365 Ninja's

Ultimate Guide to

Office 365

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Introduction

Welcome to our Ultimate Guide for Office 365!

The first thing you should keep in mind when viewing this guide is that it is a **living document**. This means that it will continue to be updated as Office 365 evolves. We recommend that you save a shortcut to the Ultimate Guide's location, and only download or print when necessary. If you must, be sure to check the "last updated" date on the title page to ensure you've got an up-to-date copy.

The second thing to note is that this guide will focus on **Office 365 for Business** and its accompanying **Office 2013** applications. It includes information for IT administrators, end users, and everything in between. When it's relevant, you'll see information about the online/web app versions of Office applications, as well as mobile apps. If you're and Office 365 user on a home or personal plan, you'll still find useful material here.

The Ultimate Guide for Office 365 is divided into several sections, by application and a few other useful categories. In each section, you'll find helpful links that direct you to external sites with information on relevant topics. Some of these links lead to Ninja videos, some to Microsoft resources, and some to other useful sites that we've assessed as reliable and educational.

Just as on 365ninja.com, we are always receptive to new ideas, questions, and anything else you'd like to share. If you have feedback related to this document, don't hesitate to email ninja@365ninja.com or reach out on social networks.

Thanks,

365 Ninja

Contents

Getting started

Welcome to the most powerful and valuable suite of cloud-based business productivity software! If you're just getting started with Office 365, there are a lot of great resources out there to support you. This section will give you a few resources for getting started on Office 365 for Business and the accompanying Office 2013 applications.

The beginning

- Get started with Office 365: video and guides cover the basics of reading email, sharing documents, and more.
- What's the difference between Office 365 and Office 2013?
- How to sign in and sign out of Office 365: the basic action of signing in and out, explained in a quick video.
- Download and install Office 2013 desktop apps: watch this video to install Office 2013 using Windows 8.1.
- Check the Office 365 system requirements
- Do you have earlier Office versions? Set them up to work with Office 365 here.
- Use Office 365 on your phone or tablet.
- What's new in Office 2013: if you're used to a previous version of Office, this page will help.
- The basics of Office Online: AKA Office Web Apps, this page from Microsoft provides some useful overview information.
- Use Office Online to work together: this page offers some written tips for getting started with sharing in Office Online.
- Office Touch Guide: using a touchscreen? Check out this guide.
- Change your account settings in Office 365 like your password or language: written instructions on changing your personal and admin settings in Office 365.
- Can you run Office 2013 without internet access?
- What does Office 365 have that Office 2013 doesn't?

Basic tasks and features: Here are a few things you can do in Office 365 and Office 2013 as you are getting started in order to customize your experience and make everything run a little more smoothly.

- Personalize your online experience by changing your theme
- Add or change a profile photo
- Change the default home/landing page
- Customize the theme and colors of Office 2013 apps
- Learn about the Office Ribbon
- Disable or remove the start screen of Office 2013 apps
- Customize the Quick Access Toolbar
- Change the authors of a document
- Clear the recent document list

OneDrive for Business / SharePoint

OneDrive for Business is the "work version" of Microsoft's OneDrive storage solution, built on top of **SharePoint** architecture. The difference between OneDrive and SharePoint can be a little difficult to pin down, mostly based on the name and the way we talk about the two components, but we worked to de-mystify it for you with this Ninja post.

OneDrive tasks and features:

- Free webinar: 10 Ways to Work More Efficiently in OneDrive for Business
- Save to OneDrive for Business
- Sync and find OneDrive for Business files
- Stop or pause syncing
- Use OneDrive as your default auto-recover location
- Technical overview of OneDrive for Business in SharePoint Server 2013
- Create sharing links for OneDrive and SharePoint documents
- Require others to sign in to view shared documents

SharePoint tasks and features: If you're using SharePoint with your Office 365 tenant, there's a lot you can do, both on the end user side and the administrator side. These links will help you get started.

- Introduction to document libraries
- Update profile and privacy settings
- Follow content
- Move multiple/bulk files
- Start using a list
- Create and set up a list (note that you'll need permission to add an app to the site in order to create a list)
- Create and manage a blog
- Organize and configure a library
- Post to a newsfeed within your organization
- Post to a team site feed

Outlook

Many of us think of Outlook as simply email, but it also includes a calendar, task manager, contacts manager, and more. It's been around since the early 90s, and now it's part of Office 365 as both Outlook Online (also known as Outlook Web App) and Outlook 2013.

- Overview of supported email programs and features
- Set up your email account in Outlook 2013
- Webinar on the Outlook Web App

Tasks and features: Outlook includes the actual mailbox, as well as your contacts and calendar. We've got links on these three areas of Outlook, plus some tips on search and mail management, and a few links specific to Outlook Online (AKA the Outlook Web App).

Mail

- Change the view (layout) of your inbox, calendar, or other folder
- Change the layout of the preview pane
- Change your message preview settings
- Change what your unread messages look like
- Show your calendar and tasks in the inbox
- Prevent the first message from being automatically selected
- Create a folder
- Fonts and spell check in email messages
- Add hyperlinks to email messages
- Insert and format tables
- Send and open attachments
- Send or delete mail stuck in your mailbox
- Recall and replace sent messages
- Restore deleted emails
- Send automatic replies when you're out
- Enable the Bcc and From fields
- Group conversations together in your inbox
- Use email categories for organization
- Use rules
- Track email with read receipts
- Password protect your mailbox
- Turn off your email notification sounds
- Disable incoming desktop notifications
- Attach an email to another email or meeting invite
- Create a signature
- Open replies in a new window
- Set replies to always open in a new window
- Customize your spam filter with the safe senders list
- Forward/redirect your mail to a different account

- Create a new profile

Contacts

- Add and use contacts
- Import and export vCards (virtual business cards)
- Create contact groups/distribution lists

Calendar

- Calendar basics
- Create meetings
- Add holidays to your calendar
- Share your calendar with others
- Check coworkers' schedules

General search and management

- Tips for Outlook search webinar
- Use Instant Search to find messages
- Use Instant Search to find contacts
- Use Instant Search to find calendar items
- Create or delete a search folder
- Archiving items webinar

Online/Web App-specific

- Built-in Outlook filters: all, unread, to me, flagged
- Add an image to your signature in Outlook Web App
- Sweep

Skype for Business / Lync

Microsoft's instant messaging client is **Skype for Business**, which replaced **Lync** in 2015. Skype for Business is used for basic instant messaging as well as group chat, voice calls, and video conferencing. We're keeping our Lync archive below, but it will be removed in 2016.

Lync tasks and features:

- Set up Lync
- Install Lync
- Open Lync
- Sign in to and out of Lync
- Set your conversation history
- Set up your audio and set up your video
- Add a contact in Lync
- Send an instant message
- Check someone's availability
- Change your presence status in Lync
- Add your mobile number
- Change your password
- Make and receive a Lync audio call
- Make or receive a video call
- Find a previous Lync conversation
- Disable Lync conversation history
- Set up a Lync Meeting
- Join a Lync Meeting
- Share your desktop or a program in Lync

Skype for Business tasks and features: Get familiar with the new Skype for business—make calls, schedule meetings, share files, and more.

- Quick Start guides
- Install Skype for Business
- Start a call
- Make and receive calls
- Schedule a video/audio call
- Add contacts
- Send IMs
- Record meetings
- Share your screen or program
- Control access to your presence info
- Set Call Forwarding options

Word

With dozens of releases on multiple platforms dating back to the 80s, Microsoft **Word** has extensive reach and history. Used across cultures and demographics, the word processing app is both simple and powerful. In Office 365, it lives purely on the cloud as Word Online, as well as in a familiar (cloud-connected) desktop version as Word 2013.

- Word 2013 Quick Start Guide

Tasks and features: Go from starting a basic document to adding advanced features like styles and taking actions like mail merge.

- Create a document
- Landscape vs. portrait orientation
- Custom margins
- View the ruler
- Basic Table of Contents overview
- Add page numbers
- Alphabetize a list
- Add, reply to, and complete comments
- Track changes
- Work with word counts
- Create labels
- Footnotes
- Mirror margins
- Use find and replace
- Create a resume
- Turn off paragraph marks and formatting symbols
- Intermediate Table of Contents
- Using Styles
- Watermarks
- Basic mail merge + advanced mail merge + next level mail merge
- Advanced Table of Contents
- Collapsible headings
- Delete an unwanted blank page
- Create a dynamic form
- Use Word 2013 to open up a Google Doc
- Convert a Word doc to a PDF
- Edit PDFs with Word
- Migrate Gmail contacts to Outlook

Online/Web App-specific
- Introduction to Word Web App
- Top tips for working in Word Online

- Basic tasks in Word Online
- Collaboration and co-authoring
- Web App training on Lynda.com (note: cost associated)

Excel

Excel and spreadsheets are practically synonymous. At its most basic, it is a data tool comprised of a grid of cells arranged into rows and columns, but quickly gets more complicated with features including calculation, graphing, pivot tables, and Visual Basic. (Note: VBA is not covered in this guide.) Excel serves the needs of many different users and industries.

- Excel 2013 Quick Start Guide

Tasks and features: The possibilities are endless with Excel, but we'll get you

started with some of the most useful things you can with this tool. Check out the Web App-specific links for some advice if you're not using Excel 2013 (though we recommend that you do in order to take advantage of all of Excel's features).

- Create a workbook
- Freeze or lock panes
- Insert a line break
- Add hyperlinks
- Make text appear on multiple lines (wrap text) in a cell
- Create a chart
- Create a drop-down list
- Understand and use cell references
- Insert headers and footers
- Sort and filter data
- Remove duplicate values
- Split or merge cells
- Print worksheets and workbooks
- Create a survey
- Add numbers
- Basic math
- Password protect workbooks and worksheets
- Use Auto Fill and Flash Fill
- Replicate/concatenate data across cells
- Add or subtract time
- Average a group of numbers
- Simplifying your Excel data webinar
- Use conditional formatting
- Advanced conditional formatting
- VLOOKUP
- Advanced IF functions
- Array formulas
- Create and manage drop-down lists
- Create a PivotTable and analyze data
- Understanding the Excel Data Model webinar

- Understanding Power Pivot webinar
- Work with macros

Online/Web App-specific
- Top tips for working in Excel Online
- Basic tasks in Excel Online

PowerPoint

Microsoft **PowerPoint** has long been the go-to application for presentations and slideshows, with a final product that can be printed, displayed on a computer or video projector, and/or navigated through by a presenter. Slides can include text, graphics, sound, movies, and other objects, and movement is included via transition of elements and slides as well as custom animation.

- PowerPoint 2013 Quick Start Guide
- 5 steps to a better PPT
- How to create beautiful slides (even if you're not a designer)

Tasks and features: Learn to love PowerPoint! With these tips, you can go beyond simple slides with text and images (though you can learn to do that, too) and create beautiful, dynamic presentations.

- Create a presentation
- Apply and change a theme
- Duplicate, hide, or delete slides
- Apply transitions between slides
- Add sound effects to a transition
- Highlight text and change fonts
- Print slides, notes, or handouts
- Use Presenter view
- Backgrounds
- Change the size of a slide
- Crop a picture to fit a shape
- Working with watermarks
- Working with handout masters
- Video in PowerPoint webinar
- Juggling multiple PowerPoints webinar
- Add bullets to text
- Add headers and footers
- Animate text
- Animate pictures, art, and other objects
- Using animation webinar
- Design motion paths
- Add sound effects to an animation
- Create a flow chart
- Create an org chart
- Install a template
- Create a template from a presentation
- Insert a bar chart, line chart, or pie chart
- Rehearse timings for a slide show

- Use the laser pointer during a slide show
- Trigger an animation effect
- Use slide masters to customize a presentation
- Embed a PPT presentation on a webpage

Online/Web App-specific
- Introduction to PowerPoint Online
- Basic tasks in PowerPoint Online

OneNote

OneNote is a free-form note-taking application that has awesome capabilities. You can take basic notes, but you can also take your notes to the next level with drawings, screen clippings, images, links, and embedded files. OneNote will help you stay organized.

- OneNote 2013 Quick Start Guide
- Intro webinar
- Basic tasks in OneNote Online

Basic tasks and features:
Once you master the common actions you can take with OneNote, you can really personalize your experience and make OneNote work for you. Take the first steps with these links, and then explore your possibilities.

- Create a notebook
- Change the default font type and size
- Using tables
- Save and sync notebooks to OneDrive
- Sharing with OneNote webinar
- Add links
- Take screenshots
- Pull text out of images
- Password-protect OneNote
- Email your OneNote notes pages
- Use OneNote to take awesome meeting notes
- Embed an Excel spreadsheet
- Create to-do lists
- Make and share shopping lists
- Capture audio and video
- Create an Outlook 2013 Task From OneNote
- OneNote Clipper extension for Google Chrome
- OneNote for students webinar
- OneNote for holiday planning webinar
- Onetastic for OneNote webinar
- Use OneNote for a business training (as a student)
- Use OneNote for a business training (as a trainer)

For IT pros

IT administrators have a wide variety of responsibilities when it comes to managing Office 365. While this guide doesn't cover every single task an IT pro might deal with, we're providing some links that should cover the breadth of your work.
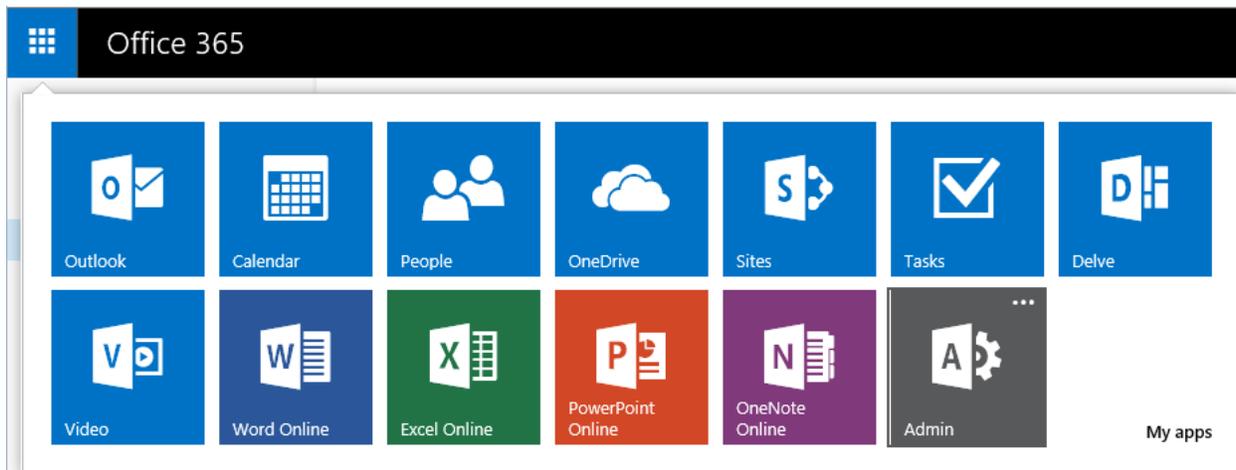
Start with 365 Ninja's admin-centric posts by clicking here.

Resources and training

- Check the system requirements for Office 365 ProPlus and Office 2013.
- Get started with O365 using FastTrack.
- Ignite Guides for Office 365 provide great introductions.
- Check out Office 365 training from Microsoft Learning.
- Browse the Office 365 courses on Microsoft Virtual Academy.
- Follow the Garage Series for Office 365 for a fun take on technical topics.
- Office 365 on TechNet is a great resource for articles and information.
- Scroll through Technet's library of articles on Office 365.
- The Office 365 community has many valuable resources, including this Manage Office 365 wiki.
- Stay security-minded with the Office 365 Trust Center.
- Get some FREE eBooks from Microsoft.
- Training from Pluralsight on Office 365 administration. (Note: this training has a fee.)
- Training from Lynda.com on Office 365 administration. (Note: this training has a fee.)
- Learn about using PowerShell to manage O365 and advanced to some scripts for managing users.

Staying ahead of the curve

- Watch out for known issues.
- Get early updates for your users.
- Keep an eye on the Office 365 roadmap from Microsoft.

Other apps and platforms

Access

Access is a database management system that Office 365 users may use in a few different ways. Access Web App allows users to build a database in Access, then use and share with others as a SharePoint app in a web browser.

- Access 2013 Quick Start Guide
- Access training courses
- Basic tasks for an Access app
- Basic tasks for an Access 2013 desktop database

Project

Project is a project management program that assists PMs in planning, assigning tasks, tracking progress, budgeting, and analysis. Project Pro for Office 365 is available as a subscription through Office 365.

- Project 2013 Quick Start Guide

Publisher

Publisher is a desktop publishing application that emphasizes page layout and design. 2013 provides new ways picture and text effects.

- Publisher 2013 Quick Start Guide

Visio

Visio is Microsoft's diagramming and flow chart application. Visio 2013 has updated diagram templates, new styles and themes, and other useful tools.

- Visio 2013 Quick Start Guide

Office for Mac

- Word
- PowerPoint
- Excel
- Outlook

Office for mobile

- Overview of Office on mobile devices
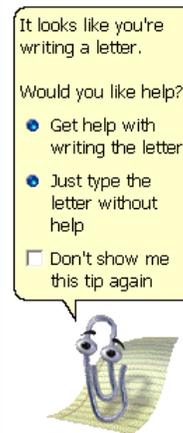- Use Office 365 on any device

New & fun

Check back here for information and links to new Office 365 products and features, interesting news, and some fun odds & ends that will keep you busy.

- Office Sway is a new presentation tool that looks like a sophisticated big sister of PowerPoint. Microsoft announced Sway in October 2014 and the preview became generally available in December.
- You may have noticed Delve in your Office 365 tenant. It's been described as "a new way to discover relevant information and connections from across your work life." Basically, it's an app that uses Office Graph to surface the most useful and relevant information you've been working on in a card-like interface. And what's Office Graph? It's the machine-learning component that actually powers Delve. You can learn more on the Office Blogs.
    - How to Use Delve: Finding People and Information
    - How to Use Delve: Grouping and Sharing Documents

Just for fun

- Add Clippy and friends to any website.
- Find Clippy in Office 2013.
- Discover past Easter eggs in Microsoft products.
- Rob Schneider in Microsoft ads, playing Google docs? It's true.
- Check your humor proficiency level with Microsoft.
- See beautiful art created in Excel.
- Read a passionate defense of PowerPoint.
- Outlook calendar trivia

It looks like you're writing a letter.

Would you like help?

- Get help with writing the letter
- Just type the letter without help

☐ Don't show me this tip again

Conclusion

Office 365 is a powerful and trustworthy full-service productivity suite with a wide variety of capabilities for IT pros, power users, and true beginners. At Office 365 Ninja, we love the opportunities and challenges that Office 365 brings to businesses. We hope you've found our Ultimate Guide to Office 365 useful, relevant, and comprehensive.

For more information on 365 Ninja, please visit 365ninja.com or email ninja@365ninja.com.