso Marketing Central
		1	MOD Administration	Business Development
Pre-release Memo.docx		January 17	MOD Administrator	Browse sites

You can copy to another folder in the library, other places in SharePoint, or even to your OneDrive for Business.

This is a copy, not a move. After the operation is completed, the file(s) and/or folder(s) will exist in the original place as well as the place you copied them to.



You must have access permission of at least Contribute level to complete this operation. In order to see a list of available SharePoint sites, you must be following that site. If you have access to the site but are unable to follow the site, contact your SharePoint Administrator to see whether that feature can be turned on.

Summary

In this chapter, you learned about the libraries that you get out of the box with SharePoint and the most-used functions you need to know about as an end user. For more on SharePoint, go to https://support.office.com and click on SharePoint.

In Chapter 16, *More on Using SharePoint*, we are going to explore other things you can do in SharePoint, such as creating alerts, links, and personal views.

16 More on Using SharePoint

We have already looked at a lot of the capabilities and features of SharePoint, but there is still more you should know as an end user. In this chapter, we are going to explore more capabilities, such as exporting to Excel and setting alerts. We are also going to look at the different ways you can find data in SharePoint and the dangers of using the **Share** button.

In this chapter, the following topics will be covered:

- Quick edit mode
- Exporting to Excel
- Creating a link
- Creating personal views
- Switching between views
- Different ways to find data in SharePoint
- Site contents
- Recycle bin
- The danger of the Share button
- SharePoint permissions and what they allow you to do
- How to request access

Quick edit mode

Quick edit mode is a way to put your list or library into a spreadsheet-like mode where you can easily make edits as in an Excel spreadsheet.

In the Classic Experience, on the List or Library tab, click on the Quick Edit button:

BROV	VSE	L	IST					
			🎲 Modify View 🧅	Current View:		\bigcirc		
View	Ouick	Create	합 Create Column	All items *	Tags &	E-mail a	Alert	RSS
Tien	Edit	View	🦳 Navigate Up	< Current Page >>	Notes	Link	Me +	Feed
View F	Format		Manage Vi	ews	Tags and Notes	Sha	are & Tra	ck
Hom	ne		÷	new annound	cement or	edit th	is list	

In the Modern Experience, on the action bar, click **Quick Edit**:



Once the **Quick Edit** is initiated, you can edit the list in a spreadsheet-like manner:

~	∕ Exit quick edit								
	~	Title	Client POC	Project Name					
		Amnesty International, USA	none	Media Training					
		Enterprise Community Partners	Vrunda Vaghela	Opportunity360					
		Society of NeuroInterventional Surgery	none	Agendy of Record					
		University of South Florida		Making Connections for Mental Health and Wellbeing Among Men and Boys Initiative in the U.S.					
		League of Women Voters of the United States	none	Convention Video					
		League of Women Voters of the United States	none	Event Concept Paper					
		Equal Measure	none	New Connections					
		SAMHSA/Center for Mental Health Services	none	Education for Social Inclusion Initiative: Voice Awards					

There are a few things to note here:

- This operation can be done on lists and libraries.
- You can copy from a cell or cells just as you can do in Excel by clicking on the dot in the lower-right corner and dragged across the cells being copied to. See the preceding screenshot.
- You can copy and paste cells and/or columns from an Excel spreadsheet. You can even copy and paste all columns from an Excel spreadsheet as long as all of the columns match in the number of columns, the order of columns, and the type of columns.

You can exit **Quick Edit** by clicking **Exit quick edit** in the Modern Experience or the **Stop** link in the Classic Experience.

Exporting to Excel

You can export a list or a library to Excel. This can be very useful for reporting purposes.

In the Classic Experience, in the List or Library tab, click on the Export to Excel button:

BRO	BROWSE														
View	Quick Edit	Create View	Modify View 💄 Treate Column	Current View: All items * Current Page >>	Tags & Notes	E-mail a Link	Alert Me +	RSS Feed	Connect to Outlook	Export to Excel	Open with Access	Form Web Parts - Edit List	List Settings	Shared With	Workflow Settings -
View	Format		Manage Vi	iews	Tags and Notes	Sh	are & Tra	ck		Connect	t & Export	Customize List		Setting	s
Hor	Home (new announcement or edit this list														

In the Modern Experience, in the action bar, click **Export to Excel**:

If you are prompted to confirm the operation, click **OK**.

In the File Download dialog box, click Open:

What do you want to do with query.iqy? From: vancomm.sharepoint.com	Open	Save	^	Cancel	\times

You may be prompted to enable data connections on your computer. If you think the connection is safe, click **Enable**.

There are few things to note here:

- I recommend exporting the **All items** view and then filtering the list or removing columns in Excel.
- An Excel table is created with a data connection based on a web query file (.iqy). Save the file as a .csv or .xslx file to prevent issues that can arise from the .iqy file type.
- The columns in the export are determined by the current list view.
- Filters will not apply to the export. Once data is exported, you can use the filters in Excel.

- Any page limits are ignored.
- This export is a snapshot in time. The data in the spreadsheet will not refresh as things change in SharePoint.

Now that we have learned how to export a file to Excel, let's see how to create a link.

Creating a link

Using links is a great idea for adding access to a file that needs to be in multiple places. Using a link instead of adding that file to multiple places ensures that you have the single source of truth. Using links only works in the Modern Experience.



Adding a link to a document to multiple libraries does not mean that everyone with access to the library will have access to the file via the link. In order for a person to access the file via the link, they must have permission to, at least, view the file.

Go to the list or library of your choice and, in the action bar, click **New** and then choose **Link** from the dropdown:



Once the **Link** choice is clicked, you can type or copy in any link you want, or choose from some of the choices you are presented with:

		20		Croate) link to
	${}_{\mathrm{p}^{\mathrm{d}}}$ Flow \checkmark \cdots			Enter ti	he link to the webpage or file
Library				Recent	
	Modified \smallsetminus	Modified By \smallsetminus	+ Add column	w	Details Pane edited by Nikkia Carter
				w	Intranet-RecycleBin edited by Nikkia Carter
				w	Filtering, Sorting, and Groupi edited by Nikkia Carter

If you type or copy in a link, the system will give the link a default name before it is created. You can choose to accept the link name or change the name to something else, then click **Create**:

×	×
Create link to 1%20Documents/Forms/AllItems.as ×	Create link to
File name	File name
Create	nn Create

If you choose from one of the system-provided choices, the link will be created without giving you the opportunity to change the link name, but you can rename the link afterwards by clicking on the open menu (the three dots) and choosing **Rename** from the dropdown:

	×	Scotters Sportung	ibrar .
		\square Name \checkmark	Share odif
	Create link to	CompanyResources.url	Copy link De
		Intranet-DetailsPane.url	Elete
	File name		Pin to top
	Intranet-DetailsPane .url		Move to
Add column	Creating your link 🔓		Copy to Rename
-			Version history

This operation can be done on lists and libraries, inside of the actual list or library. This action cannot be done via a list or library web part:

Contacts			
Company Calendar			
Company Resources			
Government BD		- lim	Se
Non-Government BD Ouals	$+$ New \sim $\overline{\uparrow}$ Upload \sim $\stackrel{?}{\Rightarrow}$ SF	hare 🐵 Copy link 🧔 Sync 🚺 Export to Excel	\equiv All Documents \vee
Site Contents	Folder	Modified \checkmark Modified By \checkmark	
Recycle bin Edit	Word document Mord document Excel workbook PowerPoint presentation		
	OneNote notebook Excel survey		

If you are on a page and want to easily get to that web part's list or library, click on the **See all** link on the right side of the web part.

Alerts

An alert is a notification that lets you know when things have changed or have been added in SharePoint lists/libraries. These notifications can be very useful. One way they can be helpful is for use with issues tracking project tasks, or tasks lists. If you are responsible for responding to trouble tickets or tasks when they are submitted, you will likely want a notification as soon as an item is created or edited. An alert can be set on the entire list or library, or on specific files or items.

Creating alerts

In the Classic Experience, click on the **List** or **Library** tab, and then on **Set alert on this list** or **Set alert on this library** under the **Alert Me** drop down to set on the entire list/library; alternatively, click the checkbox next to item(s) or file(s), and then on the **Items** or **Files** tab; click on **Set alert on this item** or **Set alert on this file** under the **Alert Me** dropdown to set on item(s) or file(s):



For an entire list or library, fill out this form and click **OK**:

Alert me when items change		
Alert Title Enter the title for this alert. This is included in the subject of the notification sent for this alert.	OK C	ancel
Send Alerts To You can enter user names or e-mail addresses. Separate them with semicolons.	Users: MOD Administrator x	
Delivery Method Specify how you want the alerts delivered.	Send me alerts by: © E-mail admin@M365x810302.onmicrosoft.com © Text Message (SMS) © Send URL in text message (SMS)	
Change Type Specify the type of changes that you want to be alerted to.	Only send me alerts when: All changes New items are added Existing items are modified Items are deleted 	



You'll probably want to leave the **Title** as is so or may add the site name so you can manage them easier later.

You can set alerts for yourself and/or others. If you set them for others, you will not be able to manage the alerts unless you are a site owner or above.

For items or files, fill out this form and click OK:

Send Alerts for These Changes Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.	Send me an alert when: Anything changes Someone else changes a document Someone else changes a document created by me Someone else changes a document last modified by me
When to Send Alerts Specify how frequently you want to be alerted.	Send notification immediately
(mobile alert is only available for immediately send)	 Send a daily summary Send a weekly summary
	Time: Tuesday V 2:00 PM V
	OK Cancel

You may have noticed that the form for the item or file, and the list or library are slightly different but are basically the same.

Managing alerts

To manage your alerts, first go to the **List**, **Library**, **Files**, or **Items** tab of any list or library in the site where you set your alert; then click on **Manage My Alerts** on the **Alert Me** dropdown:

BRO	WSE IT	EMS L	IST								
New Item +	New Folder	View Item	Edit Item	C Version Hist Shand With	Attach File	Ale	rt •	Tags & Notes	Workflows Approve/Reject		
N	lew		M	anage	Activ as	Shi 🔔	Set al	ert on this item	Workflows		
Hor Not	Home Home new announcement or east tris list										
_				All item	New view			Find an item	2		
Doo	cuments			✓ Tit	e			Body			Expires
Pag	es						_	body			Expires
Rec	ent			🗸 Ta	x Day is Comi	ng!		Don't forget	to do you taxes this wee	kend (or get an extension)!	
	Calendar										

[399] -

 Home
 Communities
 Search

 My Alerts on this Site ()
 ()

 Modern Calendar
 Add Alert | X Delete Selected Alerts

 Site Assets
 Alert Title

 There are currently no alerts to display.

You can delete and modify alerts here as well as create new ones:

To modify an alert, simply click on the alert and make changes to the form. To delete an alert, click the checkbox next to it and then click **Delete Selected Alerts**.



I highly recommended that you create them using the method detailed in the *Creating alerts* section.

More on views

When working in a list or library, you may wish that you could change the way the list or library looks by doing things such as ordering the columns differently, hiding or showing columns, grouping items or files, or hiding the folders. As an end user, you can create your own views on any list or library you have access to. A personal view is a view only you have access to and can see. You can create up to 10 personal views per list or library. Let's look at how you can create your own personal view.

Creating a personal view

Once in the list or library of your choosing, there are three ways get to the page where you can create a new view: via the Classic Experience, via the Modern Experience, or via the list or library **Settings**.

To get to the page for creating a new view in the Classic Experience, click on the **List** or **Library** tab (or the **Calendar** tab), and then click on the **Create View** button on the ribbon:

BROWSE	LIST					
View Quick Edit	Current View: Current View: Current View: Current View: Current View: All items • All items •	Tags & Notes	E-mail a Alert RSS Feed	Connect to Excel	Form Web Parts - Edit List	List Shared Settings With Workflow Settings -
View Format	Manage Views	Tags and Notes	Share & Track	Connect & Export	Customize List	Settings
Home Notebook Documents	new annound All items New View	ement or	edit this list d an item	٩		
Pages Recent Calendar	 Title Tax Day is Comir 	ıg! ☆ ⊷•	Body Don't forget to do you	taxes this weekend (or get an extension	Expires Modified)! Yesterd	ay at 10:06 PM



You can use the **Modify View** button to modify any personal views or, if you have the required permission level, public views. Clicking on that button will take you to the same page you will go to in order to create a new view. You just need to make sure you have switched to the view you want to edit first.

To get to the page for creating a new view in the Modern Experience, click on the **View Options** menu on the right side and then click on **Save view as**:



Give the view a name and click the **Save** button. You will be switched to that new view. Next, you will want to edit it, so click on the **View Options** menu again and then on **Edit current view**:



Depending on your permission level, you may have the ability to make a view a public view, which everyone can see. If you don't have the required level of permission, you either won't see the checkbox option or it will be greyed out.

You can use the **Edit current view** option to modify any personal views or, if you have the required permission level, public views. Clicking on that option will take you to the same page you will go to in order to create a new view. You just need to make sure you have switched to the view you want to edit first.

The last way to get to the page for creating a new view is through the list or library's **Settings**.

In the Classic Experience, click on the **List** or **Library** (or **Calendar**) tab and then on the **Settings** button:

BROWSE	LIST					
View Quick Edit	Create View Navigate Up Current View:	Tags & Notes	E-mail a Alert RSS Link Me + Feed	Connect to Export to Outlook	Form Web Parts	List Shared With Settings -
View Format	Manage Views	Tags and Notes	Share & Track	Connect & Export	Customize List	Settings
Home Notebook Documents Pages	new annound All items New View Title	Find	edit this list d an item Body	A start this weakand (or get an actanging	Expires Modi	fied
Recent Calendar	Tax Day is Comir	g! # •••	Don't forget to do you	taxes this weekend (or get an extension)! Yeste	rday at 10:06 PM

Next, choose the type of view you want to create or use an existing view as your starter:



In the Modern Experience, click on the gear icon and then on **List Settings** or **Library Settings**:



Once on the Settings page, scroll down to the Views section and click on Create View:

Viev A vie	vs ew of a list allows you to see a particular selection of items or	to see the items sorted in a particular order. Views currently conf	gured for this list:	
Vie	v (click to edit)	Default View	Mobile View	Default Mobile View
All I Nev	ems v Gew	~	~	~
= C	reate view			



If you want to modify any personal views or, if you have the required permission level, public views, click on the view and it will take you to the same page you will go to in order to create a new view. Once on the **Edit View** page, you will have a lot of options for creating the new view. First things first, give it a name:

Home / roor lines Settings > Edit View ©		
Name Type a sine for the line of the line. Make the raise discuption, such as "Softed by Autor", as that she values will now what to expect when they club this line.	Drive OC Canon Vere Name: New York I	
	Now for a sum to the answer the assumet theory Name to save an explore, such as "Sound 1, Advar", is the site values with the appendixes they stall the save	OK Gever View kanner My View Make file for Goldat view Digities to pholic view onja
	Auferen Sons freugissen eine sonsente file entweldt auferste for trei own	View Audience: Contra & Personal View Personal views are intended for your use only. Contra its Palitic View Public views care be visited by anyone using the site.



Depending on your permission level, you may have the ability to make a view a public view, which everyone can see. If you don't have the required level of permission, you either won't see the radio button option or it will be greyed out. If you do have the option to make the view public, you can choose to make the view the default view so it will be the first one a user sees when they go to the list or library.

Next, you can choose which columns would like to show in the view and in what order:

Columns			
Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the Position from left box.	Display	Column Name	Position from Left
\triangleright	\checkmark	Title (linked to item with edit menu)	1 🗠
	\square	Body	2 🗸
		Expires	3 🗸
		Modified	4 🗸
		App Created By	5 🗸
		App Modified By	6 🗸
		Attachments	7 🗸
		Compliance Asset Id	8 ~
		Content Type	9 🗸
		Created	10 🗸
		Created By	11 🗸
		Edit (link to edit item)	12 🗸
		Folder Child Count	13 🗸
		ID	14 🗸
		Item Child Count	15 ~
		Item is a Record	16 🗸
		Label applied by	17 🗸
		Label setting	18 🗸
		Modified By	19 🗸
		Retention label	20 🗸
		Retention label Applied	21 🗸
		Title	22 🗸
		Title (linked to item)	23 🗸
		Type (icon linked to document)	24 🗸
		Version	25 🗸



Make sure you check the box next to all columns you want to show in the view or they will not even if you change that column's order.

In the next two sections, you can choose to **Sort** by a primary and/or secondary column in ascending or descending order and/or to **Filter** by one or many columns in ascending or descending order. Click on **Show More Columns...**to add more columns to filter by:

⊒ Sort	
Select up to two columns to determine the order in which the items in the view are displayed. Learn about sorting items.	First sort by the column:
	Modified \checkmark
	Show items in ascending order (A, B, C, or 1, 2, 3)
	 Show items in descending order (C, B, A, or 3, 2, 1)
	Then sort by the column:
	Show items in ascending order (A, B, C, or 1, 2, 3)
	C Show items in descending order (C, B, A, or 3, 2, 1)
	□ Sort only by specified criteria (folders may not appear before items).
B Filter	
Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type [Today] or [Mei] as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for fists containing 5,000 or more items because the value value view with lawn filter more difficult. Lawn of the first clause in order to the tite filter of the value	Show all items in this view
uestage any woor you to note maningerate more entoring count moves meeting rema-	O Show items only when the following is true:
	Show the items when column
	None 🗸
	is equal to
	○ And ● Or
	When column
	None
	is equal to
	Show More Columns

In the next three sections, you can choose to enable **Tabular View**, to **Group By** a primary and/or secondary column in ascending or descending order in a specified number of collapsed or expanded groups by default per page and/or to **Totals** certain columns in order to calculate the **Count**, **Average**, **Maximum**, **Minimum**, **Sum**, **Std Deviation**, or **Variance**:

Tabular View Choose whether individual checkboxes for each row should be provided. These checkboxes allow users to select multiple list items to perform bulk operations.	Allow individual item checkboxes	
Group By		
Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. Learn about grouping items.	First group by the column: None Show groups in ascending order (A, B, C, or 1, 2, 3)	
Δ.	C Show groups in descending order (C, B, A, or 3, 2, 1)	
77	Then group by the column: None V	
	Show groups in ascending order (A, B, C, or 1, 2, 3)	
	C Show groups in descending order (C, B, A, or 3, 2, 1)	
	By default, show groupings:	
	Number of groups to display per page:	
🖼 Totals		
Select one or more totals to display.	Column Name	Total
	Expires (Average supported in datasheet view only)	None ~
	Modified (Average supported in datasheet view only)	None ~
	Title	None ~

In the last three sections, you can choose to change the **Style**, to show the items in **Folders**, if any, and/or to change the number of items to display. Click the **OK** button to save your view:

🖼 Style	
Choose a style for this view from the list on the right.	View Style: Basic Table Bowed, no labels Bowed Newsletter, no lines Shaded Preview Pane Default
Folders Specify whether to navigate through folders to view items, or to view all items at once.	Folders or Flat: Show items inside folders Show all items without folders
Item Limit Use an item limit to limit the amount of data that is returned to users of this view. You can either make this an absolute limit, or allow users to view all the items in the list in batches of the specified size. Learn about managing large list.	Number of items to display: 30 © Display thems in batches of the specified size. O Limit the total number of items returned to the specified amount.
	Delete OK Cancel

Here is the result:

+ New	🚺 Export	t to Excel 👦 🖉 Flow 🗸 🚸 PowerApps 🗸					\equiv New View \vee	V	()
Anne	ounce	ments							
	> 1	Fitle \vee	Body $\!$	Expires \smallsetminus	Modified \smallsetminus	+ Add column			
	∽ Mod	lified By: Megan Bowen (1)							
	1	fax Day is Coming!	Don't forget to do you taxes this weekend (or get an extension)!		Yesterday at 10:06 PM				

In this view, I added Grouping on the Modified column.

Switching between views (to view, edit, or delete)

There are three ways to switch the view: two ways via the Classic Experience and one way via the Modern Experience.

In the Modern Experience, click on the **View Options** menu in the upper-right corner and choose the view you want:



In the Classic Experience, click on the **List** or **Library** tab, then on the **Current Views** dropdown to choose the view you want, or, under the **+New** button, click on the view you want:

BROWSE	UST									
View Quick Edit View Format	Create Columnia All items Manage Vie All items Manage Vie All items Manage Vie All items Manage Vie All items Manage Vie All items	E-mail a Alert RSS Link Me - Freed Share & Track Connect & Export to Connect & Export Connect & Export &	:							
Home Notebook Documents	Home Notebook Documents Personal New View Find an item P									
		All items New View Find an item P Title Modify this View Tax Day is Coming! Create View get to do you taxes this weekend (or get an extense	iion)!							

More views may be available in the more options dropdown.



To edit or delete a view, switch to it before opening it in edit mode. If you want to delete it, a **Delete** button is located at the top or bottom of the **Edit View** page.

The different ways you can find data

When searching in SharePoint, you have two main ways to find data:

- Via the site
- Via the list or library

Besides searching, you also have the ability to find things by using **Filtering**.

Let's look at all three of these ways.

How to use list/library filtering

Instead of searching, you may want to filter the list or library by the metadata columns in the list or library. To do so, click on the drop-down arrow of the column you want to filter by, hover over **Filter By**, and choose from the options:

Sales & Marketing	Sales and Marketing								
	$+$ New \checkmark $\overline{\uparrow}$ Upload	🖉 Quick edit	G Sync \cdots		\equiv All Documents \vee				
Name 🗸		Modified \checkmark	Modified By \checkmark	Checked Out To $ \smallsetminus $	Document Type 💛 🛛 Rating (0-5)				
Asia Q2 Sales.xlsx		October 16	Ben Walters		A to Z				
Asia Q4 Sales.xlsx		October 16	Ben Walters		Z to A				
Carbon 3D Printin	g Proposal.docx	October 16	Lidia Holloway	Internal	Filter by > * *				
Contoso Denver E	xpansion.pptx	October 16	Miriam Graham	Marketing	Group by Document Type * *				
Contoso Electroni	cs Product List.xlsx	October 16	Miriam Graham	Sales	Column settings > 🖈 🖈				

To release the filter, hover over the column, click on the dropdown, and choose **Clear filters**. Repeat to clear any and all filters you want to clear.

$ abla$ Document Type \smallsetminus	Rating (0-5)
	++++
A to Z	
Z to A	*:
Filter by	>*:
Clear filters	*:
Group by Document	t Type \star
Column settings	>*

You can filter multiple columns at once.

How to use searching in a list/library

The search box for the list or library only searches the list or library you are in:



In the Classic Experience, if items were very recently added to the list or library, they may not show up in a search immediately. They may need to be indexed by the system or manually. The system usually crawls every 156 minutes.

How to search sites in SharePoint

This search will search the contents of the current site you are in and any sub-sites' contents and their sub-sites, down the hierarchy. If you are at the top of the site collection, it will search the entire site collection. For more details, see *The Anatomy of the SharePoint Page, The Classic Page Anatomy, Search,* and *The Anatomy of the SharePoint Page, The Modern Page Anatomy, Search* portions of Chapter 13, *Understanding SharePoint.*

Searching via the SharePoint home

This search will search across all site collections you have access to. For more details, see *The SharePoint Home* and *Search* section of Chapter 13, *Understanding SharePoint*.

Site contents

The **Site contents** shows you the contents of the site you are currently in. It will show you the site's lists, libraries, apps, and sub-sites.

In the Classic or Modern Experience, go to **Site Contents** by clicking the link on the left navigation:

s>	Site co	ontents					540	ion this site	۵ *		
Home	Lists, Librar	ries, and other Apps					SITE WORKFLOWS	Ø SETTINGS	RECYCLE BIN (3)		
Pages Recent) •	add an app	Announceme 182n Modified 26 to	M3 NIS 499	Calendar D Items Mudified 25 hours o	#20	Contacts Oliterns Modified 26 hours ago				
Custom Tasks		Custom Diterrs	Demo Docs Biteros		Documents 1 inves		Form Templates 0 items				
Contacts Announcements	шш	and the most ago	OD Office 3	65 Demo	S						☆ Not following
Site contents		JT Design Documents									
Recycle Bin		3 items Modified 8 months ago	₽ Search	$+$ New \sim						🚮 Site usage ု Site workflow	ers 🔘 Site settings
			Home	Contents	Subsites						
			Documents	D	None	Type	Iterus	Modified			
			Pages		Demo Docs	Document Monary		1/17/2019 1	2:07 AM		
			Site contents	-6	Documents	Document library	4	4/12/20193	MA 41		
			Recycle bin	-8	Form Templates	Document library	0	1/15/2019 7	29 AM		

You can also click on the gear and choose Site contents from the dropdown.

The recycle bin

In SharePoint, the recycle bin functions similarly to how it works in Windows. When you delete a file or item from a library or a list, it goes to the recycle bin.

In the Classic or Modern Experience, click on **Recycle Bin** on the left navigation or, if the link isn't there, go to **Site content** (also on the left navigation or under the gear) and click on **Recycle Bin** in the upper-right corner:

5>	Site contents					Search	n thi ste 🔹 🔎	
Home	Lists, Libraries, and other Apps					SITE WORKFLOWS OF SETTINGS 💿 RECYCLE BIN (2)		
Notebook Decunges Pages Recent Calendar	acd an app	Announcemen 1 km ModTed 261 or	ts n ege	Calendar Ditoms Mootfied 25 hours ago		Contacts 0 items Modified 26 hours ago		
Custom	Custom **	Demo Docs Sittens		Documents 1 items		Form Templates 0 items		and the second se
Contacts Announcements	Modifed 26 hours ago	OD Office 3	65 Demos	-				t Not following
Site contents Recycle Bin	JF Design Documents 3 items	O Gawth	ala Mara V					A Chaurana C Ghaunakhaur C Chaushian Roosta
A CONTRACTOR OF	****	Home Notebook	Contents Subsites					a servey of serveral of servery of regime
	*******	Documents	D Nove	ly ly	(pe	Rens	Modified	
	*******	Poges	Demo Docs	P	ocument Morany		1/17/2019 12:07 AM	
	· · · · · · · · · · · · · · · · · · ·	Site contents	Cocuments	De	ocument library	9	4/12/2019 3:14 A.M	
		Recycle bin	🗟 Form Templa	145 D:	ocument library	0	1/15/2019 7:09 AM	

In the **Recycle Bin**, you can choose an item:

🗎 Del	ete	Sestore			
Rec	cycl	e bin			
		Name	Date deleted \downarrow	Deleted by	Created by
0		NikkiDoc.docx	9/26/2018 2:32 PM		

To restore a deleted item in the recycle bin, simply click it and click **Restore**.

To delete an item permanently from the recycle bin, select it in the recycle bin and click on **Delete**.



Items stay in this recycle bin for 30 days, unless manually deleted, then go the site-collection administrator's recycle bin and stays there for 30 days, unless manually deleted. After that, consider it gone. The site-collection administrator's recycle bin is only accessible to site-collection admins and above.

ť	Dim Empty recycle bin										
	Recycle bin										
		\square	Name	Date deleted \downarrow	Deleted by	Created by	Original location				
			NikkiDoc.docx	9/26/2018 2:32 PM			Shared Documents				
	\bigcirc		Document4.docx	9/26/2018 2:32 PM			Shared Documents				
		e *	Presentation.pptx	9/12/2018 5:29 AM			Shared Documents				
			New Resources Right Here.docx	9/12/2018 5:28 AM			Shared Documents				

You can delete all of the contents of the recycle bin by unselecting any checked items and clicking the **Empty Recycle Bin** link.

The danger of the Share button

When you share a file using the **Share** button, you may inadvertently break the permission structure, leaving a mess for the person trying to make sure everyone has proper permissions, and/or give permission to someone you shouldn't. This is one of those powers that you need to consider very carefully before using. Do not assume that it is OK to use just because it is enabled. If you find you have the ability to share with anyone, you may want to check with your organization's leadership before proceeding.
Just like any other power, you should try your best to use it wisely. Consider using the least-needed access rule. This is where you give the least amount of access needed. When determining the access you should give, ask yourself these questions:

- Does the person you wish to share with need to edit the file or just view the file?
- If the person only needs to view the file, should they be able to download it as well or should that ability be blocked?
- Does that person need access for a long time or would it be better to set an expiration?
- If you created an anonymous link, would bad things happen if the link is shared with unintended parties or somehow gets "out into the wild"?

SharePoint permissions and what they allow you to do

SharePoint's access control is made up of permission levels and security groups.

Permission levels are groupings of permissions that give a user the ability to have a certain level of access to be able to do certain things. Here is a list of permission levels, straight from SharePoint. Most levels are out of the box but some are custom-made:



Groups are collections of users who have the same permission level. The use of groups greatly enhances and simplifies the permissions-management process for administrators. It is easier to manage groups than to manage the permission of every user individually.

As a member of a site, you usually have unrestricted access to all the content of the site; however, certain lists or libraries on the site may be restricted for security purposes.

How to request access

When you are denied access to a resource, you might not have to find the correct administrator's email address, identify the resource you want access to, and compose an explanation on why you need access. If the **Let us know why you need access...** window opens when you try to access something in SharePoint, you can enter information pertaining to the access you would like to request, and your request will be routed automatically:



Make sure you include all of the details in the preceding screenshot. Including all of these details will help with speeding up the request.



Sometimes this box is not wired correctly to send notifications to the right person or they may miss the notification. I would not wait longer than a couple of days before reaching out and, if I had to reach out, I would notify the SharePoint admin that I had sent the request using the **Let us know why you need access...** form so that the problem can be corrected for the next time a request is sent this way.

Summary

In this chapter, we looked at more capabilities, such as exporting to Excel and setting alerts. We also looked at the different ways you can find data in SharePoint and the dangers of using the **Share** button. Then we discussed the permissions levels that give access, and how you can request access when needed.

For more on SharePoint, go to https://support.office.com and click on SharePoint.

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