Getting Started with Microsoft 365

Microsoft 365 Training

Getting Started with Microsoft 365- TEAMS - One Drive – SharePoint Collaberation

Getting Started with Microsoft® 365

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ABOUT THIS COURSE

Course Prerequisites

This manual assumes the user understands the basics of using a Windows-based computer. Students should be comfortable using the keyboard, mouse, and Start menu. Understanding and experience with printing and using a web browser is an asset, but not required.

Course Overview

Welcome to our "**Getting Started with Microsoft 365**" courseware. Microsoft 365 is Microsoft's cloud-based productivity tool, which incorporates online services with online apps, desktop apps and other Microsoft tools.

This course is intended to introduce users to Microsoft 365 and get started with basic tasks. They will become familiar with the apps and services included in a business subscription, file storage with OneDrive, and how to manage users, domains, and security.

Course Objectives

By the end of this course, users should be comfortable with logging into and out of their accounts, and modifying basic account settings. They will become familiar with the apps and services available in their subscription and how to communicate with others using OneDrive, as well as perform administrative tasks (such as managing users and groups within Microsoft 365), manage domains, and use the Security and Compliance Center.

How to Use This Book

This course is divided into five lessons. Each lesson focuses on several key topics, each of which are broken down into easy-to-follow concepts. At the end of each topic, you will be given an activity to complete. At the end of each lesson, we will summarize what has been

covered and provide a few review questions for you to answer. Supplemental learning for selected topics is provided in the form of Lesson Labs at the end of this book.

Before you begin, download the course's Exercise Files to a convenient location. They will be referenced throughout this course and are a key part of your learning experience.

LESSON 1:
GETTING STARTED

Lesson Objectives

In this lesson you will learn how to:

- Navigate your account

- Find help and change your account settings

- Use desktop apps with Microsoft 365

TOPIC A: About Microsoft 365

Welcome to our Microsoft 365 courseware! With a robust selection of common business tools and the flexibility to suit the needs of most organizations, Microsoft 365 is used in many organizations.

Topic Objectives

In this session, you will learn:

- What Microsoft 365 is

- What is included in Microsoft 365

- What the requirements are for Microsoft 365

- Answers to frequently asked questions

What is Microsoft 365?

Microsoft 365 is a subscription-based and online ("cloud") version of the popular Microsoft suite of software. As Microsoft 365 is based in the cloud, you will connect to it using a browser and go to work. As soon as you set up an account, everything is online and ready to be used.

Microsoft 365 offers online and desktop versions of Word, Excel, PowerPoint, OneNote, and Outlook, while still offering desktop versions of other popular Office applications. Also included are additional tools that allow you to join forces with other users to allow for greater collaboration amongst your team. You can work on the same document at the same time using co-authoring features, send instant messages, as well as communicate through voice and video chat. As all your documents are saved online to the cloud, you will be able to access all your files from anywhere with an Internet connection. Microsoft 365 is configured to work with most smartphones, and tablets to offer a true portable workspace.

Microsoft 365 has become increasingly popular amongst organizations both large and small. and offers a variety of different plans to best suit organizations of any size. Microsoft 365 Family and Microsoft 365 Personal plans are intended for general consumers, while Microsoft 365 Apps for Business, Microsoft 365 Business Basic, and Microsoft 365 Business Standard are aimed at small- to medium-sized businesses. Larger organizations can choose Microsoft 365 Apps for Enterprise, and Office 365 E1, E3, and E5.

What is Included in Microsoft 365?

What is included with Microsoft 365 depends entirely on the subscription that your organization has obtained. While each of these subscriptions offers different features and levels of services, all but **Microsoft 365 Business Basic** and **Office 365 E1** include the essential Office apps – Word, Excel, PowerPoint, and One Note. Along with these, you will be able to access cloud-based services, management tools, and lots more.

Assuming your organization is using the Microsoft 365 Business Standard plan, you will also have access to always up-to-date desktop versions of Word, Excel, PowerPoint, Outlook, and OneNote. Most plans also include a host e-mail, web conferencing and instant messaging, 1 TB of OneDrive cloud storage, and lots more.

What are the Requirements to Use Microsoft 365?

While Microsoft 365 is based in the cloud, to enjoy its full benefits, Windows 8 or Windows 10 are required. Internet access is needed to install or activate Microsoft 365 and manage it. Perhaps most importantly, a compatible browser is needed. Recent or current versions of Microsoft Edge, Firefox, Safari, or Google Chrome are all compatible with Microsoft 365.

Frequently Asked Questions

What is the Cloud?

The cloud is a commonly used term to describe an off-site file hosting service. While working with Microsoft 365, you are uploading and synchronizing files with OneDrive – Microsoft's own cloud service. This service can then be accessed anywhere, using any device, offering the ultimate portable office. In addition, OneDrive is inherently more secure than a local copy (on your computer) of your work as Microsoft enforces strict backup procedures to ensure that you never lose your data.

What are the differences between Office for the Desktop, Office Online, and Microsoft 365?

Chances are that you have previously used a desktop version of an Office product as this is the way Microsoft has worked for decades. Both Office Online and Microsoft 365 are different (and recent) additions that add a whole new level of functionality. Office Online is a free service that is available to anyone with a Microsoft account (https://office.live.com.) This version of Office allows you to view and edit files in a limited fashion on devices that do not have a desktop version of Office installed.

Microsoft 365 is a subscription-based service that delivers a more robust suite of services and tools that combine Office Online and Office for the desktop. It includes the functionality that the desktop version of Office delivers, while maintaining web-based access, multi-device support, and enhanced collaboration tools that make Microsoft 365 an attractive solution.

What Office file formats are compatible with Microsoft 365?

Microsoft 365 enjoys full compatibility with any files that were created with Office 97 or later. However, opening Microsoft 365 files in Office 2007 and earlier might result in some features being unsupported.

How secure is Microsoft 365?

While working with a cloud-based product such as Microsoft 365 can naturally raise security questions, Microsoft 365 offers the same user-level security options and Trust Center as the desktop version. Using the Right Management Service (RMS) you can enable encryption and set permissions. Microsoft's OneDrive servers are in very secure and specialized data centers where physical and virtual security is strictly regulated. In fact, it can be argued that for small- to medium-sized businesses, Microsoft 365 offers much better security than the traditional options that such organizations can typically afford to implement on their own.

All Microsoft 365 applications protect your data with encryption that is fully compliant with accepted industry (ISO) standards. You can also choose to implement controls to enforce and comply with HIPPA (US Health Insurance Portability and Accountability Act) and FERPA (US Family Educational Rights and Privacy Act) protocols and standards.

Can Microsoft 365 be used offline?

While Microsoft 365 is primarily intended to be used in tandem with the internet, it can be used in a limited capacity offline. Desktop versions of Office apps that you have downloaded through Microsoft 365 can be used offline but must be connected to the internet every 30 days to maintain your subscription. You will be warned before this timeframe elapses. Any features that rely on internet connectivity, such as OneDrive or the many collaborative tools that are available, cannot be used offline.

TOPIC B: Navigating Your Account

Once you are given the credentials to access your Microsoft 365 account, you can begin using it. In this lesson, you will learn how to log into (and out of) your account, navigate around the Microsoft 365 interface, and update your profile information.

Topic Objectives

In this session, you will learn:
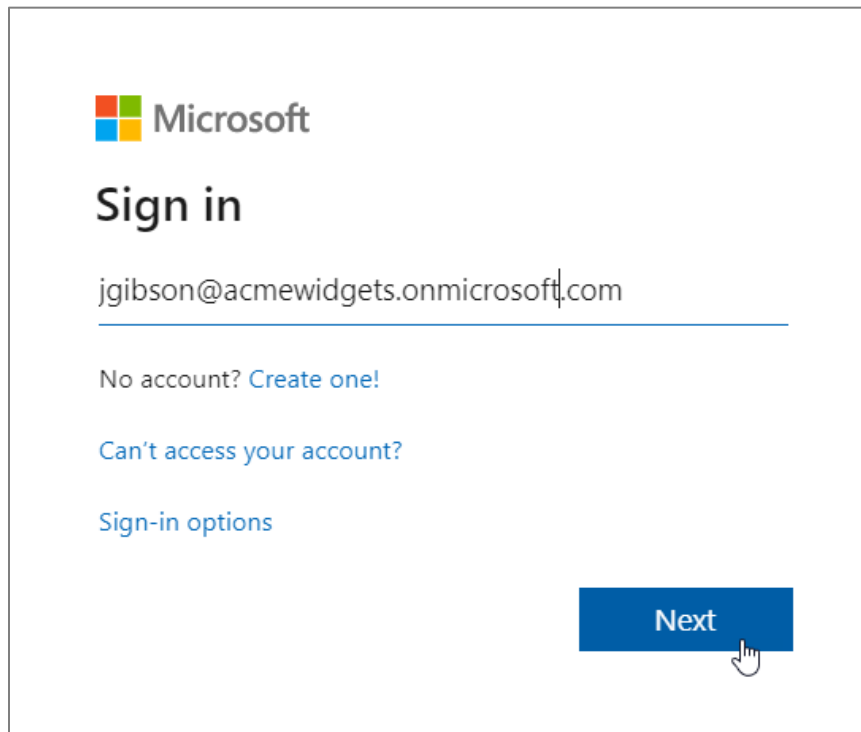
- How to log into Microsoft 365

- How to navigate the Microsoft 365 landing page

- How to update your profile

- How to log out of Microsoft 365

Log into Microsoft 365

To use Microsoft 365, you will be given a username and password to access your online account. Once you have this information, open your browser (Edge, Firefox, Chrome, etc.) and then open the login page at https://login.microsoftonline.com:
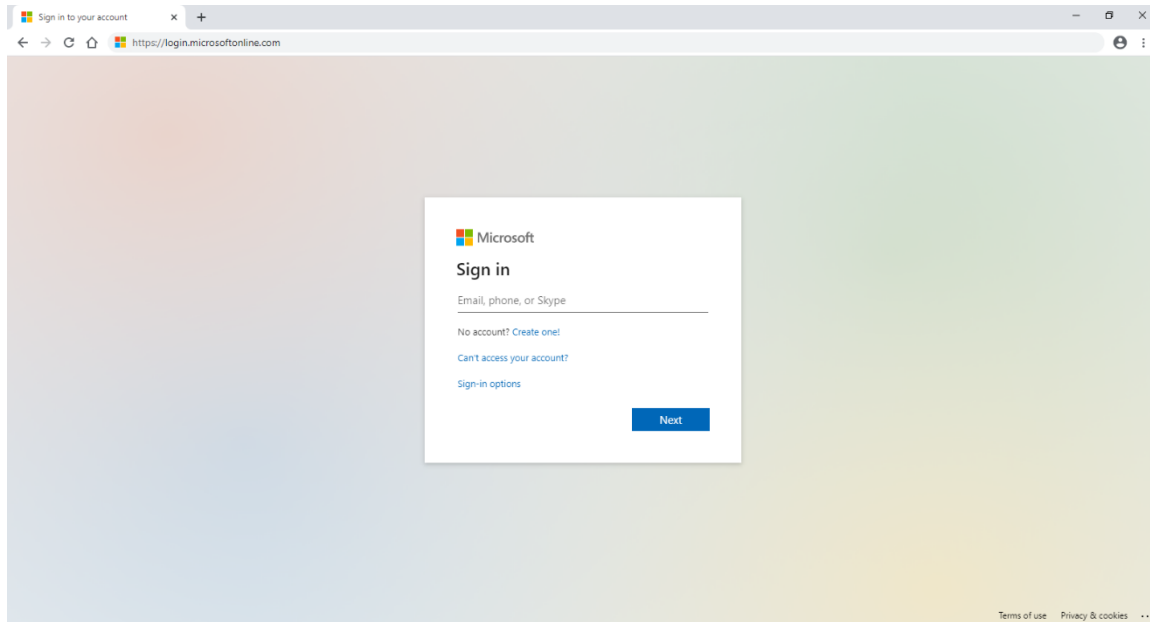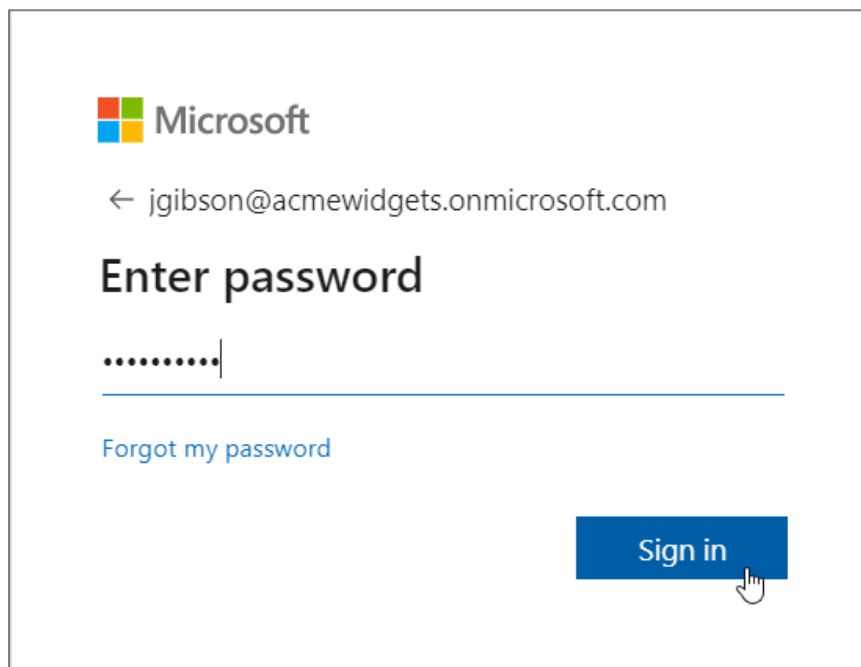
With the login page open, enter the e-mail address that was given to you, then click the **Next** button:

Type in your password, then click the **Sign In** button to complete the process:

Keep in mind that you can choose to keep yourself signed into the account by clicking the **Yes** button. This can save you time as you do not have to log into your account every day, but you should not select this option when using public computers.
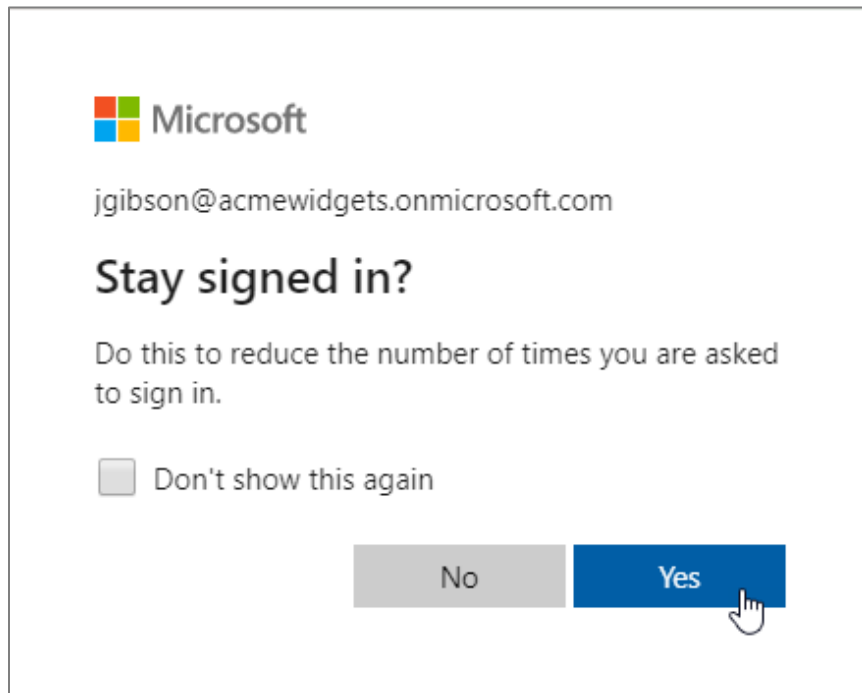
Once you are logged into your account, you will be greeted with the default **Office** landing page:
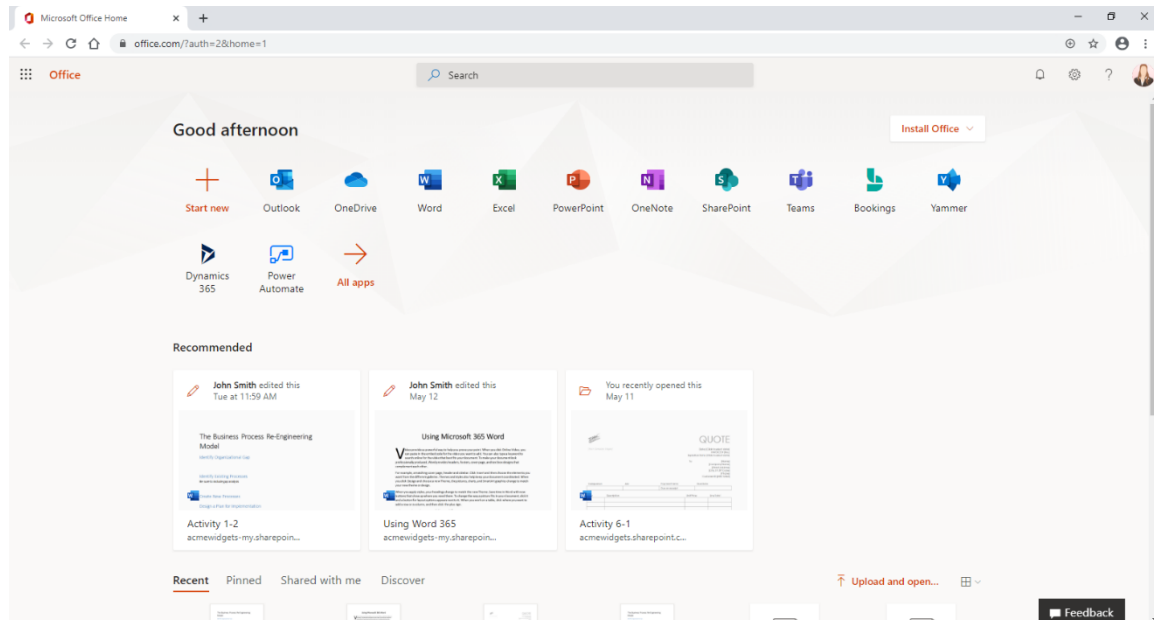
Navigate the Office Landing Page

The landing page that you see when you first log into your account is where you can find shortcuts to many of the **Online Office** applications and settings:
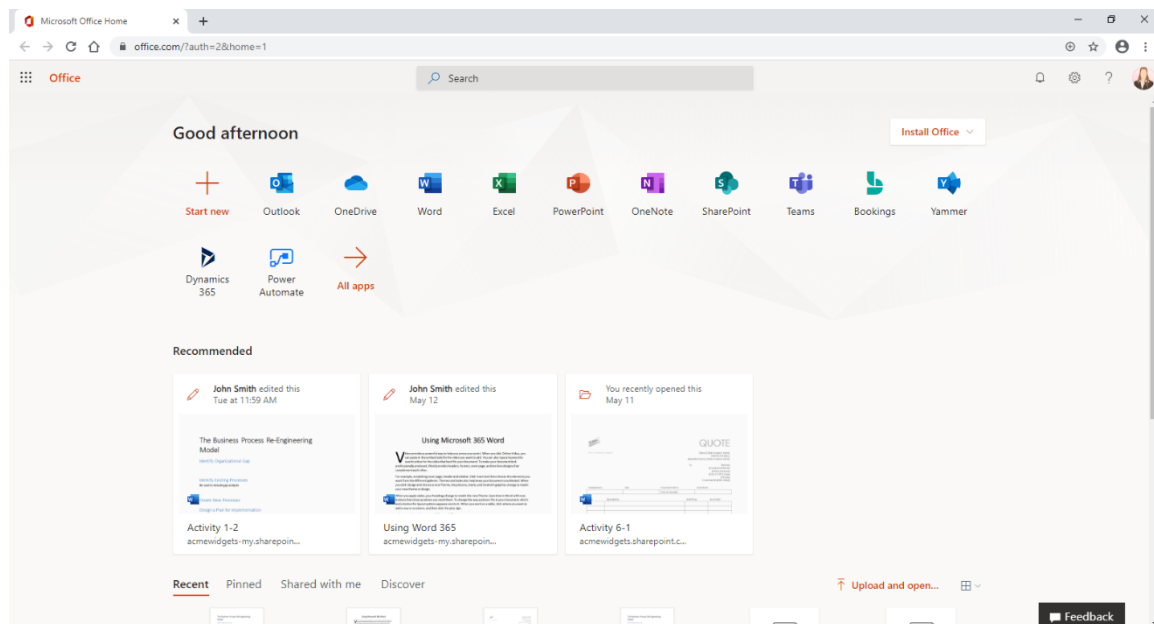
While this page may look different depending upon the **Microsoft 365** plan that your organization is using, you will always see the navigation toolbar along the top of the page:
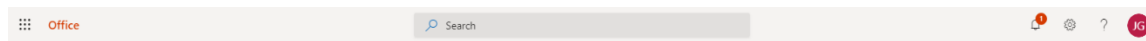
Clicking your name on the toolbar will display the **My account** pane that will provide you with links to view your profile page, view your account information, and sign out of your Microsoft 365 account completely:
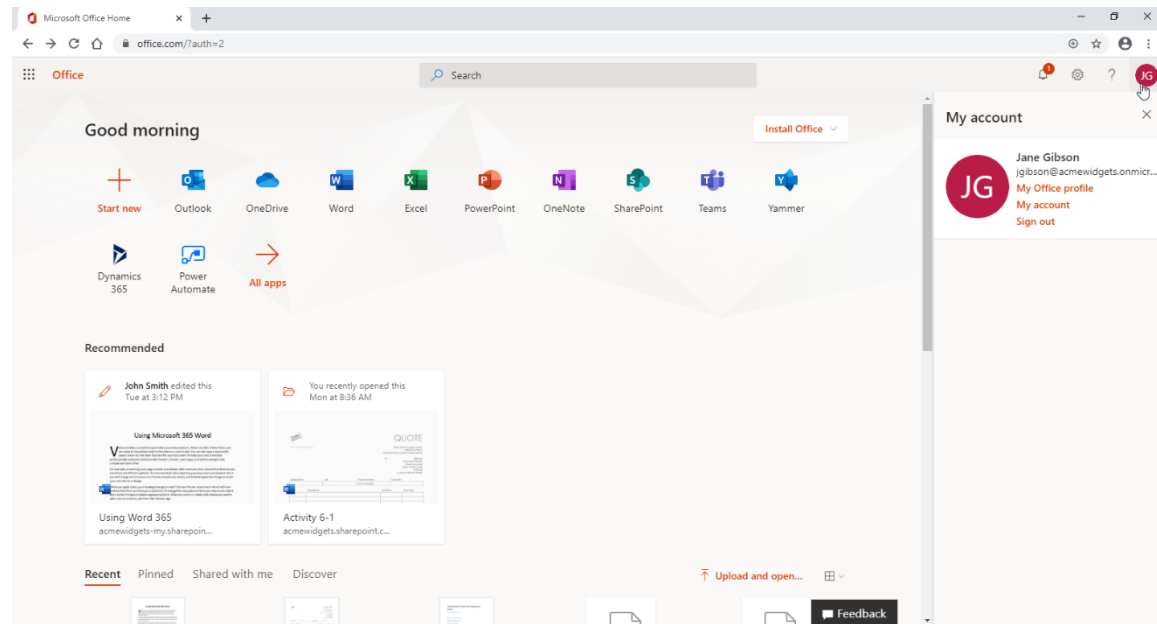
You may close this pane by clicking on the same button again or by clicking the **Close** button in the upper right-hand corner.

Clicking the **Help** button (?) on the toolbar will open the Help task pane:
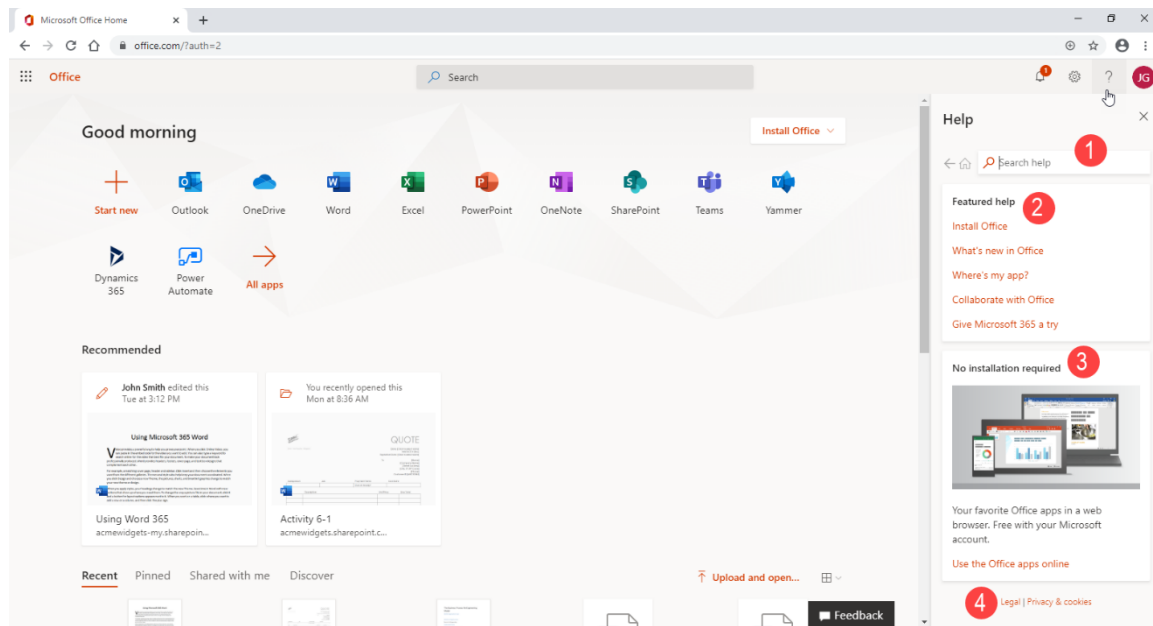
In this task pane, you will find **(1)** the **Search field**, **(2)** the **Featured help** pane to learn about latest updates, **(3)** the **No installation required** pane to learn about Office Online, and **(4)** the **Legal/Privacy & cookies** section.

Clicking the **Settings** button (⚙) opens the Settings task pane:
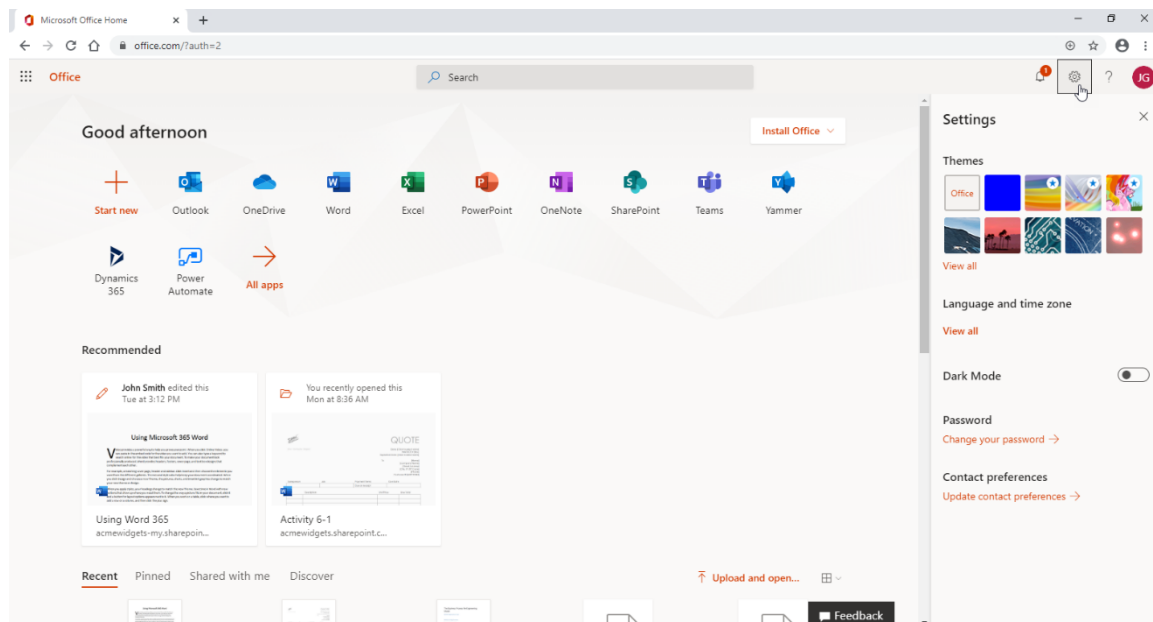
Controls in this task pane allow you to customize basic aspects of your Microsoft 365 account, such as Themes, Language and time zones, Dark Mode, Passwords, and Contact preferences.

To open Office apps, you can click the tiles on your landing page:
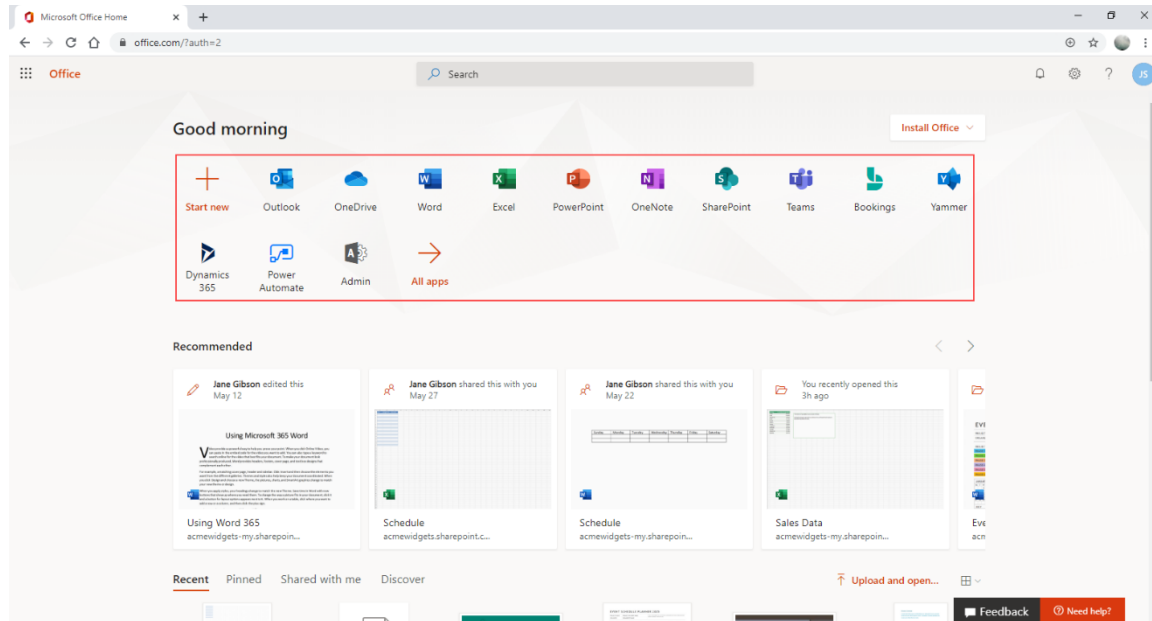
Or, open them from the **App launcher** pane:
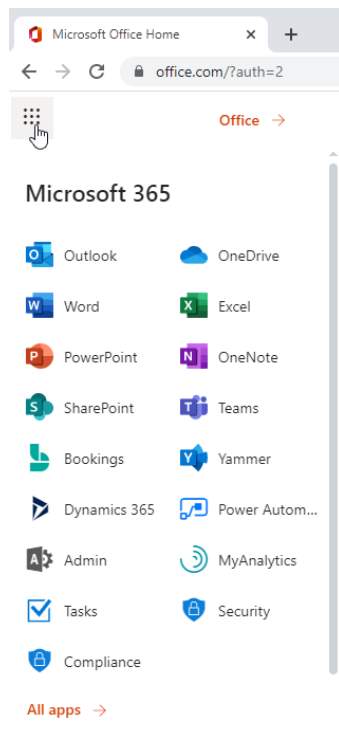
If you cannot find an app, click **All apps** to expand:
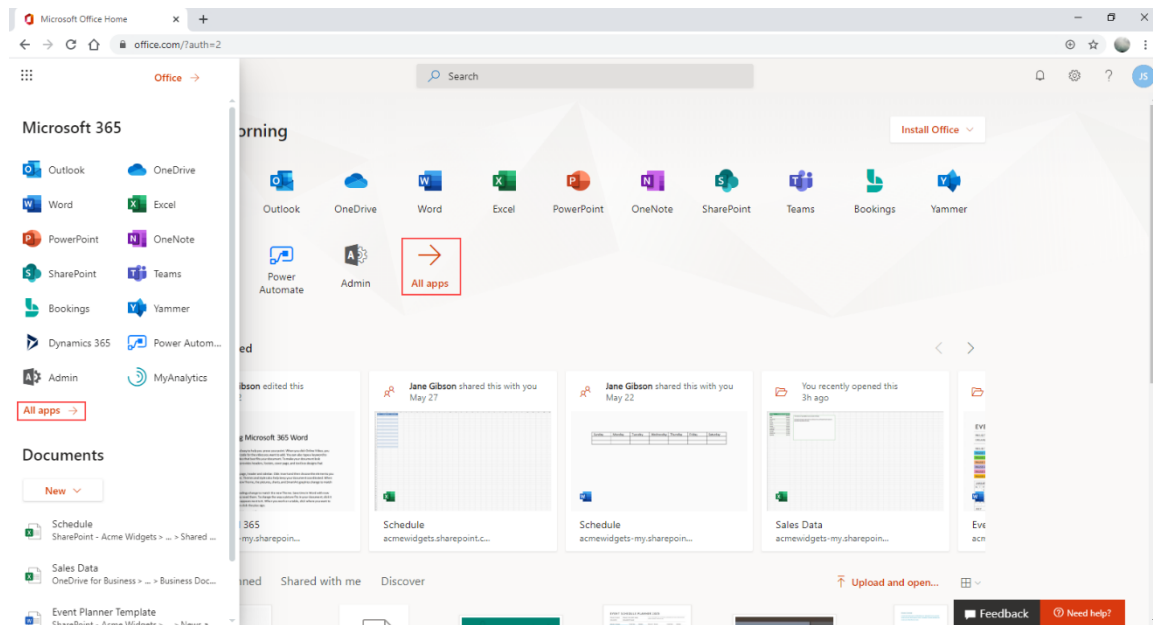
You can scroll through the App launcher or the home page to browse the apps you want to open:
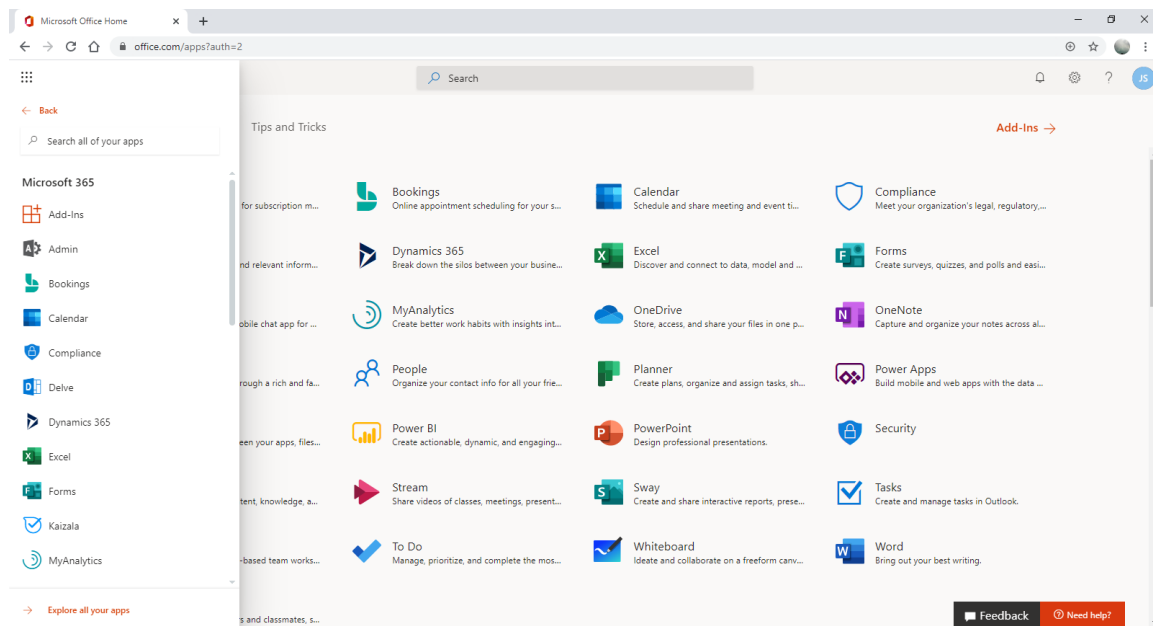
The **Notifications** icon (🔔) will provide you with a counter of how many unread notifications you might have. Clicking on this button will display the Notifications task pane:
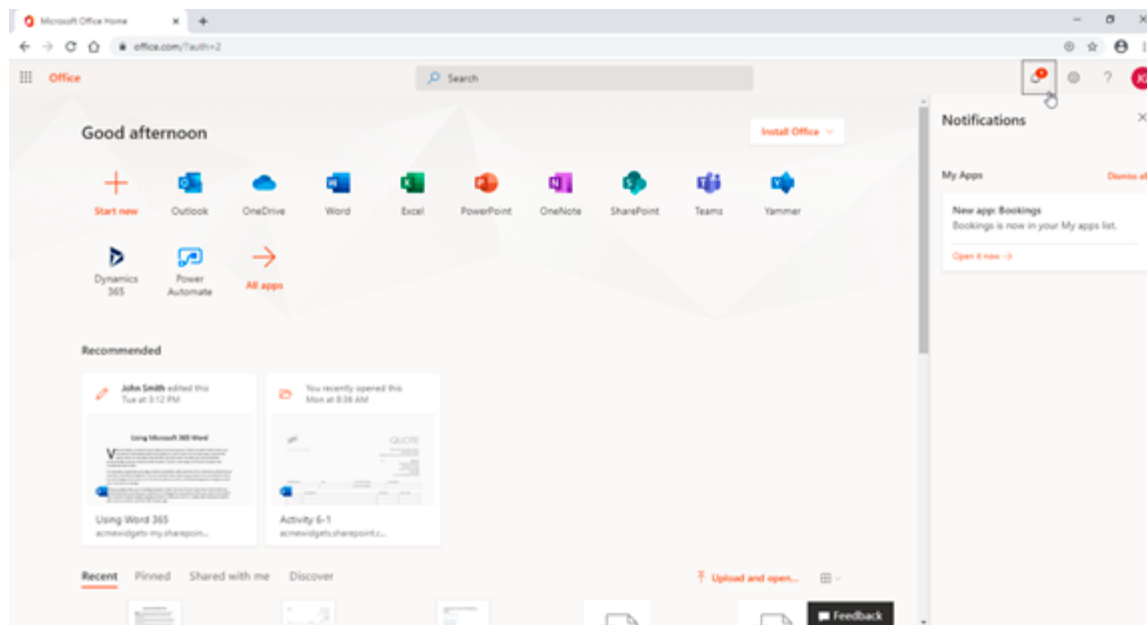
The Notifications task pane will list any unread notifications. For example, you could have notifications related to new apps. Notifications in this area typically contain links to them. Once the Notifications task pane has been displayed, the Notification icon will be reset back to its default state (🔔).

The **App launcher** (⊞) is most commonly used as a quick way to access the various online tools that Microsoft 365 has to offer. When clicked, the App launcher will drop down on the left hand-side of the browser window:
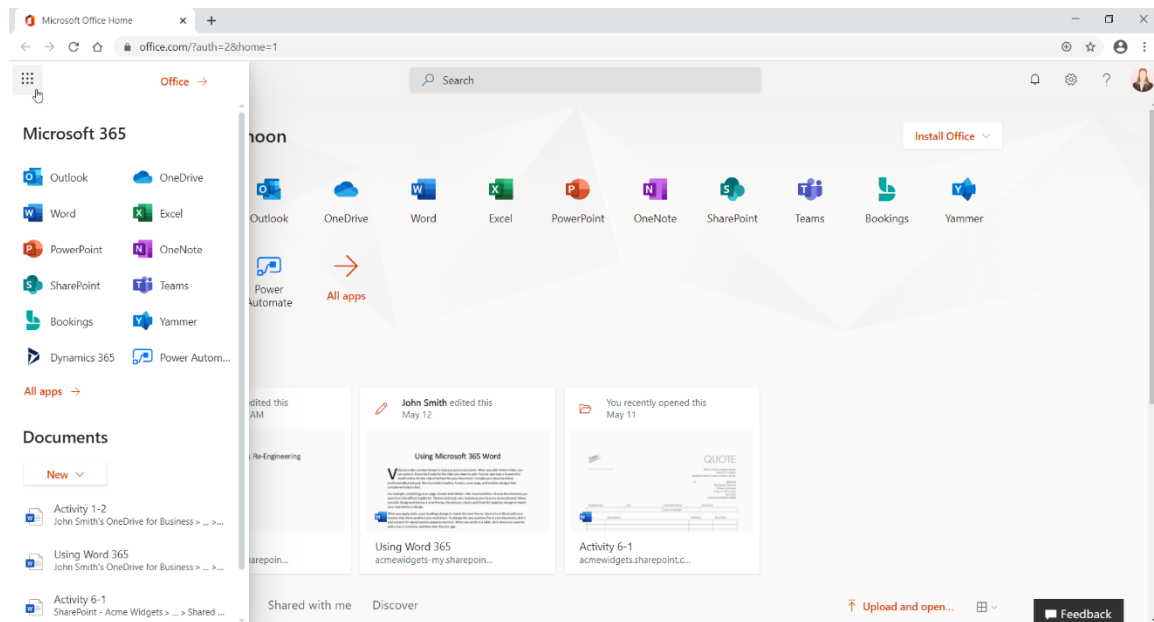
The app launcher will display a menu with many of the same links to your applications as those that are found on the landing page. It also shows documents that were recently opened. Clicking on these links will open the application.

Update your Profile

Your profile is what people will see when they add you as a contact or directly view your profile page. To view and modify your profile page, click your name on the navigation toolbar to open the **My account** task pane. In this task pane, click the **My Office profile** link:
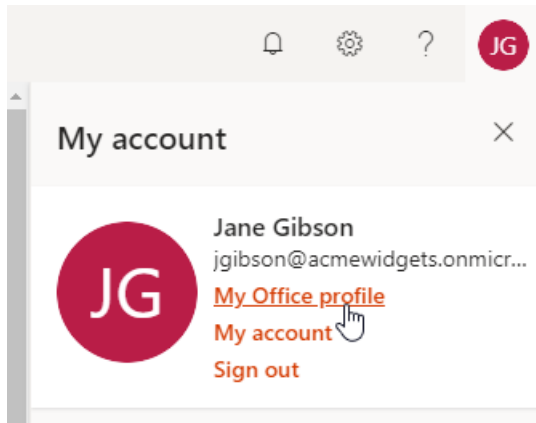
Your profile page will now be shown as part of the **Delve** application (You will learn more about Delve in Lesson 3). On this page, you will find any recent documents that you have been working with, other people in your organization, any notifications that you might have, and more:
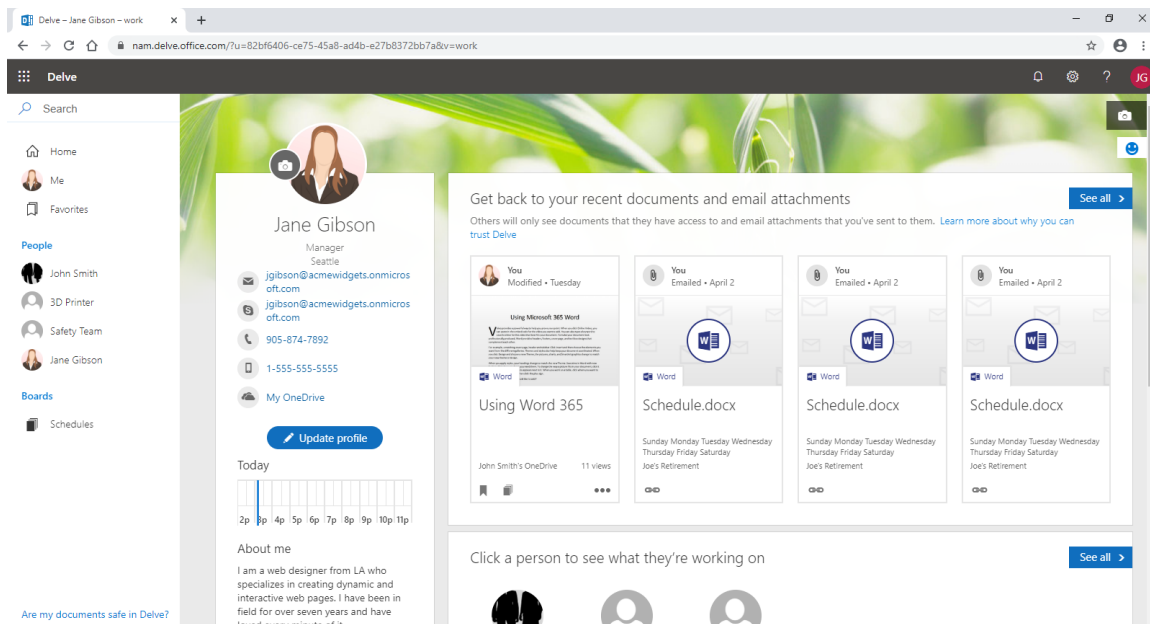
To edit your contact information, click the **Update profile** link:
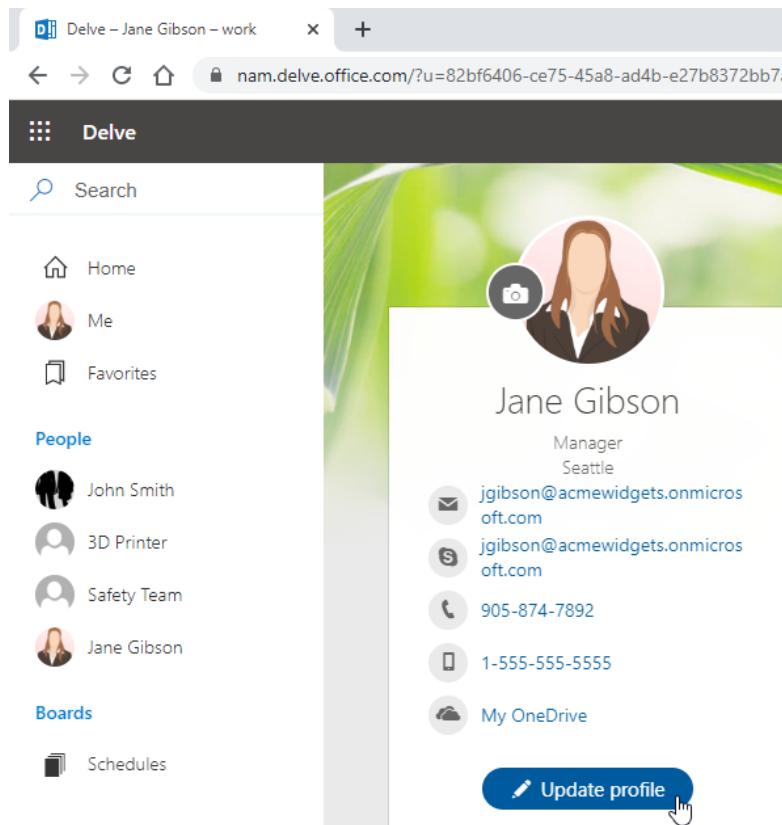
On this page you can edit your profile information. You can add a personal description of yourself, a photo, or other information such as skills, education, and even your birthday:
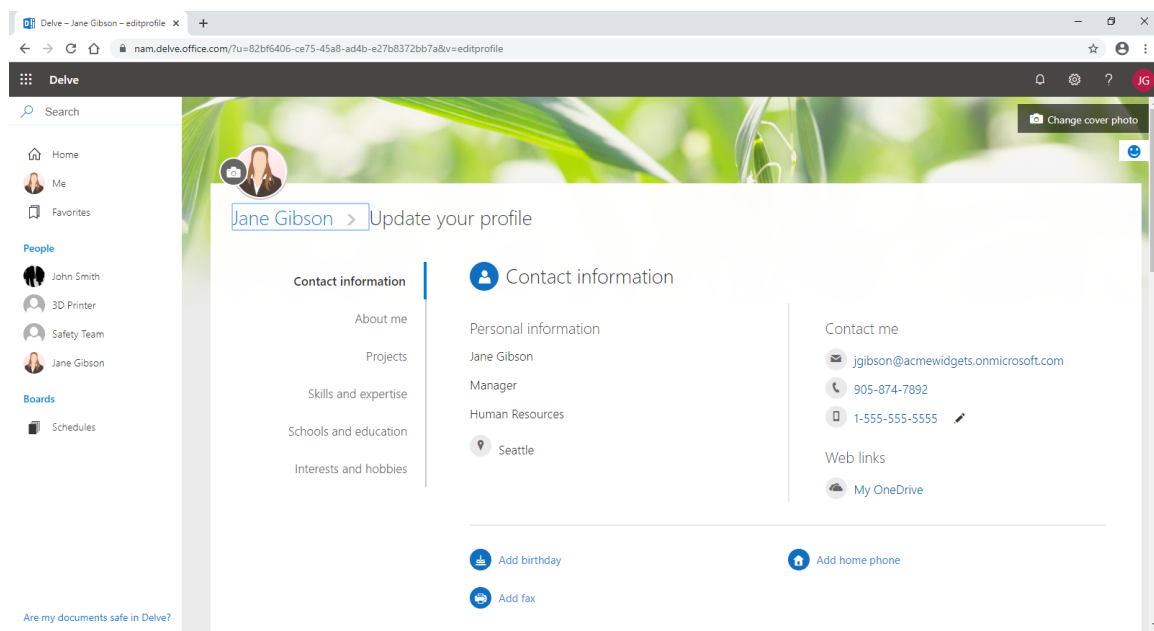
Log Out of Microsoft 365

Once you have finished working with your Microsoft 365 account, log out by clicking your name on the far right-hand side of the navigation toolbar. This action will display the **My account** task pane. Click the **Sign out** link:
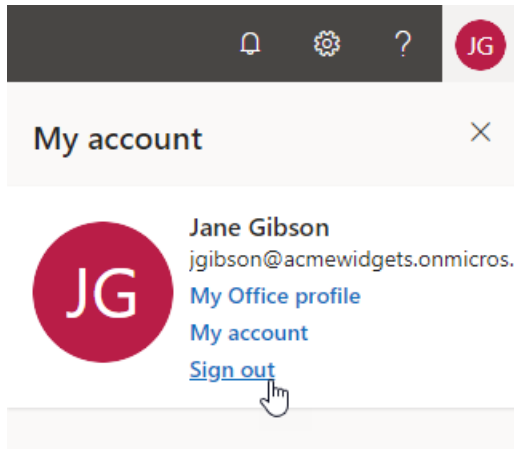
You will then see a page confirming that you have signed out of your account:
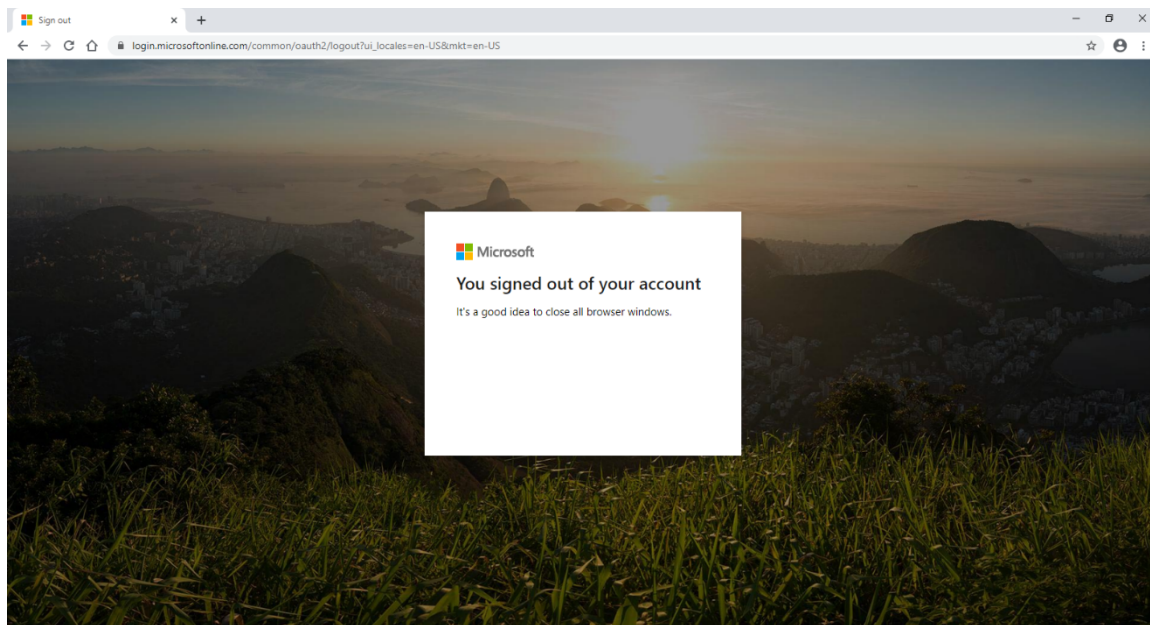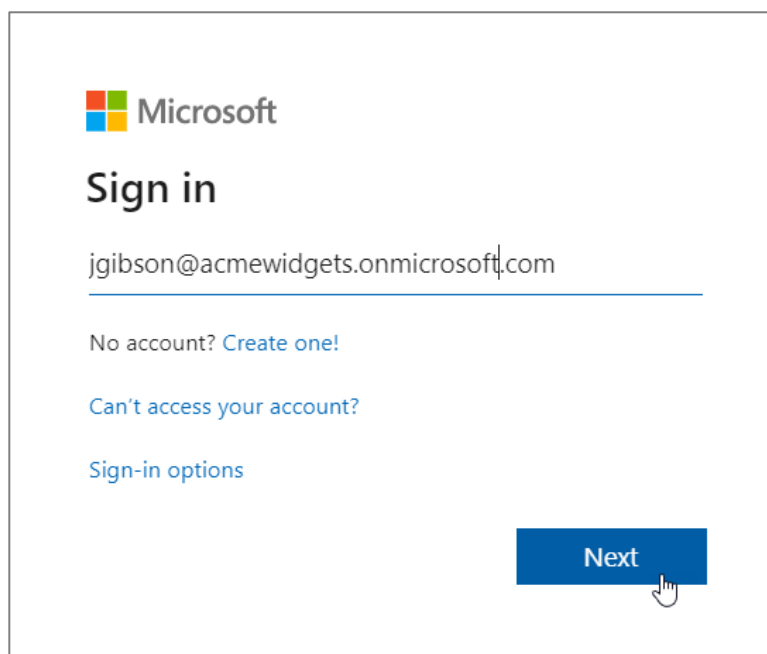
Activity 1-2: Navigating Your Account

Now that you have been assigned your own Microsoft 365 account, you would like to login and complete basic navigation tasks.
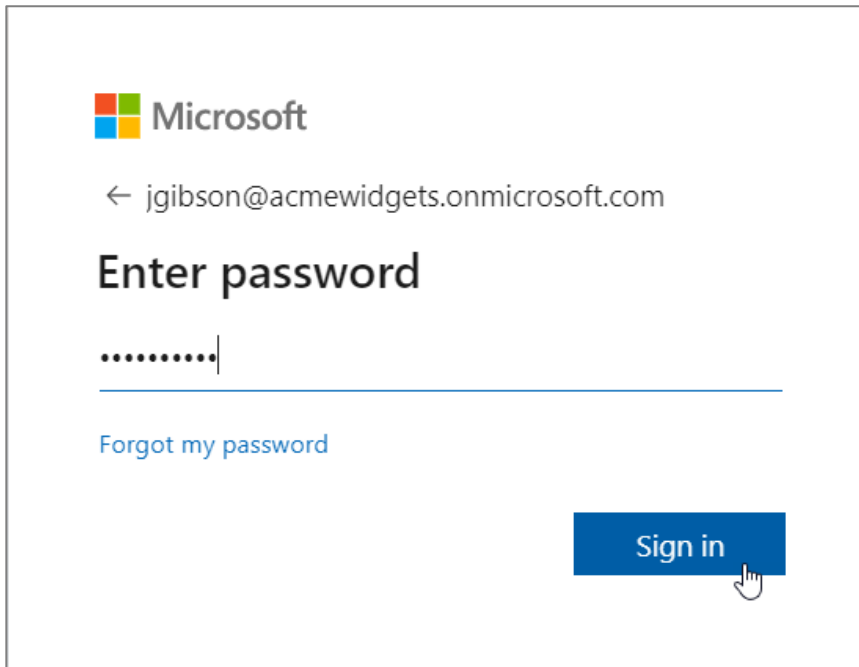
1. To begin, turn on and log into your computer. Open your most frequently used browser and open the https://login.microsoftonline.com web page:
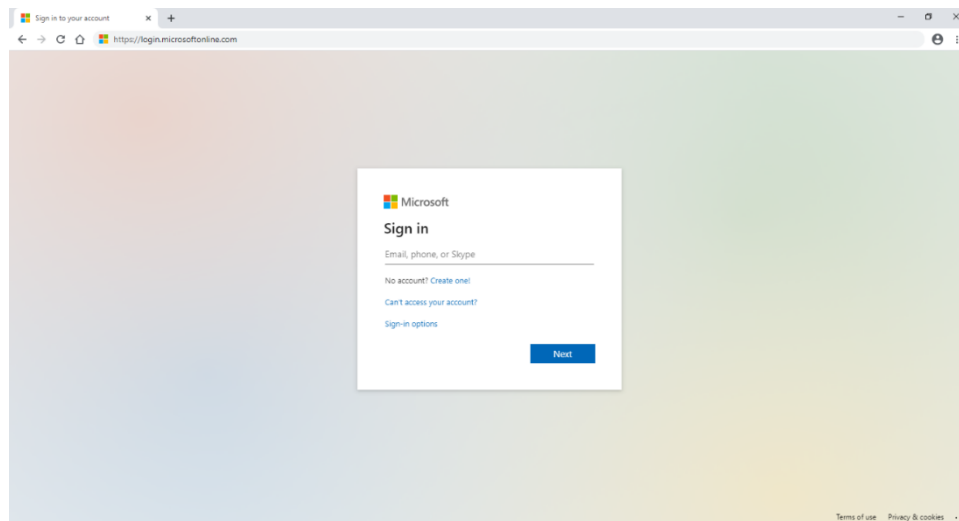
2. Type the e-mail address that has been provided to you into the provided text box on this page and then click **Next**:

3.   Next, type your password into the text box and then click **Sign in**:

4.   You will now see the landing page for your Microsoft 365 account:
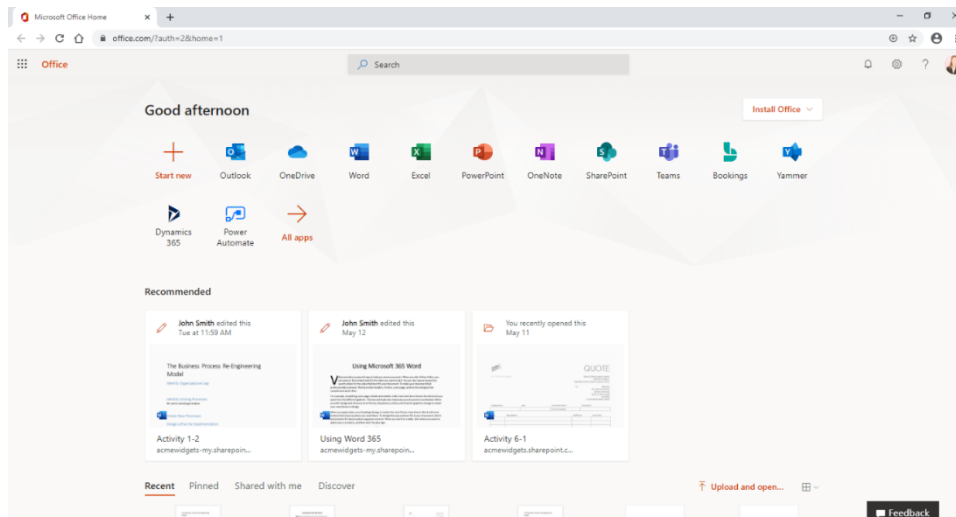
5.   Click your name in the top right-hand corner of the page:
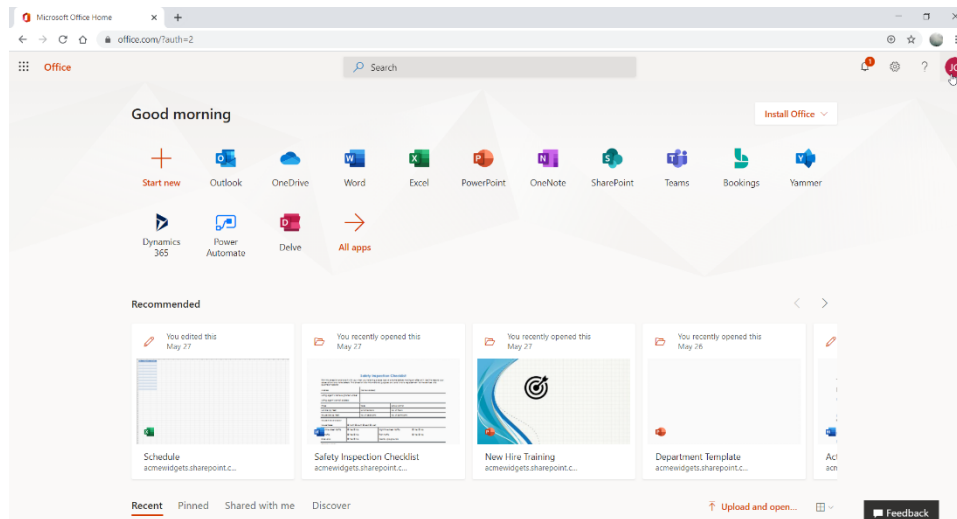
6.   Inside the **My accounts** task pane, click the **My Office profile** link:
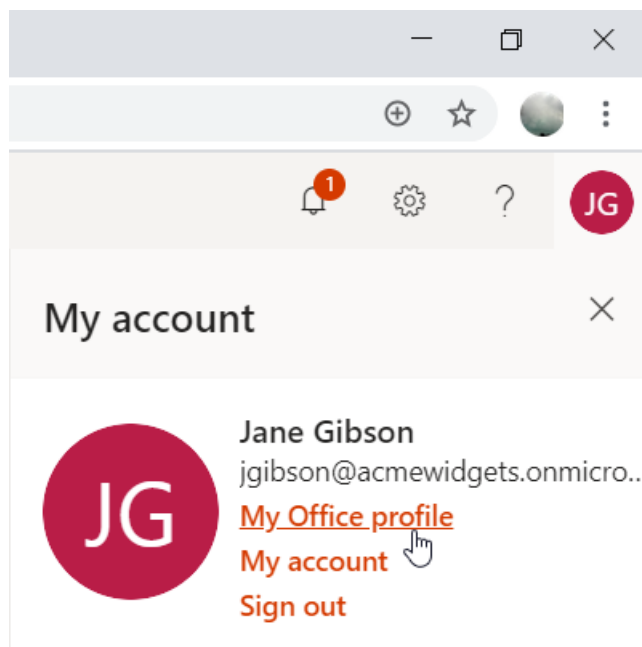
7.   Your profile page will now be shown in Delve. On the left-hand side of the page, near the middle, click the **Update profile** button:
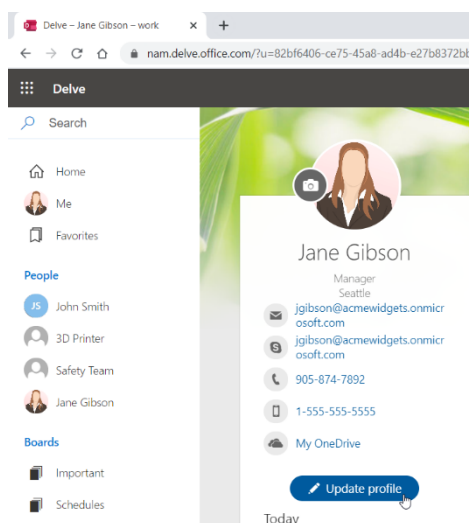
8.   You can now edit the basic parts of your profile. Scroll down on this page to the **About me** section. Inside the provided text area, type a brief blurb about yourself. Then, click the **Save** button underneath the text area:
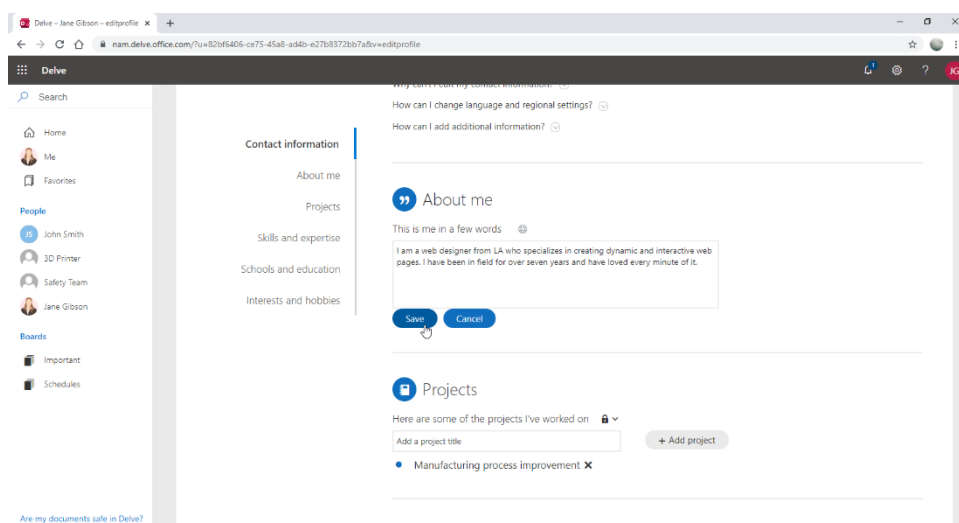
9.   Scroll back up to the **Contact information** section. Enter any contact information that you would like to appear on your profile. In this example, a mobile phone number was added by clicking the **Add mobile phone** button:
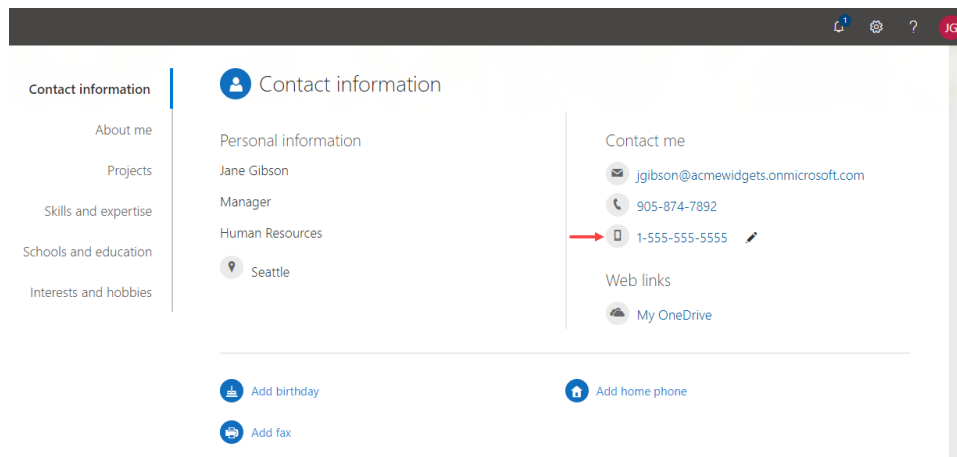
10. Click the **App launcher** button on the far left of the navigation toolbar:
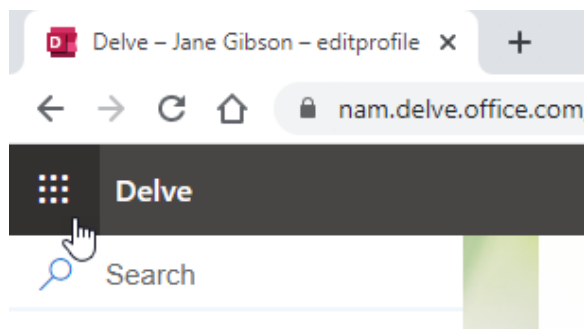
11.   With the App launcher expanded, note the tools that you have access to:
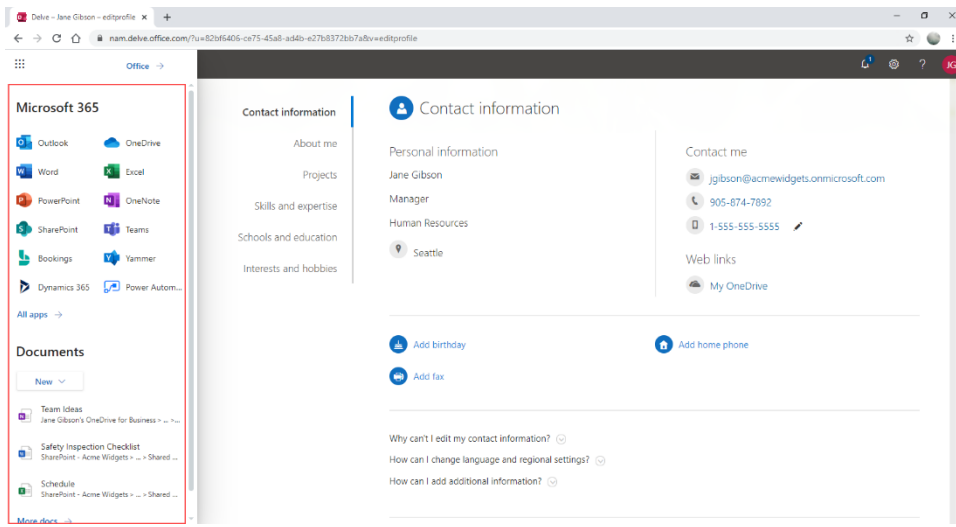
12.   On the navigation toolbar, click the **Office** button:
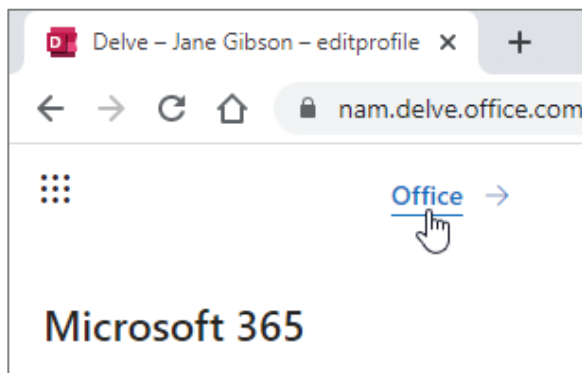
13. You will now be returned to your Microsoft 365 landing page:
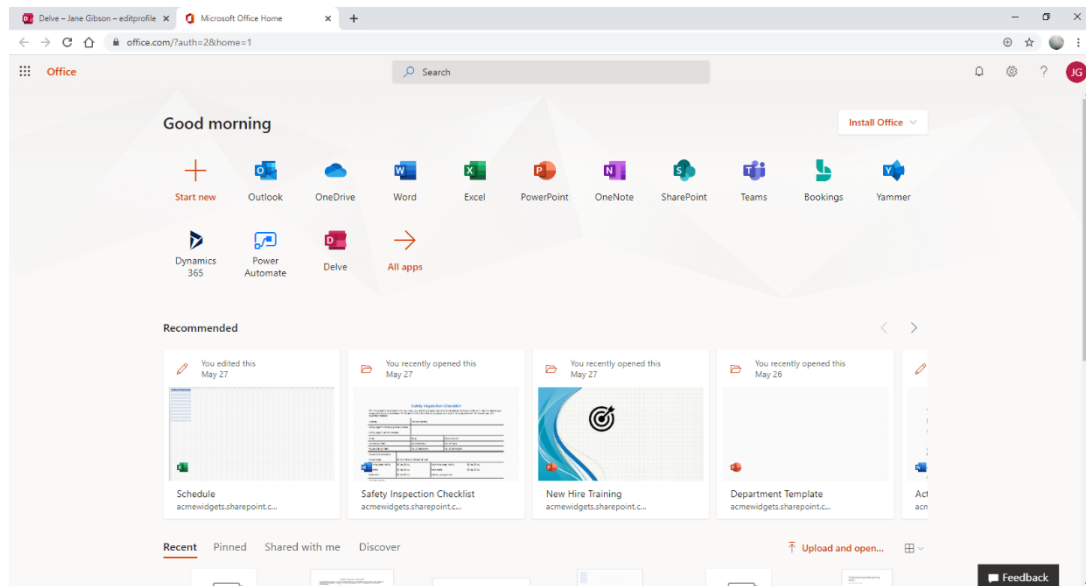
14. In the upper right-hand corner of the page, click your name. Inside the **My account** task pane, click **Sign out**:
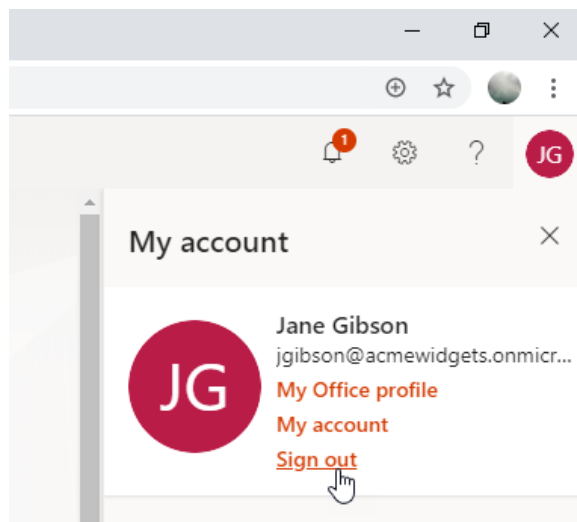
15. A page will appear that indicates you have successfully signed out of Microsoft 365:
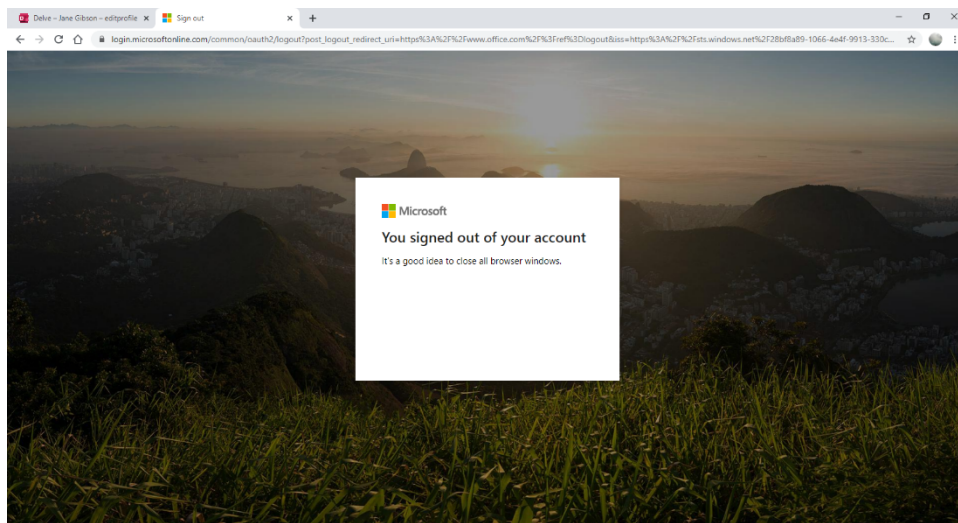
16. Close your browser to complete this activity.

TOPIC C: Finding Help and Changing Settings

Microsoft 365 includes a robust help feature to help when you have questions. Additionally, there are a few settings that you can tweak to suit Microsoft 365 to your needs and workflow. In this lesson, we will learn how to search for help, and change some of the settings found in Microsoft 365.

Topic Objectives

In this session, you will learn:

- How to search for help
- How to view settings
- How to change your password
- How to change your language

Search for Help

When you are logged into your Microsoft 365 account, you can open the Help task pane by clicking the **Help** icon (?), on the toolbar, in the top right-hand corner of the page:
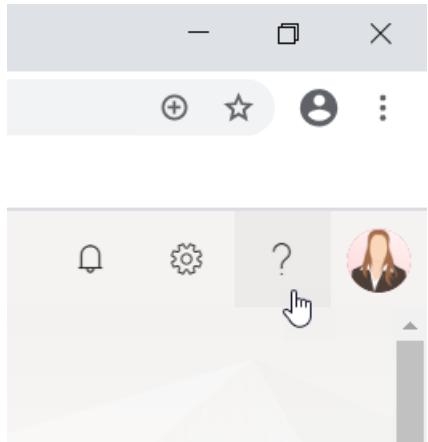
To find help with a particular feature or problem in Micosoft 365, you can use the search field in the Help dialog box:
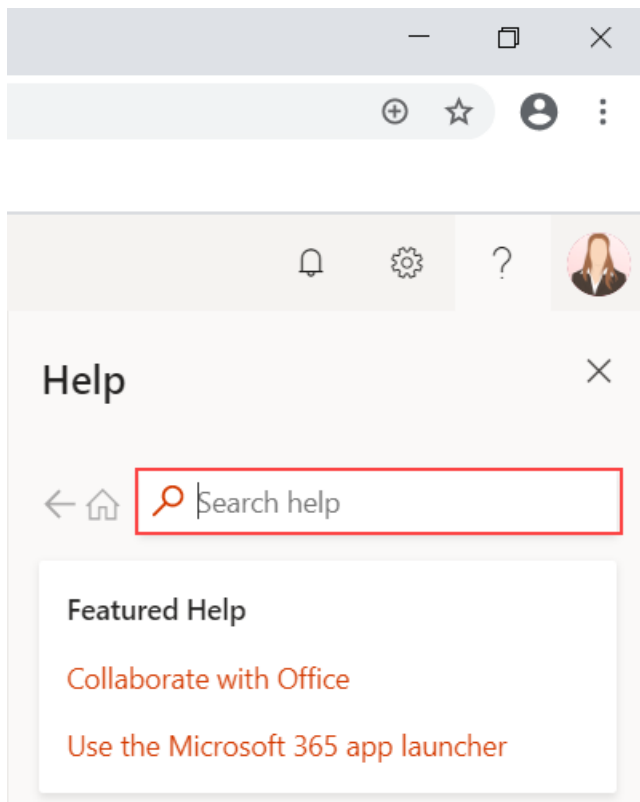
From the results that are listed, you can complete the action directly by clicking on one of the options below the **Results** subheader. Alternatively, you can acccess help articles related to your search by following the links under the **Help** header:
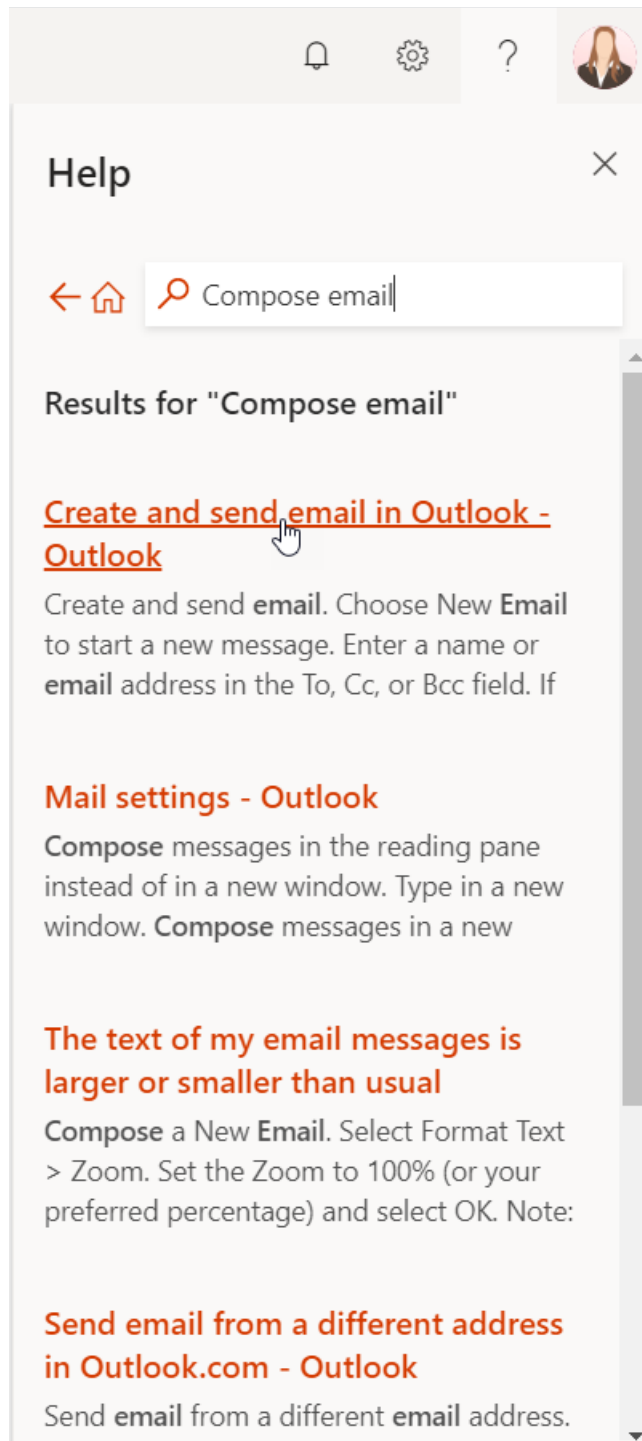
Any help articles that you open will appear in the current **Help** dialog box. **Help** articles can contain videos, as well as text-based tutorials:
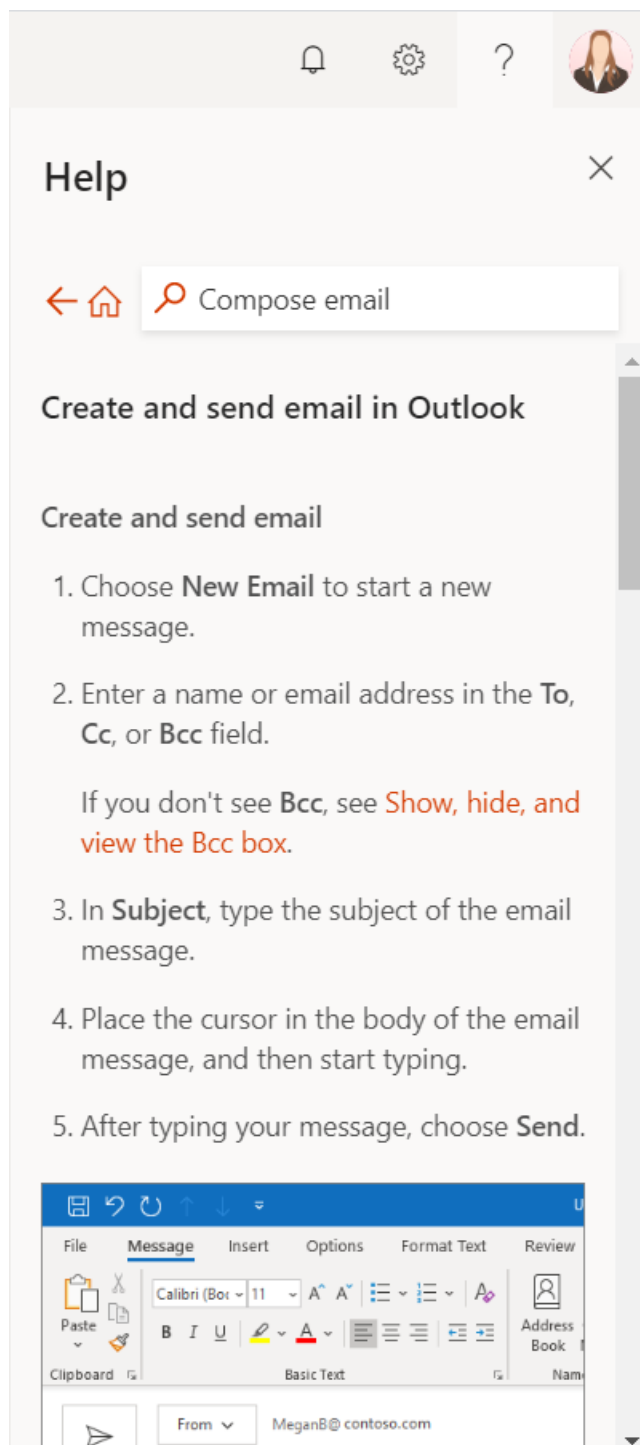
View Settings

To view the settings for your Microsoft 365 account, click the **Settings** icon (⚙)that appears in the top right-hand corner of the toolbar at the top of the current page:
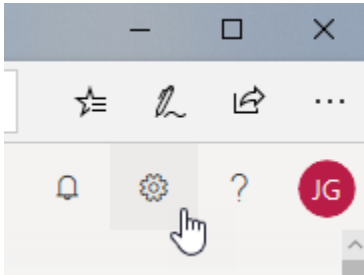
This action will display the Settings task pane. In this task pane is a series of commonly used settings that you can work with:
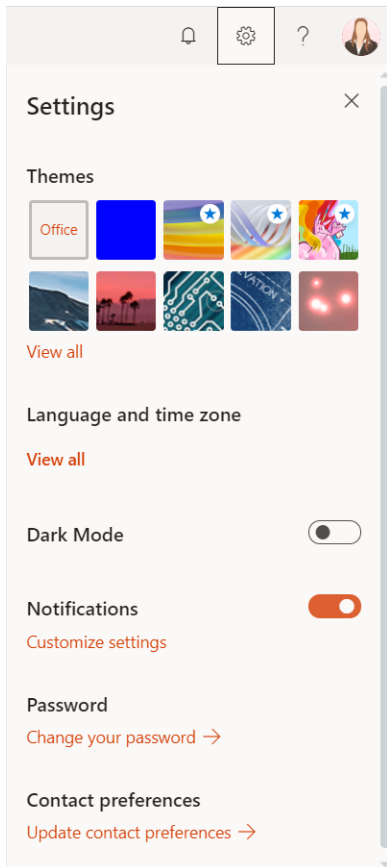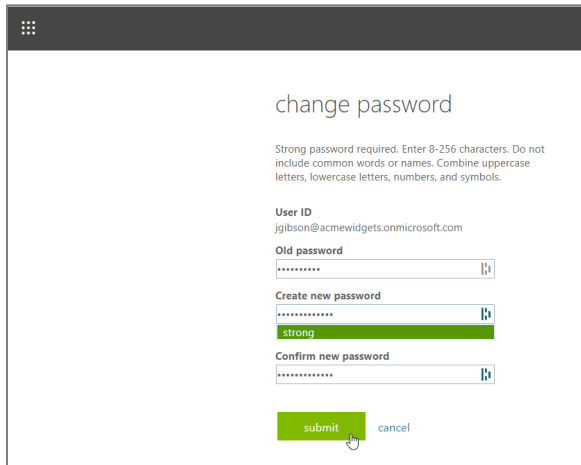
Change Your Password

To change your password, open the Settings task pane and then click **Password → Change your password**:
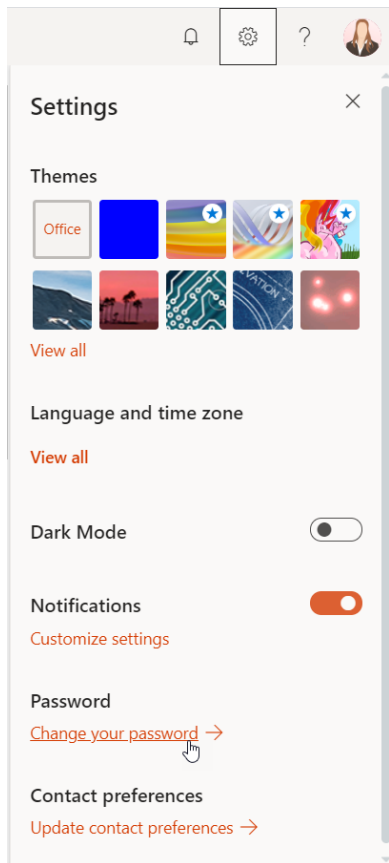
A new tab will open in your browser prompting you to change your current account password. Type your existing password into the provided text box. Then, type your new password into the two subsequent text boxes below. Once you are ready, click the **Submit** button to change your password:

Once your password has been successfully changed, you will be returned to the Microsoft 365 landing page.

Change Your Language

The language that is used can be adjusted by first clicking the **View all** link under the **Language and time zone** category in the Settings task pane:
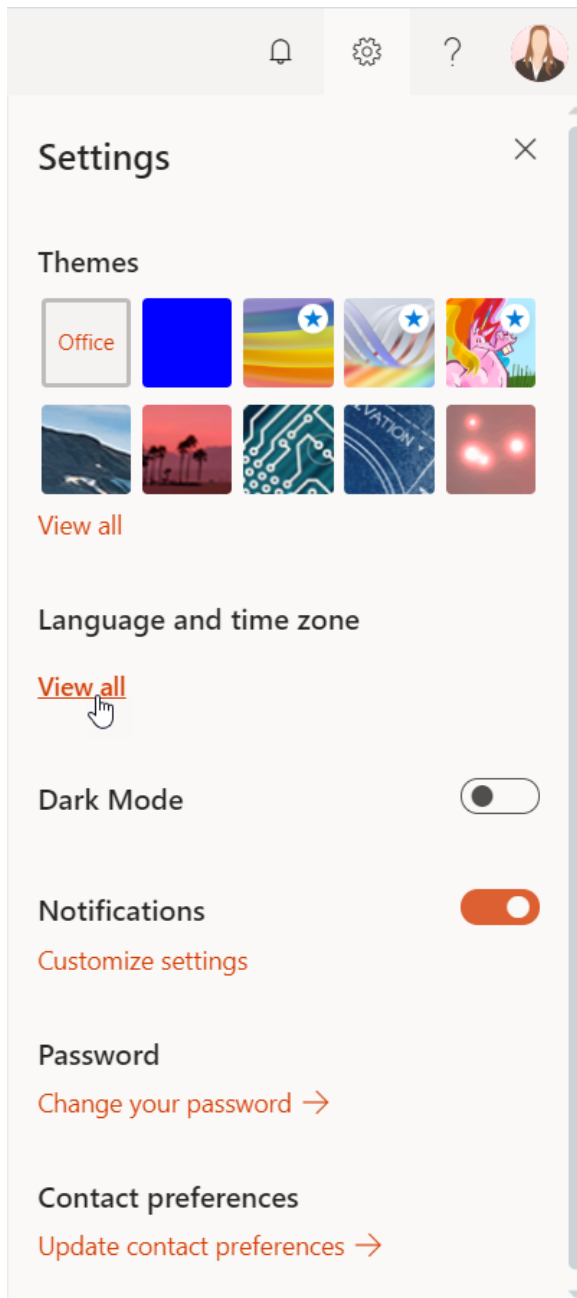
Once this category has been expanded, you will see a drop-down menu that you can use to select another language rather than the default, as well as change the time zone, date format, and time format:

Upon choosing a new language, click the **Save** button and the new language will immediately be applied to your Microsoft 365 account.

Activity 1-3: Finding Help and Changing Account Settings

Now that you are comfortable logging into your account and completing basic navigation tasks, you would like to customize some account settings.

1. To begin, turn on and log into your computer. Open your most frequently used browser and open the https://login.microsoftonline.com web page:
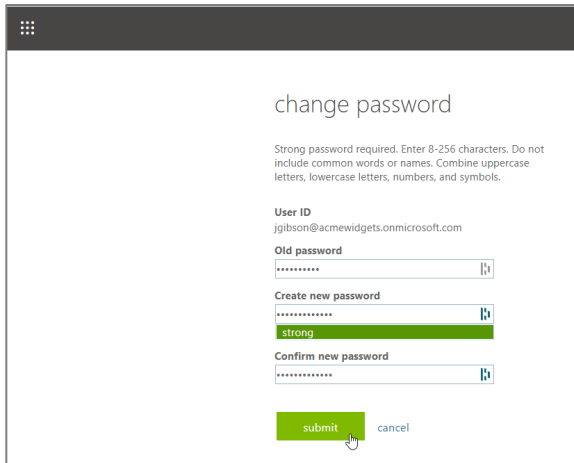
2. On the landing page for your account, open the **Settings** task pane by clicking the Settings icon that appears in the top right-hand corner of the toolbar at the top of the current page:
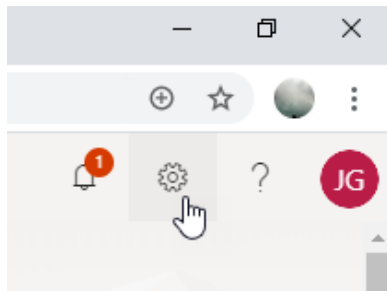
3.   With the Settings task pane now displayed, click the **Change your password link**:
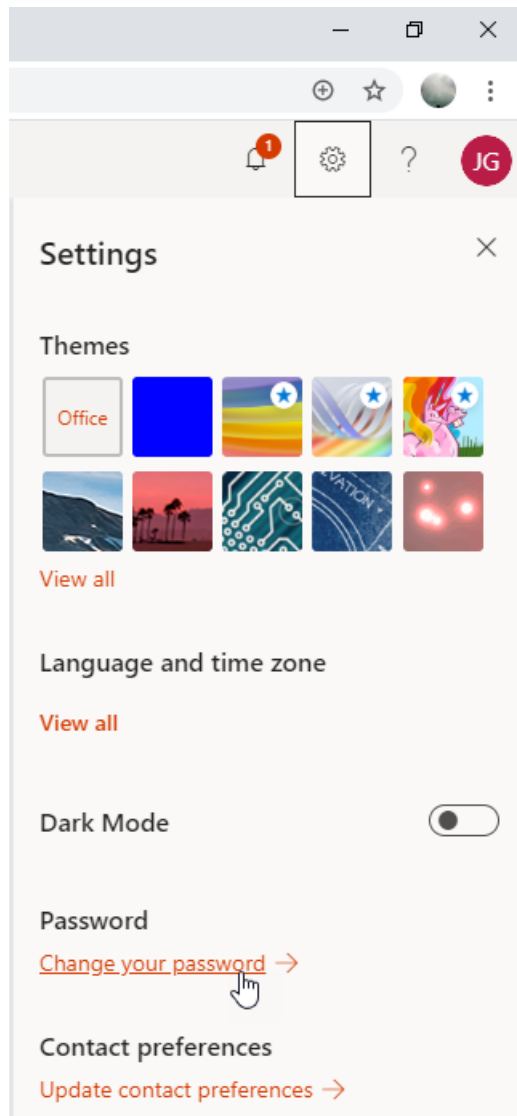
4. A new tab will open in your browser. If you are asked to sign into your account again, do so. Type your exisiting password into the **Old password** text box. Type a new password for your account into the **Create new password** and **Confirm new password** text boxes. Click the **submit** button:

5. You will now be returned to the landing page for your account:
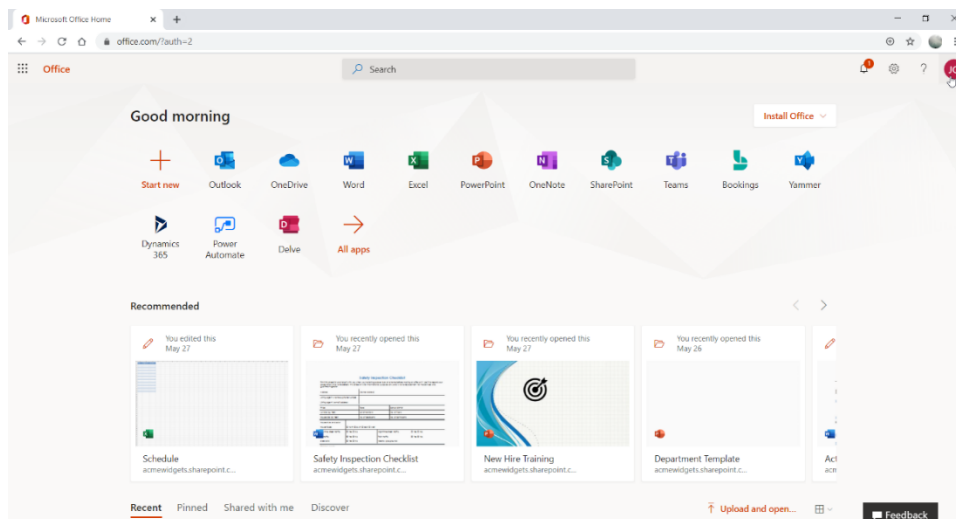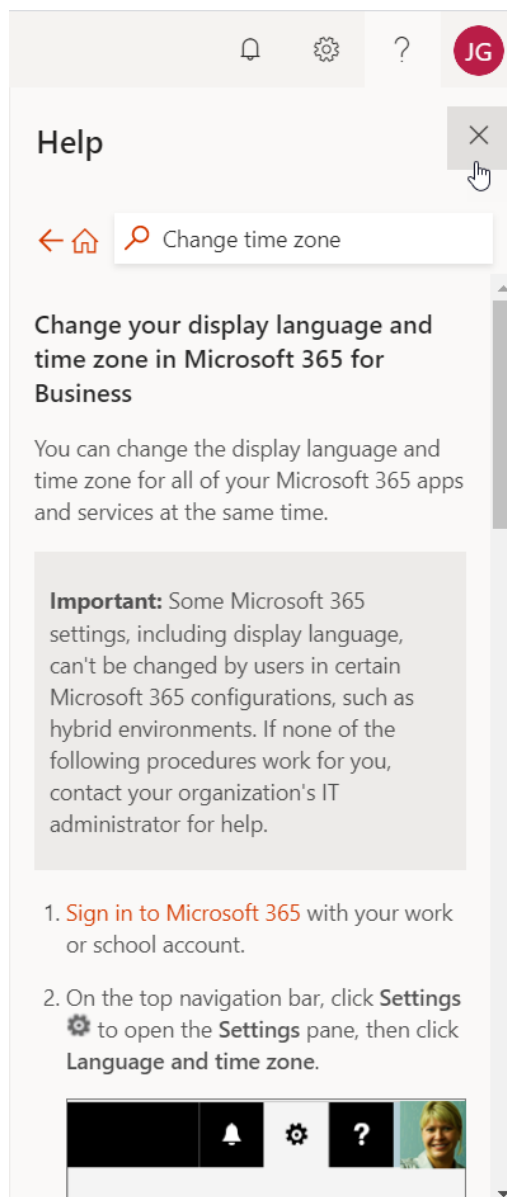
6.   Click the **Help** icon on the toolbar:
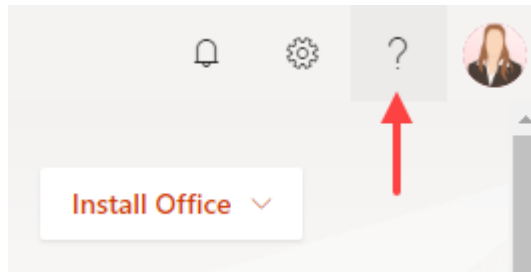
7.   Type "Change time zone" into the search field, then click the **Search** icon (🔍):
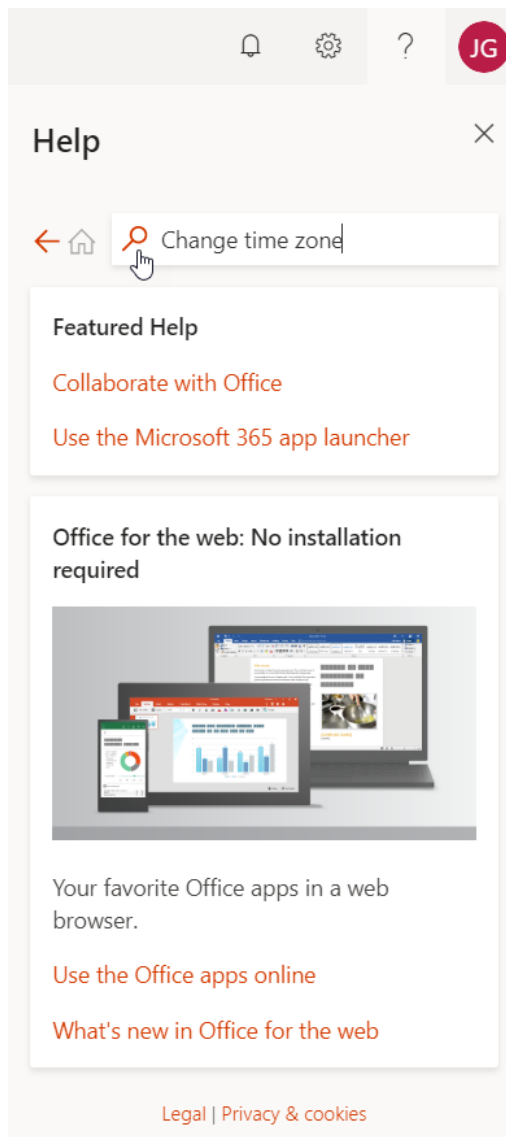
8. Scroll down and select the **Change your display language and time zone in Microsoft 365 for Business** link:
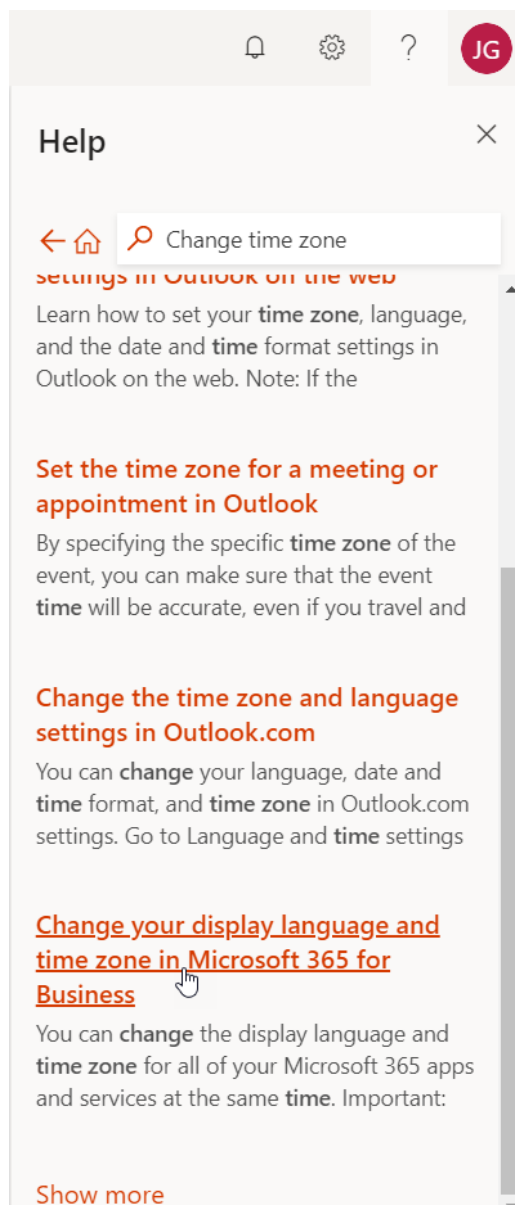
9.   Scan through the instructions to change language and time zone. Once finished, click **X** to close the Help pane:

10.   Sign out of your Microsoft 365 account and close your browser to complete this activity.

TOPIC D: Using Desktop Office Apps

While much of Microsoft 365's capability is locked into the cloud, you can still use many Office apps on your desktop. In this topic, you will learn how to download and install Microsoft 365 apps onto your computer and sign into Microsoft 365 from Office apps.

Topic Objectives

In this session, you will learn:

- How to download and install Microsoft 365 apps

- How to open the Office desktop app

- How to sign into Microsoft 365 from Office applications

Download and Install Office Apps

To install the current version of Office, click the **Install Office** drop-down button, then click the **Premium Office apps** option that appears near the top right-hand corner of the landing page:
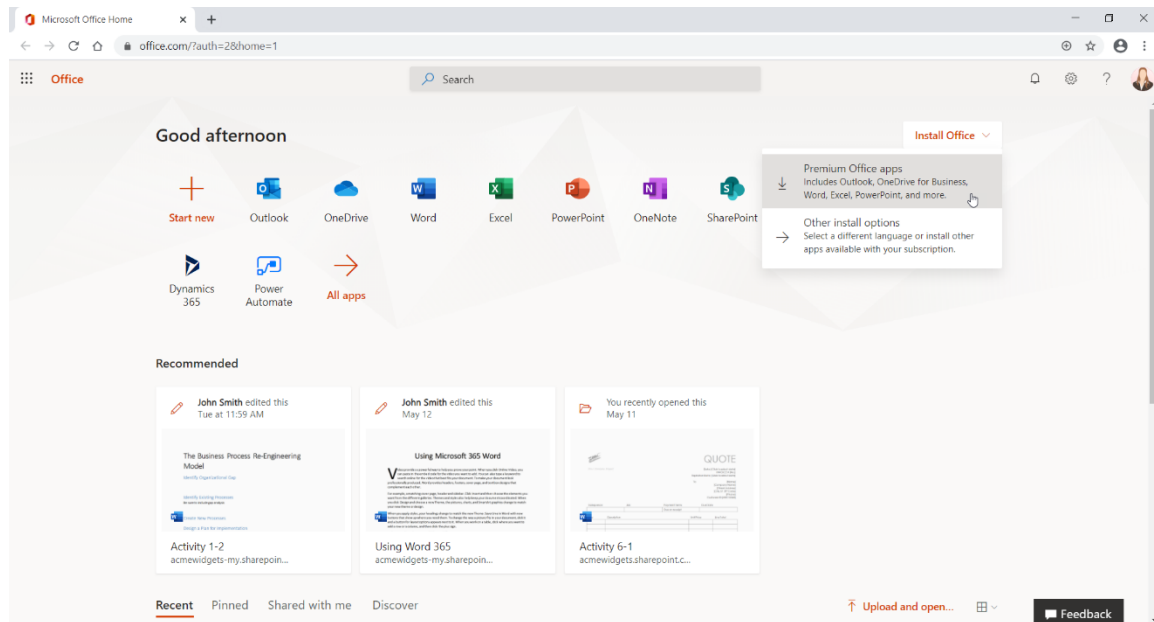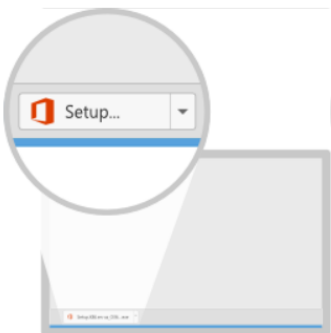
A **Save As** dialog box will be displayed. To continue, choose the folder where you want to save the Setup file, then click **Save** to finish:
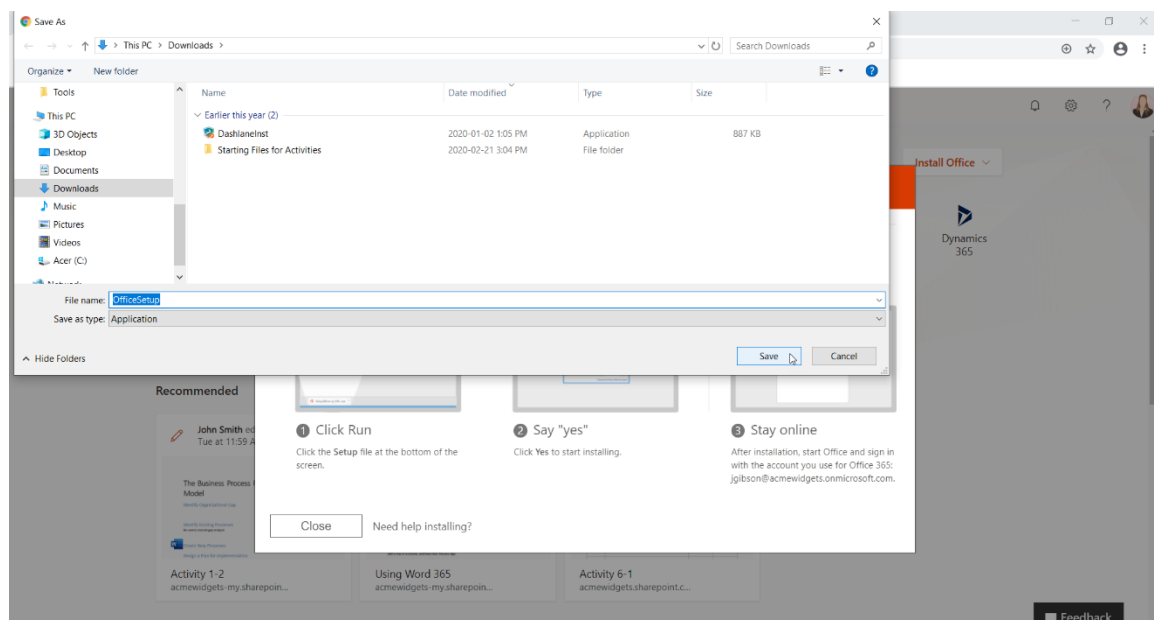
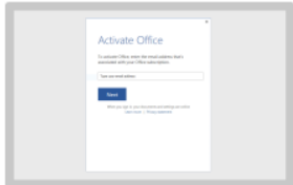To help you install the apps, an instruction dialog box will appear after you save the file:
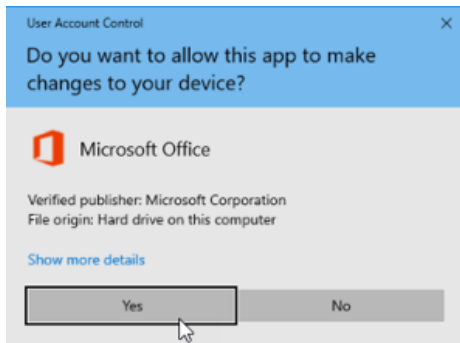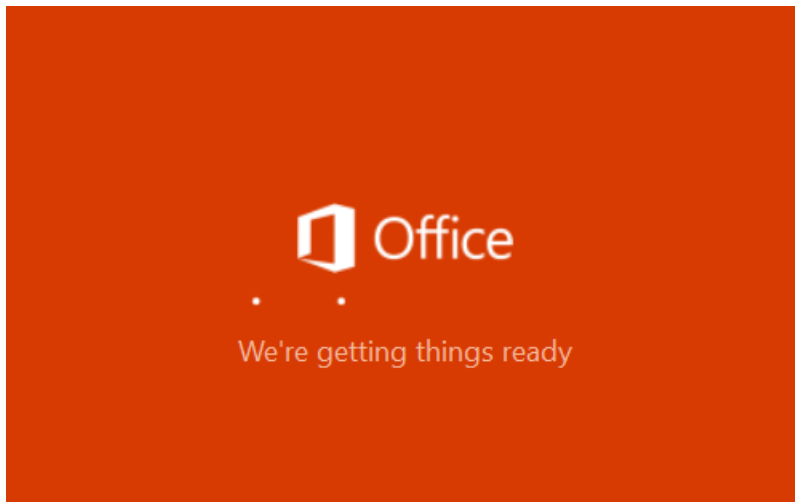

Once the download has been completed, locate and open the **OfficeSetup** file:
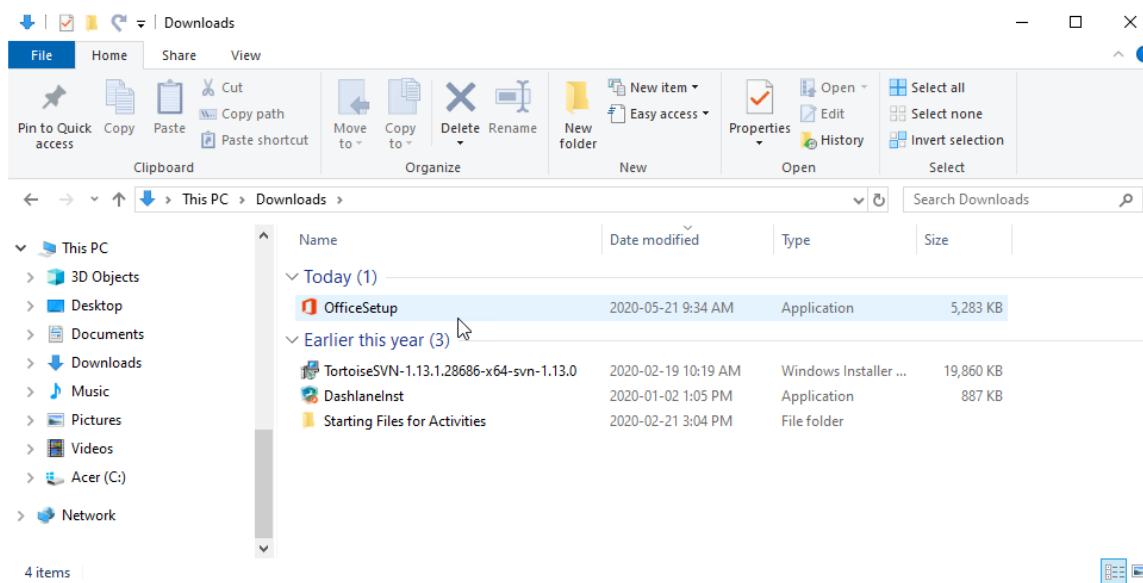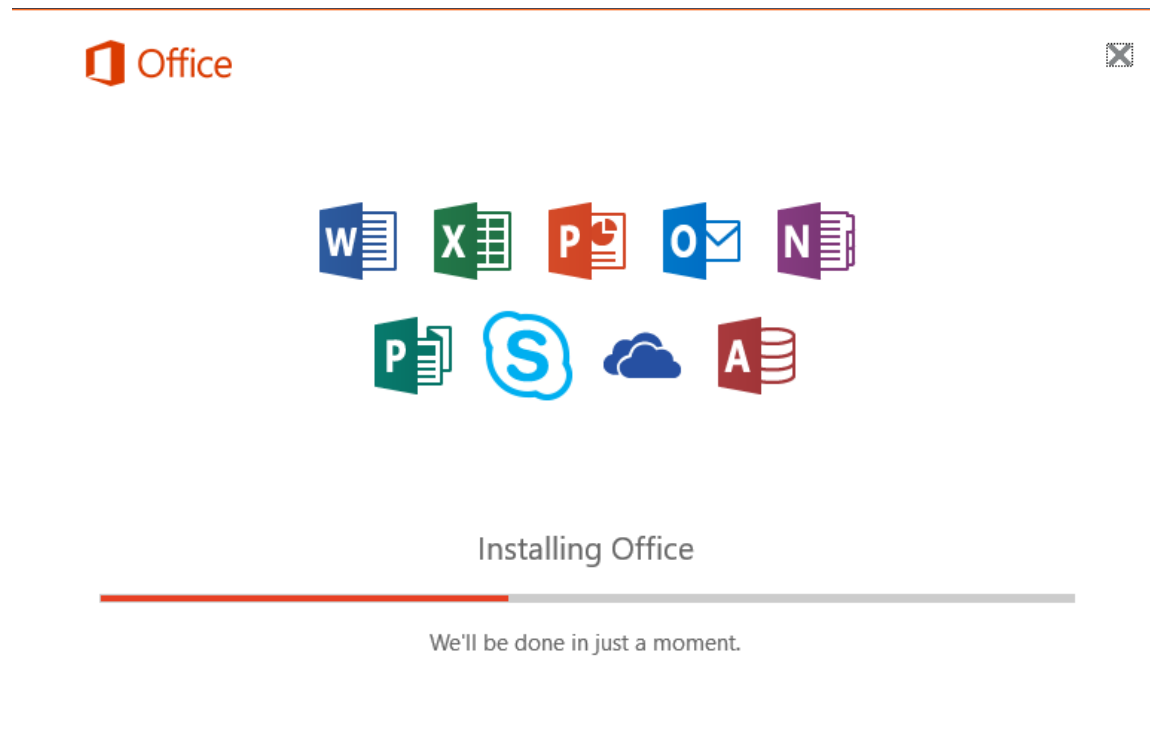
A security pop-up will appear on your computer that asks if you would like the current app to make changes. Click **Yes**:

The setup wizard will download all the files that are needed to install Office on your computer:

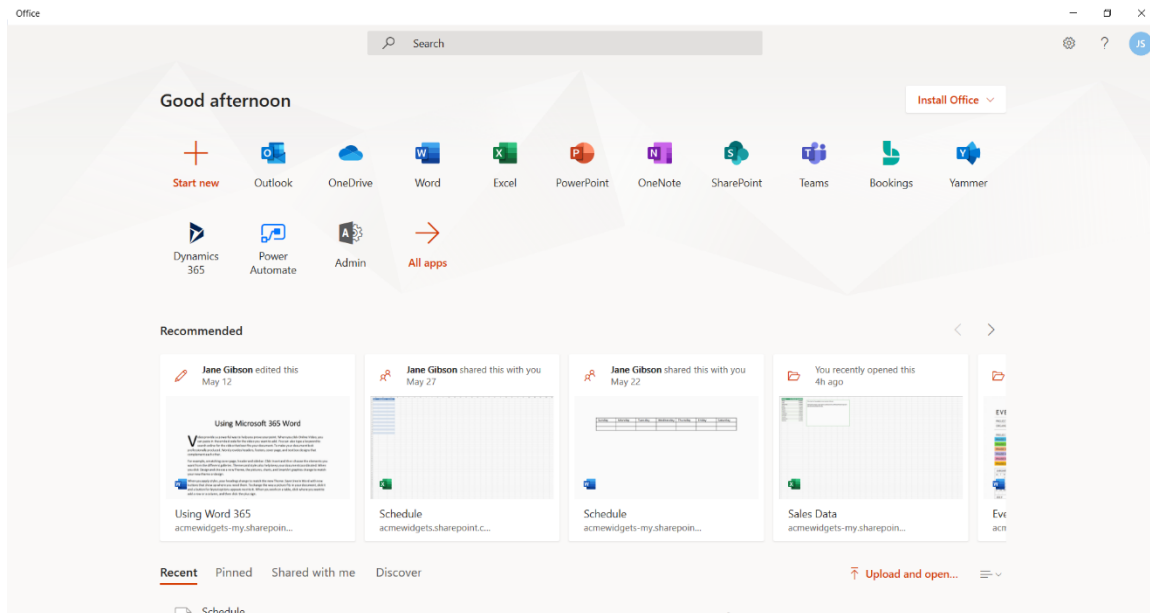Once all the files have been downloaded, the wizard will begin to install Office:

With the installation completed, the Office apps will now be available to use on your computer.
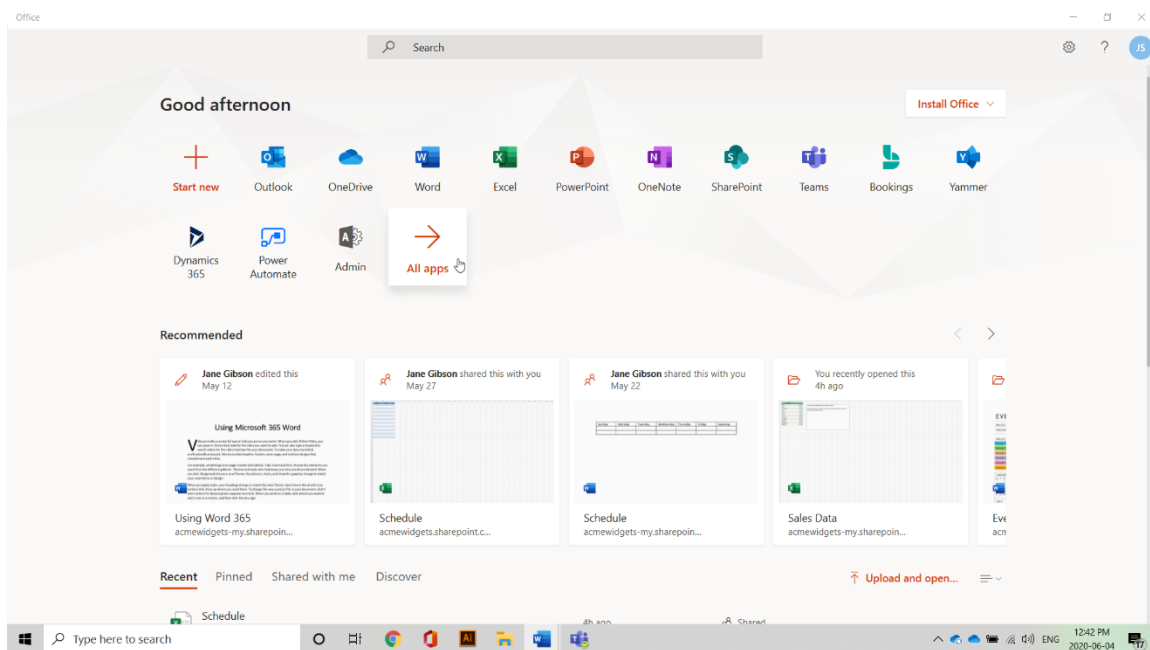
Opening the Office Desktop App

Type Office into the search bar on your computer. Click the **Office** icon to open it:
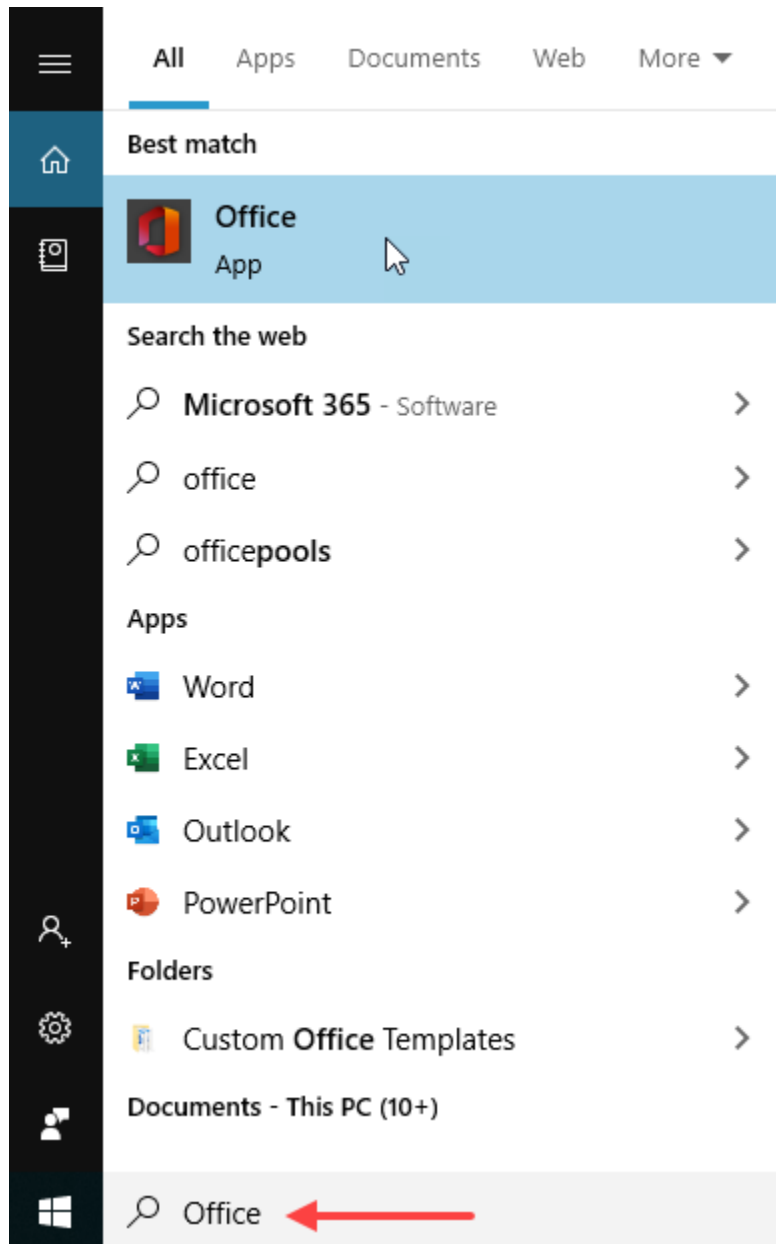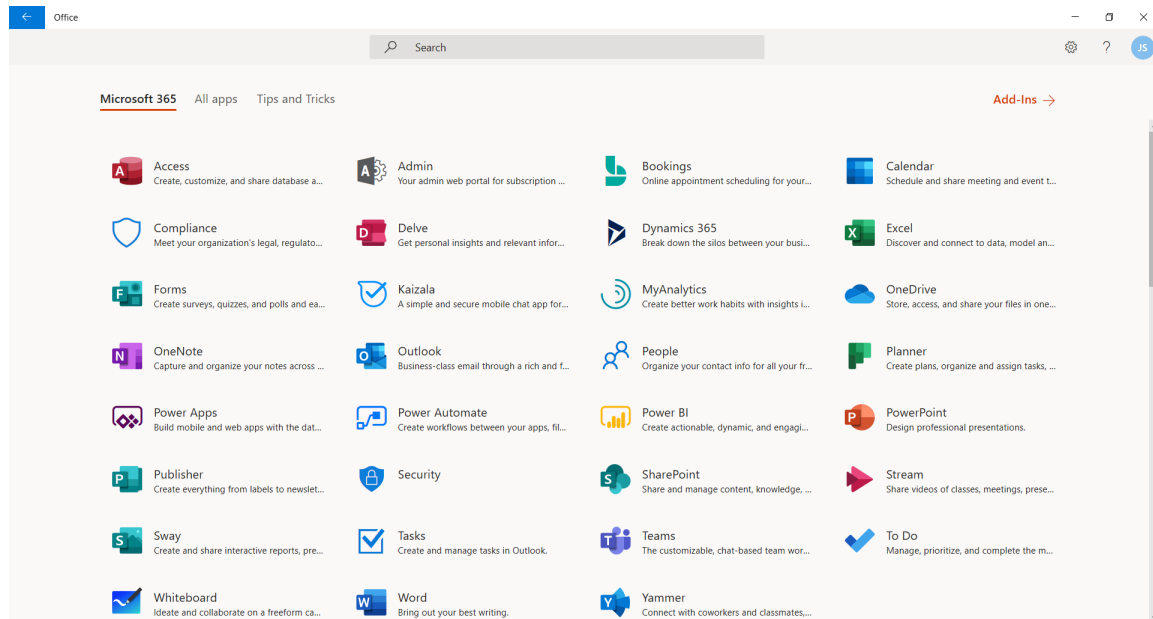
The Office app home page will open:

To open any Office desktop app, select the related app tile. To explore more apps, click **All apps** to expand:

You can view and select multiple apps that your subscription plan includes:

Signing into Microsoft 365 from Office Apps

If you already have a copy of Microsoft Office installed onto your computer or if you are installing Office for the first time, you may be required to sign into it. To do this, open any of your desktop Office apps. In this example, we have opened Microsoft Word. To sign in, click the **Sign in** button that appears in the top right-hand corner:
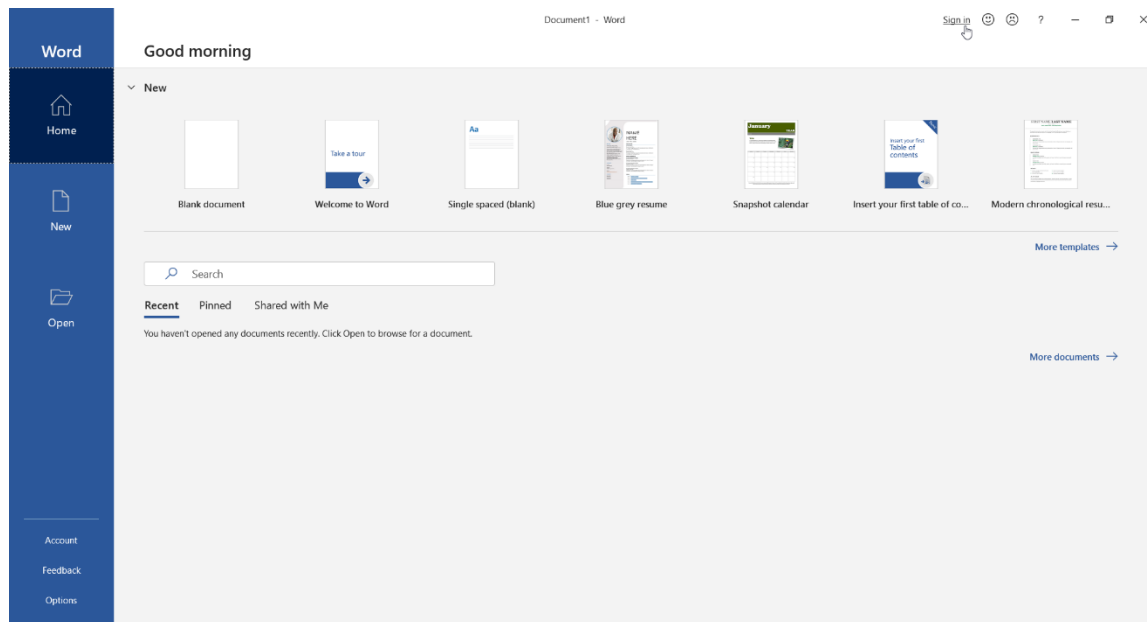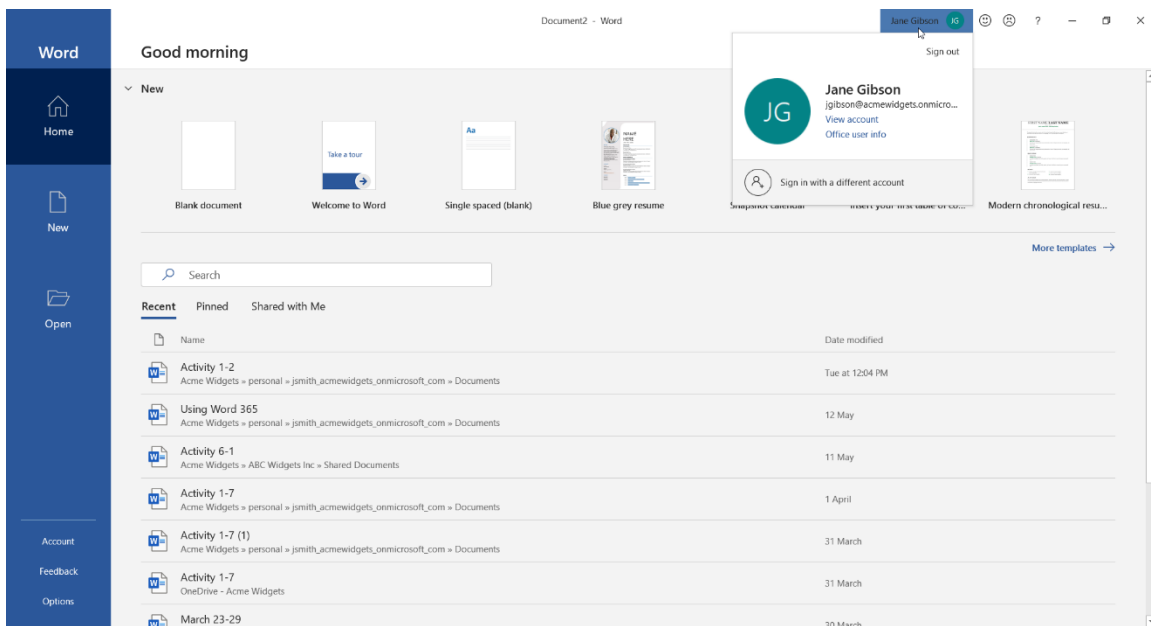

This action will display the Sign in dialog box if it is not shown already. Type the email address that is associated with your Microsoft account, then click **Next**:
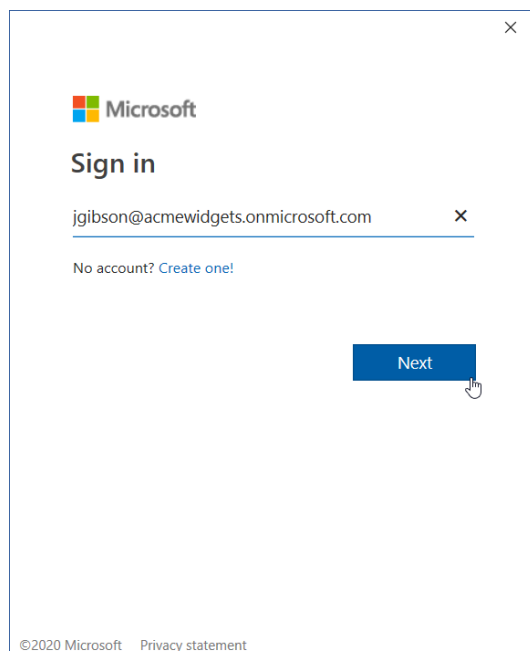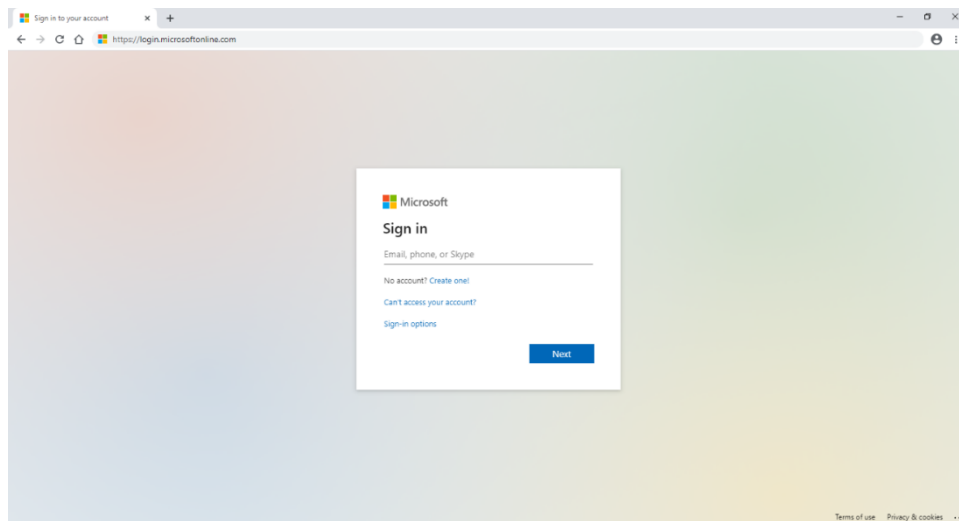
Type in your password, then click **Sign in**:
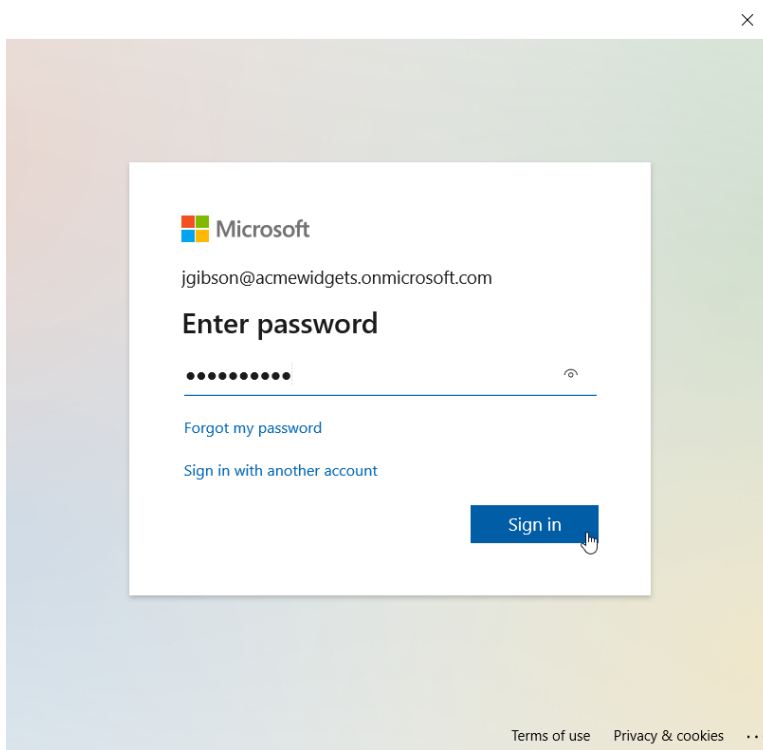
The current copy of Office that has been installed onto your computer will now be signed in using your Microsoft 365 account:

Activity 1-4: Download and Install Office

Although you have full access to Office Apps online, you would like to install Microsoft Office on your computer so that you can easily work on files while travelling.

1. To begin, turn on and log into your computer. Open your most frequently used browser and open the https://login.microsoftonline.com web page:


2. On the landing page for your Microsoft 365 account, click **Install Office**, then click the **Premium Office apps** option that appears near the top right-hand corner of the landing page:
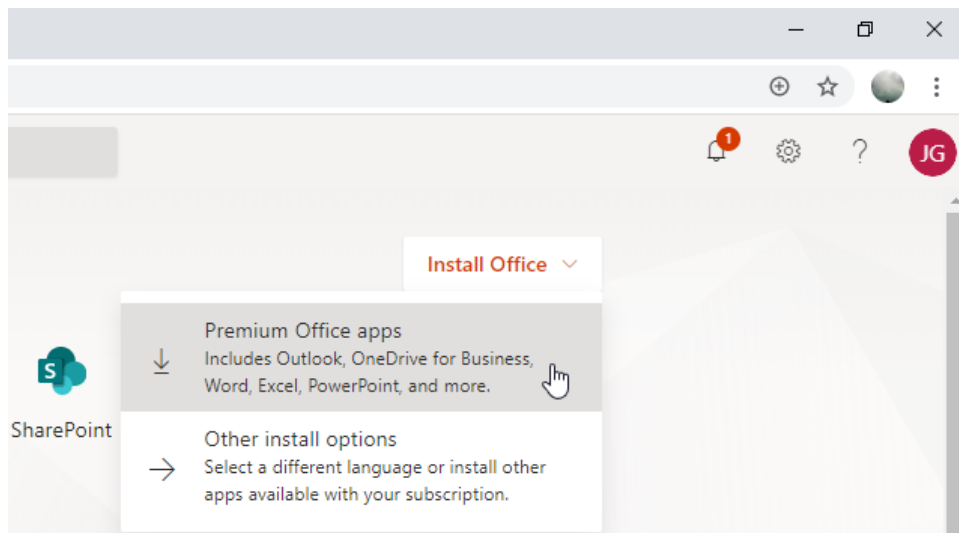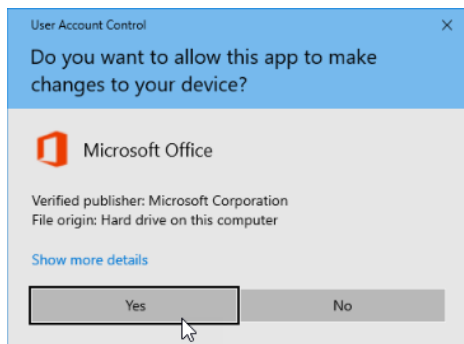
3. A Save As dialog box will appear. To continue, choose the folder where you want to save the Setup file, then click **Save** to finish:
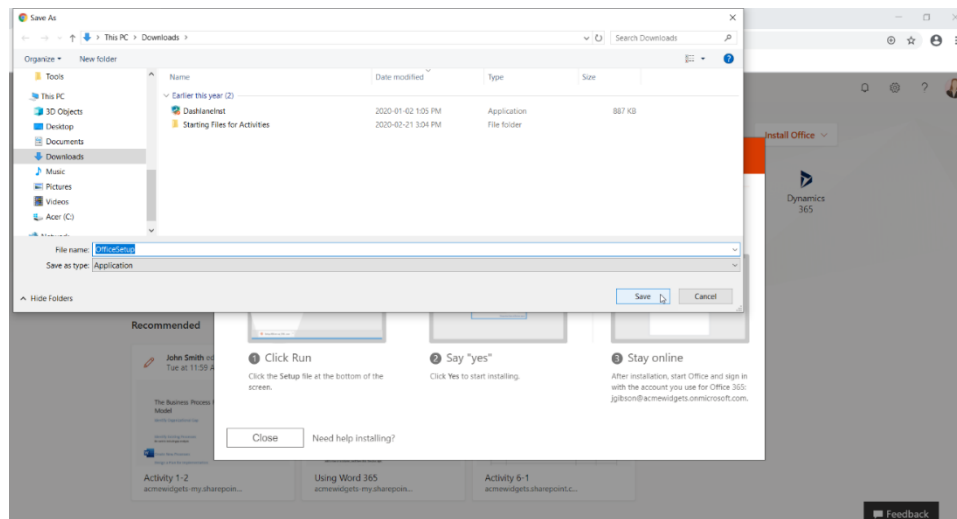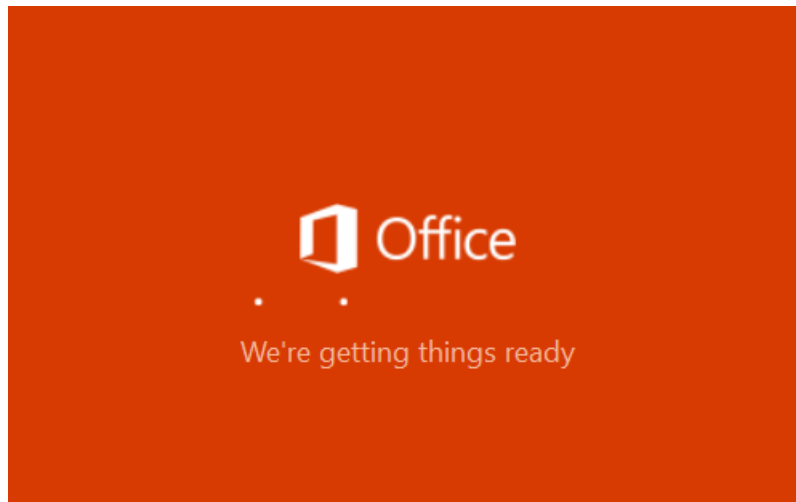

4. Once the download has been completed, locate and open the **OfficeSetup** file:
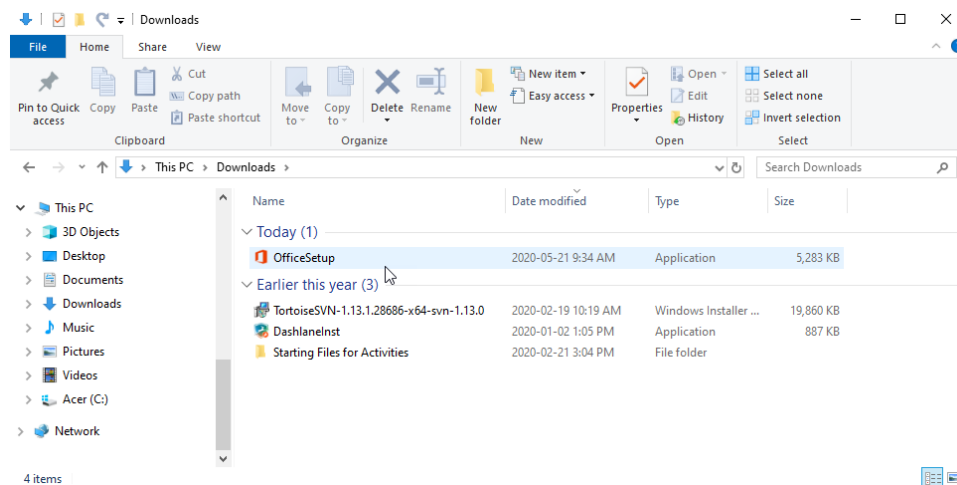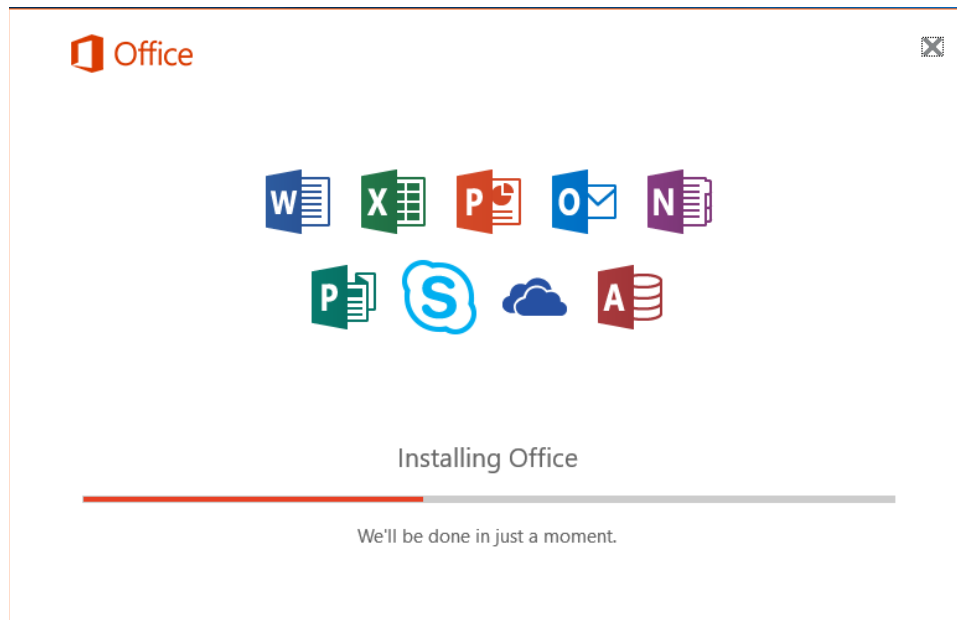
5. A security pop-up will appear on your computer that asks if you would like the current app to make changes. Click **Yes**:


6. The setup wizard will download all the files that are needed to install Office on your computer:

**7.**   Once all the files have been downloaded, the wizard will begin to install Office:

8.   Once the installation is completed, open Microsoft Word. A pop-up should appear that asks you to sign into your Microsoft 365 account. If the pop-up does not display, click **Sign in** (top right-hand corner of the window):
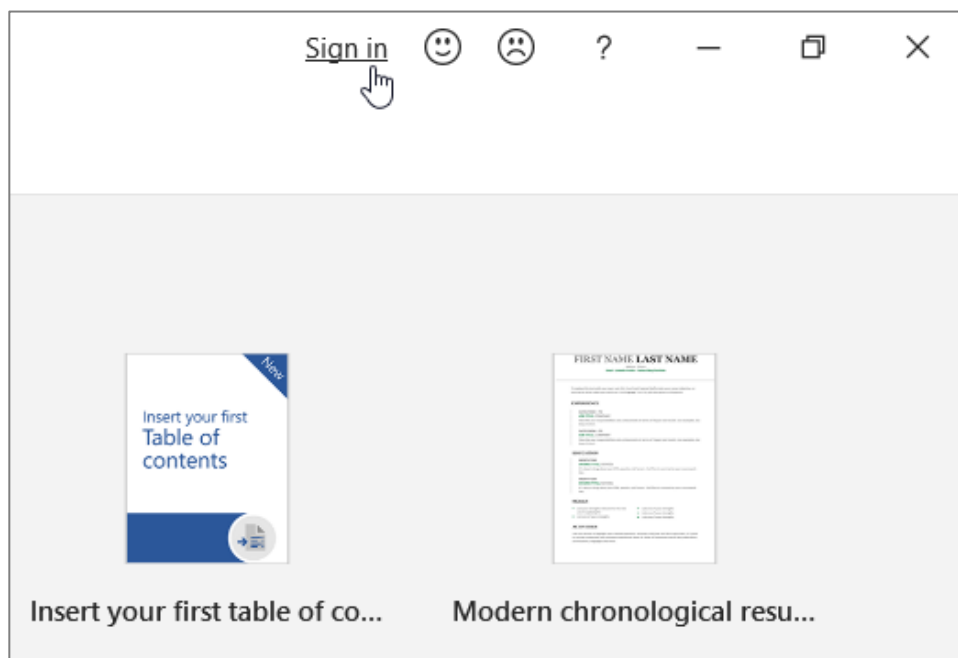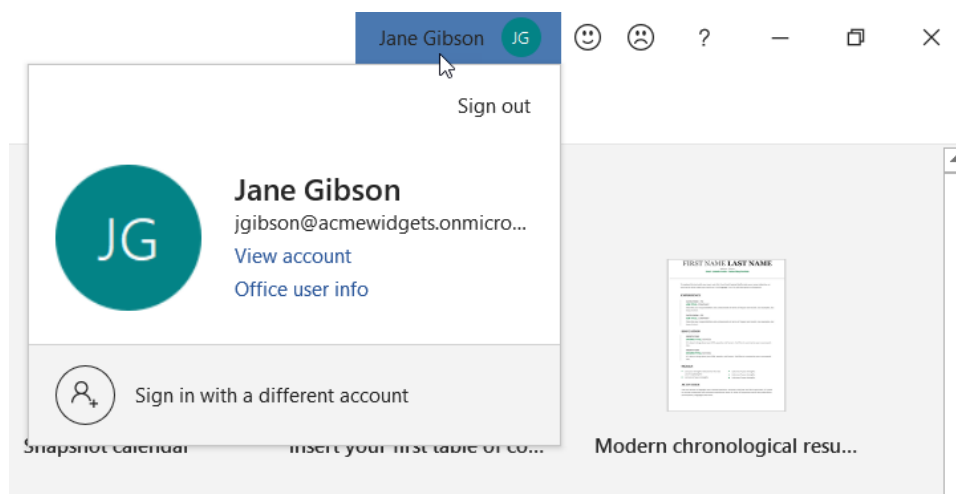
9.   Inside the **Sign in** pop-up, type the email address that is associated with your
Microsoft 365 account into the provided text box. Click **Next**:
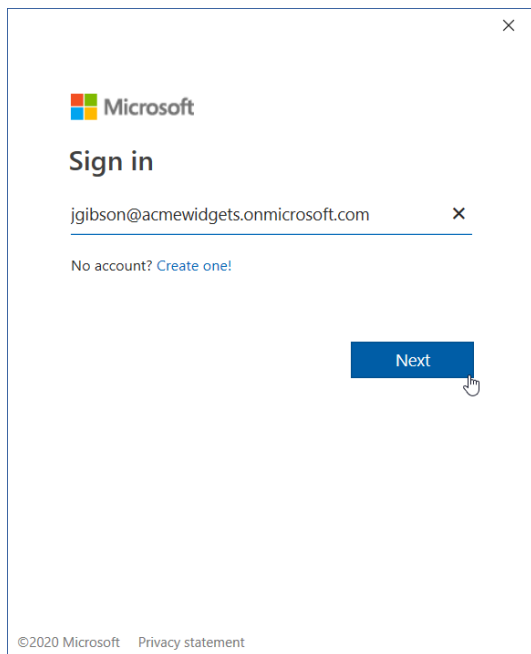
10. Enter your password into the provided field and click the **Sign in** button to continue:
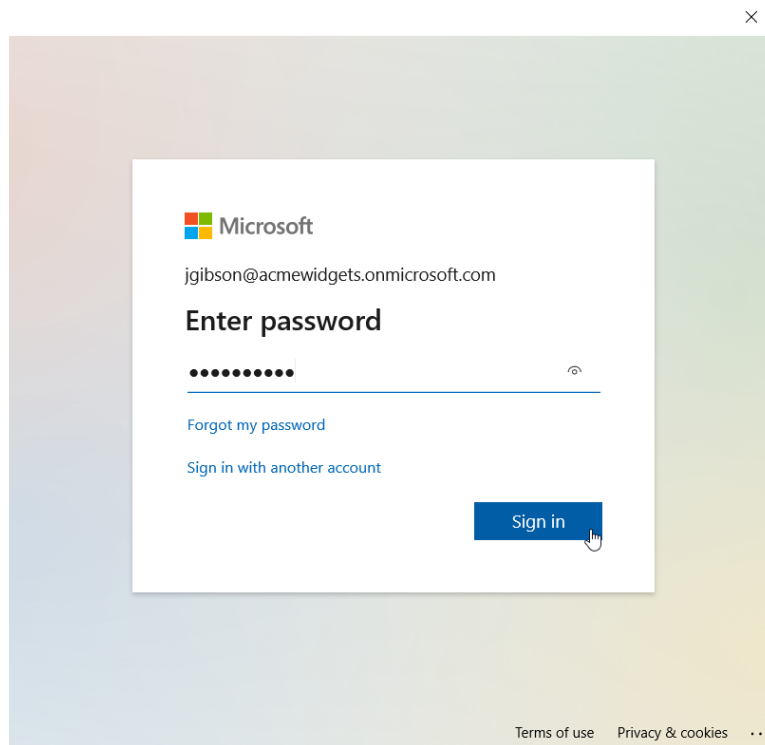
11. You will now be signed into Microsoft Office on your computer using your Microsoft 365 account:

12. Close Microsoft Word and then sign out of Microsoft 365 in your browser. Close your browser window to complete this activity.

Summary

In this lesson, you learned about what Microsoft 365 is and how it is used in organizations around the world. You should now be comfortable logging into your Microsoft 365 account, completing basic navigation tasks, search for help, and changing basic settings. Additionally, you should now be comfortable downloading and installing Office software onto your computer, and signing in your Microsoft 365 account from Office apps.

Review Questions

1. **What is Microsoft 365?**

2. **What is the cloud?**

3. **What navigational element will you always see along the top of a page while logged into your Microsoft 365 account?**

4. **What are the requirements that make your password more secure?**

5. **What happens when you click the Install Office button on your Microsoft 365 landing page?**

LESSON 2:
YOUR SUBSCRIPTION PACKAGE

Lesson Objectives

In this lesson you will learn about:

- Office apps that come with your subscription

- Services included with your subscription

TOPIC A: Included Apps

One of the fundamental features of Microsoft 365 is the inclusion of Office apps. In this topic, we will focus on the apps that come with a **Microsoft 365 Business Standard** subscription.

Topic Objectives

In this session, you will learn about:

- Word

- Excel

- PowerPoint

- Outlook

- Access

- Publisher

- OneNote

Word

Microsoft Word is Microsoft's powerful word processing program where you can create professional documents of nearly any type. You can also add tables, images, and much more. Word's interface is intuitive and easy to use, and it is customizable, so the tools you need will be easily accessible.

Microsoft Word is offered both as online and desktop versions. Although the online version has limited functionalities, it provides most of the frequently used tools needed to compose a simple document.

With Word Online opened, let's look at the different parts of the interface:
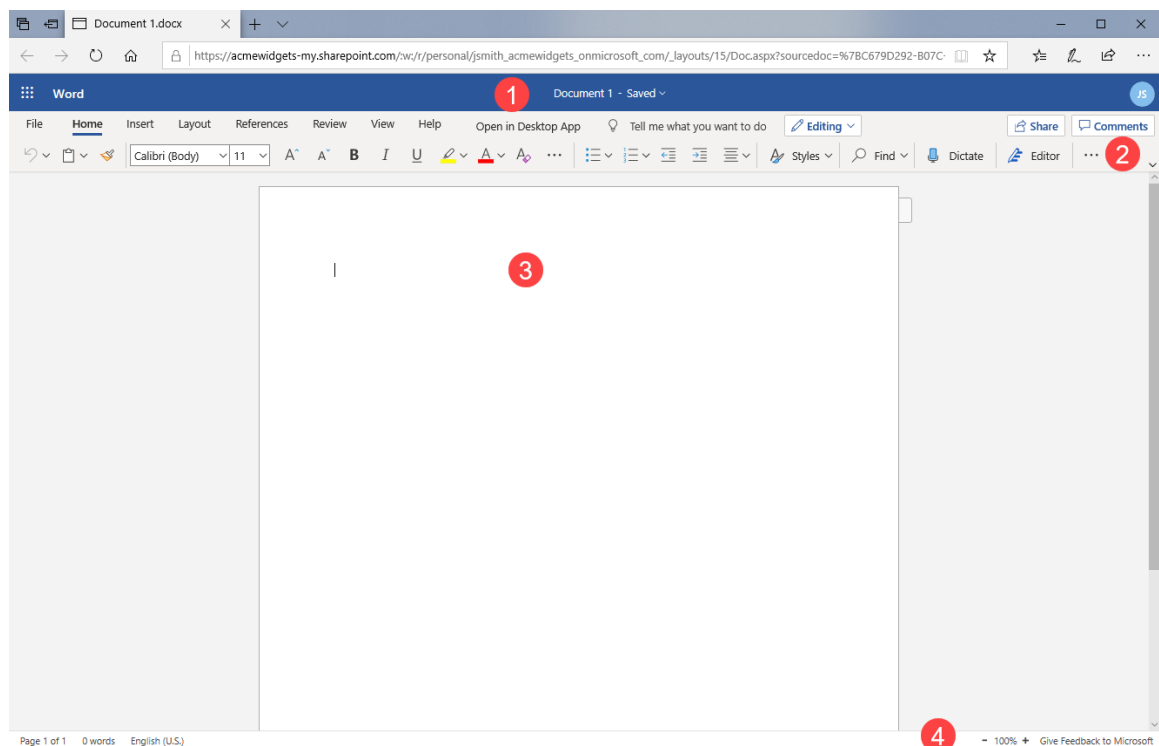
1: Title Bar

The name of the current file is displayed here. You may also see more information about the file (for example, here you can see it has been saved). You can click the file name to change it.

2: Ribbon Interface

Displays tab commands organized into groups.

3: Working Area

The content in the currently open file will be shown here.

4: Status Bar

This bar is used to display information about the document, such as page count, word count, and more.

Excel

Microsoft Excel is Microsoft's spreadsheet program which offers many tools for managing numerical data, as well as the ability to add charts, shapes, and much more.

Microsoft Excel has both online and desktop versions. If you need only simple formulas, the online version will satisfy your requirements. Otherwise, you can choose to work on the desktop app.

Let's look at the Excel Online interface:
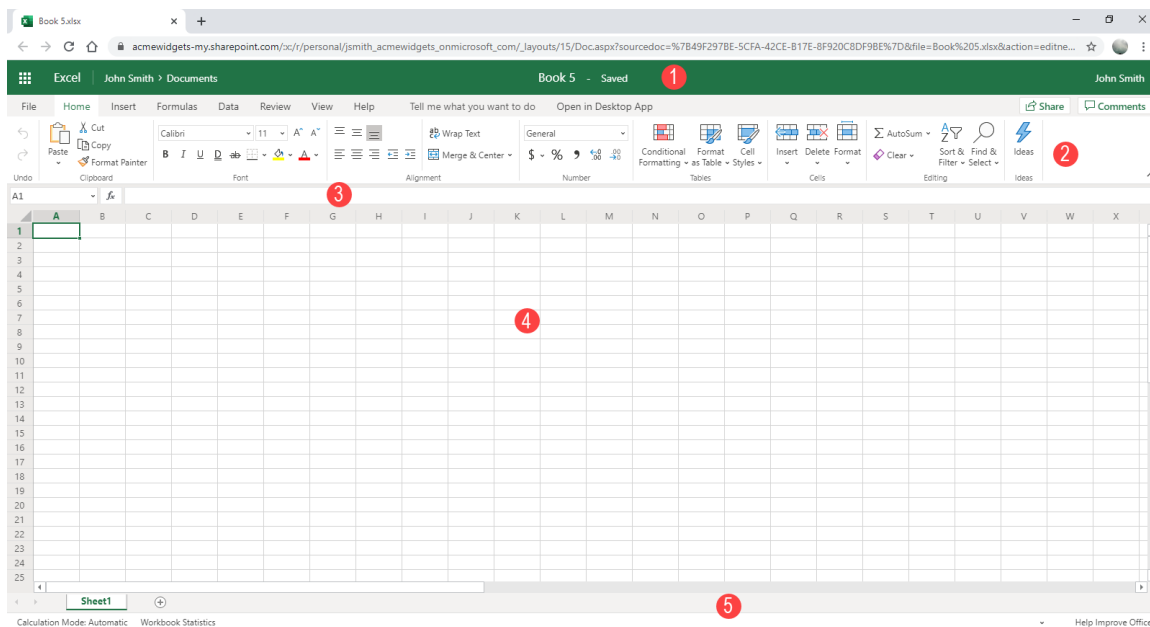
1: Title Bar

The name of the currently open file is displayed here.

2: Ribbon Interface

Displays tab commands organized into groups.

3: Formula Bar

The Formula Bar allows you to enter data into a cell.

4: Working Area

The data in the current file will be shown here.

5: Status Bar

This bar displays running calculations and other information about the workbook.

PowerPoint

Microsoft PowerPoint is Microsoft's presentation software program, which is used to create professional presentations. You can create anything from a basic slide show to a self-running narrated presentation using pictures, embedded videos, and sound.

Microsoft PowerPoint is also available as both desktop and online versions. Both have similar tools and functionalities, but the desktop app has more animations and graphics available.

Let's take a look at the PowerPoint Online interface:
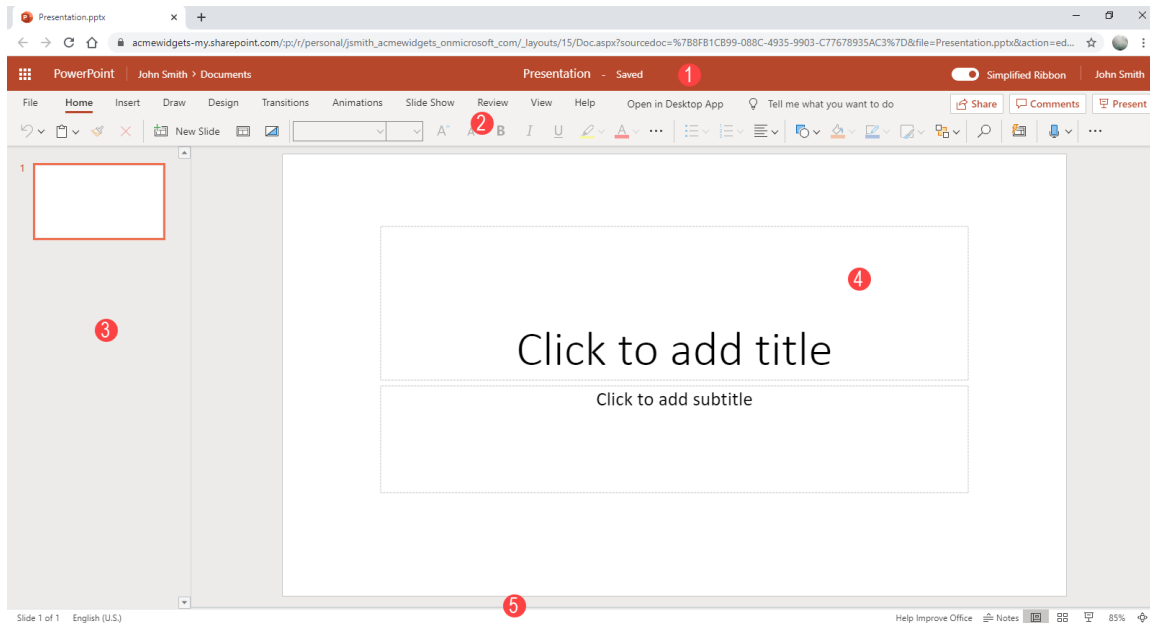
1: Title Bar

The name of the current file is displayed here. You may also see more information about the file (for example, here you can see it has been saved). You can click the file name to change it.

2: Ribbon Interface

Displays tab commands organized into groups.

3: The Slides Pane

Each slide in the presentation will be displayed in this pane as a thumbnail.

4: Working Area

The content in the currently selected slide will be shown here.

5: Status Bar

This bar is used to display information about the presentation.

Outlook

Microsoft Outlook is a powerful and easy-to-use information management application. It allows you to manage your email, calendar, contacts, tasks, and more, all from one central location. It helps users connect and follow up to get work done, set up conversations, and communicate.

Outlook is offered as both a web interface, and a desktop app. While the web interface version is compact, user-friendly, and accessible everywhere, the desktop app provides more functionality and customizability.

With the Outlook web interface open, let's take a closer look:
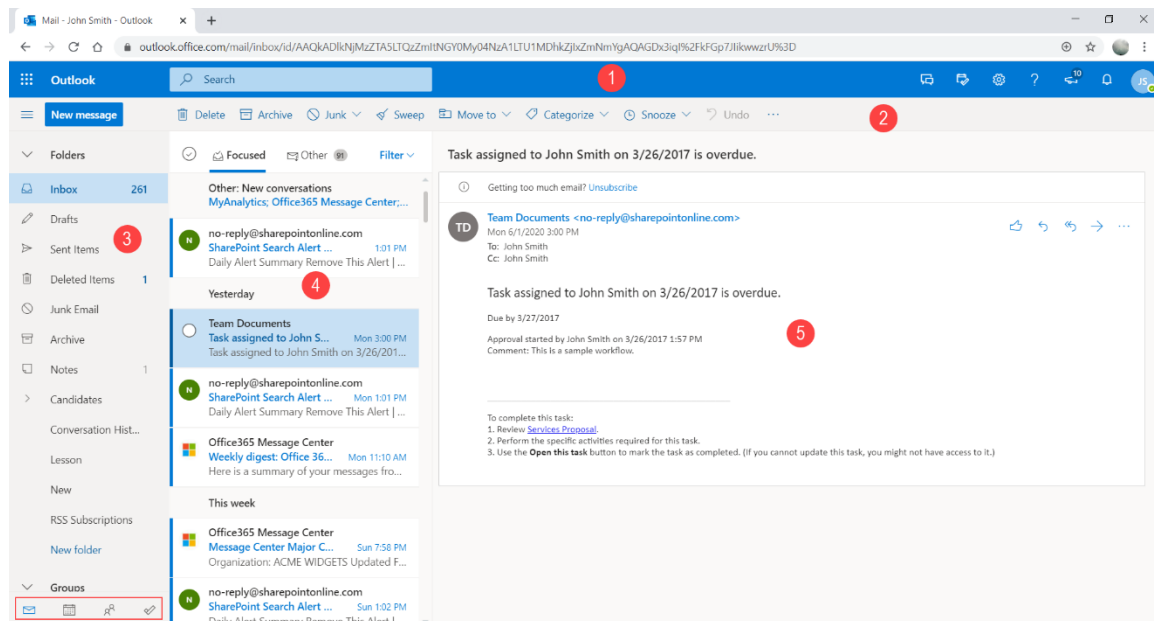
1: Navigation Commands

Includes the App launcher, the Search box, and links to view notifications, change settings, get help, and the My account task pane.

2: Editing Pane

Allows you to delete, archive, move emails, and much more.

3: Folders/Navigation Pane

Access different folders in the current workspace. There are also shortcut icons at the bottom which switch between Mail, Calendar, People, and To Do (Task) workspaces.

4: Item List

Shows a list of items in the current folder.

5: Reading Pane

Shows the contents of the selected item.

Access

Microsoft Access is Microsoft's database application which is designed to enter, edit, and analyze data. Access can also generate reports based on the data in the database. As of the latest updates, Access is only offered as a desktop app.

Let's look at the Access interface:
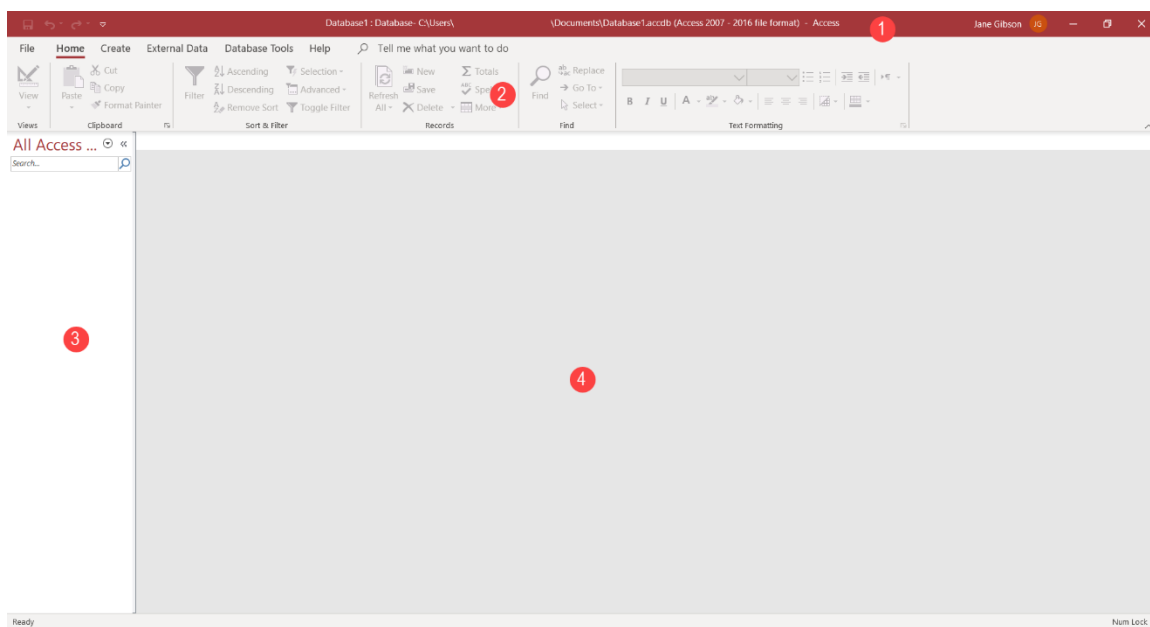
Similar to the other Office apps mentioned above, Access also has four primary elements:

1: Title Bar

Displays the name of the current databases and the name of the application.

2: Ribbon Interface

Access to different views and editing tools.

3: Navigation Pane

Displays tables, queries, and forms.

4: Working Area

Use this area to change data, design forms and reports, construct queries, and more.

Publisher

Microsoft Publisher is the Microsoft publishing application that allows you to create professional digital content. With Publisher, you can design event posters, newsletters, postcards, and brochures with easy-to-use and multiple functionalities.

Microsoft Publisher is only offered as a desktop app.

Let's look at the parts of the Publisher interface:
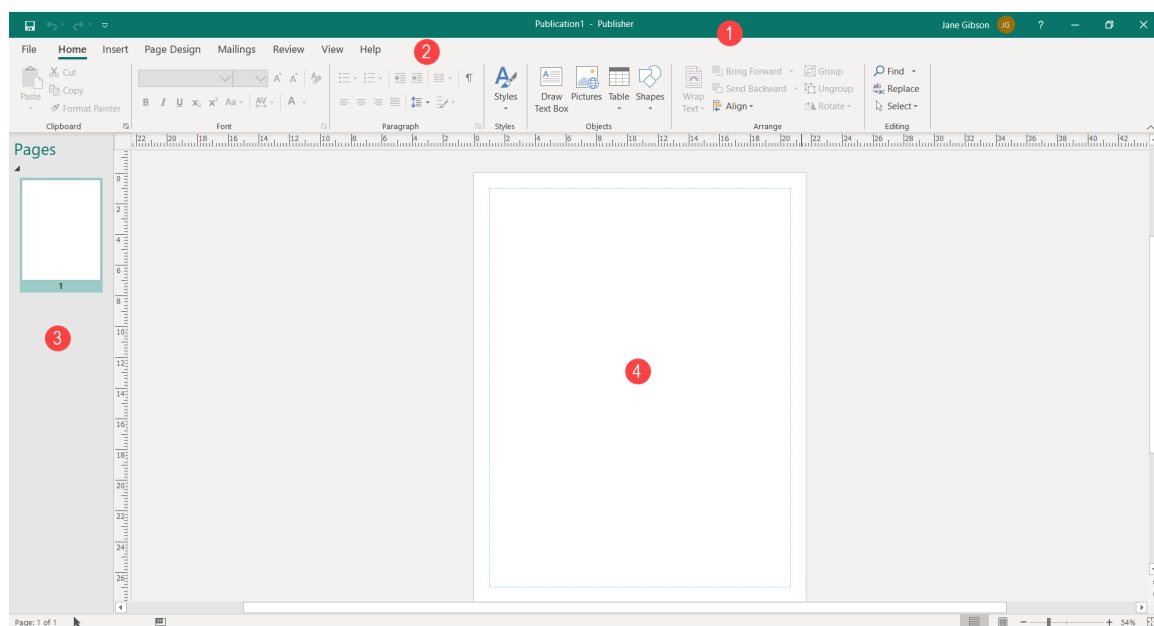
There are four primary features of Publisher's working interface:

1: Title Area

The name of the current databases and the name of the application.

2: Ribbon Interface

Access to different design and editing tools.

3: Pages Pane

Thumbnails the list of all the pages within the publication.

4: Working Area

Use this area to create your digital content.

OneNote

OneNote is Microsoft's note taking program that can be used to gather many types of content into one location and share your notes.

OneNote is offered as both an online and desktop app and both versions are very similar. If you have access to the internet, working with the online version will keep your document constantly saved. However, if you have limited internet access, the OneNote desktop version can be your lifesaver.

Let's explore the OneNote Online interface:
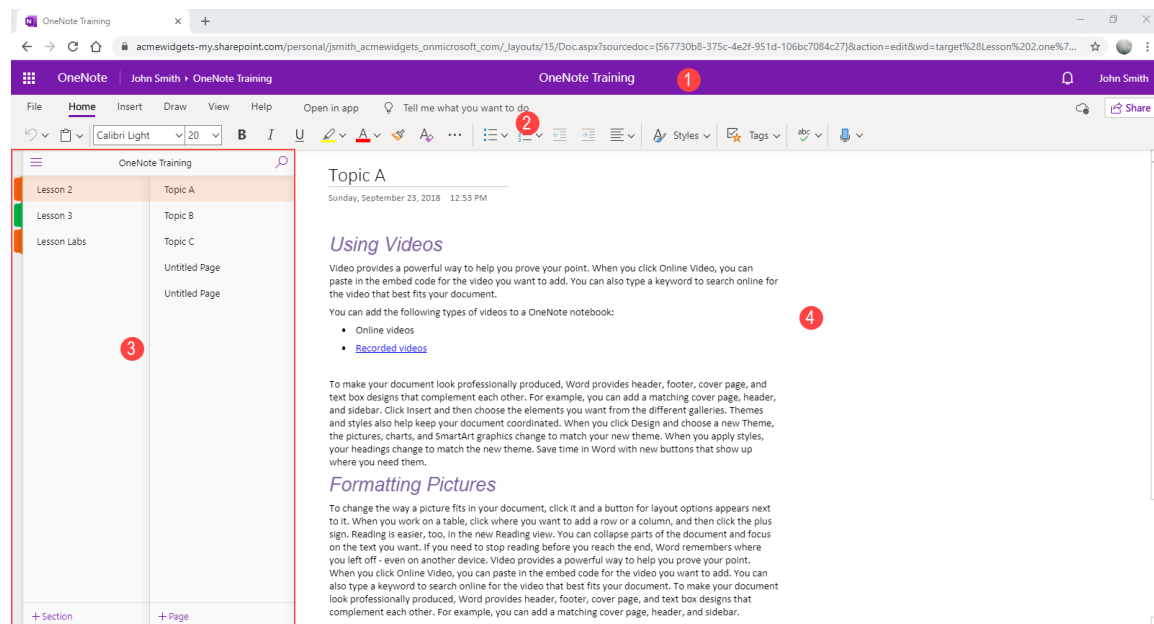
There are four primary elements:

1: Title Area

Includes the App launcher, the OneNote's logo, note's name, notifications, and the My account task pane.

2: Ribbon Interface

Access to commands and editing tools.

3: Notebook Menu

Displays any open notebooks.

4. Workspace

Displays the contents of your notes.

Activity 2-1: Exploring Microsoft Apps

In this activity, you will explore and navigate basic Microsoft Apps.

1. To begin, turn on and log into your computer. Open your most frequently used browser and open the https://login.microsoftonline.com web page:
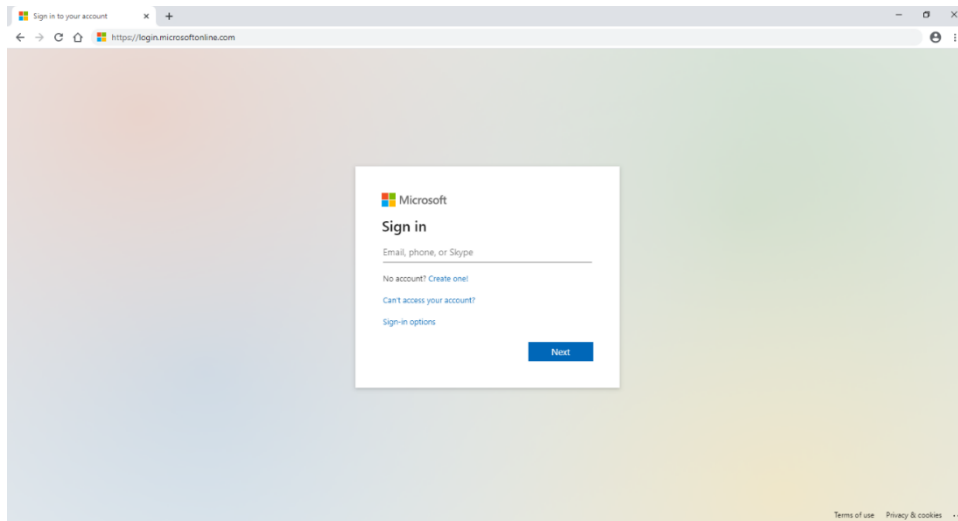
2. On the landing page for your Microsoft 365 account, click the **Word** tile:
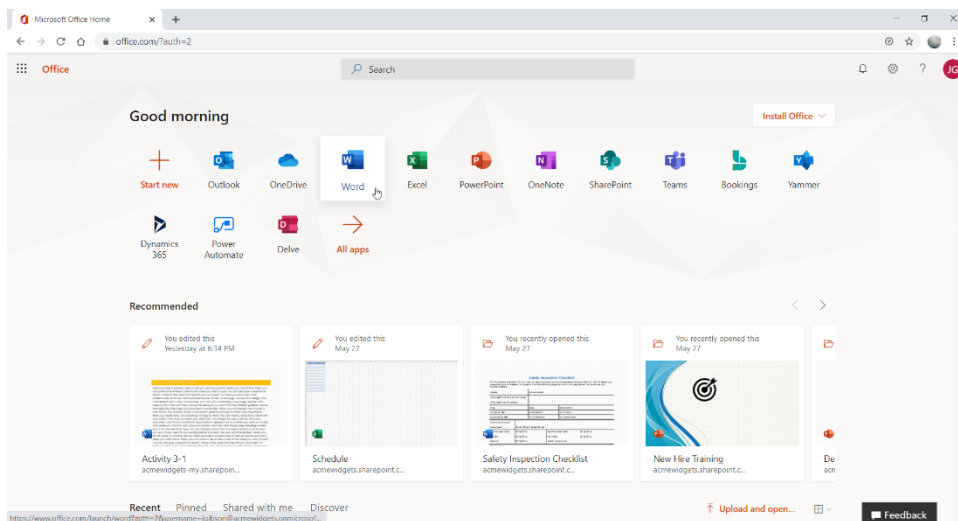
3.   Click **New blank document** to open a new Word document:
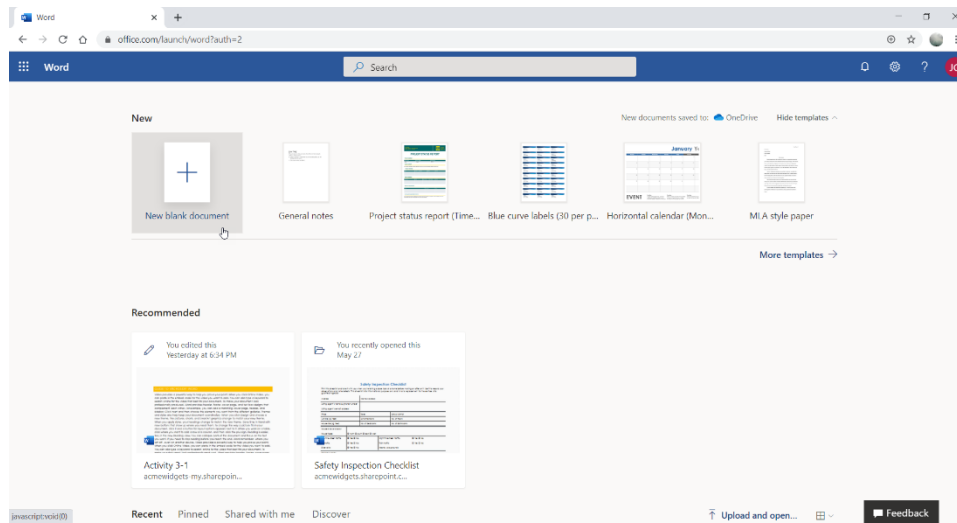
4.   A new Word document will be opened in a new tab. Navigate different
           components of Word Online:
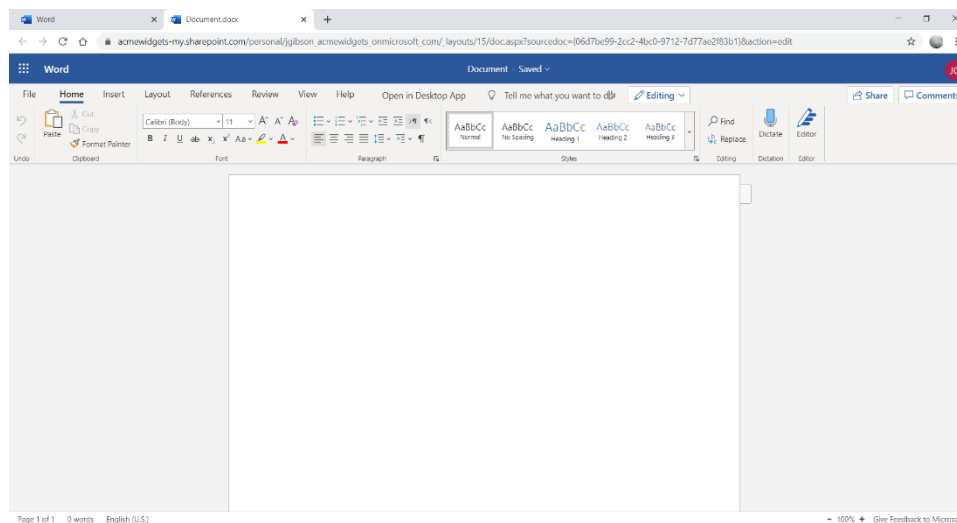
5.   Open the app launcher and click **Excel** to open:
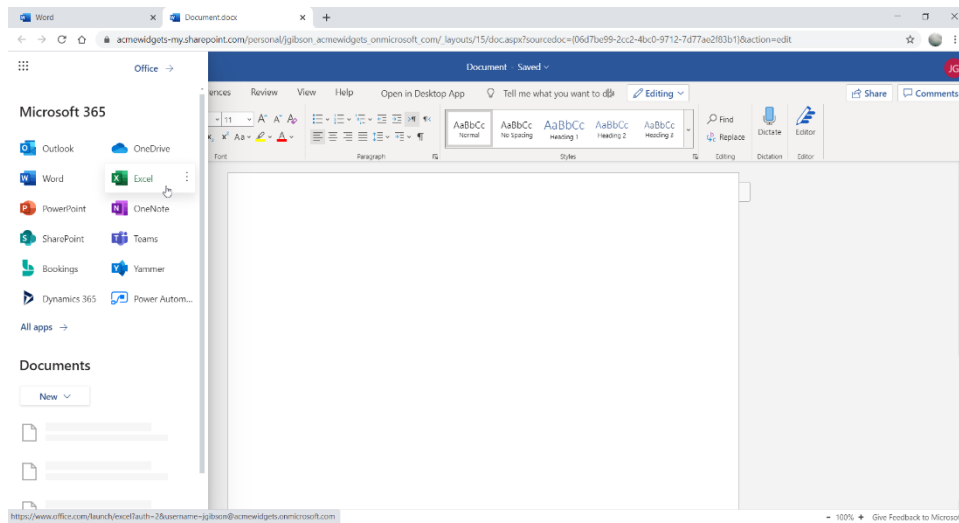
6.   Click **New blank workbook** to open a new Excel workbook:
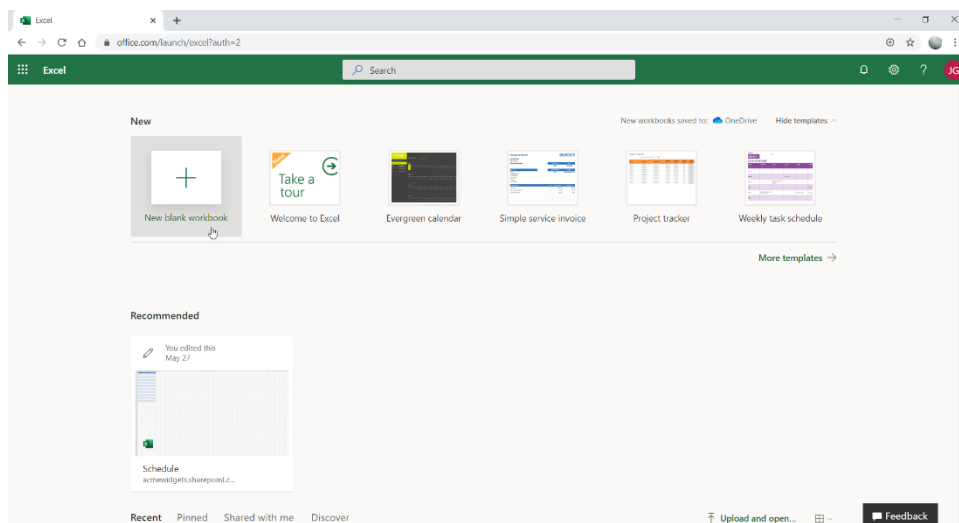
7. A new Excel workbook will be opened in a new tab. Explore the different components of Excel Online:
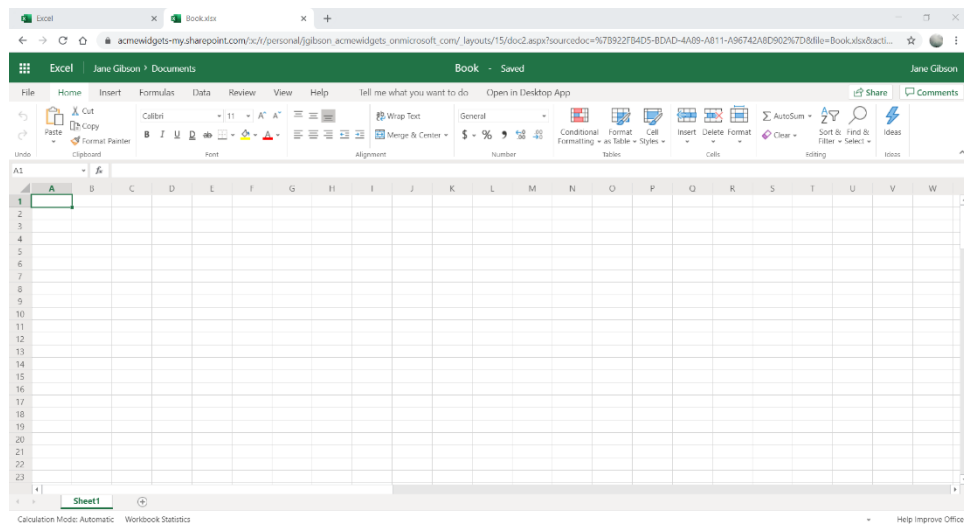
8. Open the app launcher and click **PowerPoint** to open:
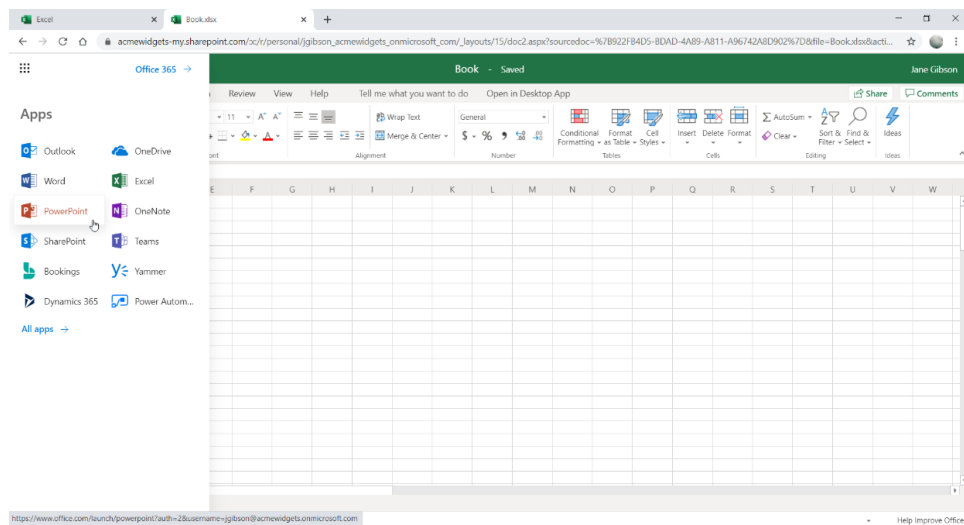
9. Click **New blank presentation** to open a new PowerPoint presentation:
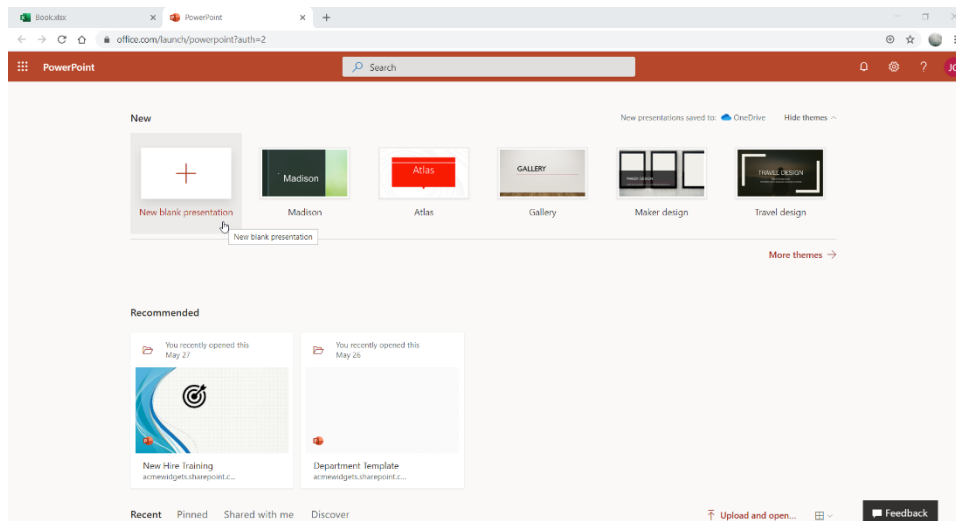
10. A new PowerPoint presentation will be opened in a new tab. Explore different components of PowerPoint Online:
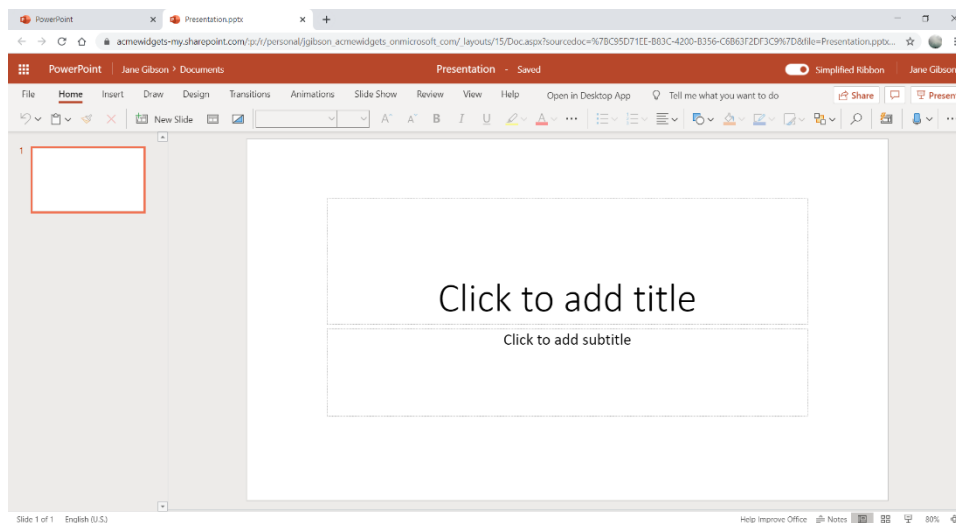
11. Open the app launcher and click **Outlook** to open:
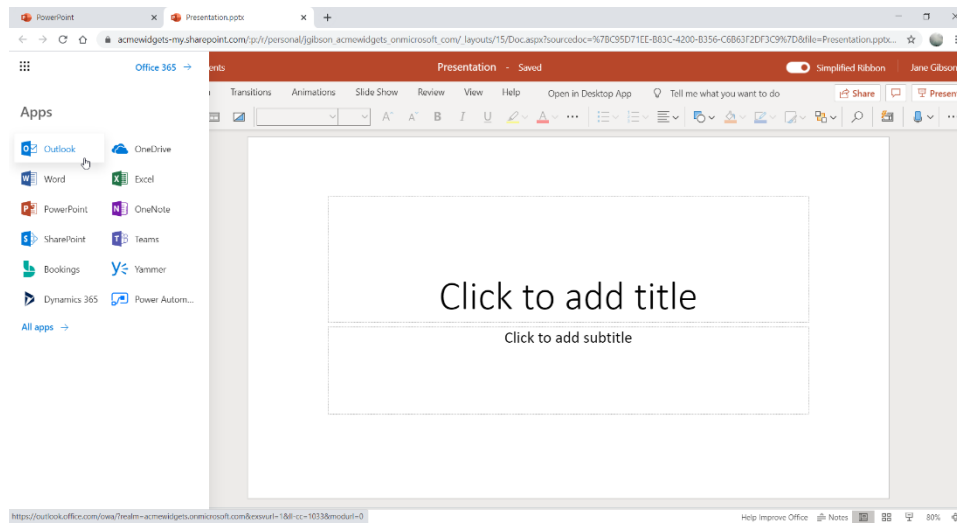
12. Explore different components of Outlook Online:
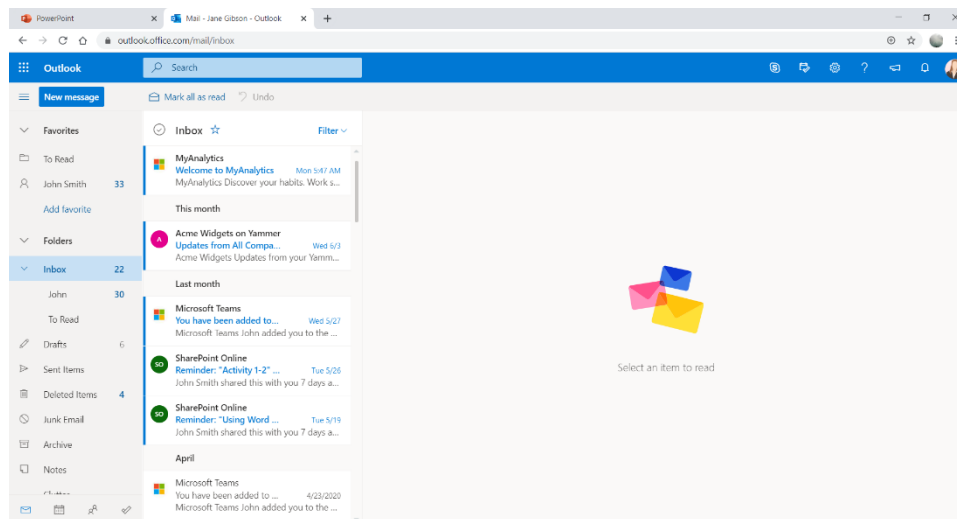
13.   Open the app launcher and click **OneNote** to open:
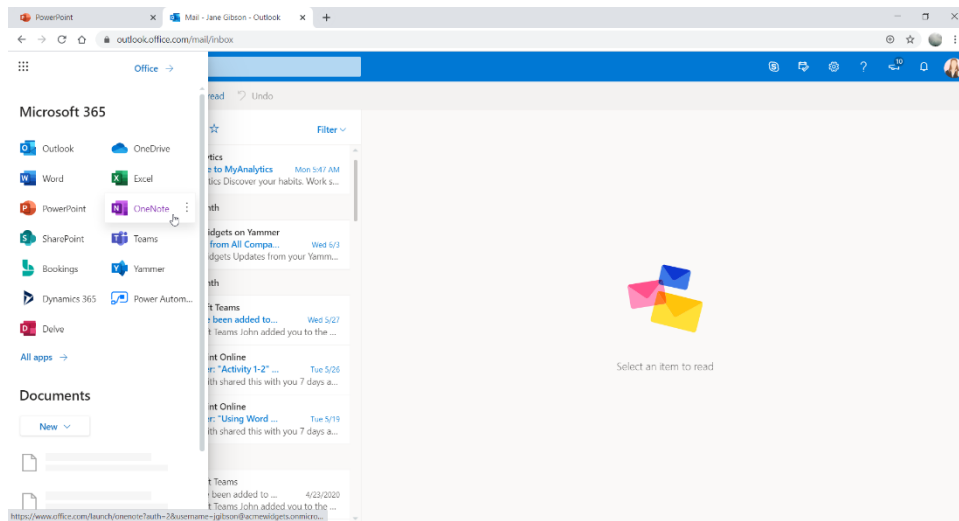
14.   Click **New notebook** to open a new OneNote notebook:
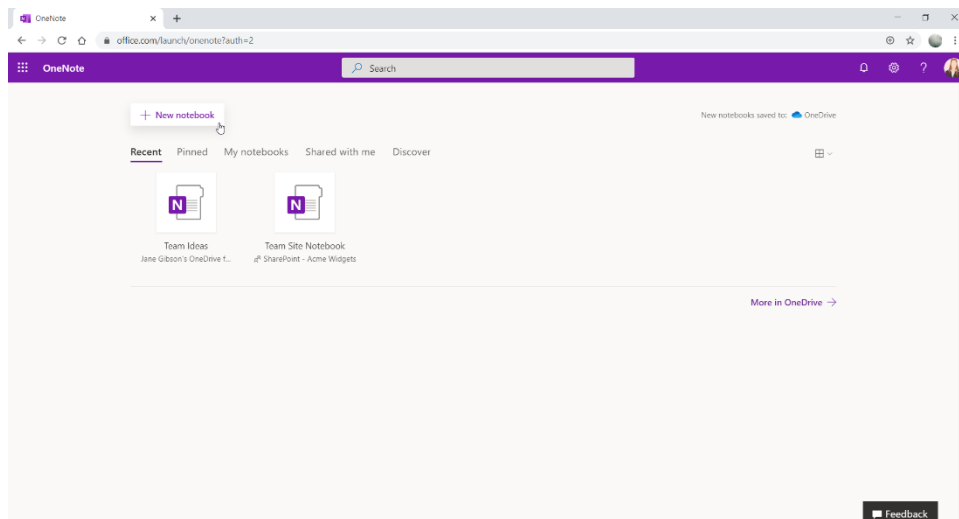
15.   Enter "**Activity 2-1**" as a name for the new notebook. Then, click **Create**:
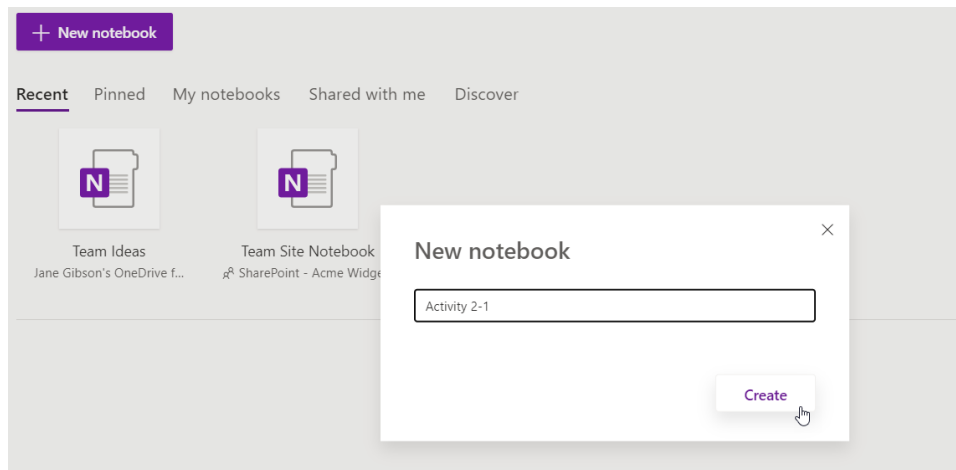
16.   A new OneNote notebook will be opened in a new tab. Explore different components of OneNote Online:
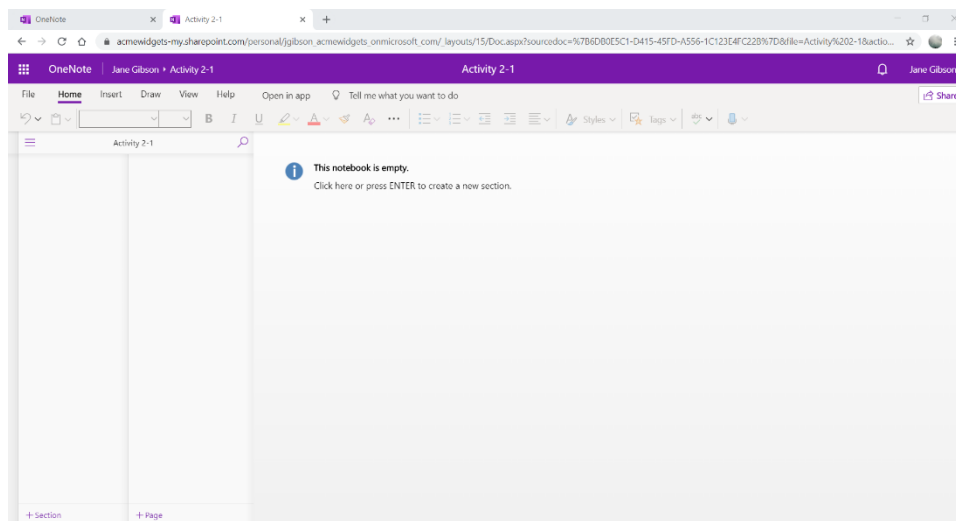
17.   Type **Office** into the search bar on your computer. Click the **Office** icon to open it:
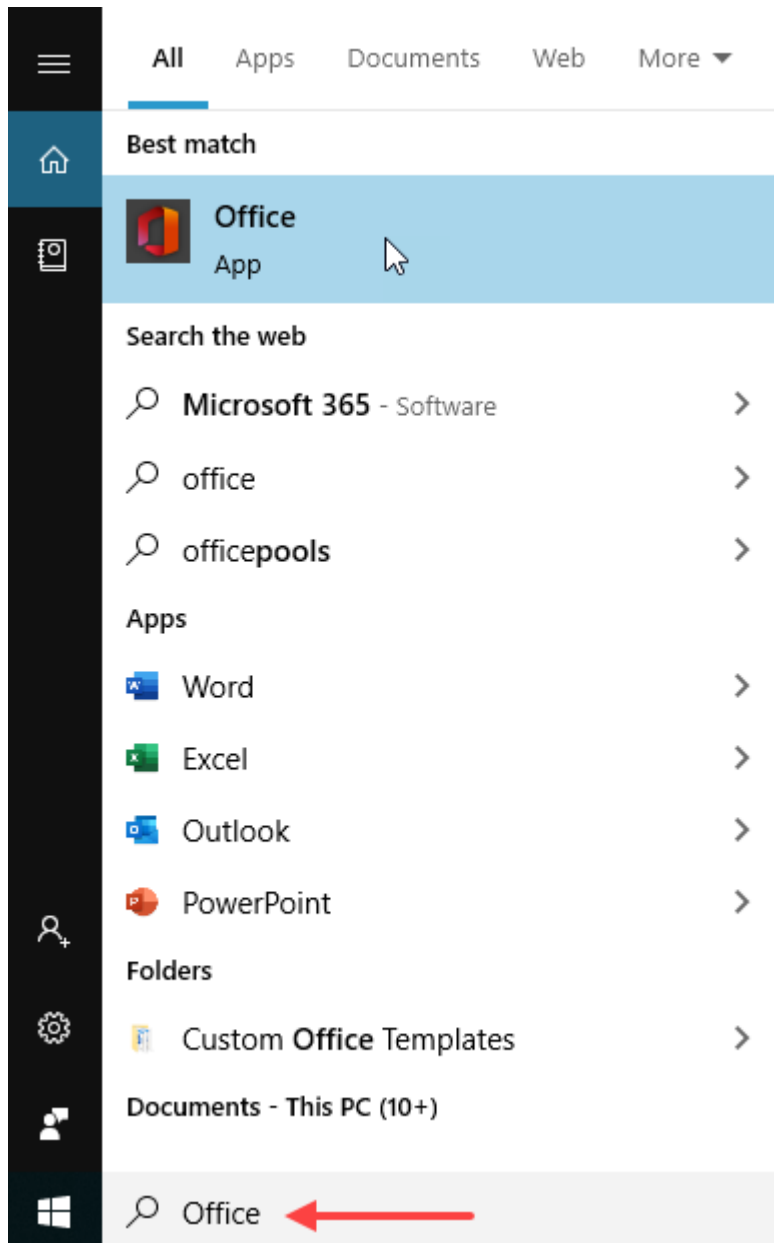
18. The **Office** desktop app will open on your computer:
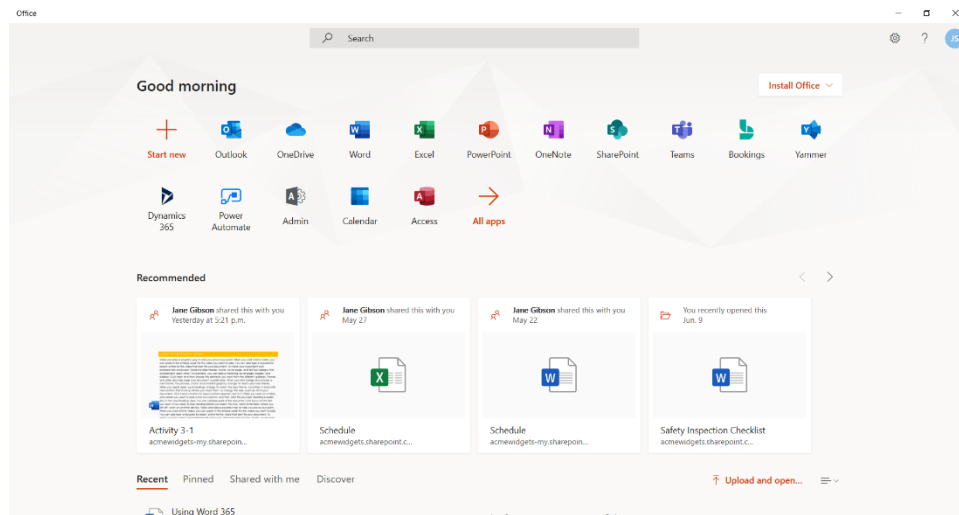
19. Click the **Access** tile on the landing page to open:
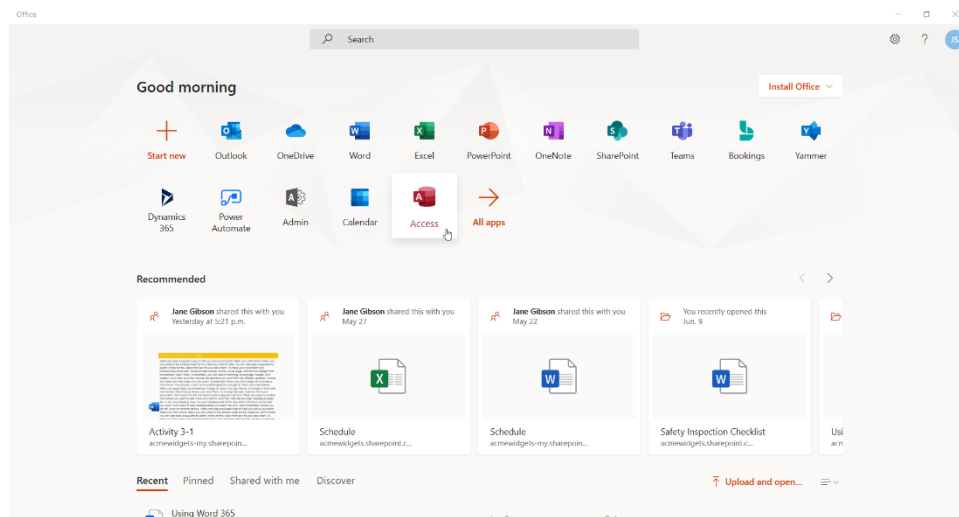
20. Click **Blank database** to open a new Access database:
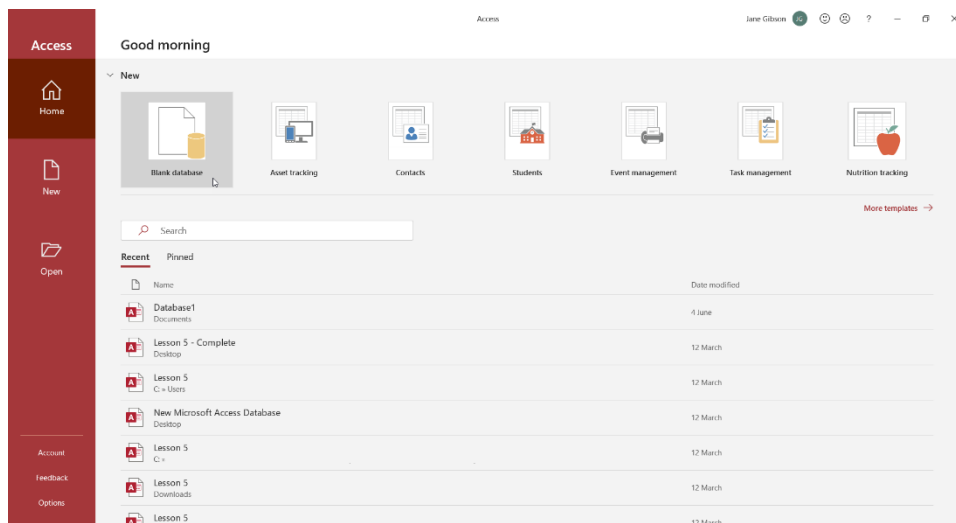
21. Leave everything at the default and click **Create**:
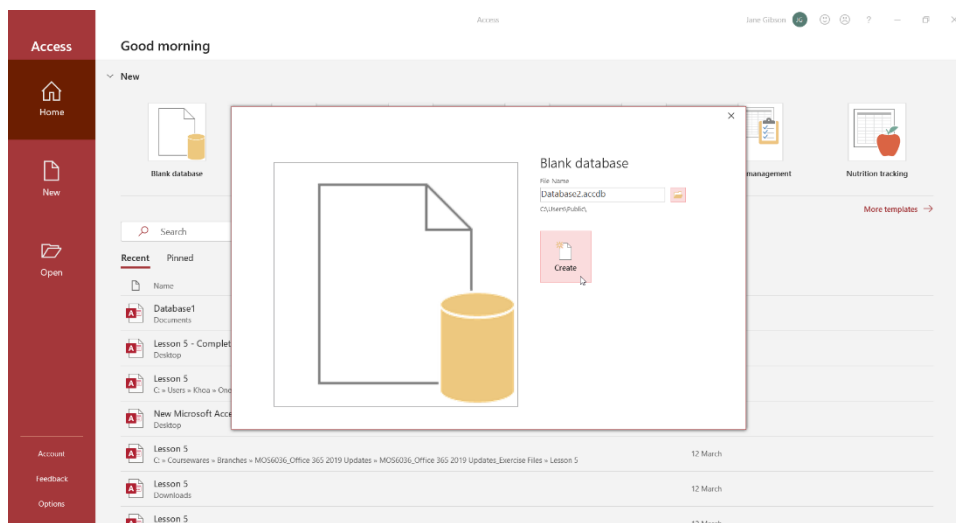
22. Explore different components of Access desktop app:
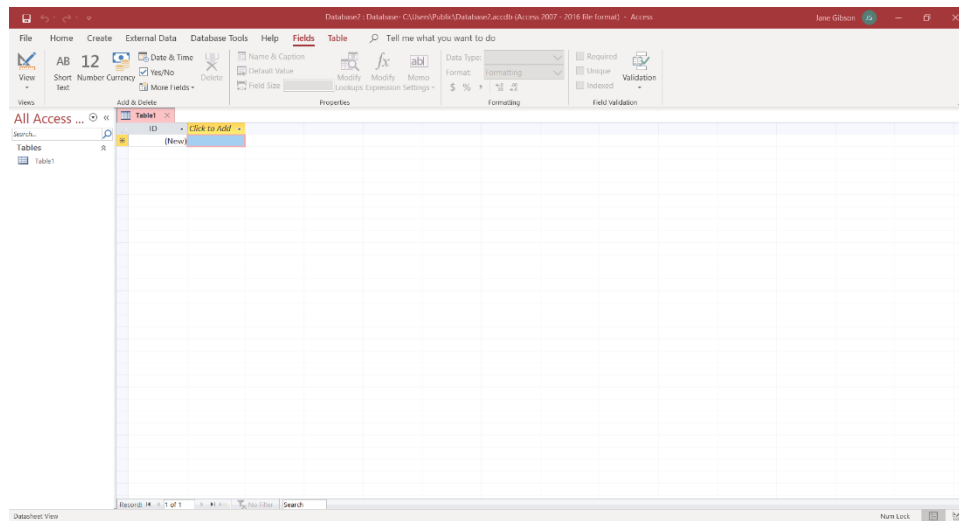
23. **Close** the Access window and return to the Office desktop landing page. Click **All apps** to expand the list:
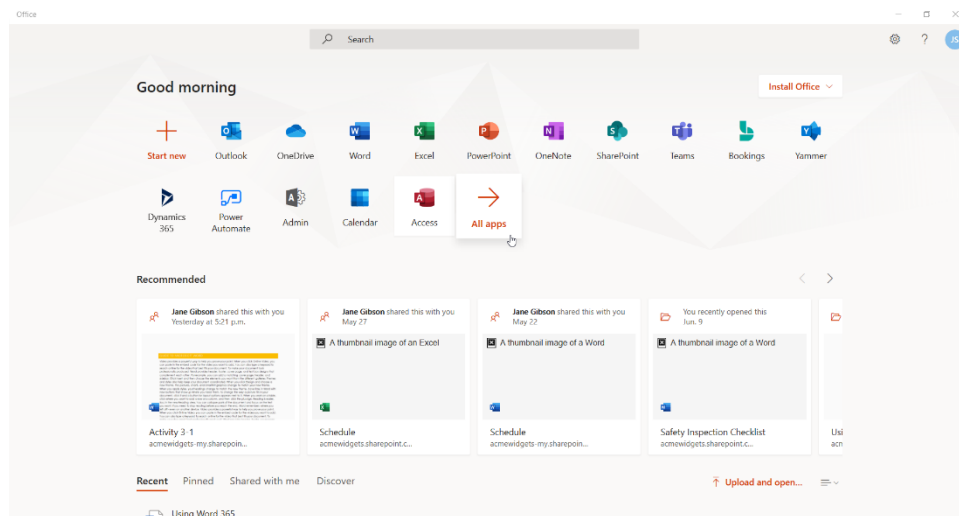
24. Click the **Publisher** tile on the landing page to open:
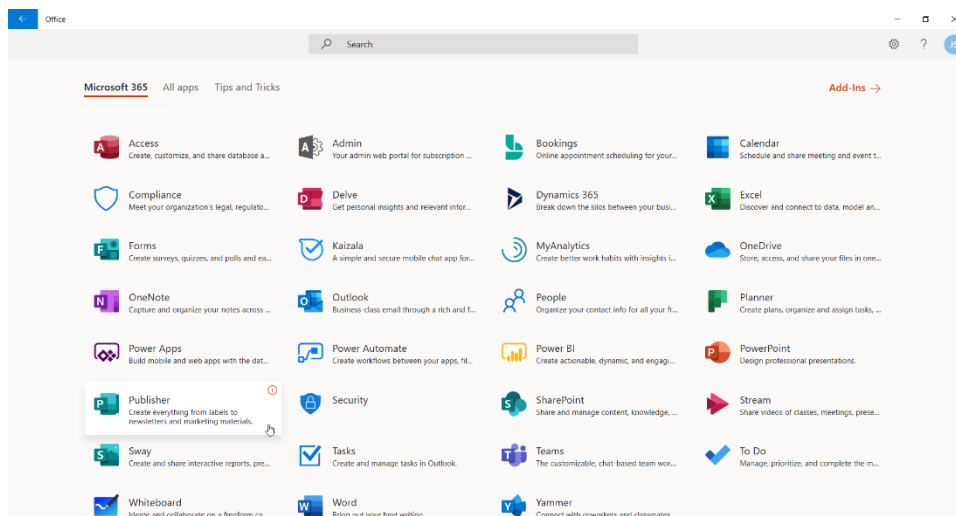
25. Click the first **Blank** document to open a new Pusblisher page:
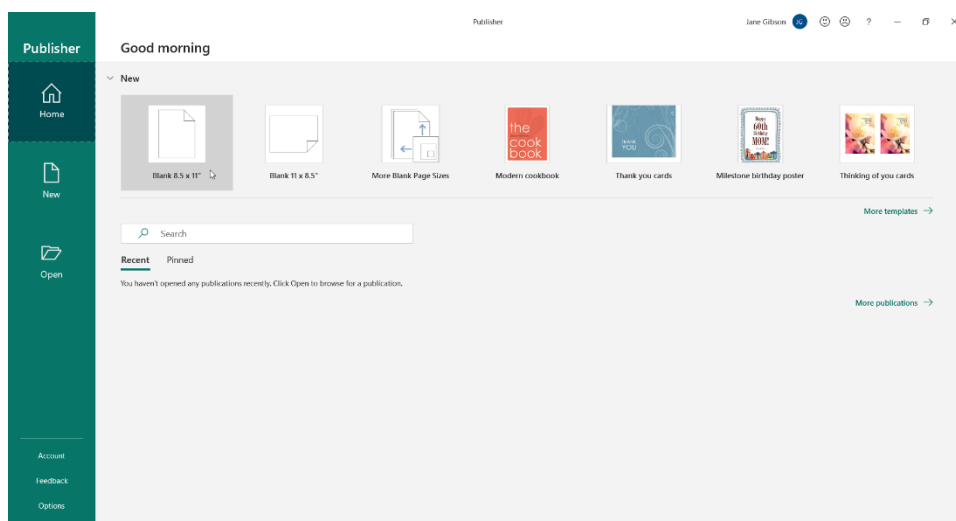
26. Explore different components of Publisher desktop app:
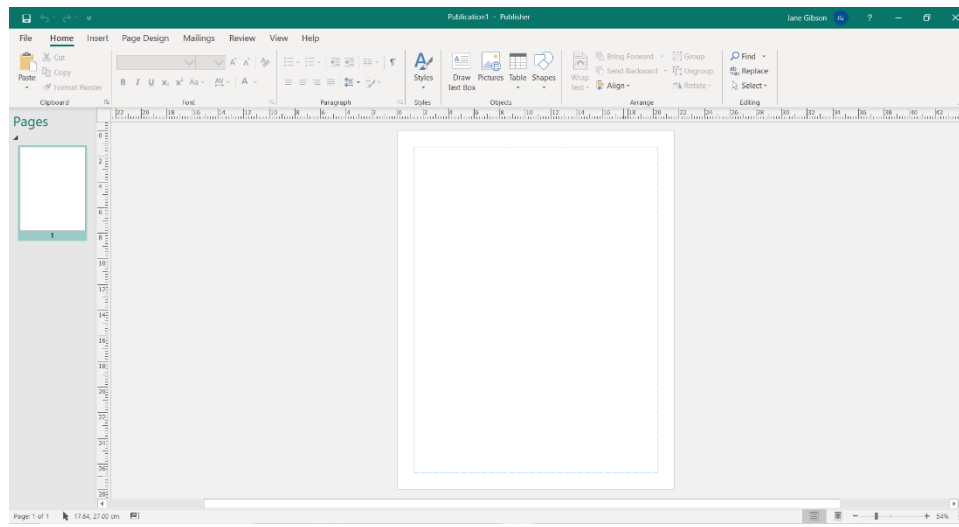
27. Close all the opened apps and the Office desktop app. Return to the Microsoft homepage on the browser for the next activity.

TOPIC B: Included Services

Along with the basic and familiar Office apps, you will also have access to a variety of services with your subscription plan. These services range from communication tools and file storage to information sharing. In this topic, you will learn about the different services, their interfaces, and their purposes.

Topic Objectives

In this session, you will learn about:

- Microsoft Teams

- OneDrive

- SharePoint

- Exchange

Microsoft Teams

Microsoft Teams is a collaborative, cloud-based workspace where Microsoft 365 users can connect by sending messaging, sharing files, and more. A team can be created for a department, a project, or for anything you like! Each team has access to channels**,** which are places where people can share messages, files, and more. Teams can be **public** (open to everyone) or **private** (accessible to invited users only). You can be part of as many teams as you like, and you can join or leave teams as needed.

Microsoft Teams is offered as a desktop app, a web interface, and a mobile app.

Let's look at the Microsoft Teams interface:
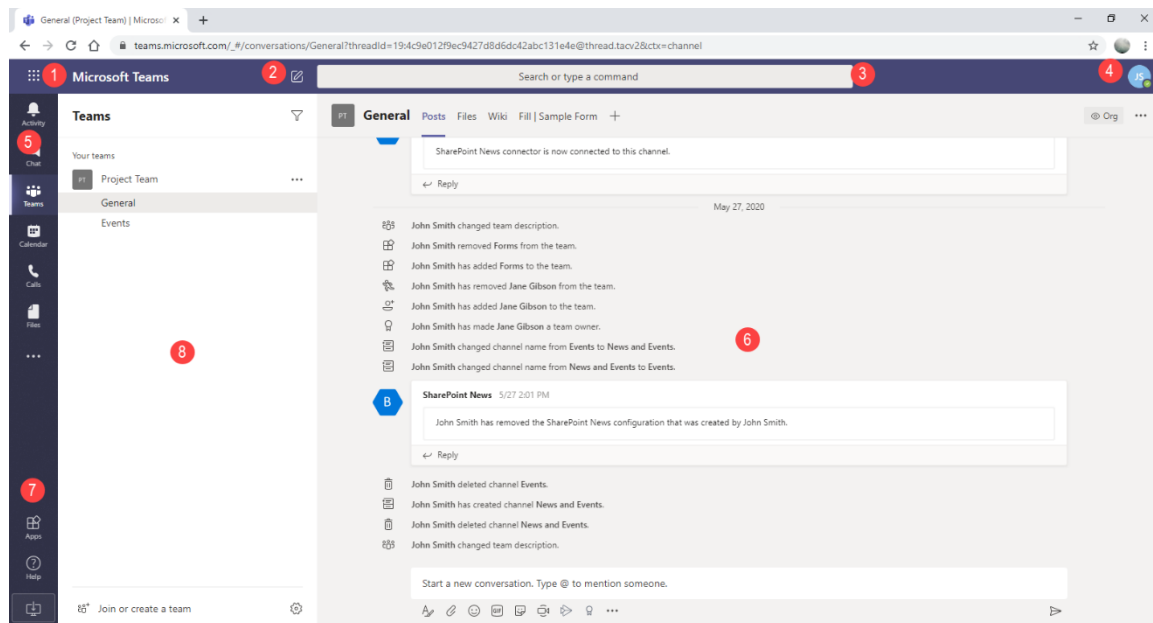
1: App Launcher

Access Microsoft 365 apps from here.

2: New Chat

Click this icon to start a new chat.

3: Search Box

Type "/" to search for a command or "@" to search for a contact.

4: Microsoft 365 Profile

Access your Microsoft 365 profile.

5: Sidebar

Each icon opens a different feature of Teams.

6: Main window

Displays related content of the feature selected from the side bar.

7: Bottom Part of the Sidebar

Includes icons for the Store, Feedback, and a download button for the desktop app.

8: Contextual Task Pane

Displays folders related to your current activity. This task pane's display varies based on the selected feature.

OneDrive

OneDrive for Business is the Microsoft cloud-based service that helps you manage your documents and share them with your teammates. OneDrive is accessible through an internet browser or a desktop app, which makes collaboration possible anywhere.

Let's look at the various components that make up the OneDrive interface:
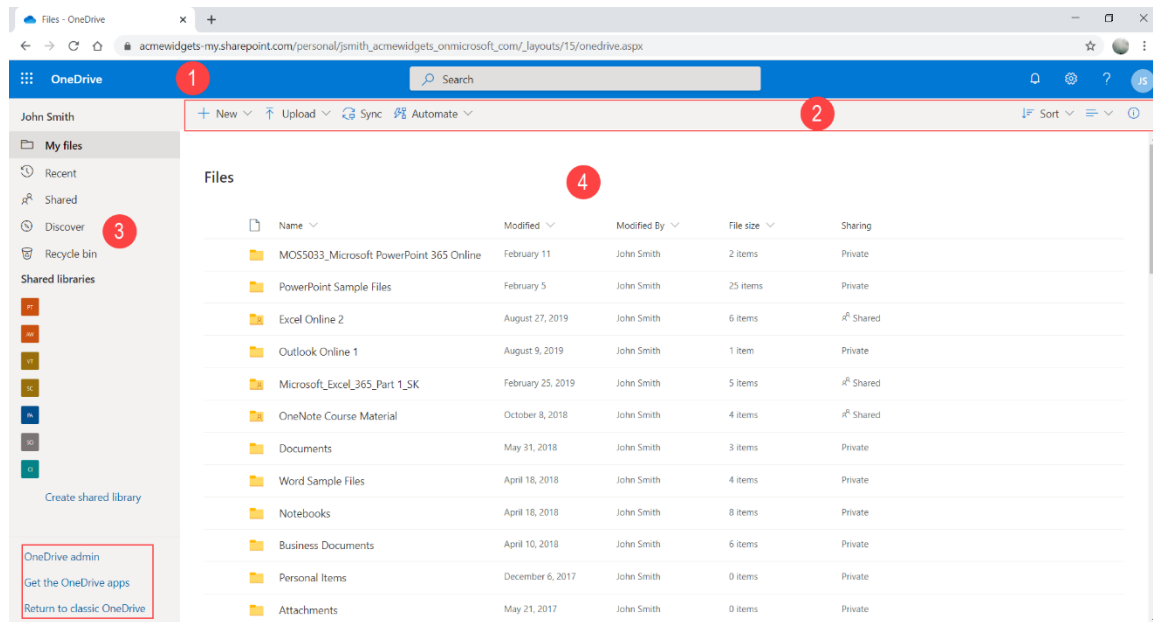
1: Title Bar

Includes the App launcher, the Search box, commands for notifications, settings, help, and your Microsoft 365 profile.

2: Document Pane

Links to help you create, upload, sync, and automate your documents.

3: Navigation Pane

Includes folders and files in your OneDrive as well as shared libraries. You can access the OneDrive administration center, download the OneDrive desktop app, or switch back to your old OneDrive interface by using the links at the bottom.

4: Files Area

Displays folders and files for the selected item from the Navigation pane.

SharePoint

SharePoint is Microsoft's collaboration platform where your organization's members can communicate, exchange information, and collaborate seamlessly. It also provides functionalities such as web content management, intranet, file repository, and more.

The interface of SharePoint is made up of three main elements:
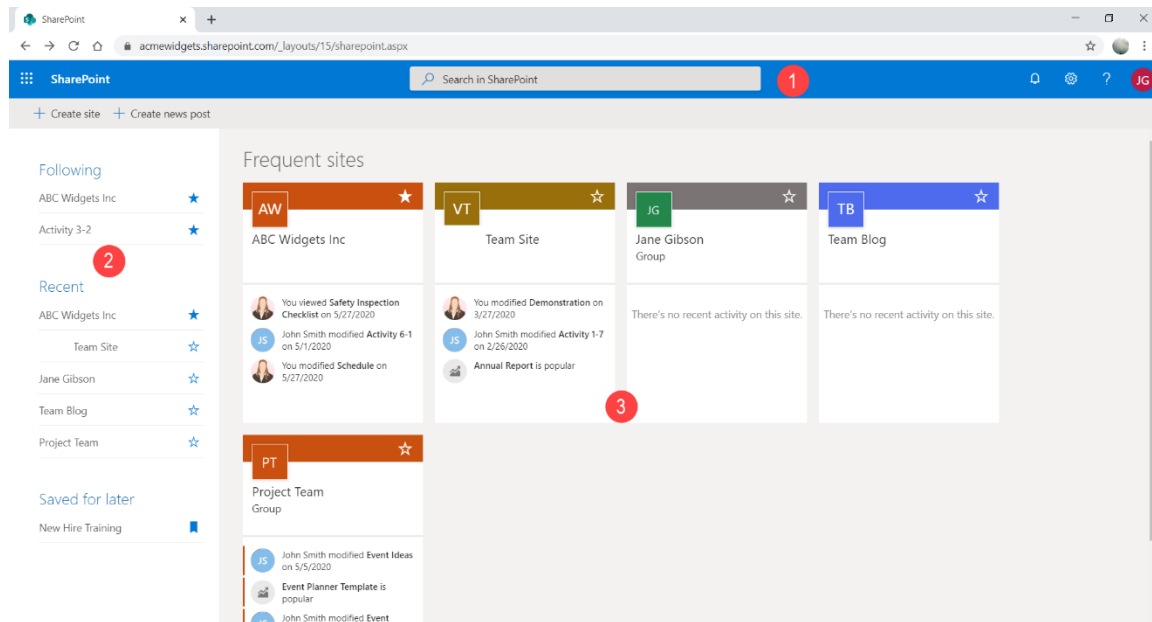
1: Title Bar

Includes the App launcher, the Search box, links for notifications, settings, help, and your Microsoft 365 profile.

2: Navigation Pane

Displays sites you are currently following, recently opened sites, and your saved list.

3: Sites Area

Displays detailed activity of frequently opened sites.

Exchange

Microsoft Exchange is Microsoft's email management server. It enables your organization's host to store, manage, and distribute emails effectively. Because Exchange stores and backs up data on a cloud-based server, the risk is minimal of losing information due to hardware malfunction of the host computers.

Activity 2-2: Exploring Microsoft Services

In this activity, you will explore and navigate basic Microsoft Services.

1. From the currently open landing page, click the **Teams** tile:
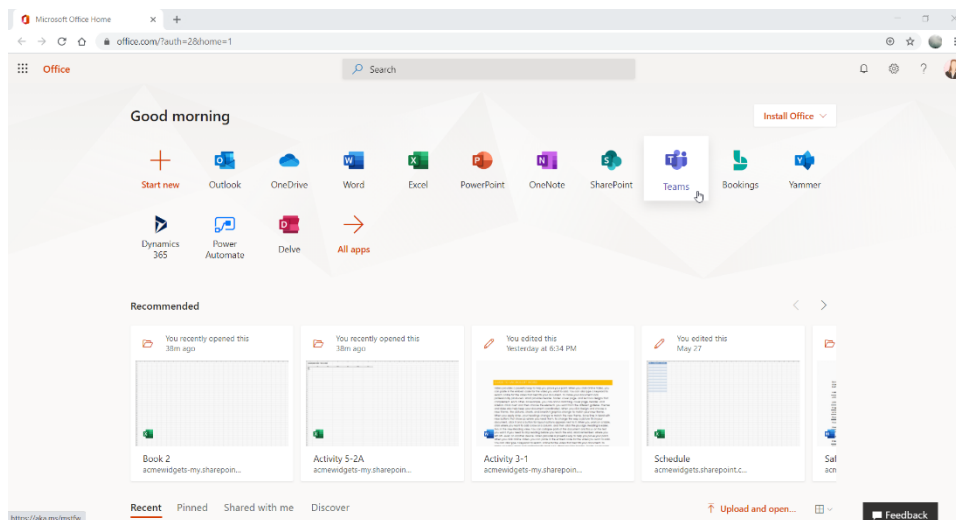
2. The Microsoft Teams window will be opened in a new tab. Explore different components of Teams Online:
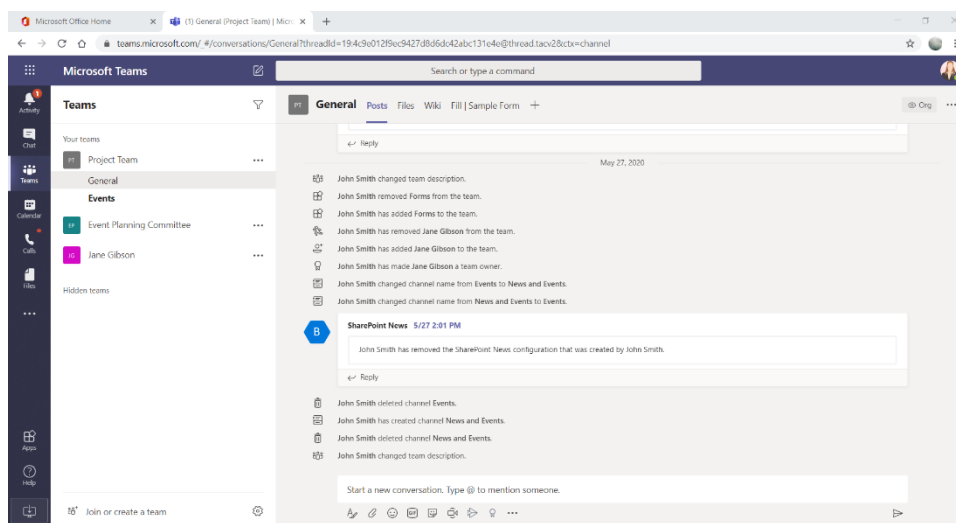
3.   Open the **App launcher** and click **OneDrive** to open:
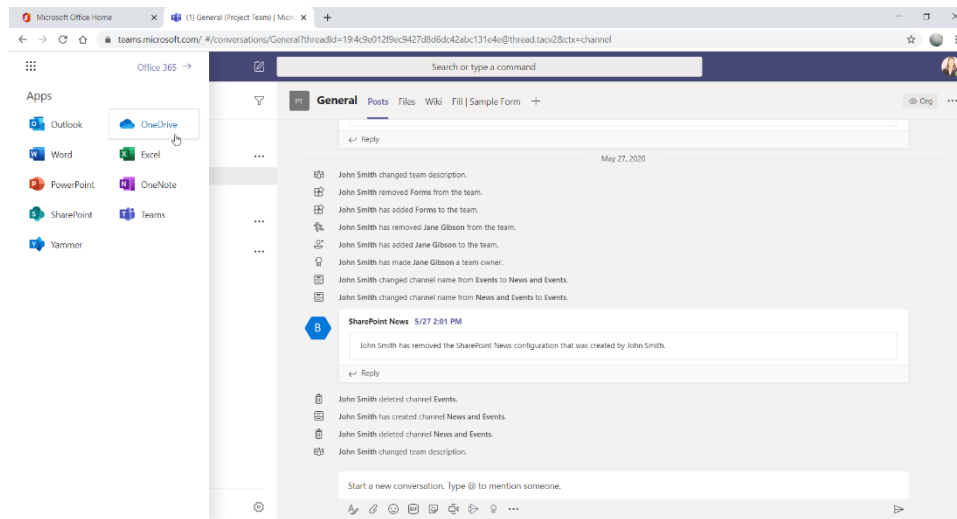
4.   OneDrive will be opened in a new tab. Navigate different components of OneDrive Online:
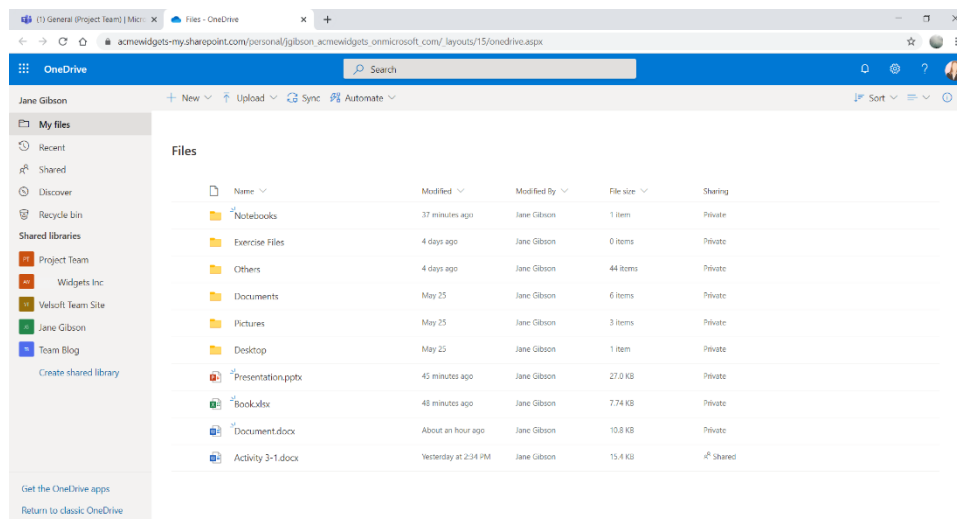
5.   Open the **App launcher** and click **SharePoint** to open:
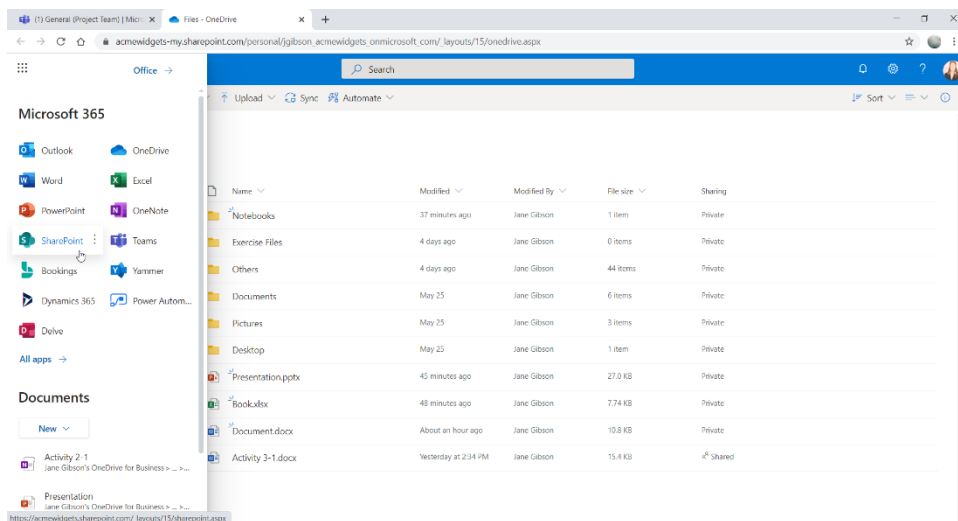
6.   SharePoint window will be opened. Explore different components of SharePoint:
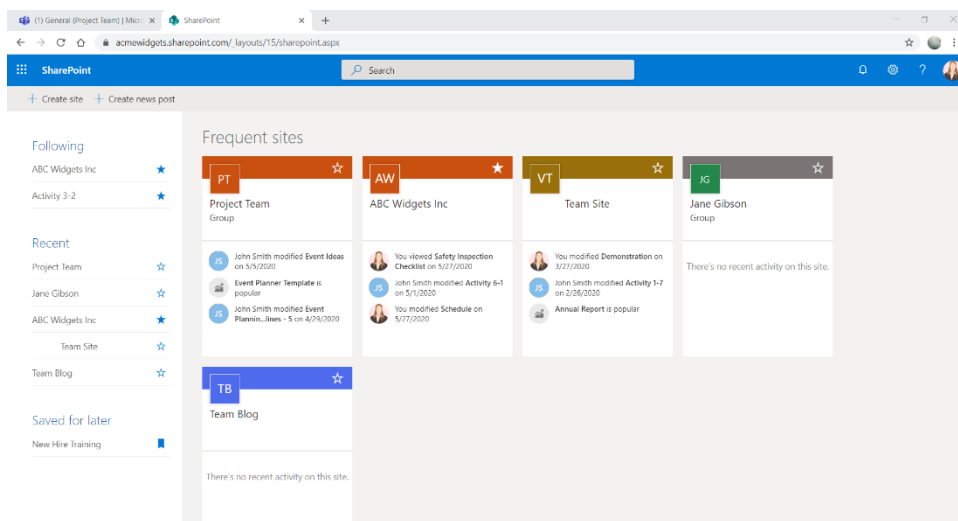
7.   Close all the opened tabs and sign out of Microsoft 365 in your browser. Close your browser window to complete this activity.

Summary

After this lesson, you should be familiar with the applications and services offered by the **Microsoft 365 Business Standard** subscription plan. You should also understand the purpose of each app or service, and how to navigate within the interfaces of these apps and services.

Review Questions

1. **What is Microsoft Word?**

2. **What are the workspaces found on the Folder/Navigation pane in Outlook?**

3. **What do Access and Publisher have in common?**

4. **What are the differences between public and private settings in Microsoft Teams?**

5. **What is SharePoint?**

LESSON 3:
FILE STORAGE AND COLLABORATION

Lesson Objectives

In this lesson you will learn how to:

- Store files and collaborate with OneDrive for Business

- Manage an organization's activity with Delve

TOPIC A: Getting Started with OneDrive for Business

You are likely already familiar with OneDrive, Microsoft's cloud-based storage solution. However, did you know that business accounts have access to a slightly different OneDrive version?

Topic Objectives

In this session, you will learn:

- About Microsoft OneDrive for Business

- How to open OneDrive for Business

- How to add, create, organize, and delete OneDrive files

What is OneDrive for Business?

OneDrive for Business is similar to your personal OneDrive, in that it is a cloud-based space where you can store and manage documents. However, it is separate from your personal OneDrive. As well, OneDrive for Business is managed by your organization and it provides additional collaboration tools not available in personal OneDrive accounts.

To open OneDrive for Business, log into your Microsoft 365 account. Then, click the **OneDrive tile** on your landing page or from the app launcher pane:
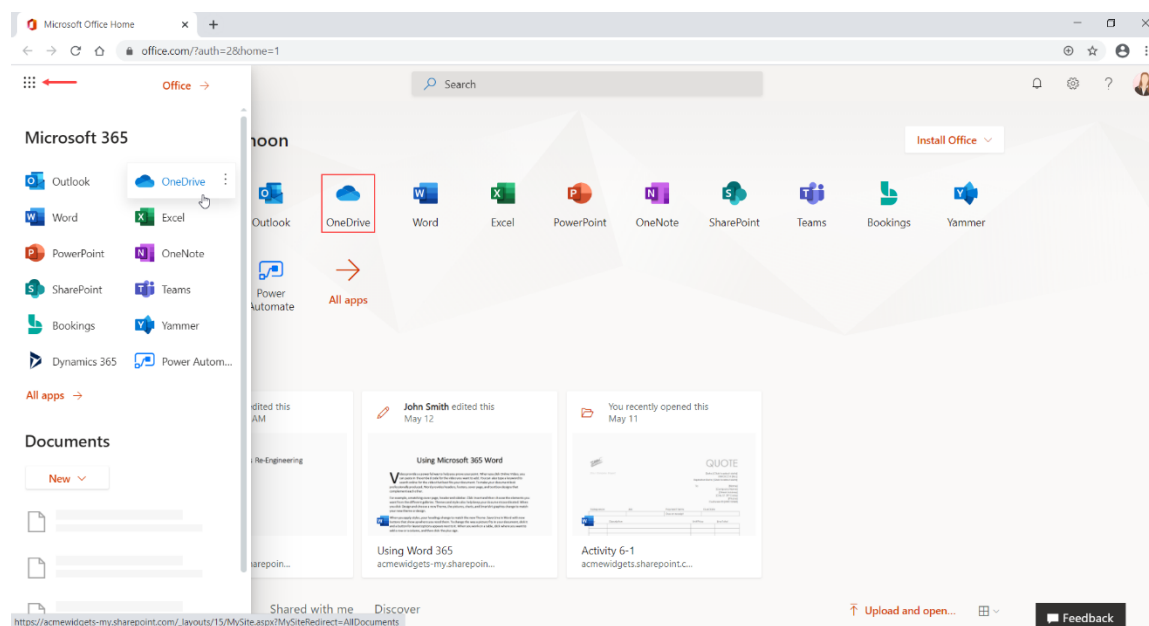
Add Files to OneDrive

There are two ways to upload a file to OneDrive. The easiest method is to **drag and drop** the file from File Explorer or your desktop to the OneDrive window:
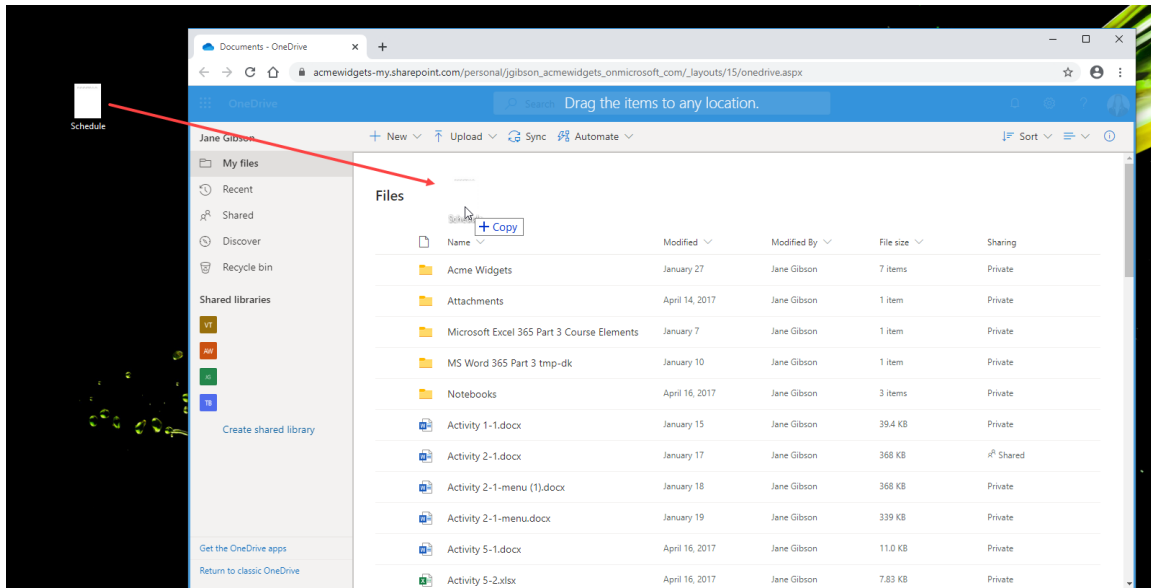
This will start the upload process immediately.

You can also click the **Upload** button in the OneDrive window and choose whether you want to upload a file or folder:
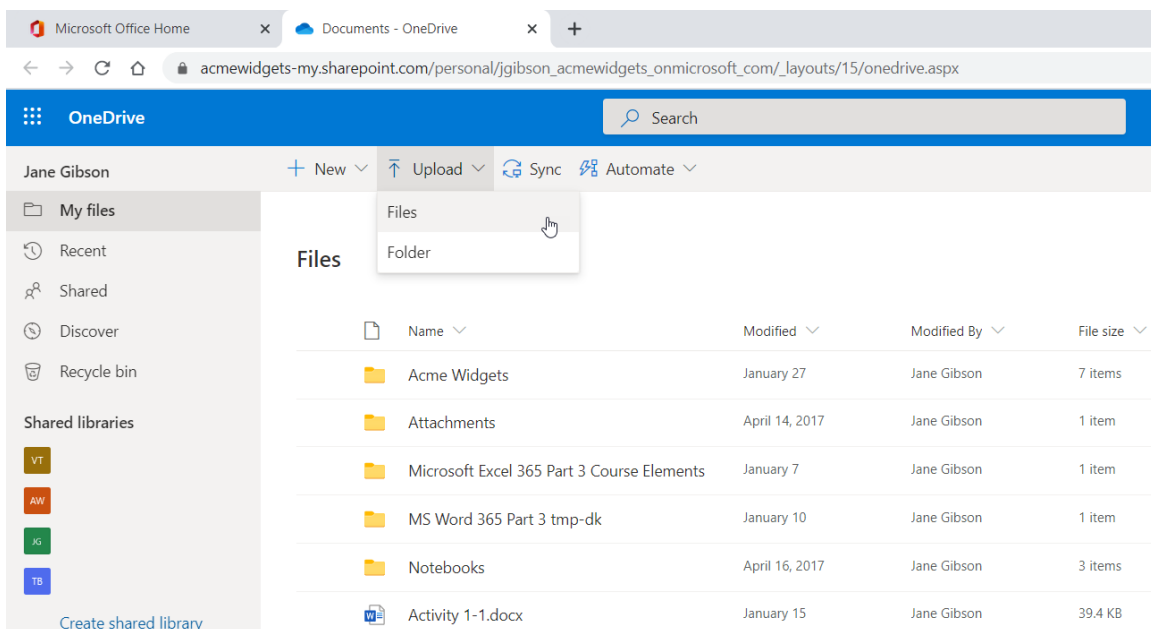
This action will launch the Open dialog box. Locate and select the file(s) or folder(s) to upload and click **Open**:
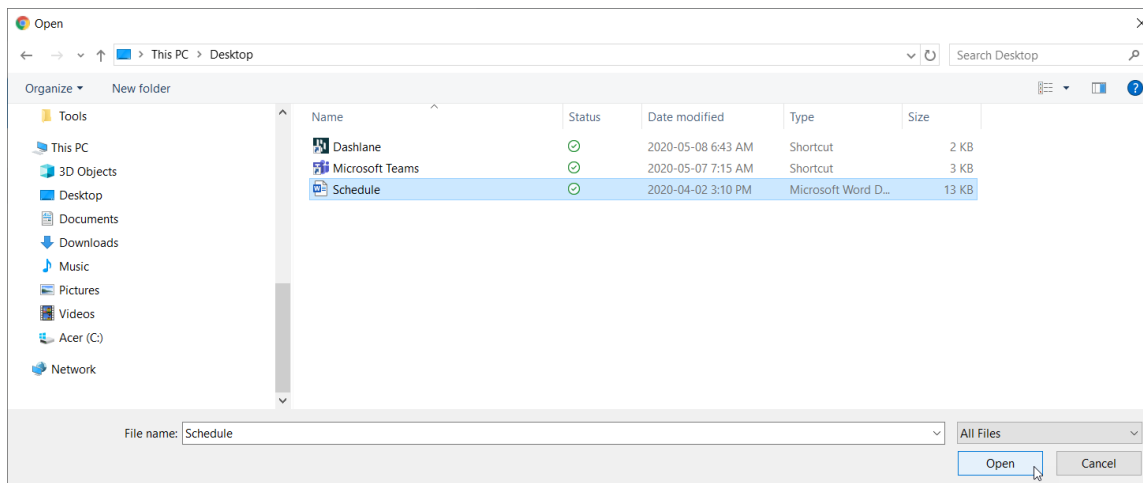
Then, the item(s) will be uploaded and visible in the OneDrive window:
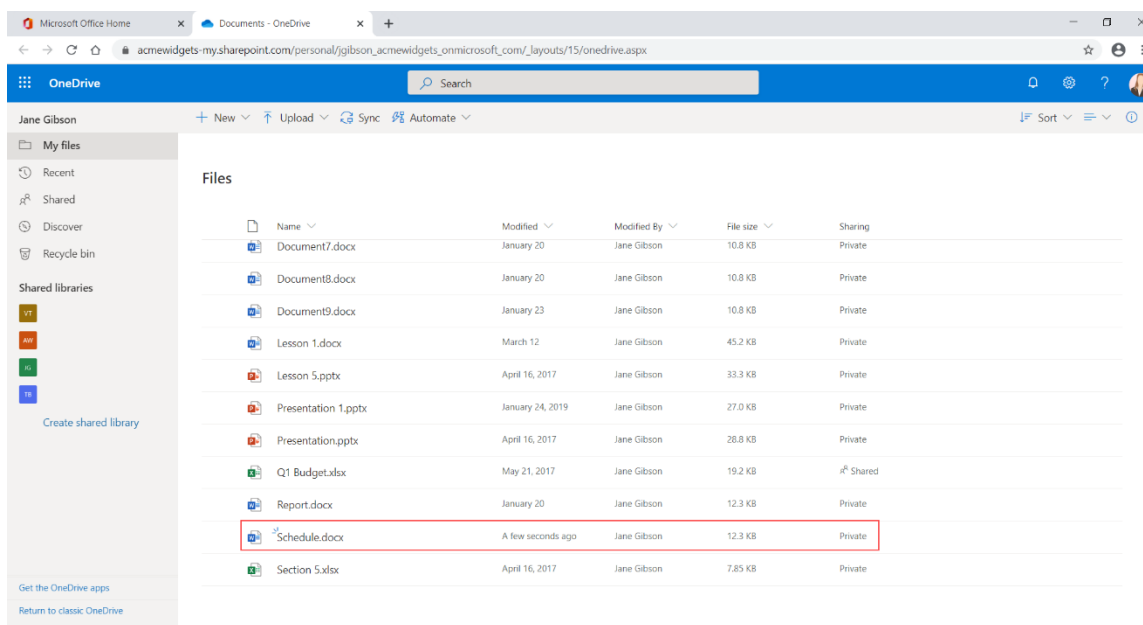
Create Files

You can also create new files using Office Online via OneDrive. To start, click **New** and choose the type of file you would like to create:
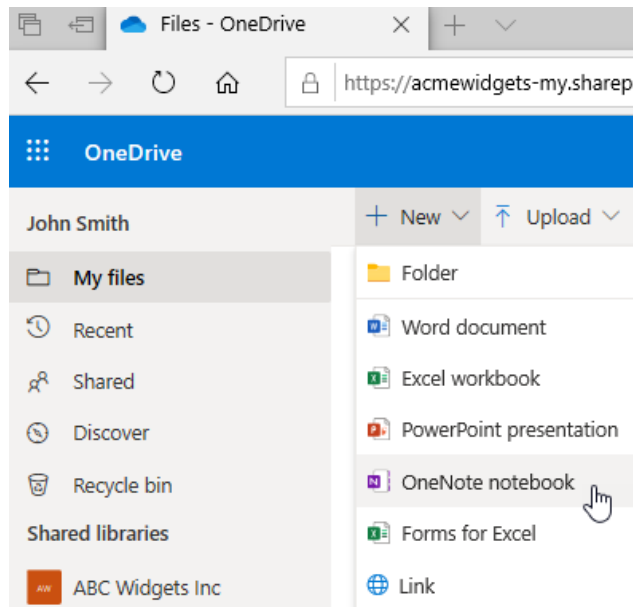
Notice that you can also create folders from here. When prompted, enter the file name and click **Create**:
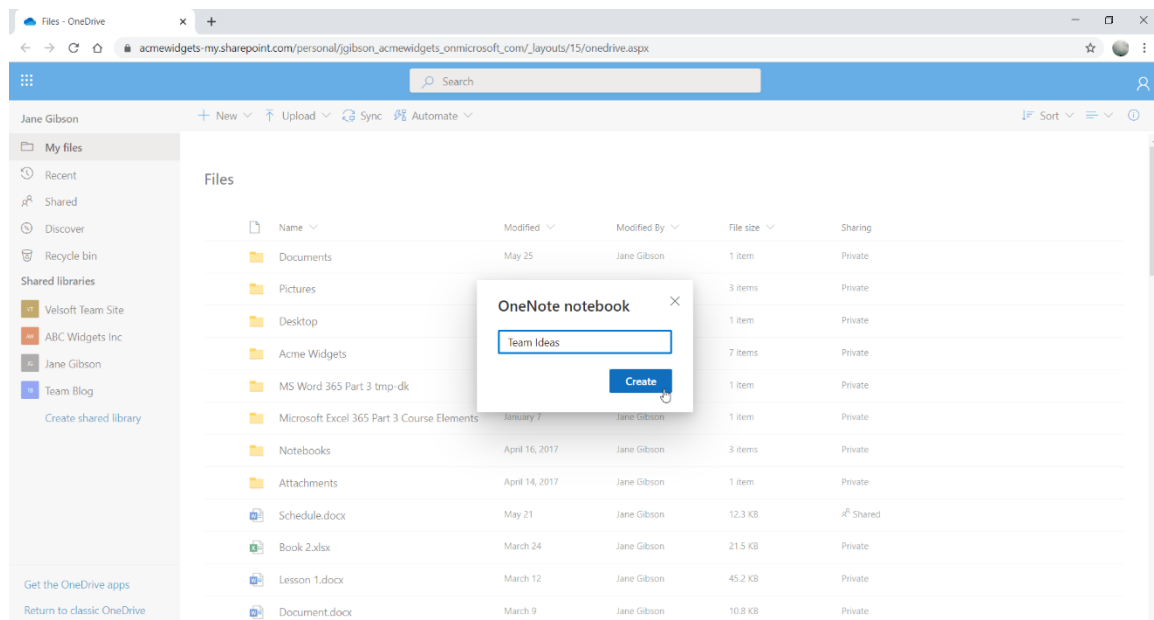
Your file will be created and opened using the appropriate app in a new tab. You can now work with it as normal:
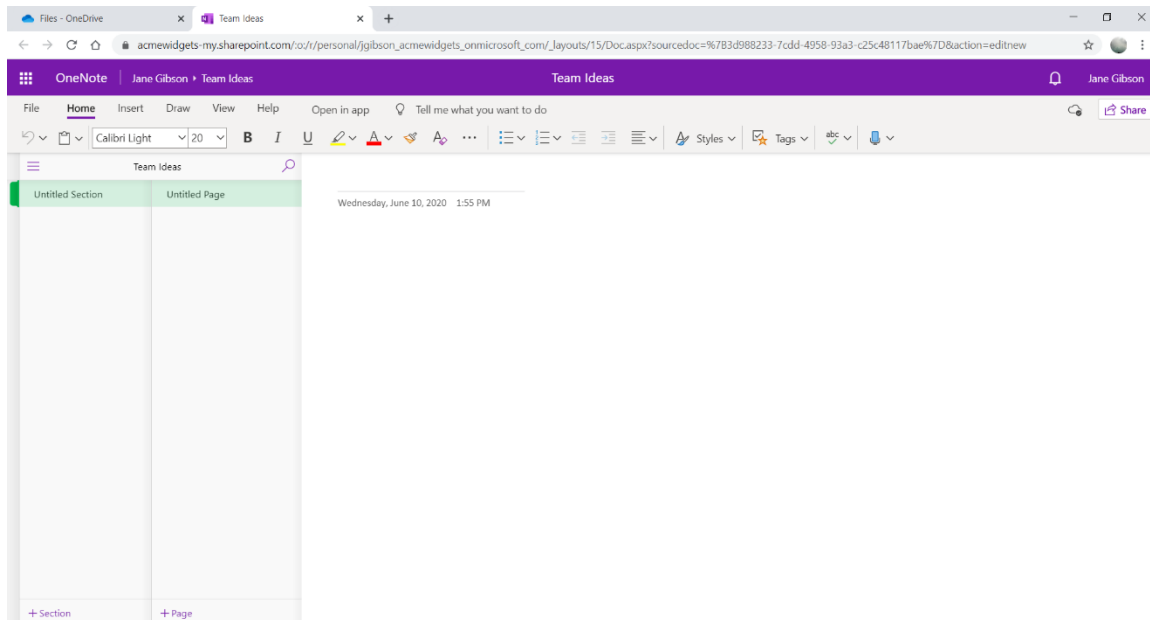
Once you have finished creating the file, you can return to your OneDrive for Business account by clicking your name in the top left corner (next to the app name):
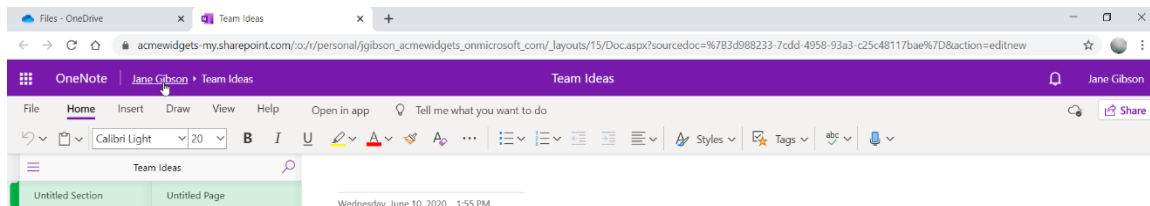
Organize Files

You can organize files on your OneDrive account just as you do within Windows. To start, move your mouse to the left of the target file name(s) and click the circle that appears:
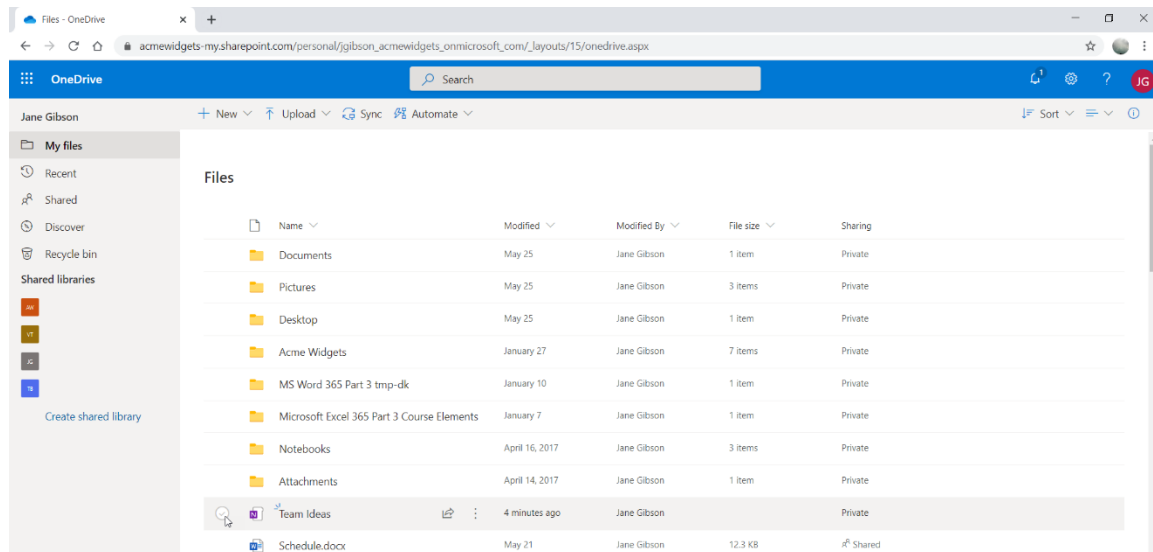
You will then see organization commands at the top of the file list:
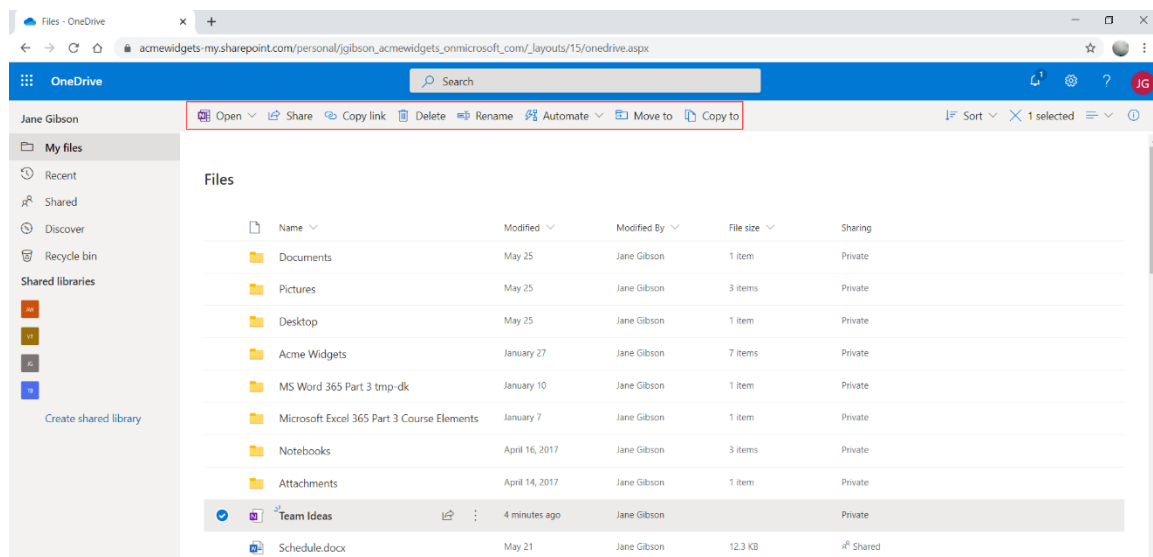
Use these commands to open, share, copy a link to, delete, move, copy, and/or rename the file. You will also find some of these commands on the right-click menu:

Lastly, you can also drag and drop files into folders to organize them:
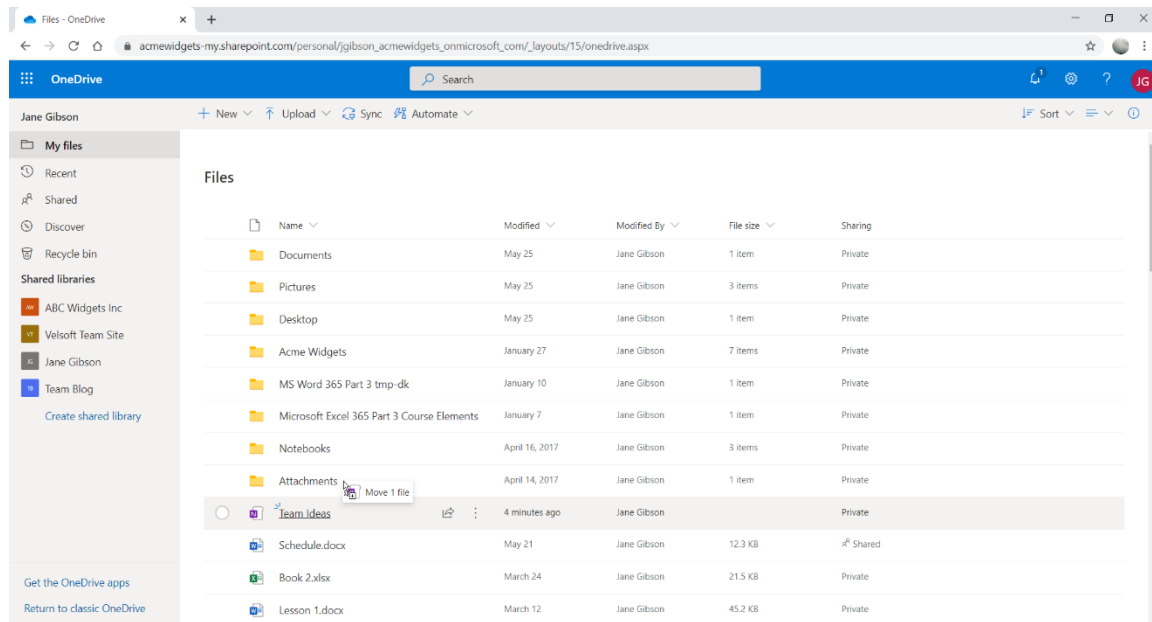
(Remember, you can create folders from the **New** menu, which is available when no items are selected.)

Delete Files

To delete a file or folder from your OneDrive for Business account, select it and click **Delete** on the top bar, or right-click and click **Delete**:
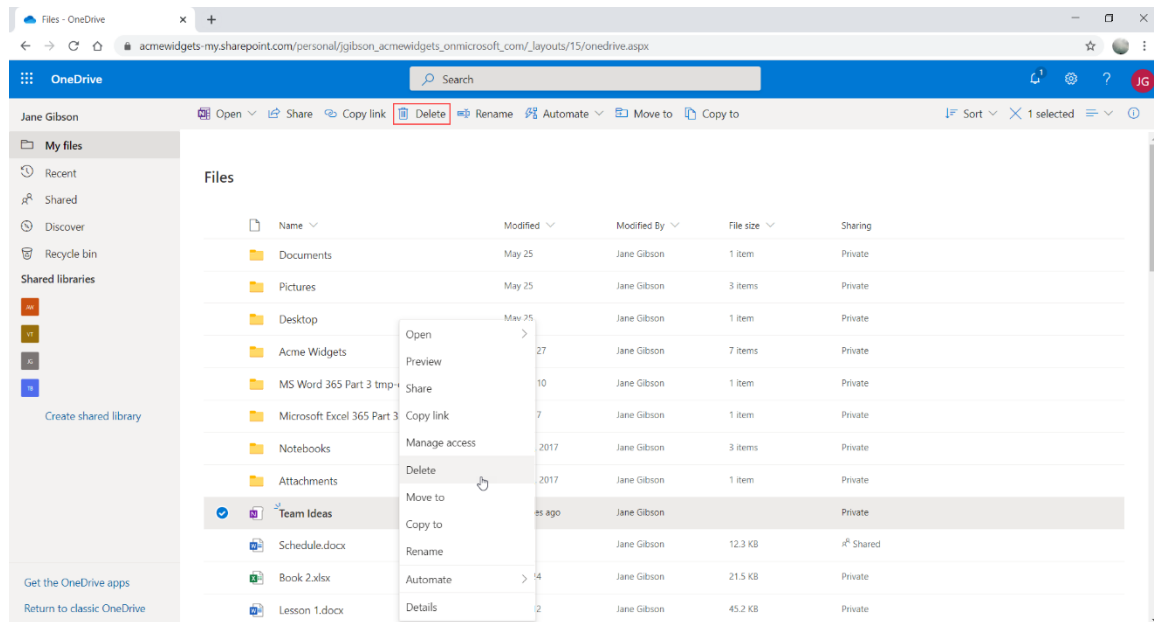
When prompted, click **Delete** to confirm:
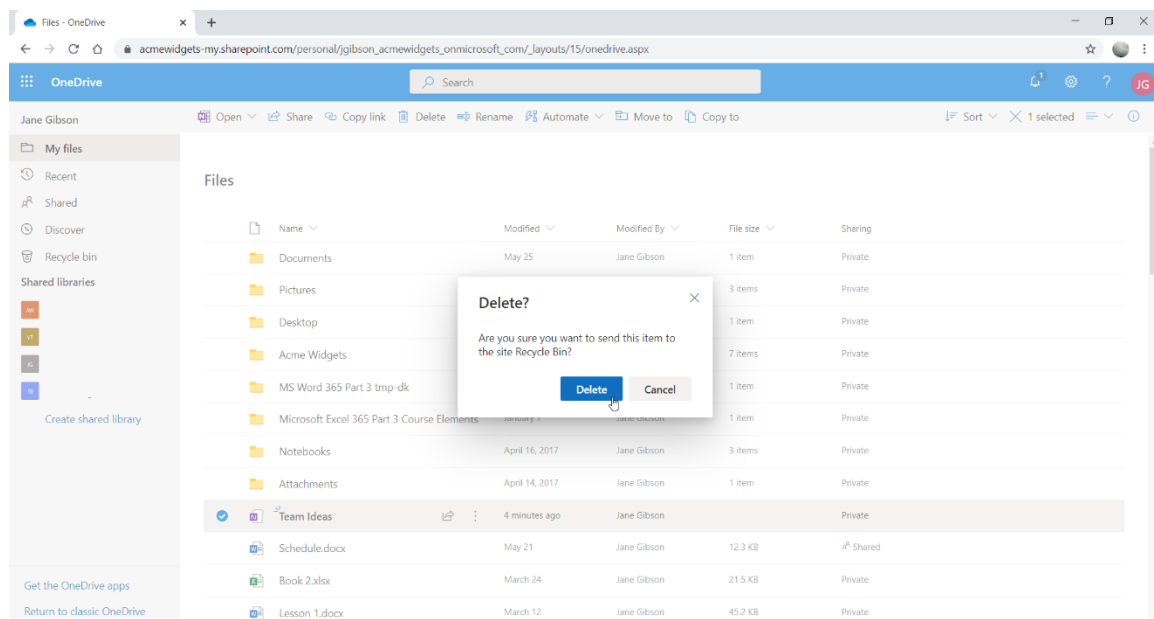
The selected file(s) will be moved from your OneDrive for Business account to the Microsoft 365 Recycle Bin.

Activity 3-1: Getting Started with OneDrive for Business

In this activity, you will upload a file to your OneDrive account, create a folder, and move the file into that folder.

1.   To begin, turn on and log into your computer. Open your most frequently used browser and open the https://login.microsoftonline.com web page:
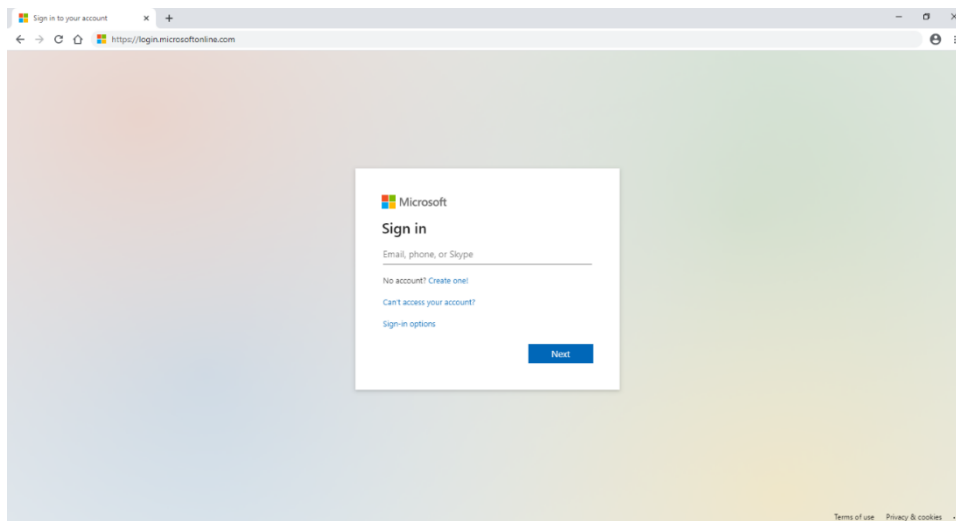
2.   Click the **OneDrive** tile on your landing page:
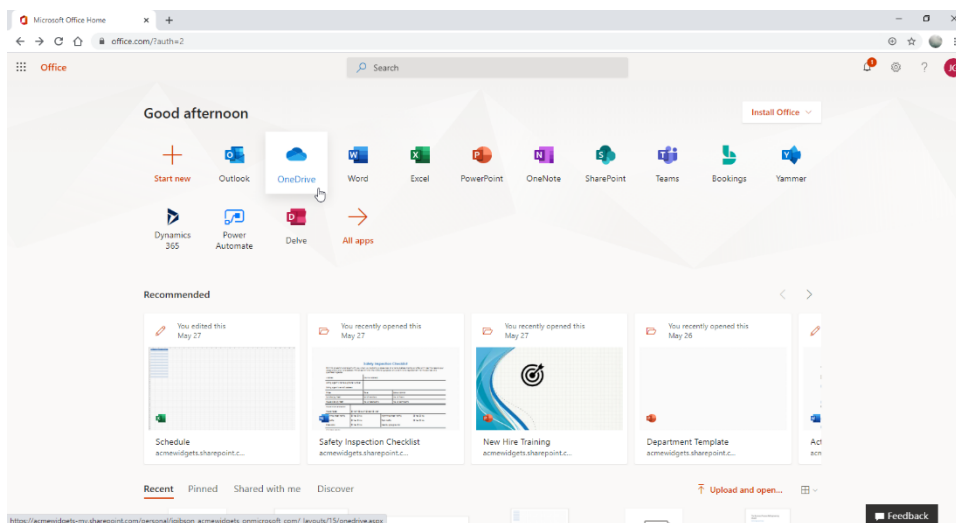
3.   The OneDrive for Business page will open in a new tab and show your account's contents:
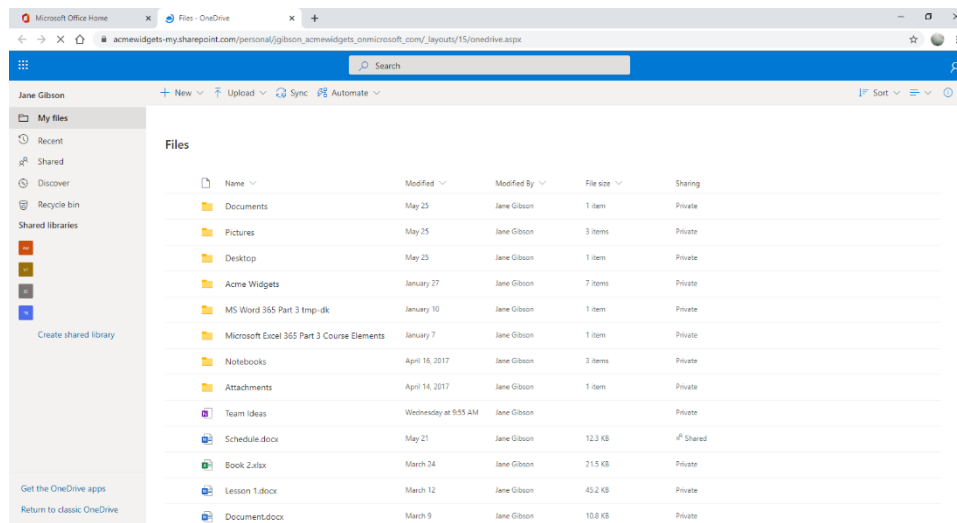
4.   Let's upload a new file to your OneDrive account. Click **Upload → Files**:
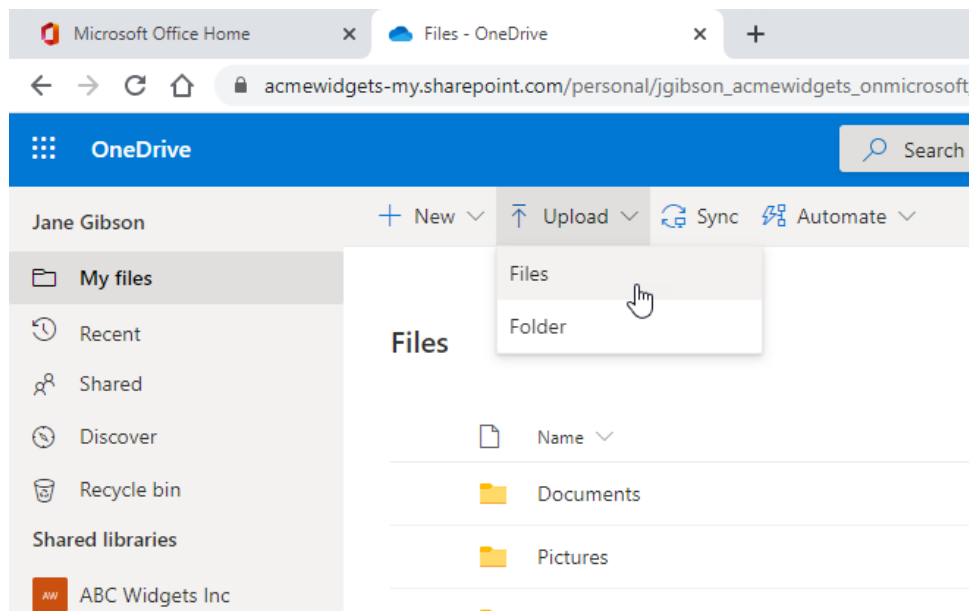
5. The Open dialog box will appear. Navigate to your Exercise Files, locate the Activity 3-1 file, and select it. Click **Open**:
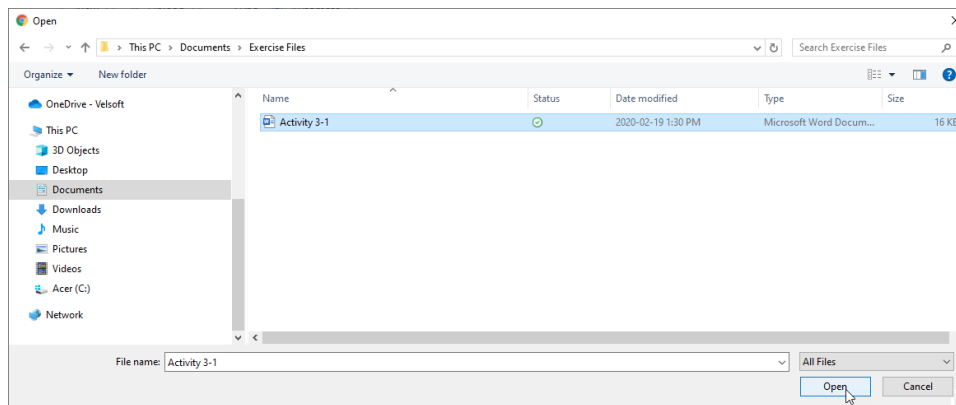
6. Back in OneDrive, you will see the new file listed here:
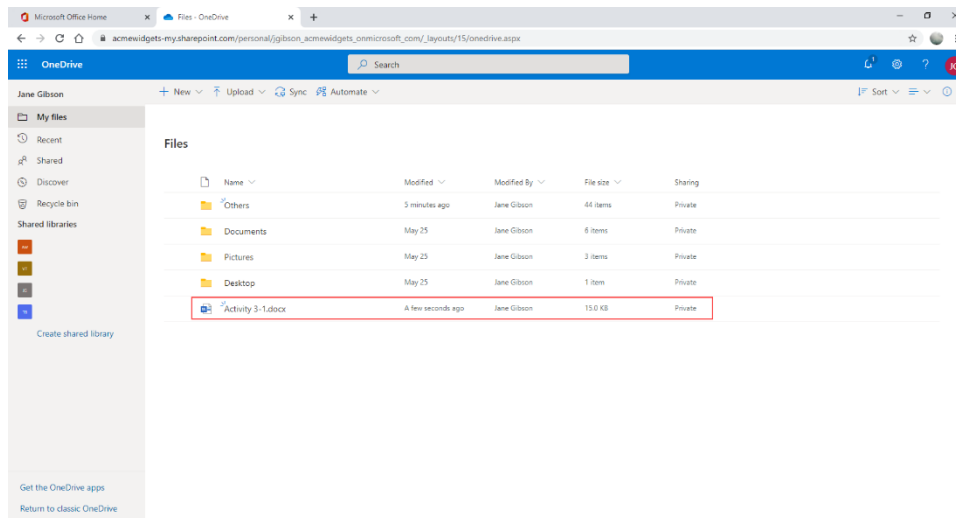
7.   Now, click **New → Folder**:
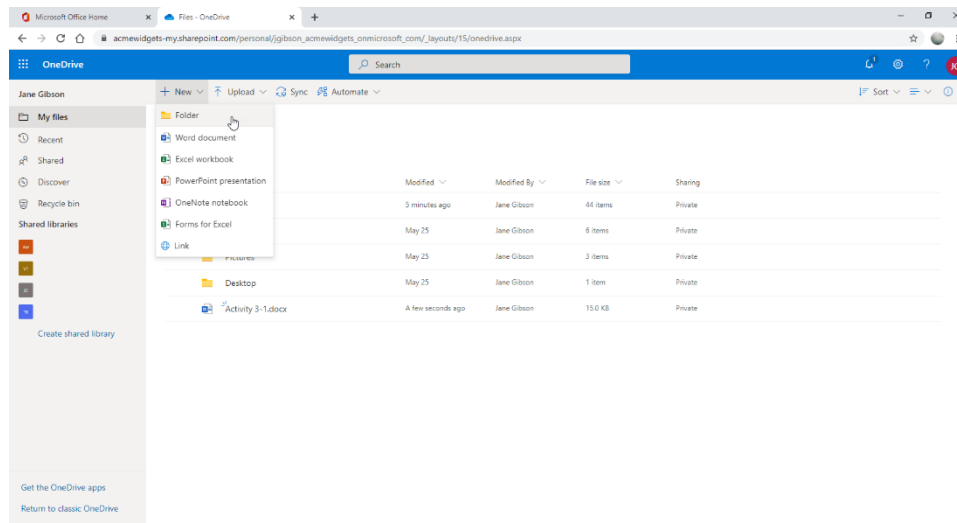
8.   Type, "Exercise Files" for the new name and click **Create**:
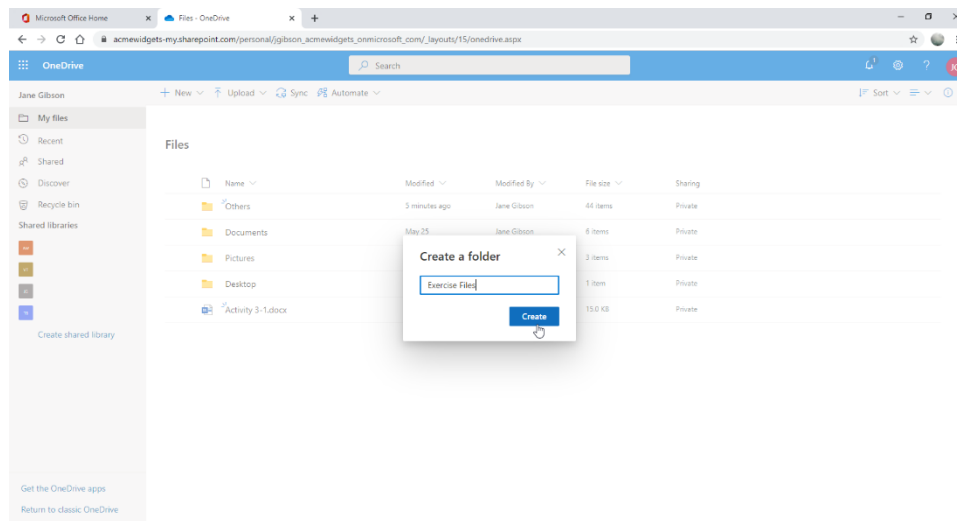
9. Click the Activity 3-1 file name to select it. Drag and drop the file into the new folder:
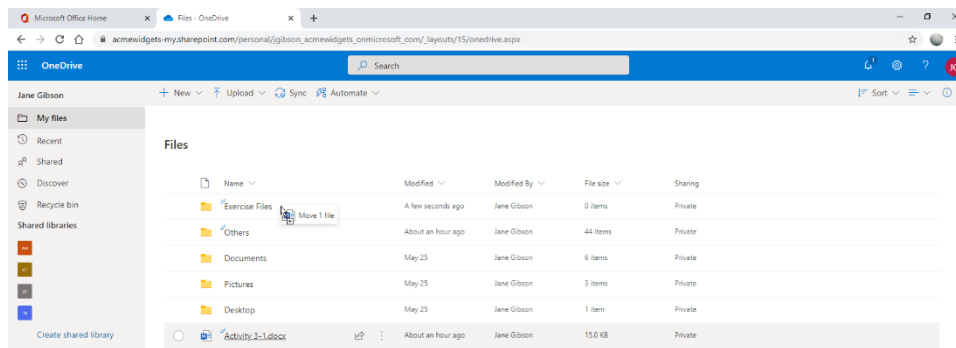
10. This activity is now complete. Leave your browser open for the next activity.

TOPIC B: Collaborating Using OneDrive for Business

As previously mentioned, one of the key features of OneDrive for Business is its enhanced collaboration tools. You can also sync your OneDrive for Business account to your local system for offline access.

Topic Objectives

In this session, you will learn:

- How to use the Discover feature

- How to share files

- About syncing

- How to configure OneDrive for Business sync

- How to sync OneDrive for Business to your computer

- How to back up and protect files

Use the Discover Feature

The Discover feature provides easy access to other documents within your organization that are relevant to you and that you have permission to access.

To view these documents, click the **Discover** link on the left side of the OneDrive window:
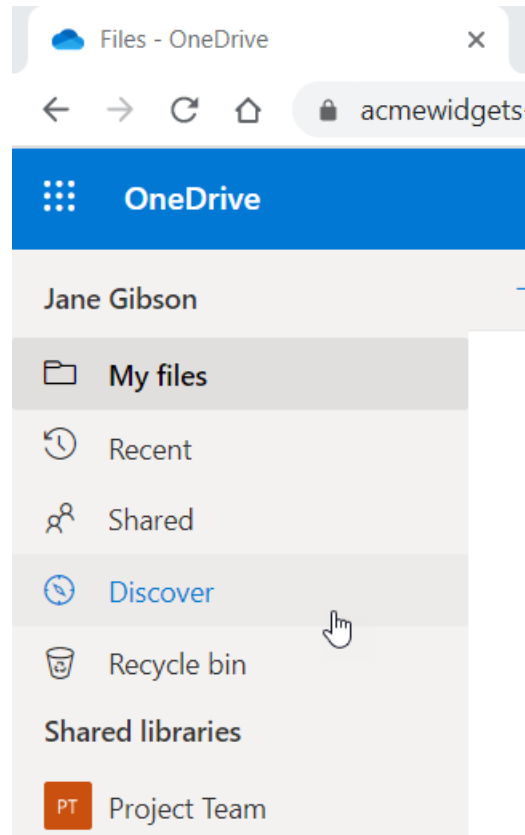
You will then see the list of relevant items:
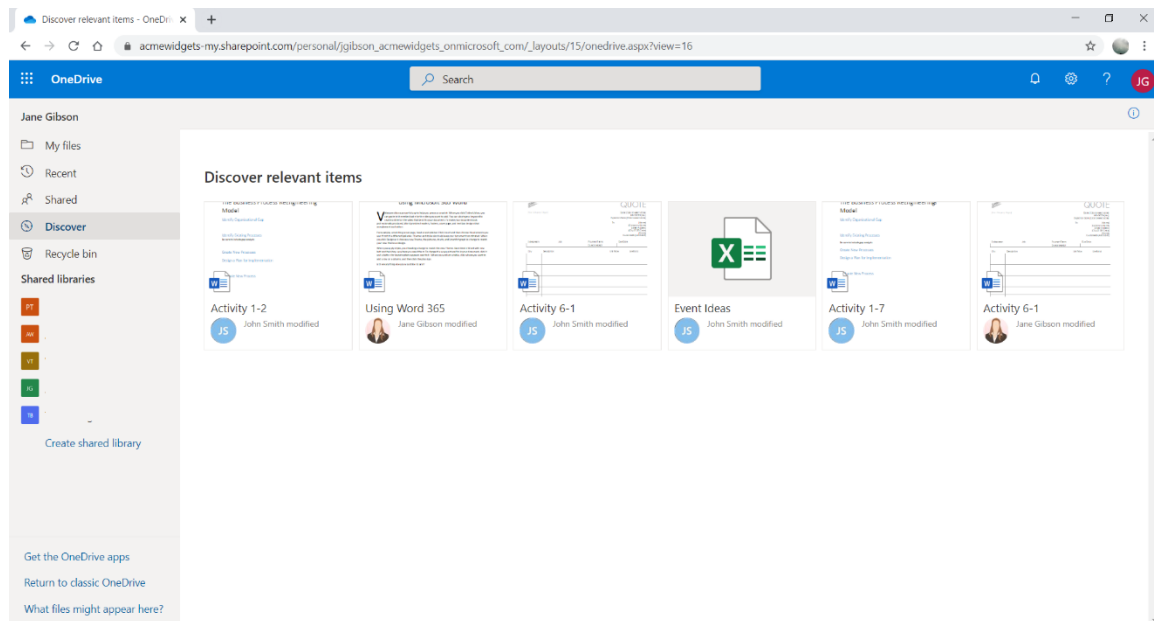
Share Files

Any file in your OneDrive for Business account can be shared with others inside and even outside of your organization. To begin, select the target file and click **Share** on the top bar, or hover the file and click the **Share** ( ) button, or right-click the file and click **Share**:
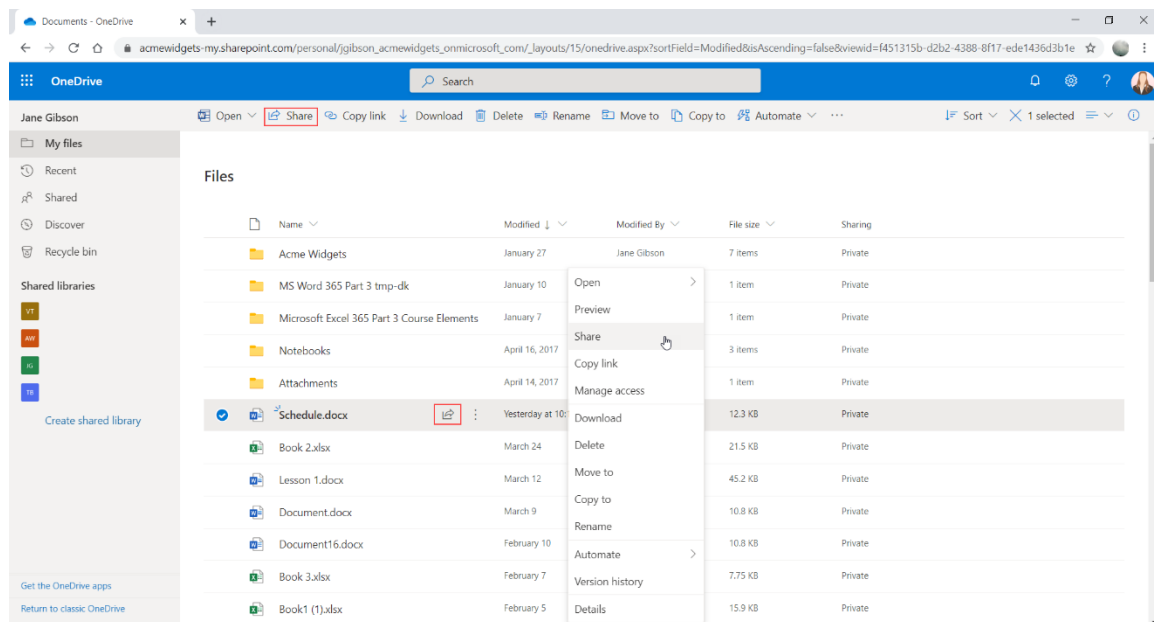
The Share pop-up dialog box will open. Here, you can choose who you want to share the file with and add a message. (Note that this will give the recipient editing privileges.) Click **Send** to complete the process:
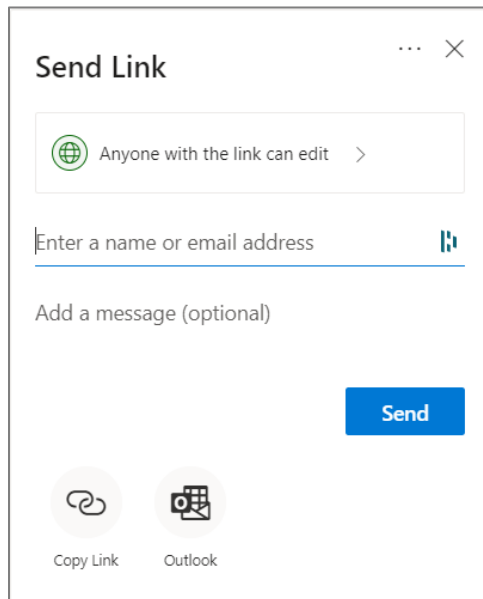
To change the access settings, click the box under the Send Link header:
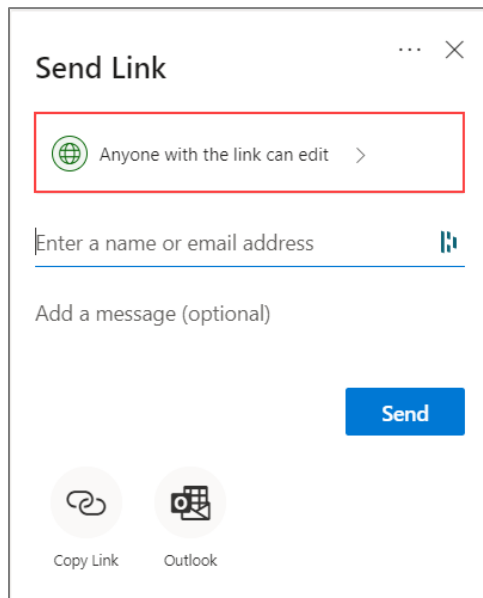
The Send Link box will switch to Link settings box:

You can choose who will have access to the file. To enable editing, check the **Allow editing** checkbox. You can also choose when the link expires, set a password, or restrict downloading. To finish, click **Apply**.

You will now see that the status of the selected document has changed to "**Shared**:"

Configure OneDrive for Business Sync

Syncing your OneDrive for Business account to your computer allows you to access all your files in File Explorer rather than always having to rely on a browser. Additionally, these files will be available to you even if you are offline. Any changes you make are automatically synced back to the OneDrive for Business account when you come back online.

The first time you sync your OneDrive for Business account, there are several steps you must complete. First, you must install the OneDrive for Business app. Remember, you can do this from the left side of the OneDrive page:
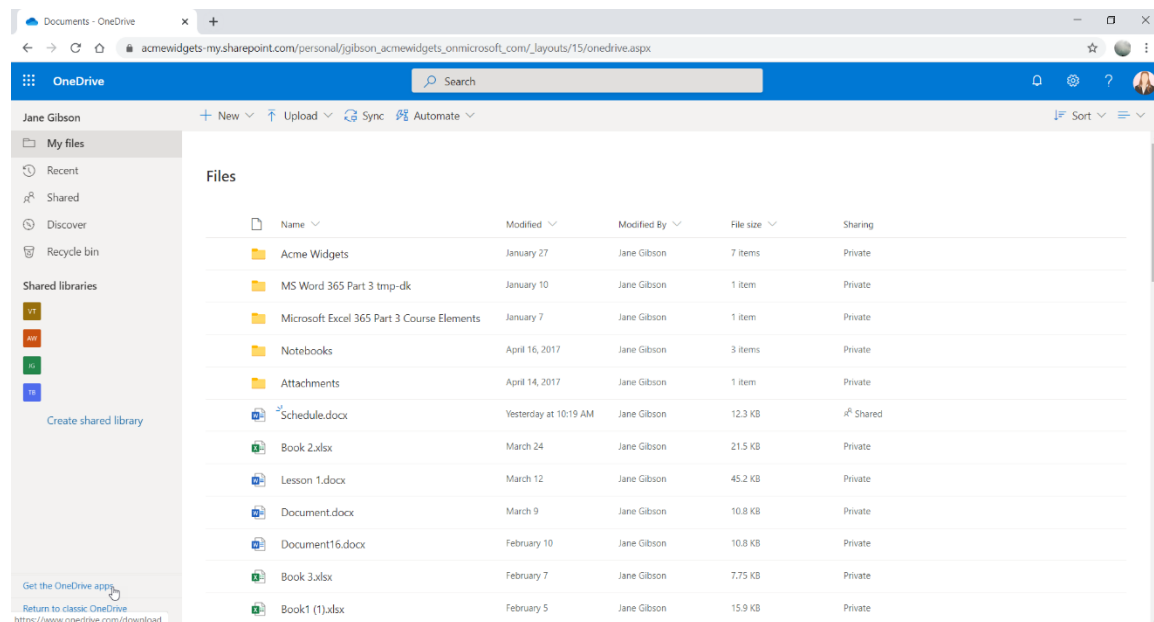
To start the setup process, simply click the **Sync** button within your OneDrive account:
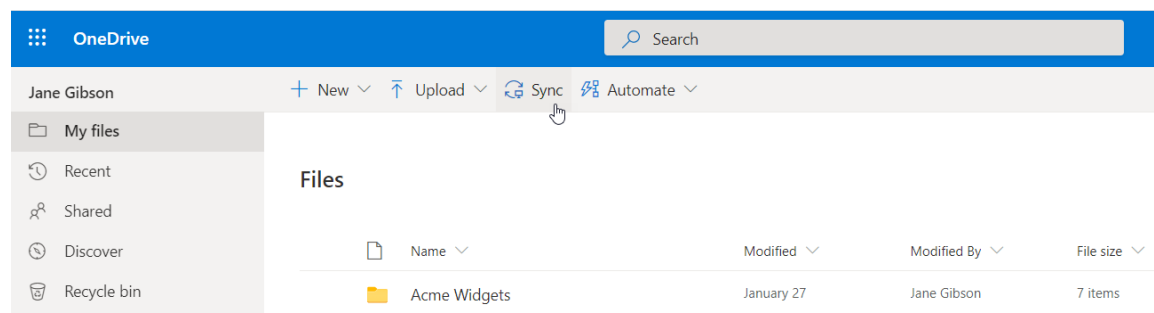
Click **Open Microsoft OneDrive** if you are prompted to switch apps:
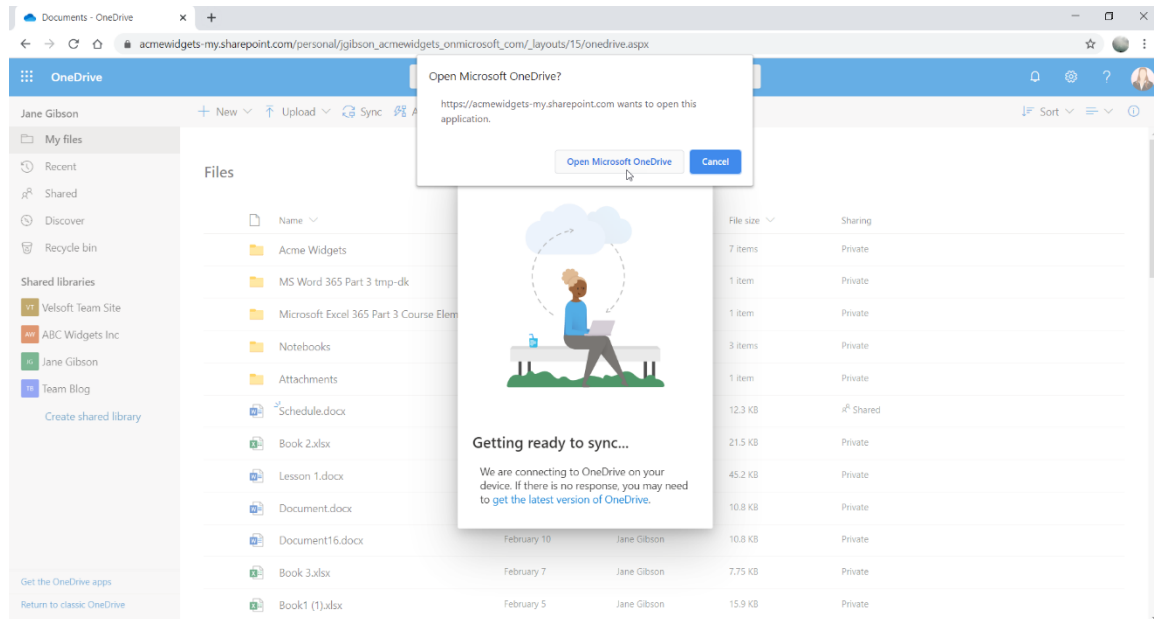
If you are prompted to sign in, enter your e-mail address and click **Sign in**:
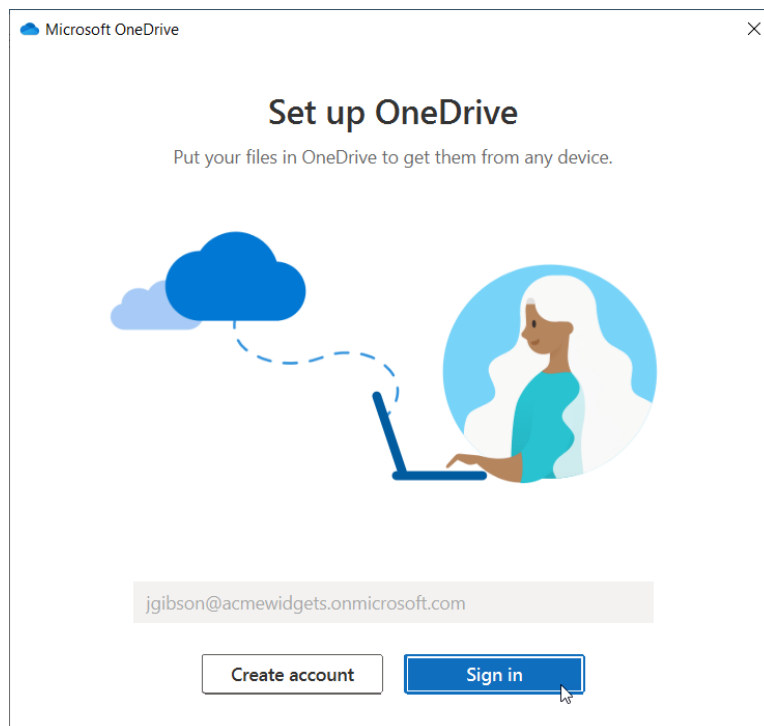
Then, click **Next** to accept the default location where OneDrive for Business files will be stored:
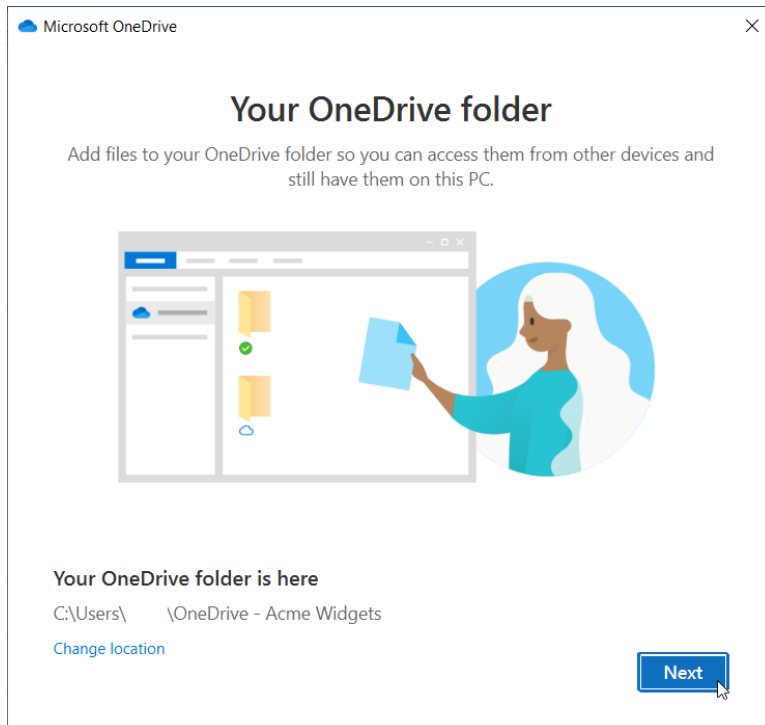
(If necessary, you can change this location with the **Change location** link.)

Another dialog box shows you the instruction to add items into the OneDrive folder. Click **Next** to continue:
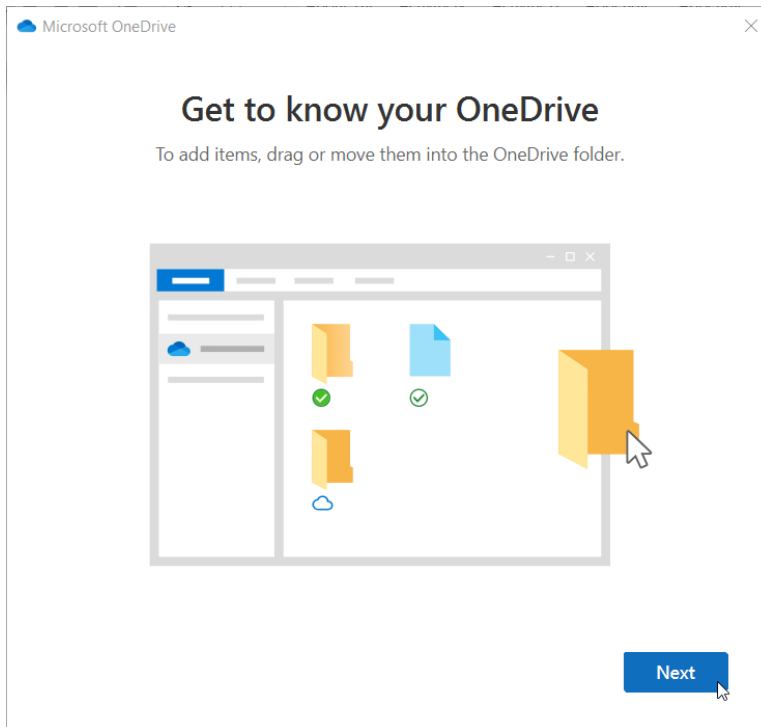
Another dialog box – **Share files and folders** – will appear. Click **Next** to continue:
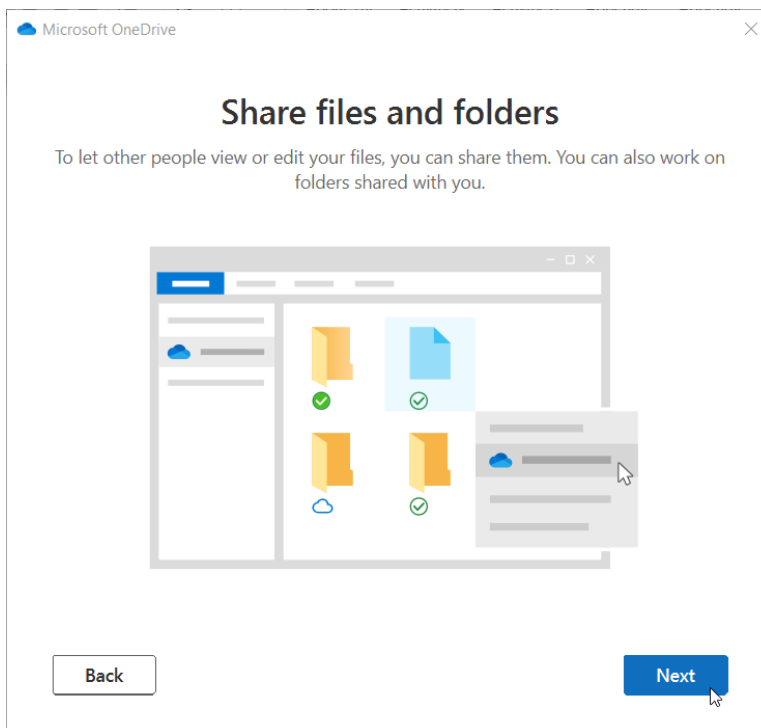
Set your preference and click **Next** to continue:
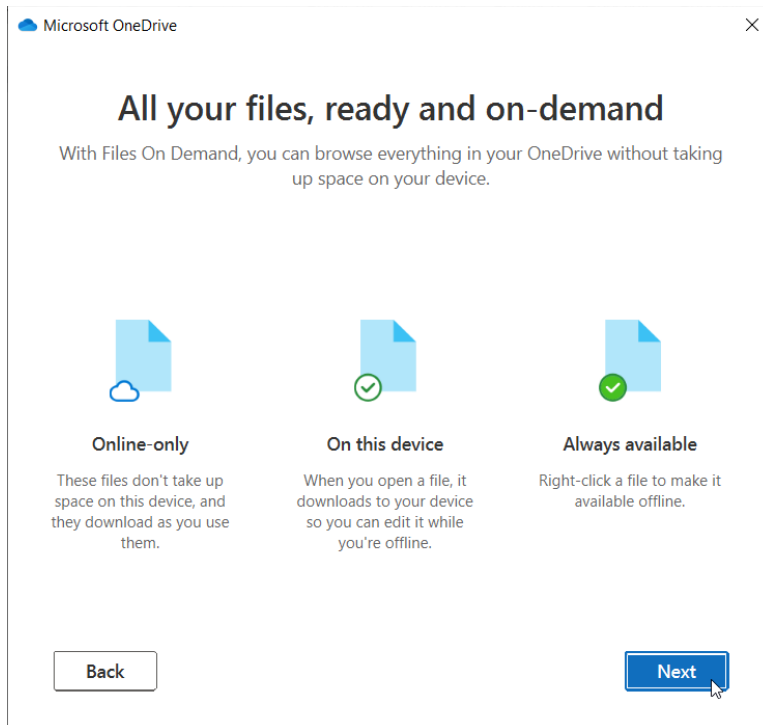
A dialog box that invites you to use the OneDrive mobile app will appear. Click **Later** to continue:
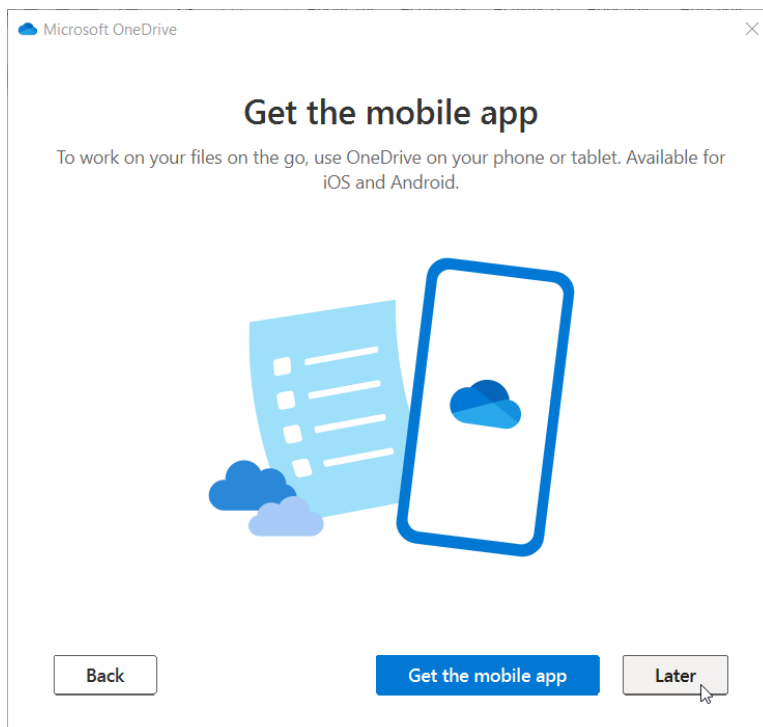
The set up process is complete. Click **Open my OneDrive** folder to finish:
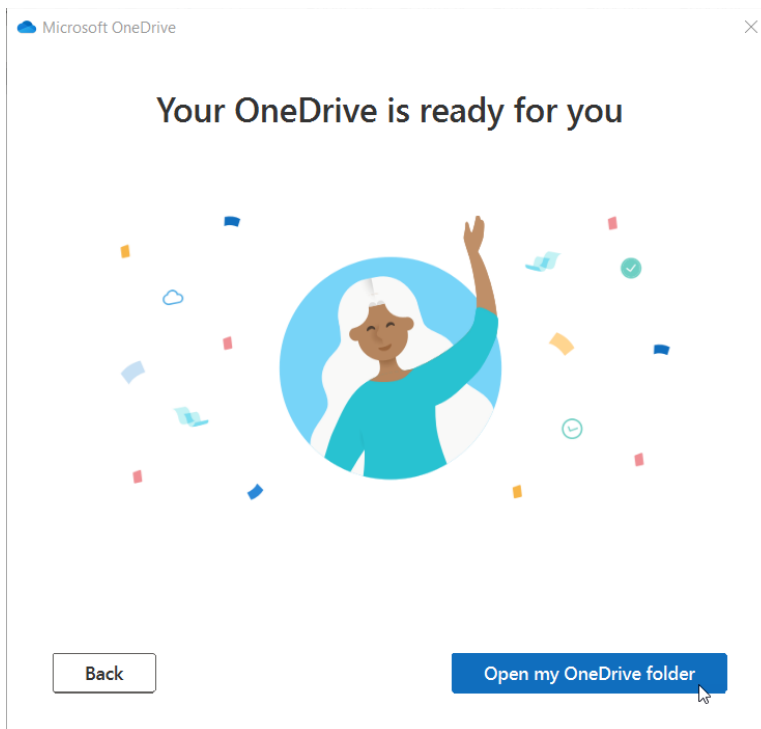
File Explorer will now open to your OneDrive for Business folder:
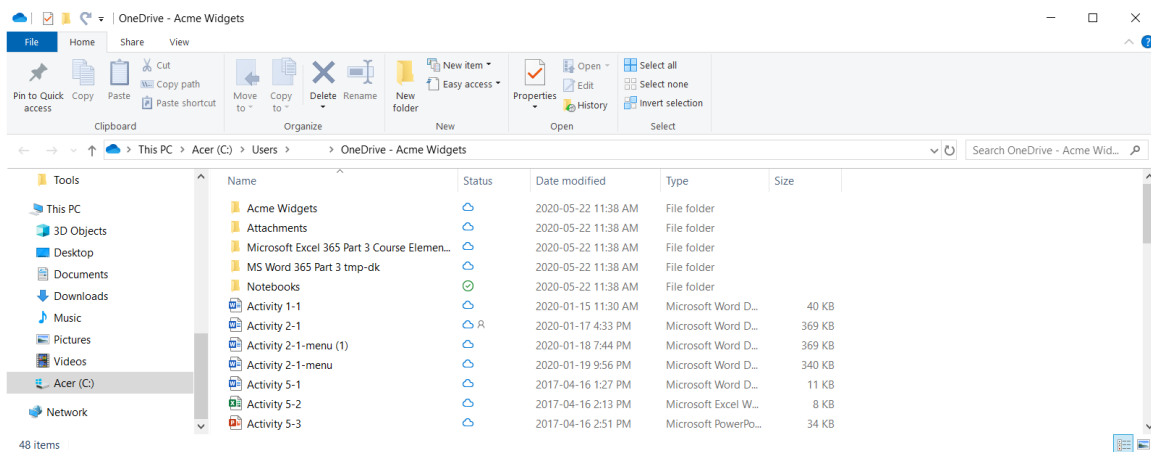
Sync One Drive for Business to Your Computer

Once the Sync feature has been configured, your OneDrive files will automatically be synced with the app. You can manually start a sync using the Sync command within OneDrive for Business:
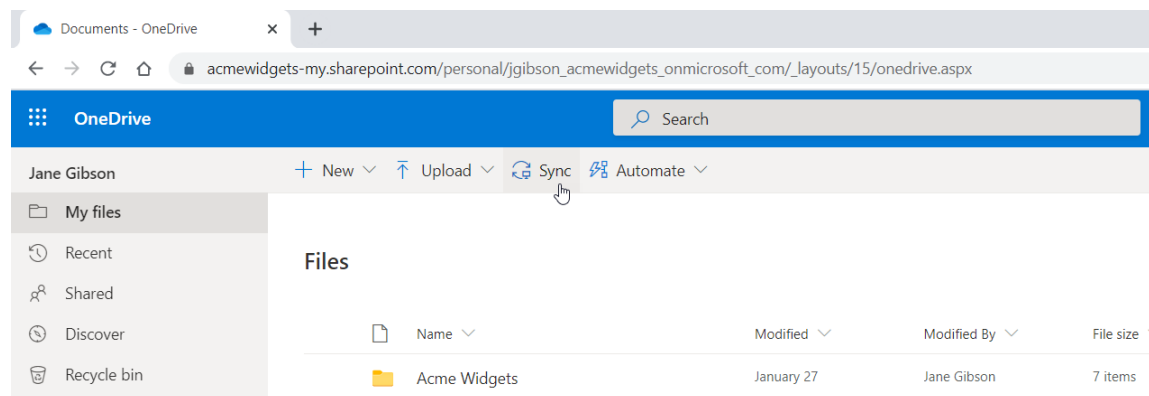
Back Up Files

With the OneDrive app on desktop, you will be able to back up files to the OneDrive PC folder backup to avoid any unwanted incidents of data loss. All the backed-up files are also available to access on other devices.

On the Windows taskbar, select the cloud icon ( ) in the notification area:
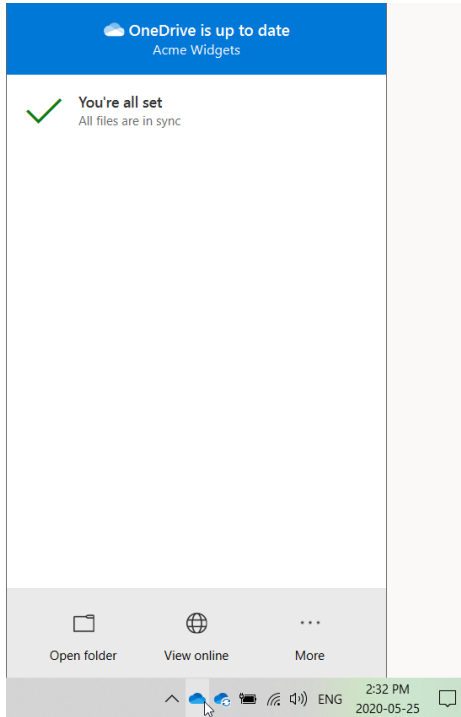
Click **More → Settings**:
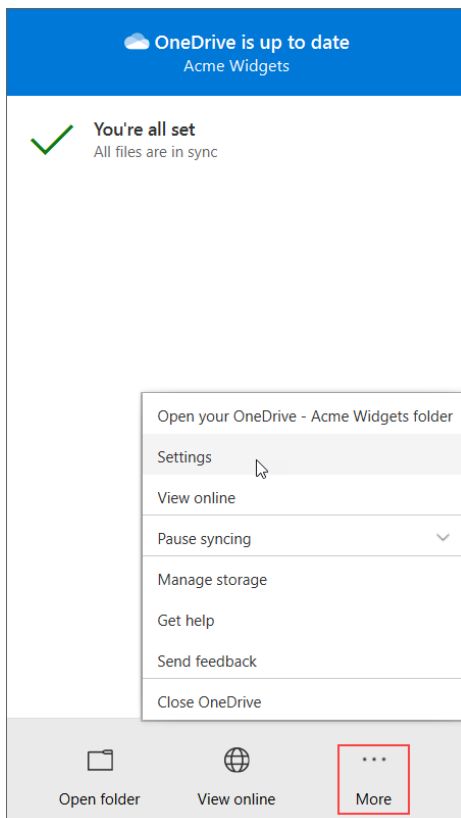
In the **Back up your folders** dialog box, check all the options for Desktop, Documents, and Pictures. Then, click **Start backup**:
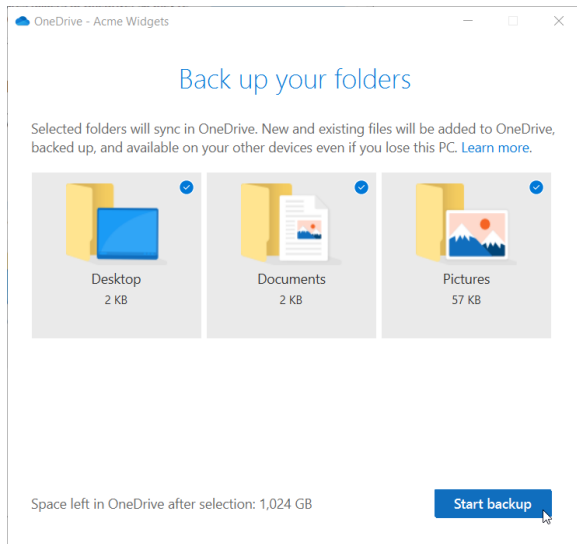
The setup process for backup will start immediately. A **Setting up folder backup…** notice will signal that the setup process is in progress:
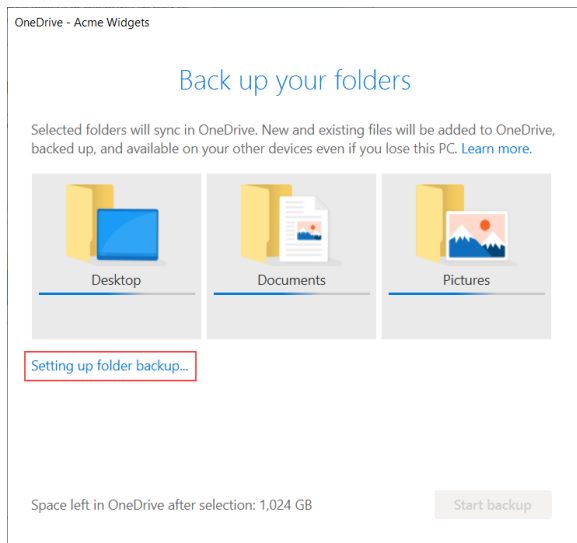
After a few seconds, another dialog box will indicate that "OneDrive is starting to back up your files." To check out the backup progress, click **View sync progress**:
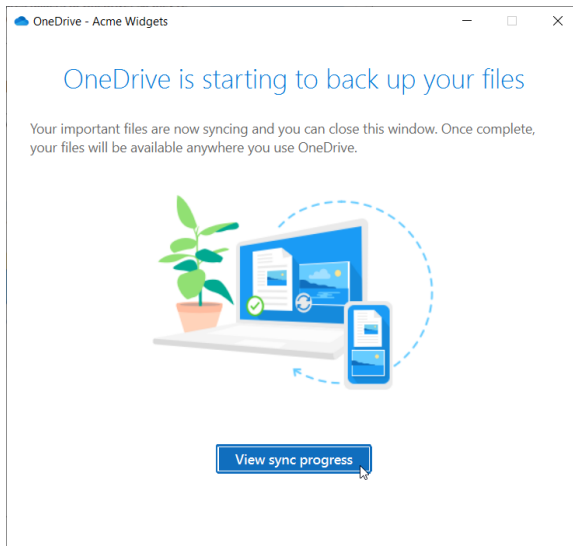
A pop-up pane will appear immediately above the notification area (on the Windows taskbar), showing the sync progress:
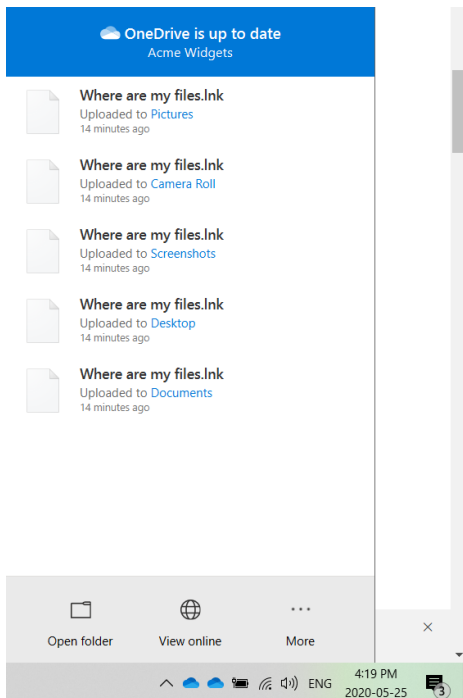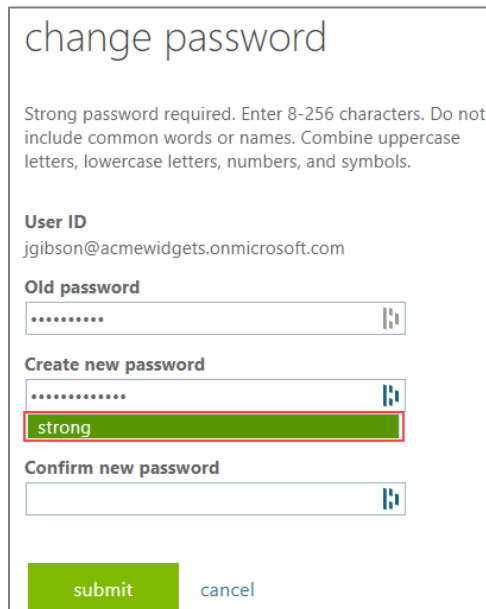
Protect Files

Microsoft has increased the security and privacy of users' information with the latest update. A number of measures such as an indicator for password strength, encryption on mobile devices, and the two-factor verification have been introduced to safeguard users' personal information.

From the Home page, click **Settings** → **Change your password**:
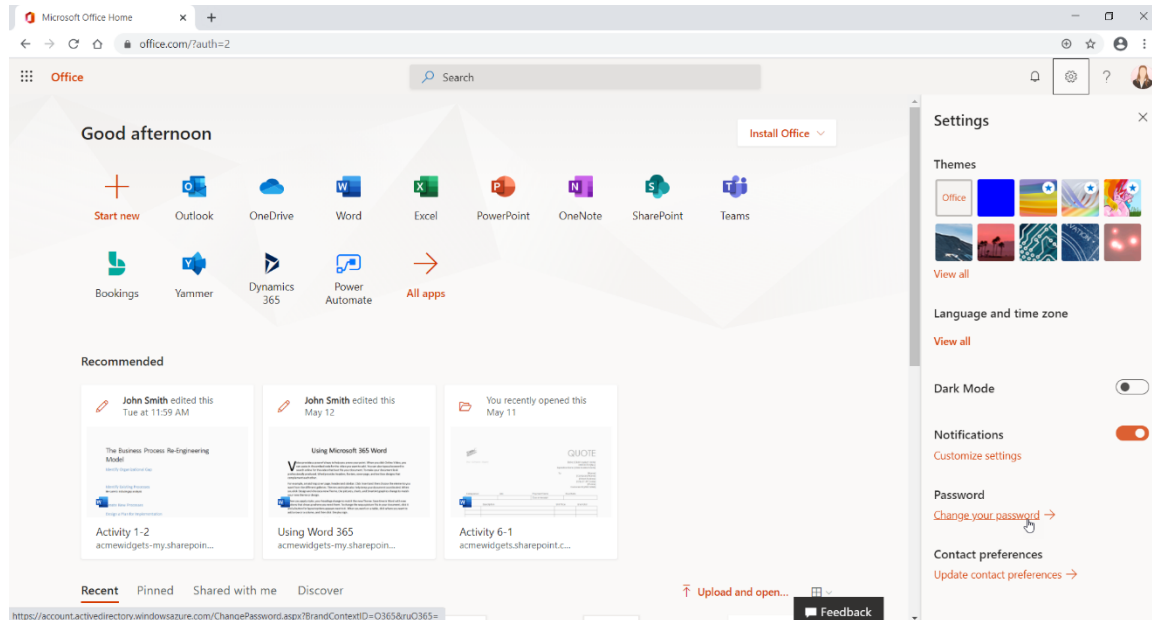
On the **change password** page, type in your old password and a new password. A small bar under the Create new password box will indicate the strength of your new password. The stronger the password is, the more secured your login credentials will be.
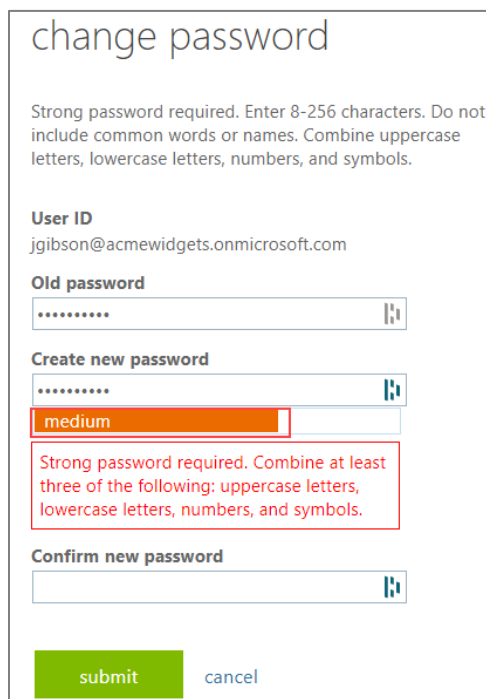
If your new password is at medium strength, the bar will change to orange with a red alert that suggests how to create a stronger password:
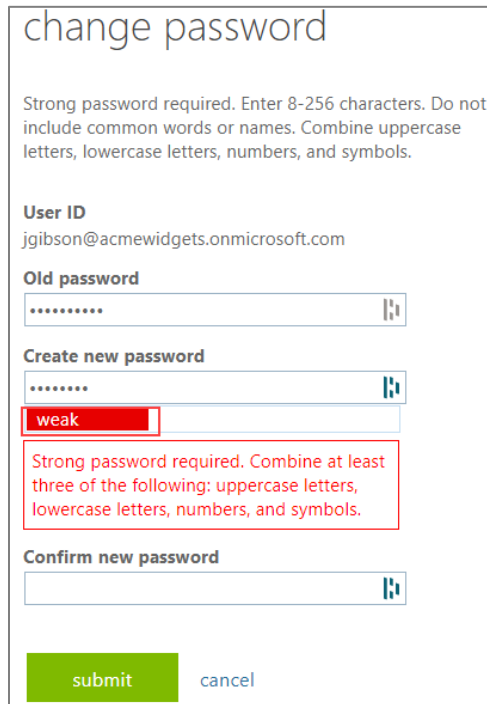
The bar will switch to red if your new password is too weak:
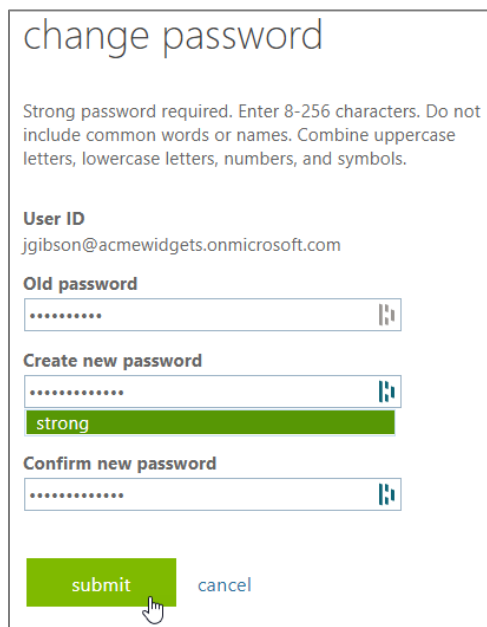
Re-type the new password to confirm, then click **submit** to finish:

You will be redirected to the homepage.

Activity 3-2: Collaborating Using OneDrive for Business

In this exercise, you will share a file with a member in your organization. You will also configure the sync feature.

1.   Ensure you have completed Activity 3-1.

2.   Ensure that the OneDrive for Business app is installed on your PC.

3.   Right click the Activity 3-1 file, then click **Share**:
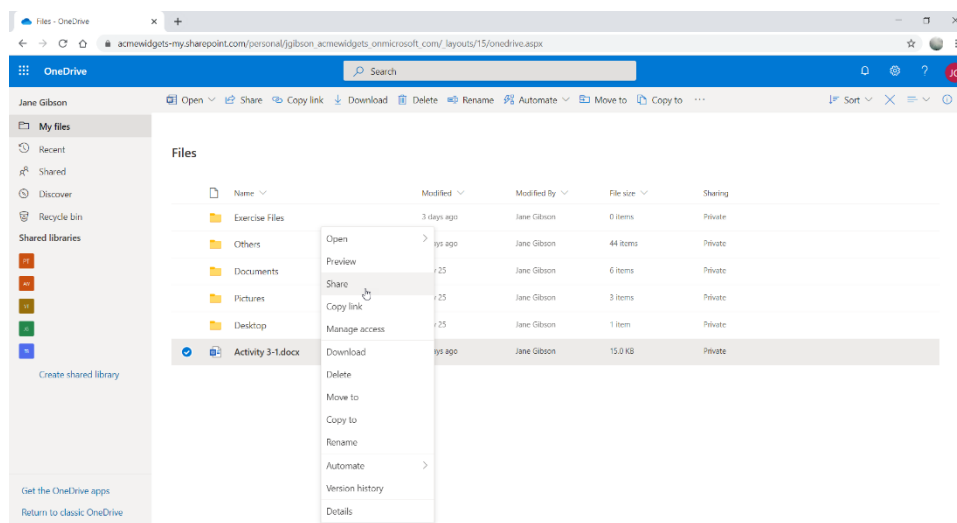
4.   Type in one of your team member's names, then select the name from the Search
     Directory:
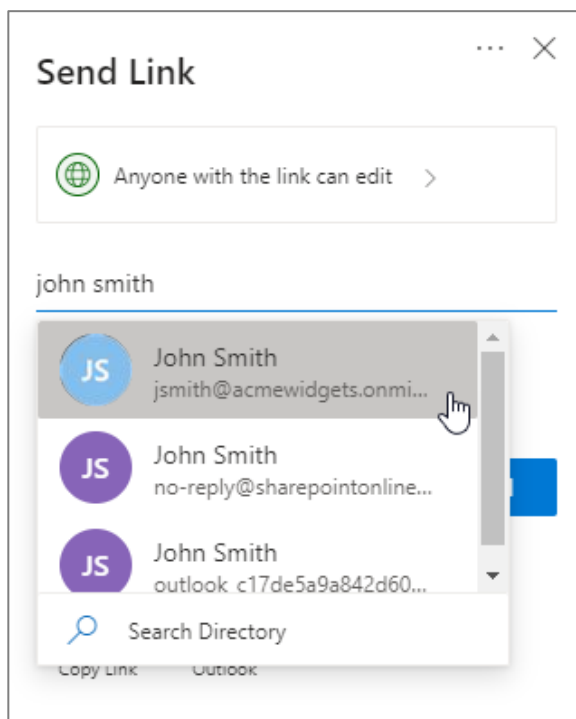
5.   Click the menu box above to open the Link settings window:
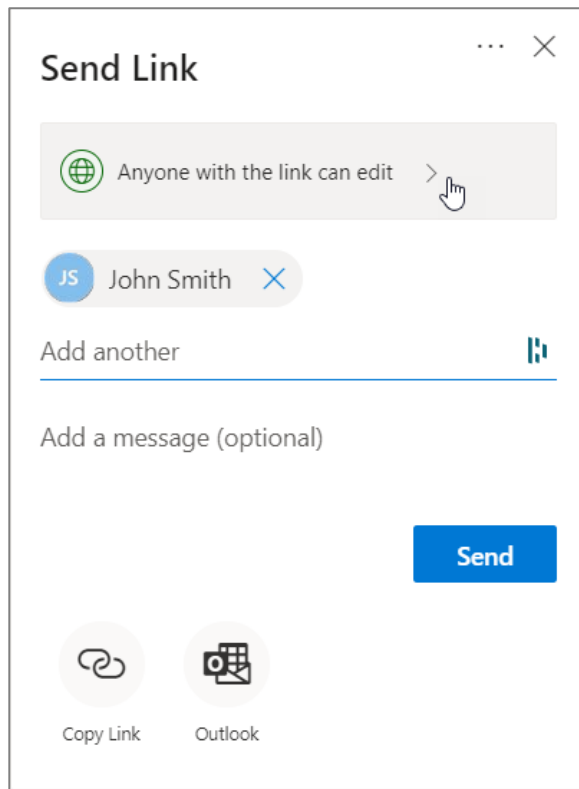
6.   Select **People in [Your Organization] with the link** and uncheck the **Allow editing** checkbox. Then, click **Apply** to return to the Send Link window:

7.   Click **Send** to finish:
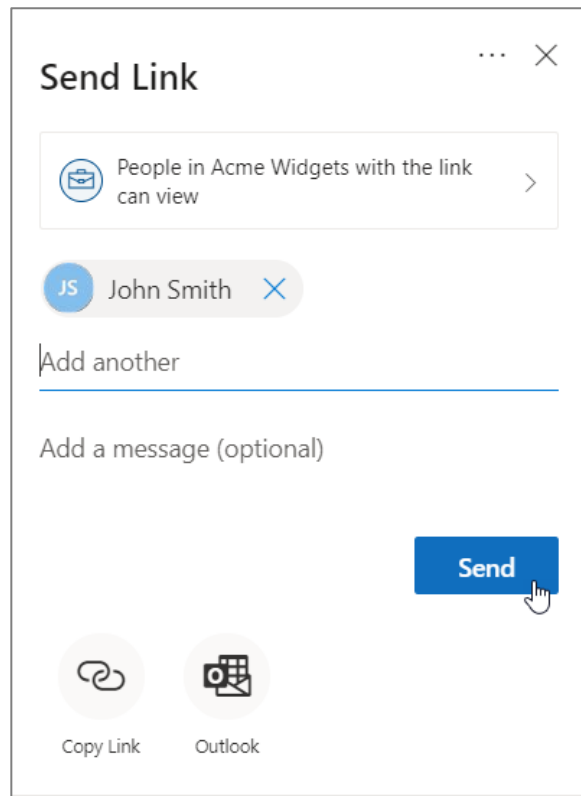
8.   You will receive a pop-up notification:
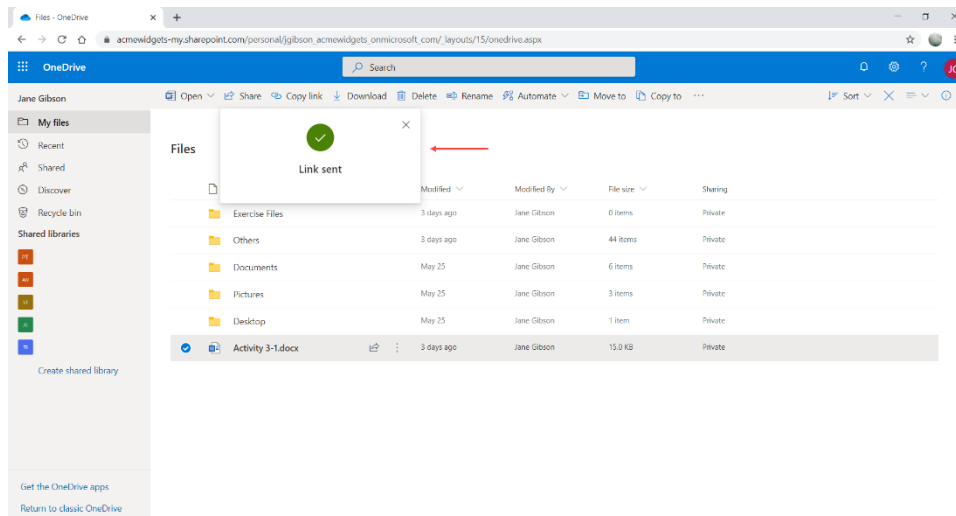
9.   Now, let's set up the sync feature. Click the **Sync** button on the top bar:
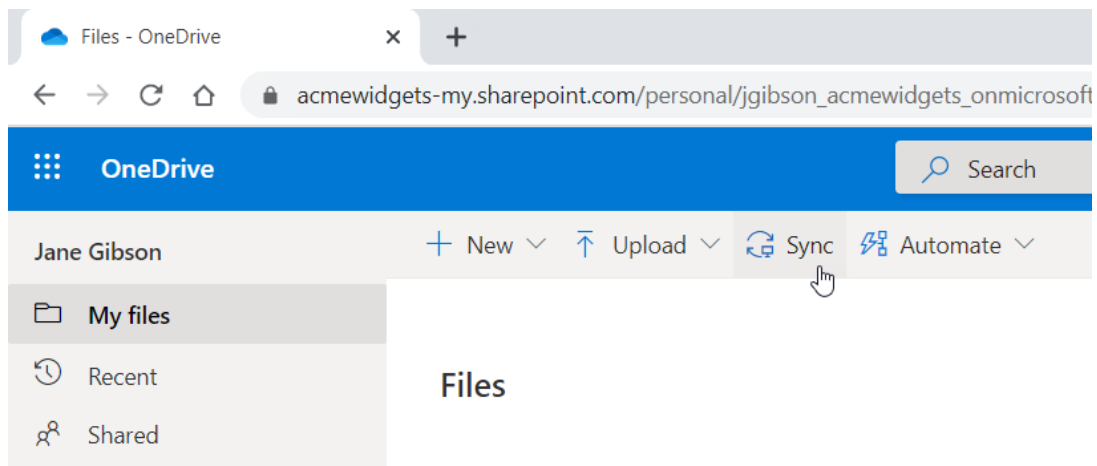
10.   Click **Open Microsoft OneDrive** if you are prompted to switch apps:
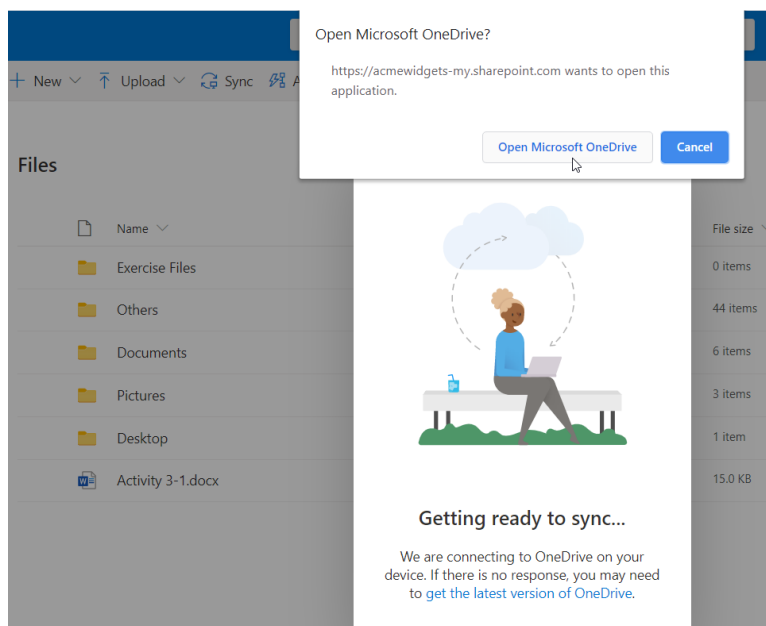
11. If you are prompted to sign in, enter your e-mail address and click **Sign in**:
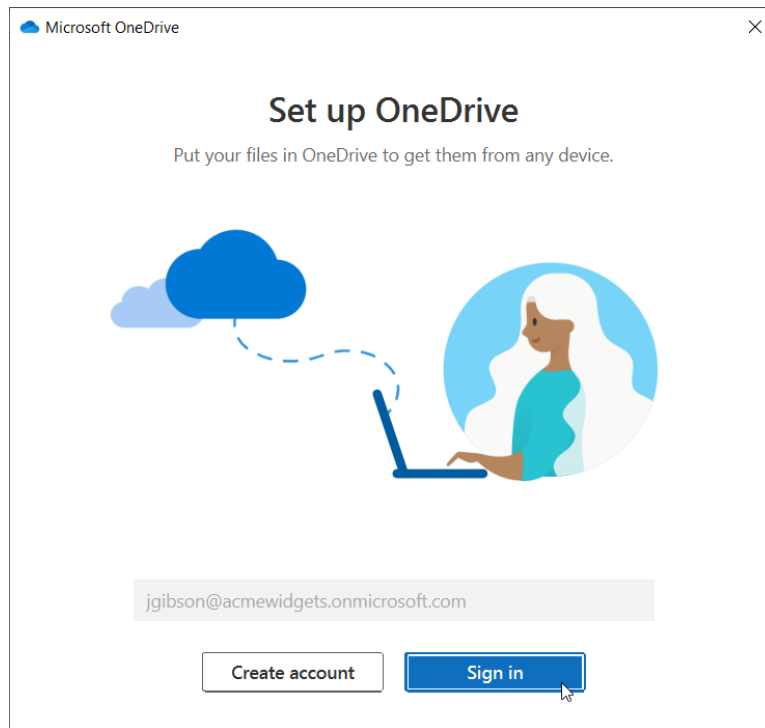
12.   Then, click **Next** to accept the default location where OneDrive for Business files
      will be stored:
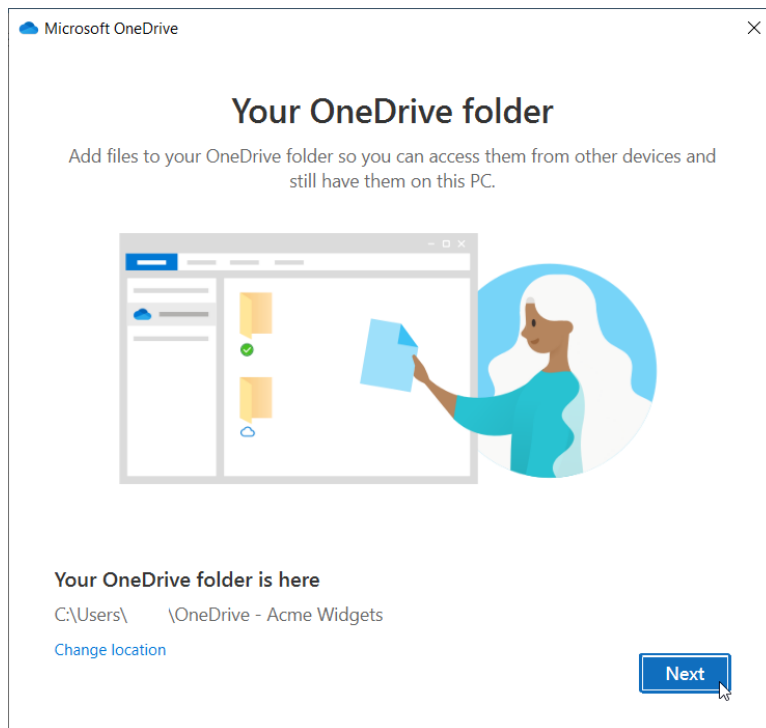
13.   Click **Next** to continue:
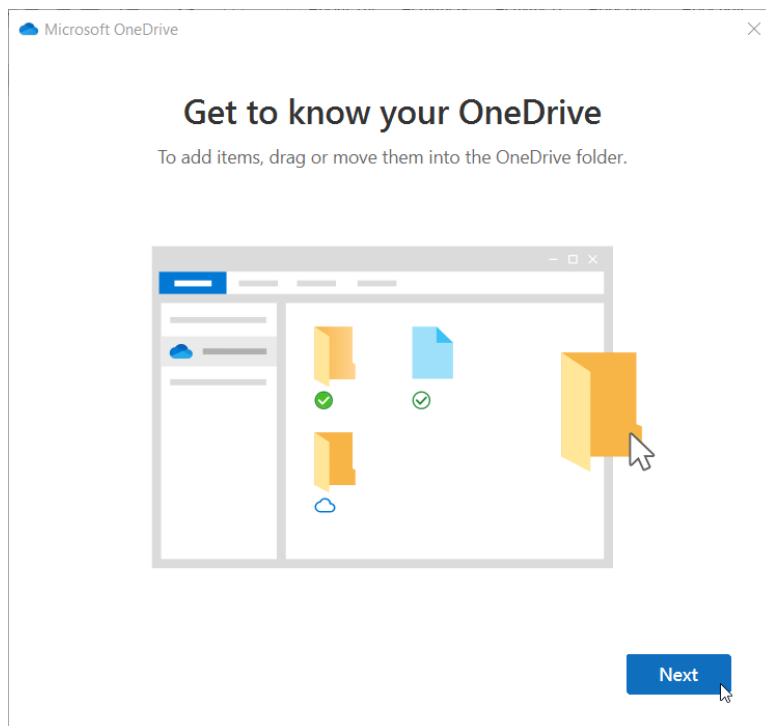
14. Click **Next** to continue:
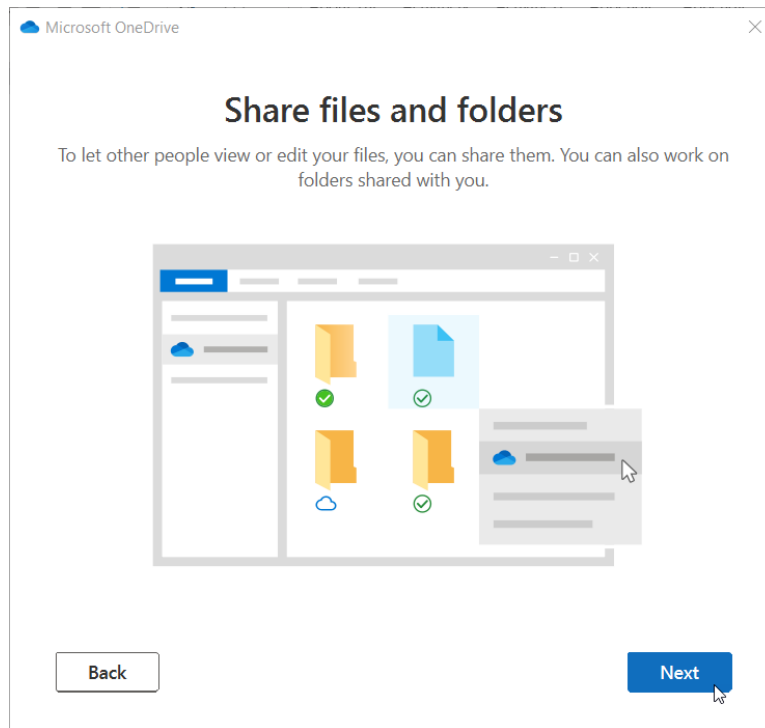
15. Click **Next** to continue:
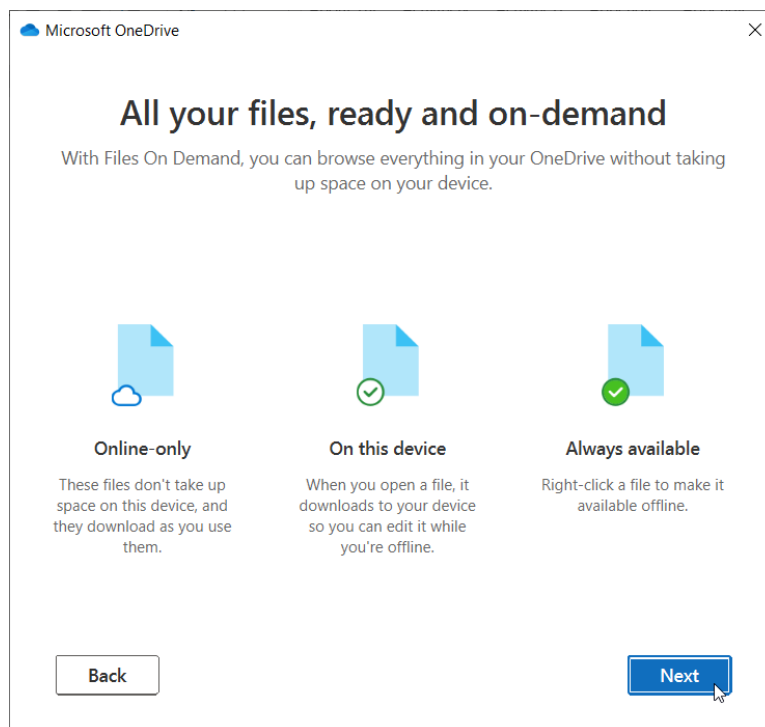
16.   Click **Later** to continue:
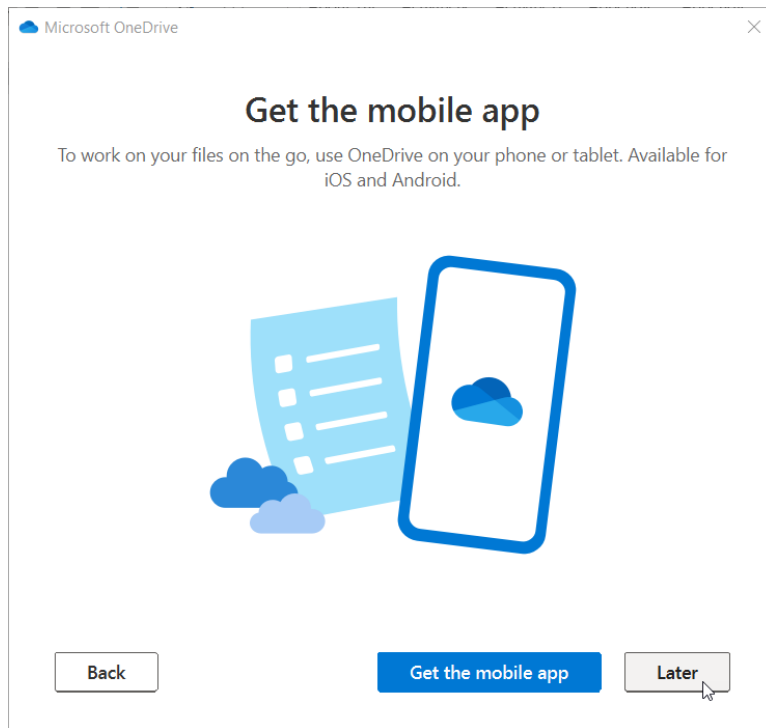
17.   Click **Open my OneDrive** folder to finish:
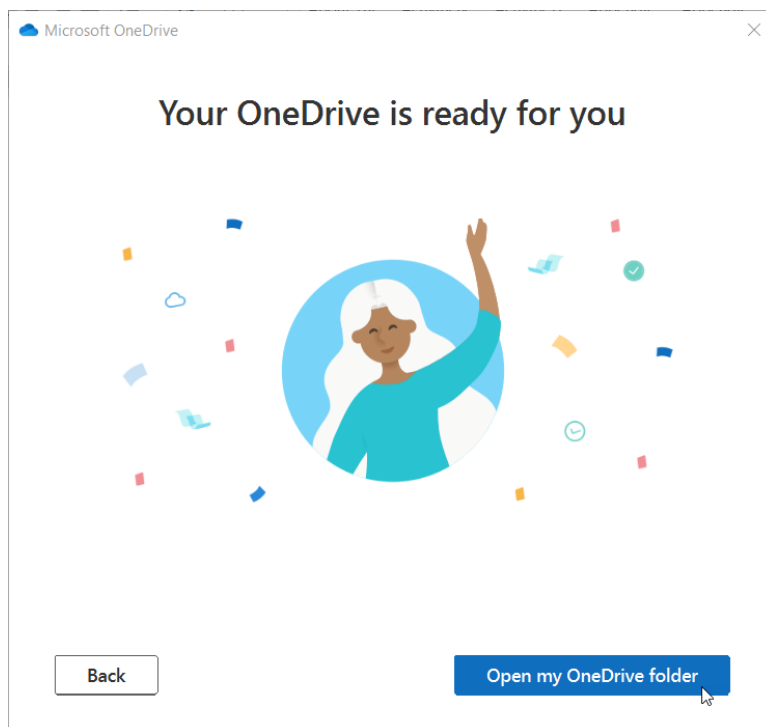
18. File Explorer will now open to your OneDrive for Business account. Confirm that all files are present:
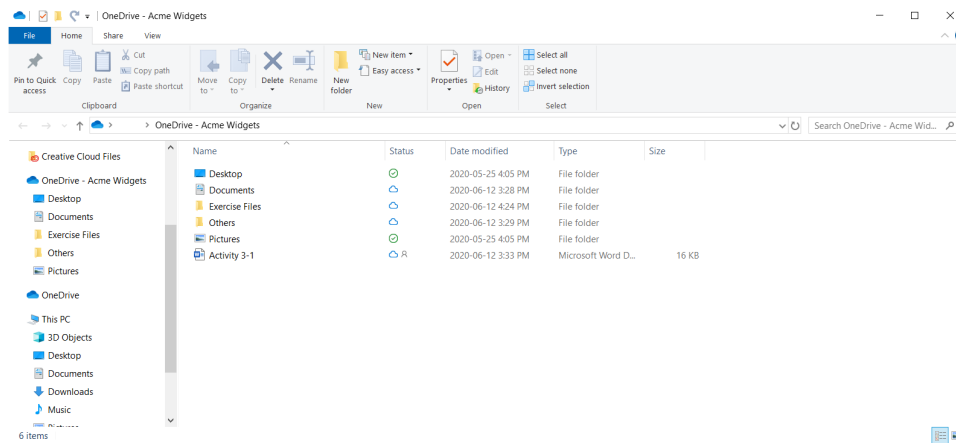
19. Close File Explorer and your internet browser to complete this activity.

TOPIC C: Using Delve

Delve is a cloud-based solution that allows you to view activity across your organization's Microsoft 365 environment. Think of it as an automatically populated feed where you can see everything relevant that is happening around you.

Topic Objectives

In this session, you will learn:

- What items Delve provides access to

- How to search and share in Delve

- How to add search results to your favorites

- About Delve boards

What is Delve?

Delve provides quick, easy access to documents, people, conversations, and activities linked to your user account. Users will only see documents they already have permissions for; items not shared with them will never be accessible.

To open Delve, log into your Microsoft 365 account. Then, click the **Delve** tile on your landing page or from the app launcher pane:
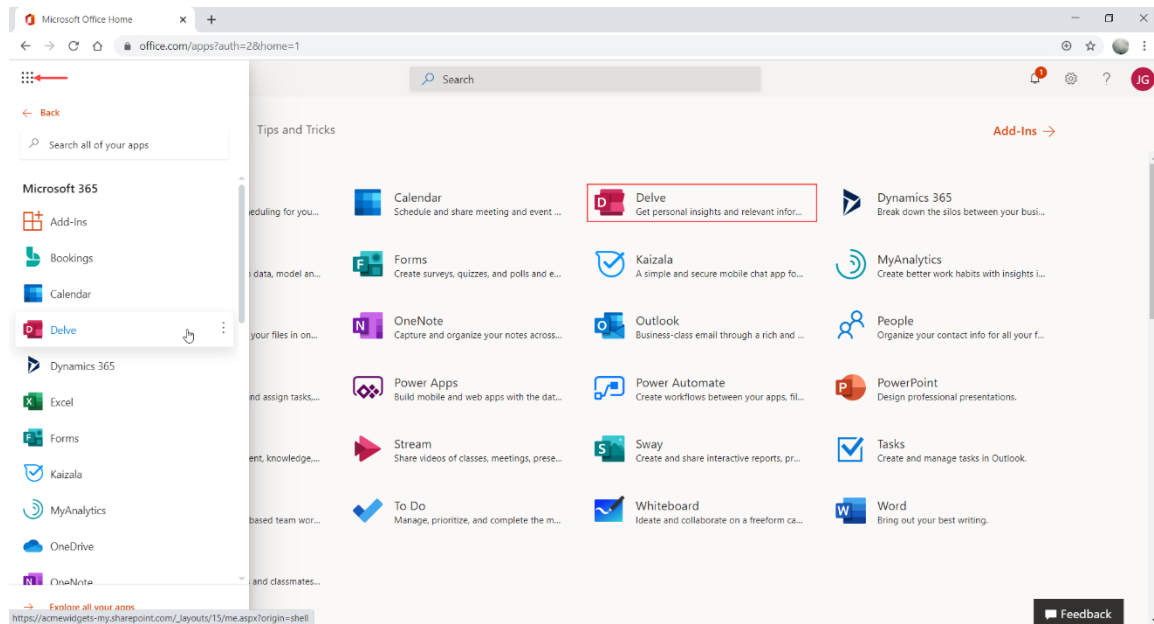
The Delve home page will then be displayed in a new tab:
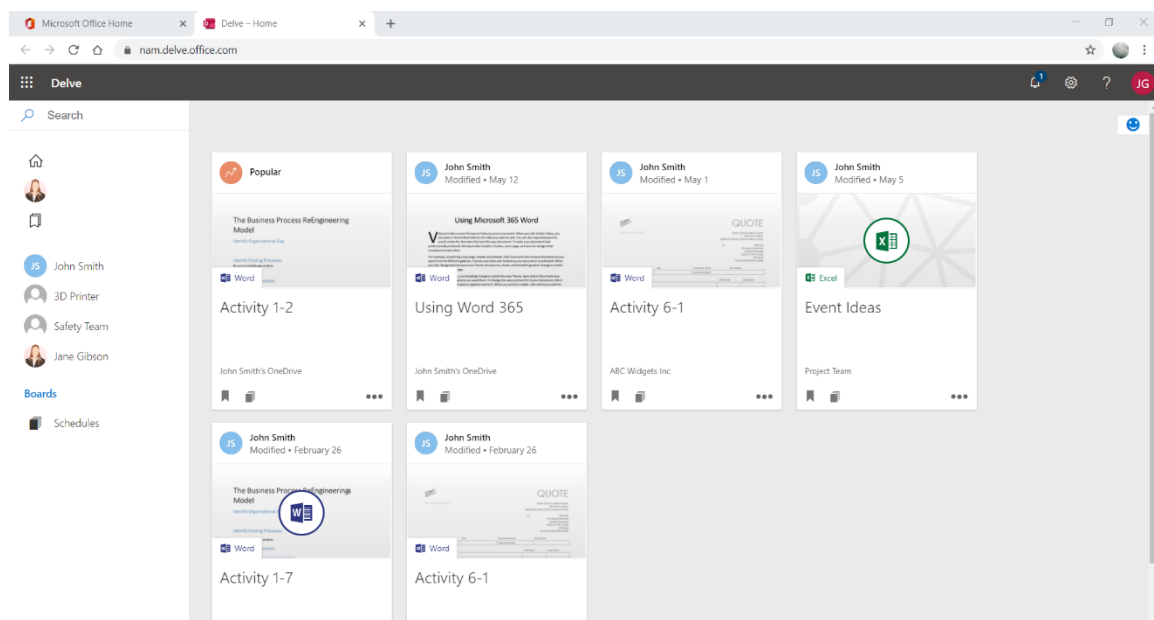
The most popular and relevant documents will immediately be displayed, but you can also use the navigation pane on the left to view your items, favorite items, and the pages of people you are associated with.

Search Using Delve

To find a particular item in Delve, type the search term(s) in the Search field on the left side. Results will be displayed as you type. Select any result to open. If you want to display all the results, click the right arrow next to the search box:
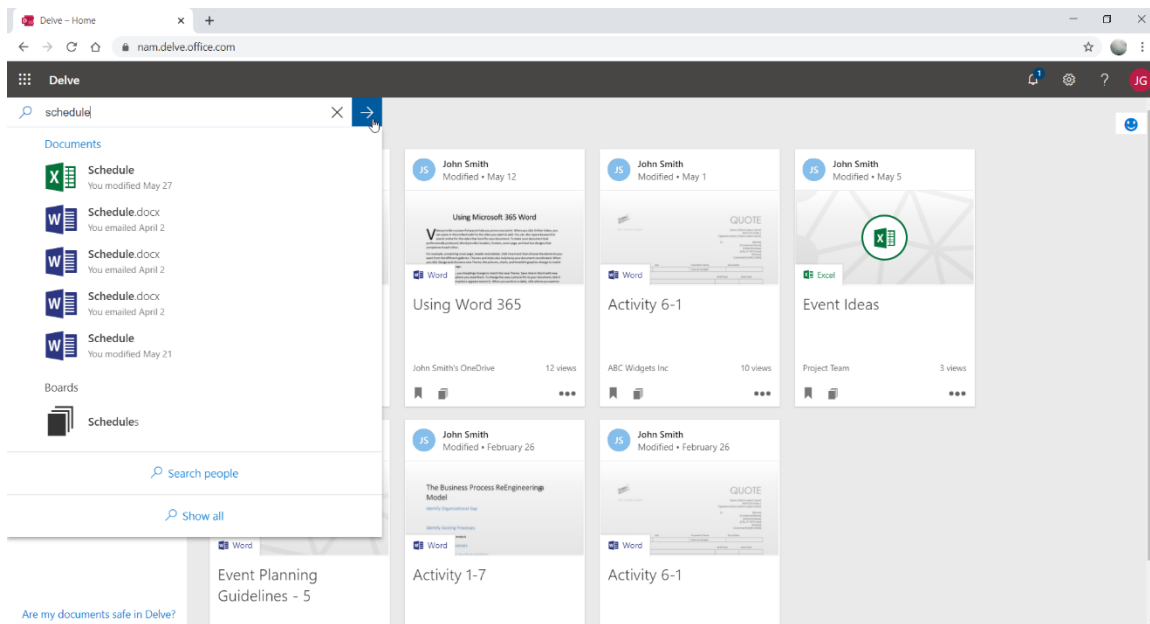
The results will be shown in more detail. You can scroll down to view more documents. Click **see all** to display all the results:
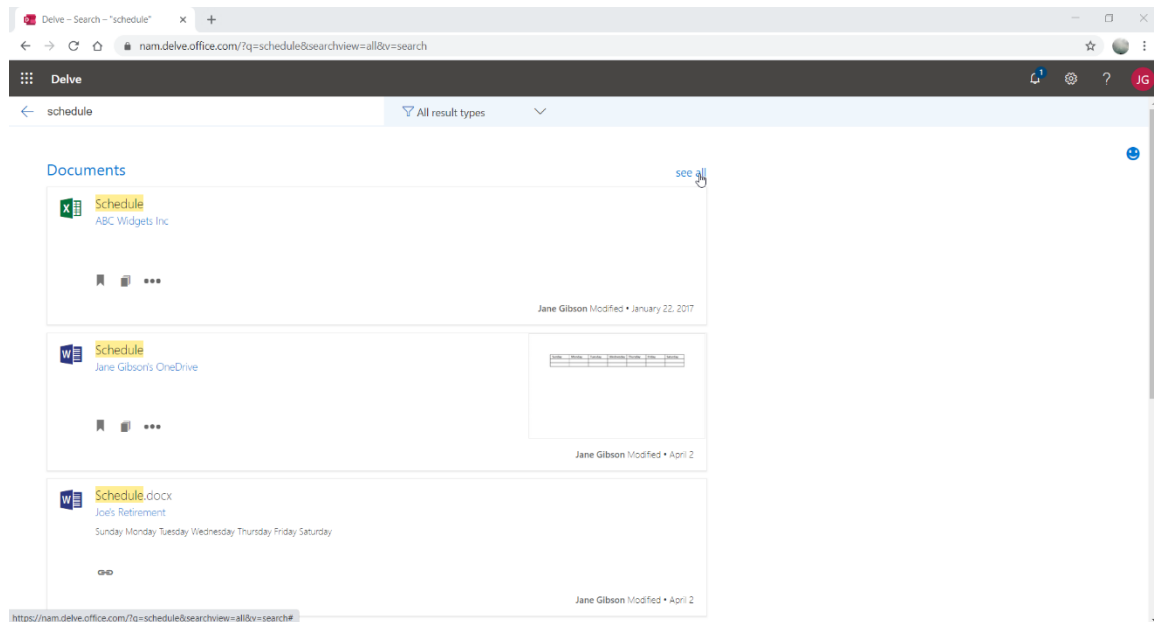
Add Results to Favorites

To add any Delve items from the search results to your favorites, click the **bookmark** icon (🔖) in the bottom left corner of it. Then, click the left arrow next to the search box to return to the homepage:
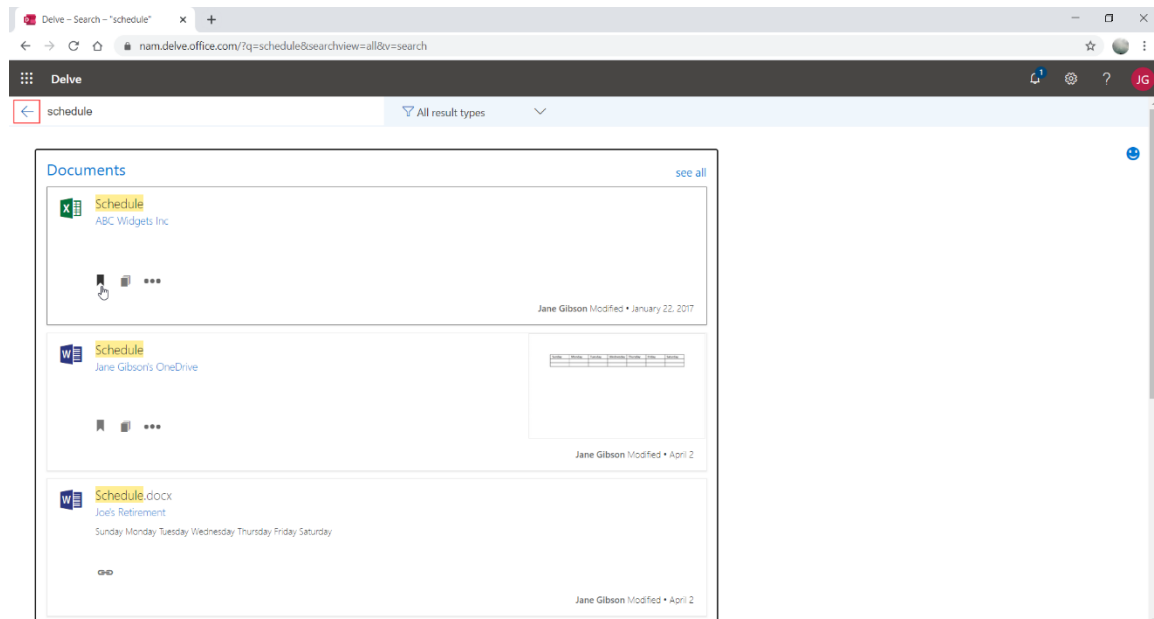
Select the **Favorites** menu to open:
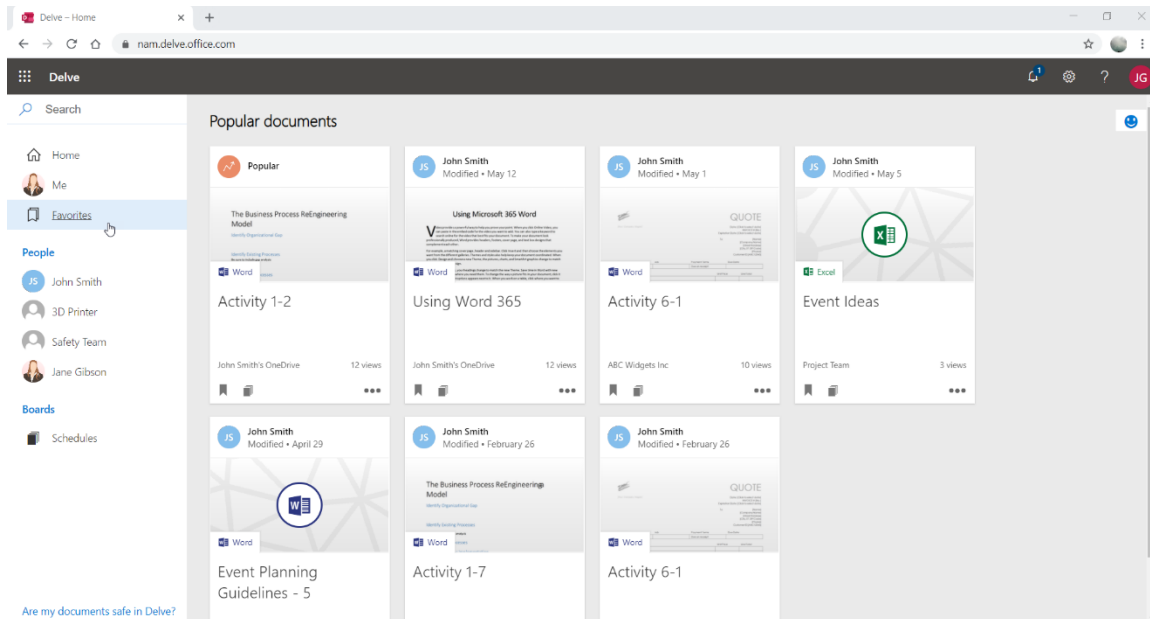
The item can now be seen in the Favorites group:
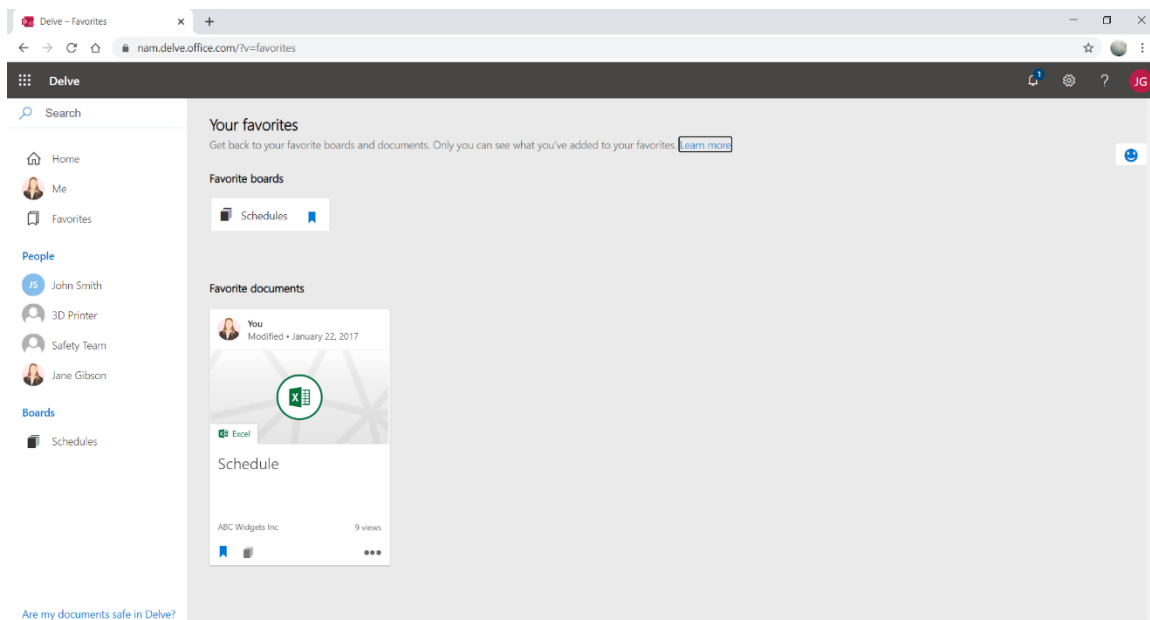
Share with Delve

To share an item, click the **ellipsis** (●●●) in the bottom right corner of any document:
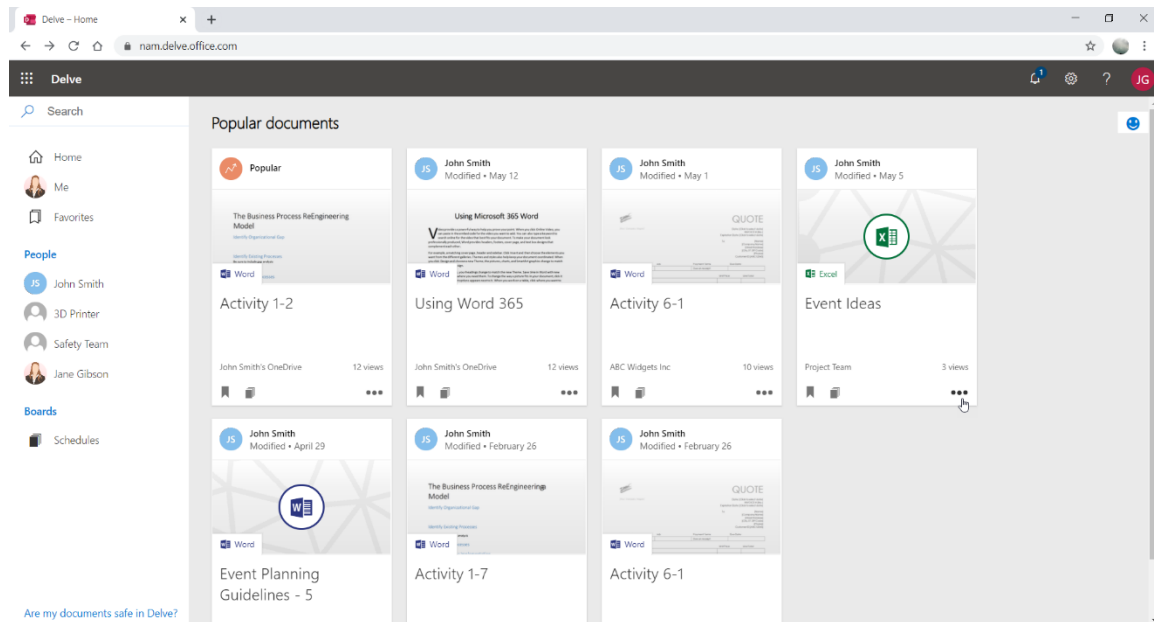
Then, click **Send a link**:
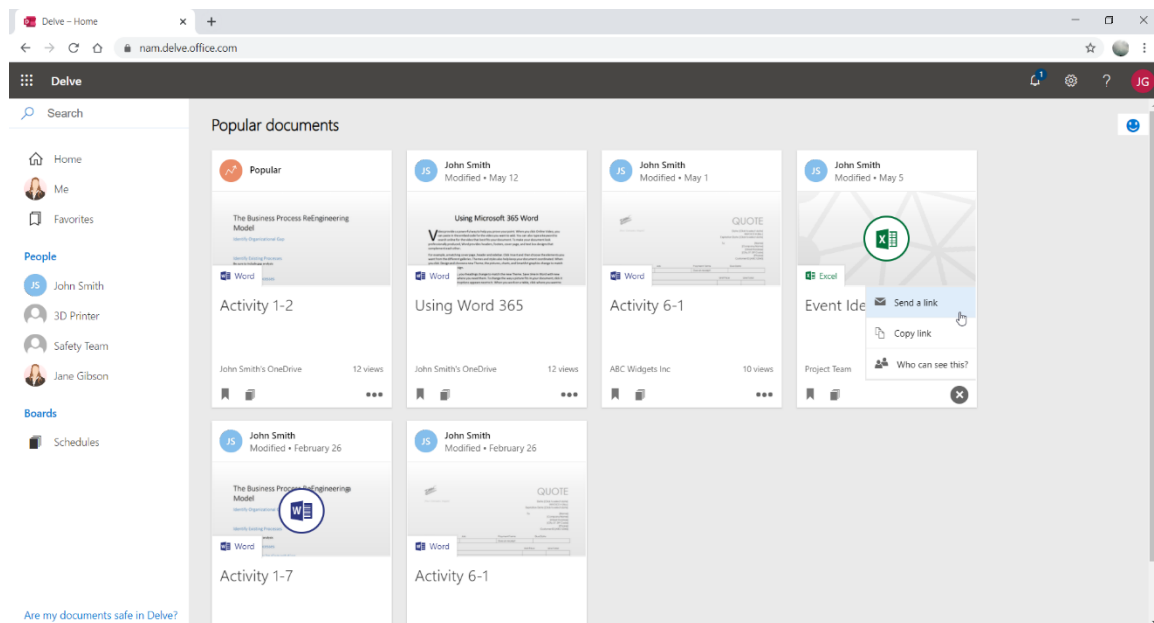
An email pop-up window will appear with the link attached to a new email. Choose the recipients and click **Send**:
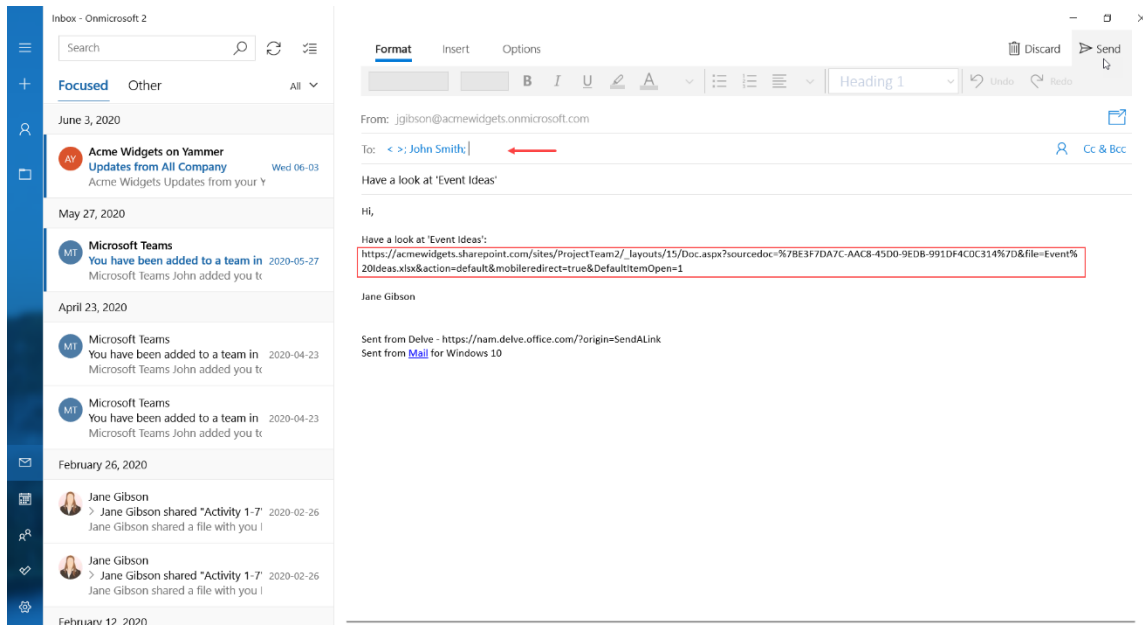
Use Boards

Boards in Delve act like folders, giving you the ability to manage search results and frequent documents. Your boards will also be available to others in your organization. To manage your boards, click the **Manage boards** stacked icon (▤) in the bottom left of any Delve search result:
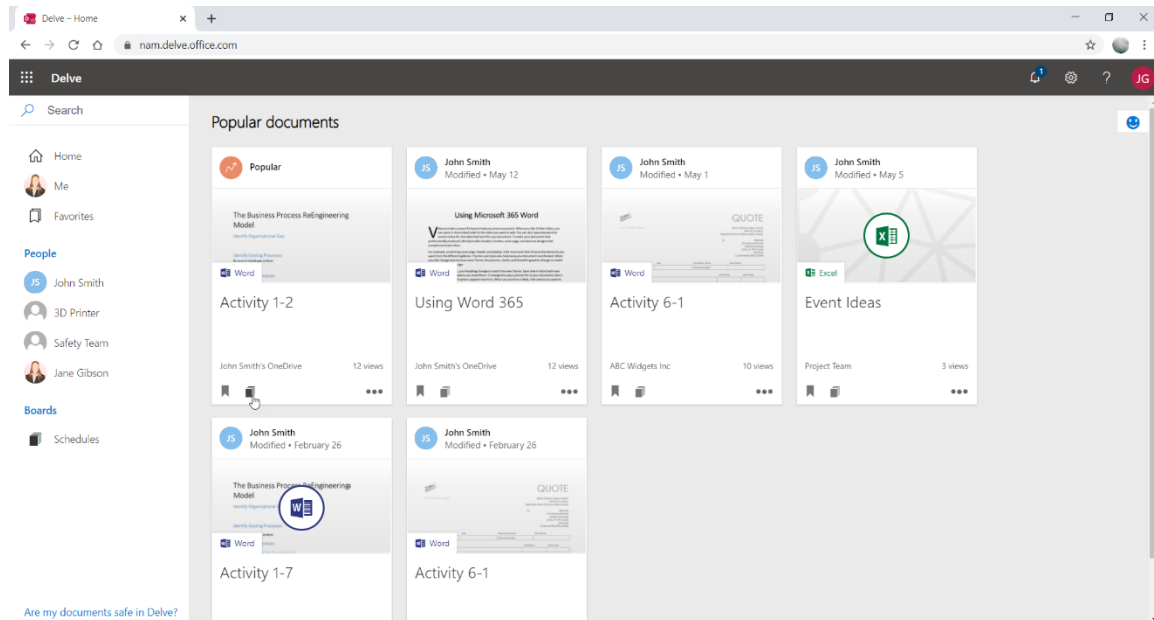
In the dialog box that appears, enter the name of the board to which you want to add the result. Or, enter a unique name to create a new board:
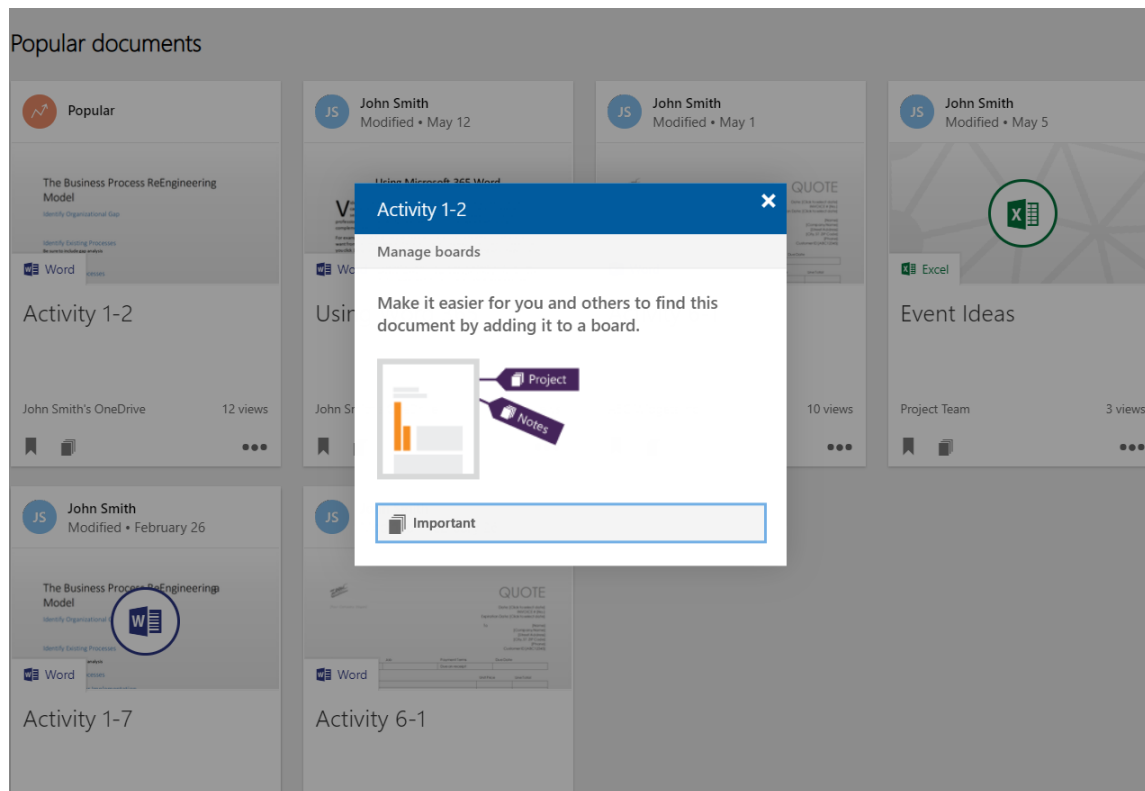
Once you press **Enter**, the Delve result will be added to the specified board (and the board will be created, if necessary):
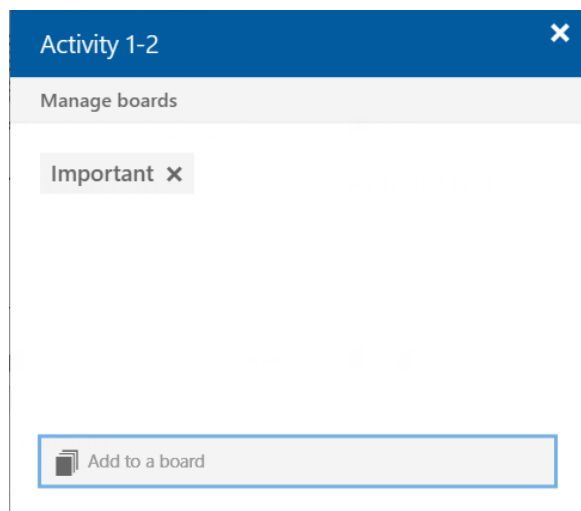
You can now add the results to more boards, or close the pop-up window to go back to Delve.

You can access boards from the navigation pane, and share or remove them using the commands at the top of the board window:
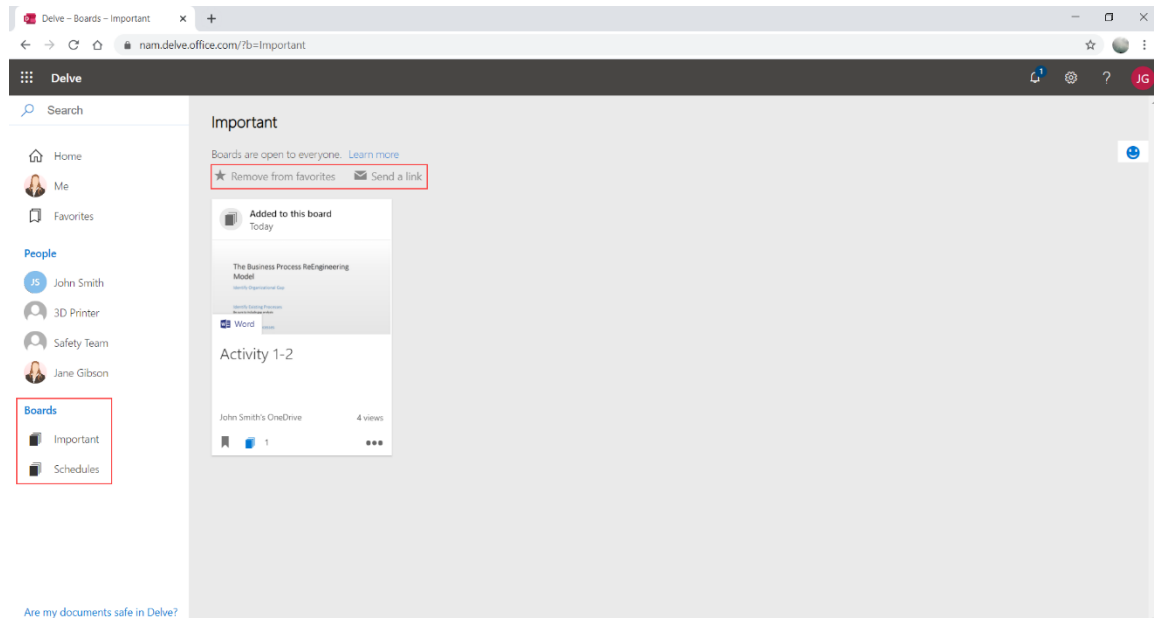
To remove an item from a board, click the stacked icon again to open the pop-up dialog box. Here, you can click the **X** to remove the item from a board:
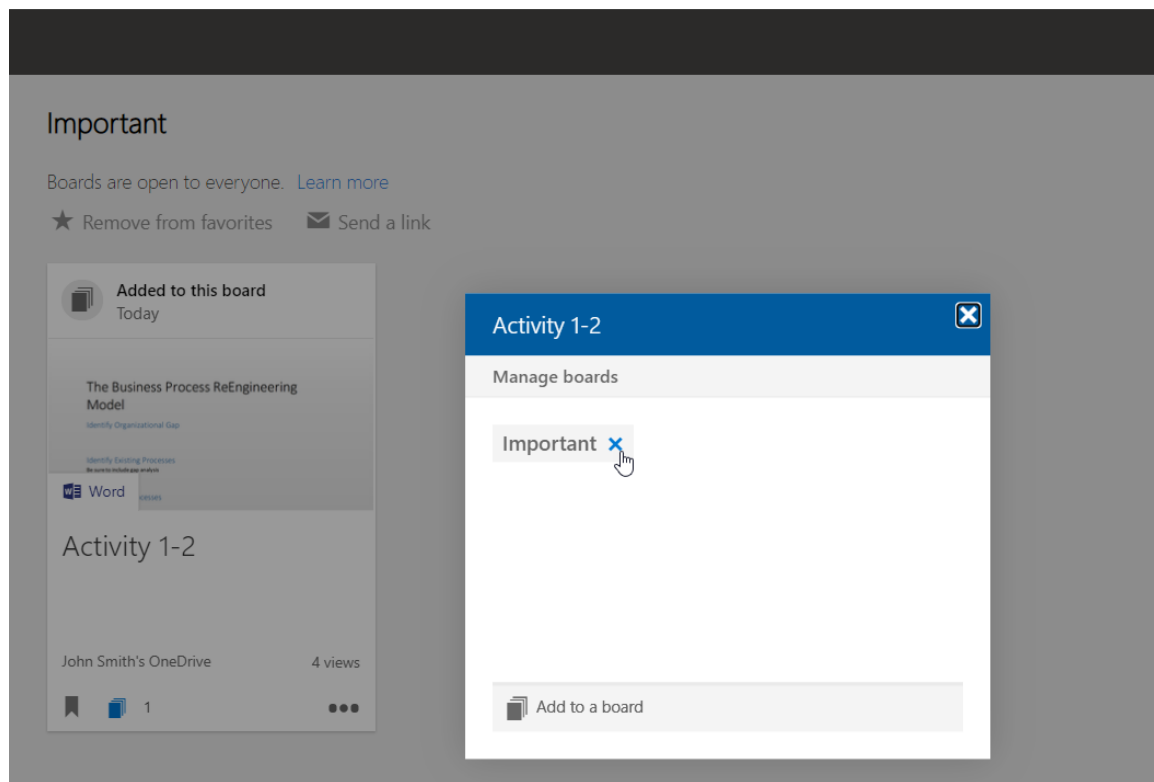
You can also add the item to other boards by typing the appropriate name in the **Add to a board** field.

Activity 3-3: Using Delve

In this activity, you will view your personal Delve page and manage its results.

1. Ensure you have completed Activity 3-1.

2. Open a browser and log into your Microsoft 365 site.

3. Click the **Delve** tile on your landing page:
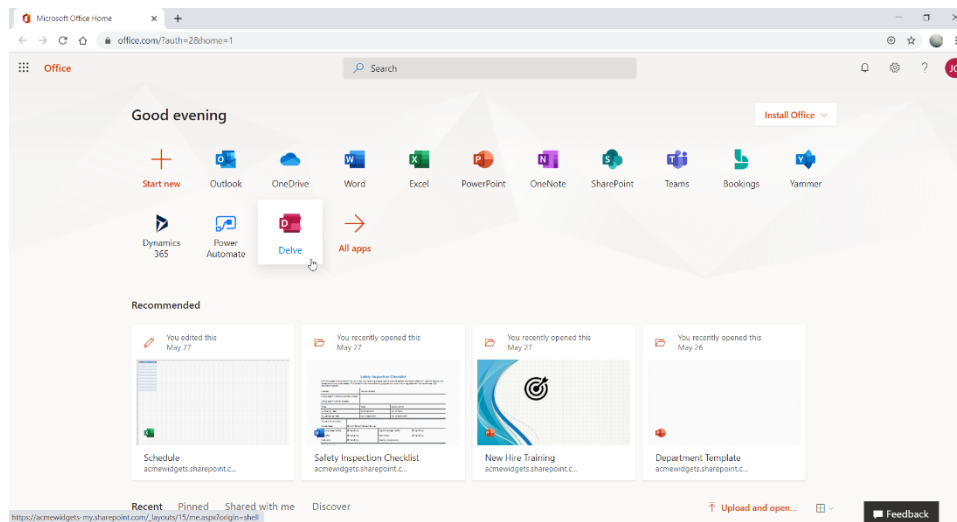
4. The Delve homepage will be opened in a new tab. Click **Me** from the navigation pane to view your personal Delve page:
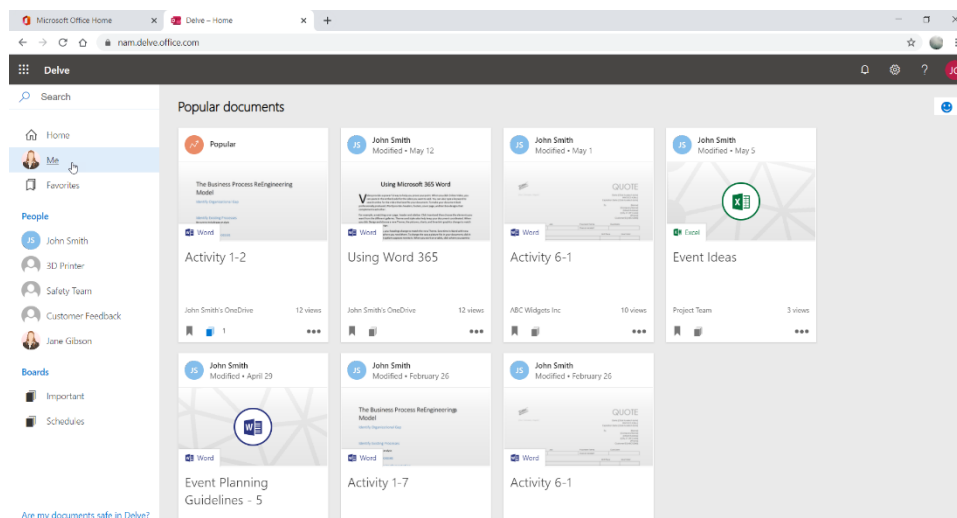
5. You should see Activity 3-1 on your personal results page. Click the **bookmark** icon to add it to your Favorites:
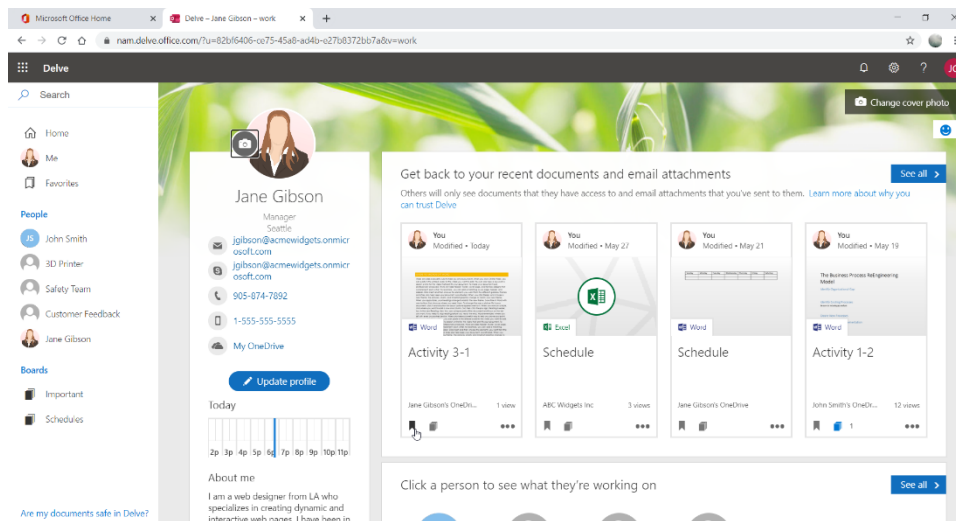
6. Click the **Favorites** link from the navigation pane:
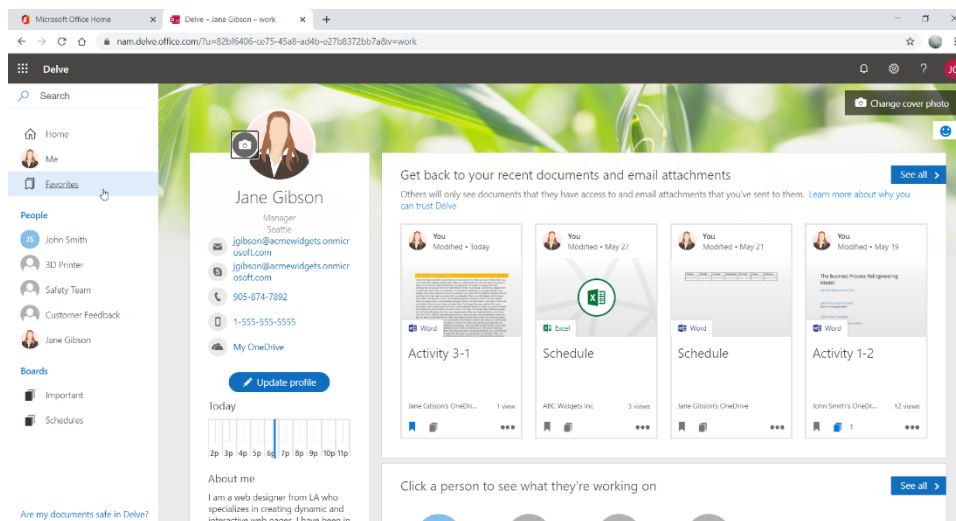
7.   You should see Activity 3-1 listed in the results. Click the **stacked** icon to add it to a board:
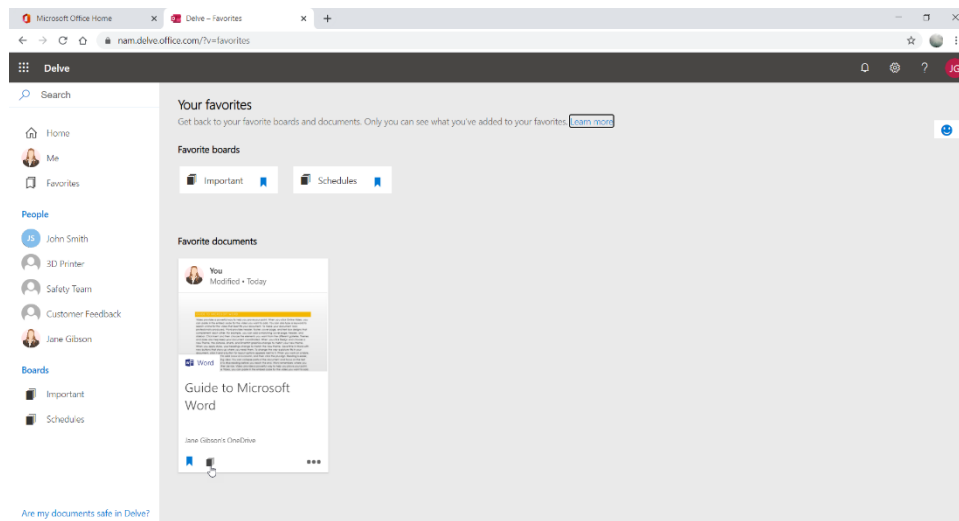
8.   Let's create a new board for this item. Type "Activities" in the **Add to a board** field and press **Enter**:

9. The board will now be created and the item will be added. **Close** the pop-up dialog box to return to Delve:
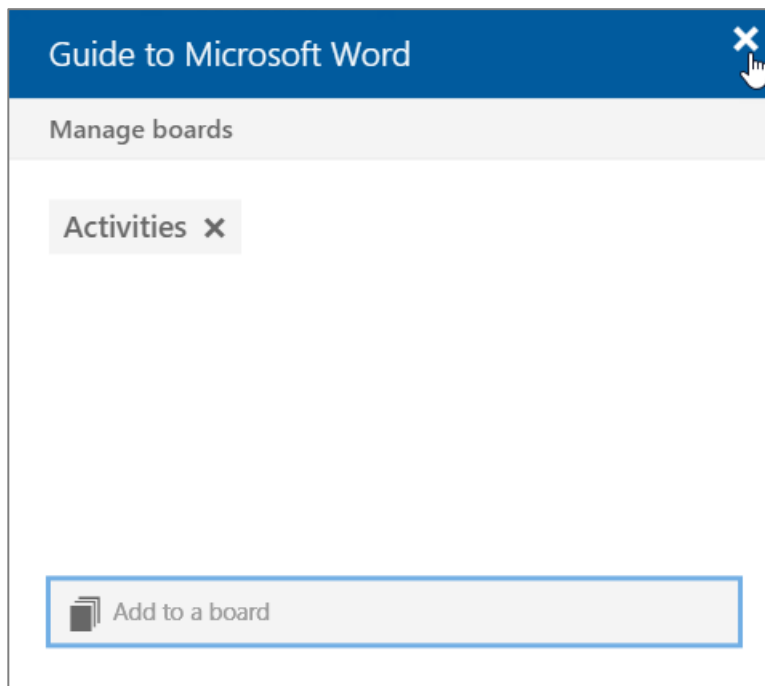
10. The new board will now be displayed with the result we have added:
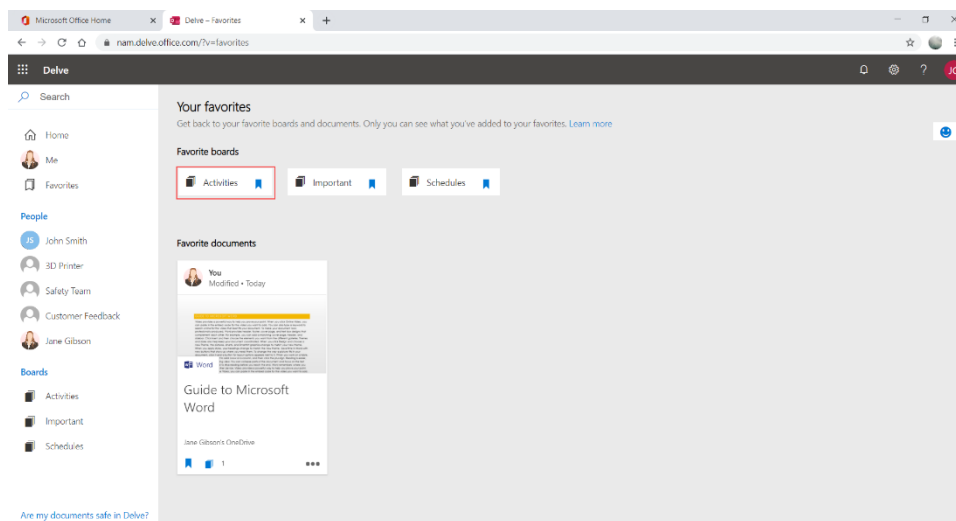
(If the board is not displayed, click its link in the navigation pane.)

11. Log out of Microsoft 365 and close your browser to complete this activity.

Summary

In this lesson, you learned how to share files and collaborate using OneDrive and Delve. You also learned about the OneDrive for Business app and how to sync your OneDrive for Business account with your computer.

Review Questions

1. **Is the OneDrive for Business account separate from your personal OneDrive account?**

2. **What is the purpose of the Discover feature in OneDrive?**

3. **What is Delve?**

4. **How do you create a board in Delve?**

5. **What set of apps is used to create new files via OneDrive?**

LESSON 4:
MANAGING USERS

Lesson Objectives

In this lesson you will learn how to:

- Get started as an administrator

- Manage users, groups, and resources in Microsoft 365

TOPIC A: Getting Started as an Administrator

In your role as a Microsoft 365 administrator, you may be required to perform many different tasks. In this topic, we will discuss what your role may look like and explore some of the key tools you may use.

Topic Objectives

In this session, you will learn:

- About your role as an administrator

- How to open and navigate the Admin Center

- How to use the Message Center and the Service Health Center

What is an Administrator?

In general, the term **administrator** is given to the user role with the highest level of privileges in a particular system or software application. In the case of Microsoft 365, the top-level administrator is called the **global administrator**. This role has access to all administrative features across Microsoft 365 and can grant administrative access to other users. Typically, very few users have this role.

Microsoft 365 also has several **specialized administrator types** which have administrative access to only specific areas. These roles include:

- Billing administrator (manages purchases, subscriptions, support, and service health)

- User management administrator

- Password administrator

- Compliance administrator

- Service administrator

Certain **Microsoft 365 services** (such as SharePoint, and Exchange) also have **separate administration roles**, and in certain cases, sub-sets of those roles. This allows an organization to assign an administrator for each of these services without providing administrative-level access to the entire Microsoft 365 suite.

Navigate the Admin Center

If you are an administrator, you will see an **Admin** tile in the app launcher pane and on your landing page:
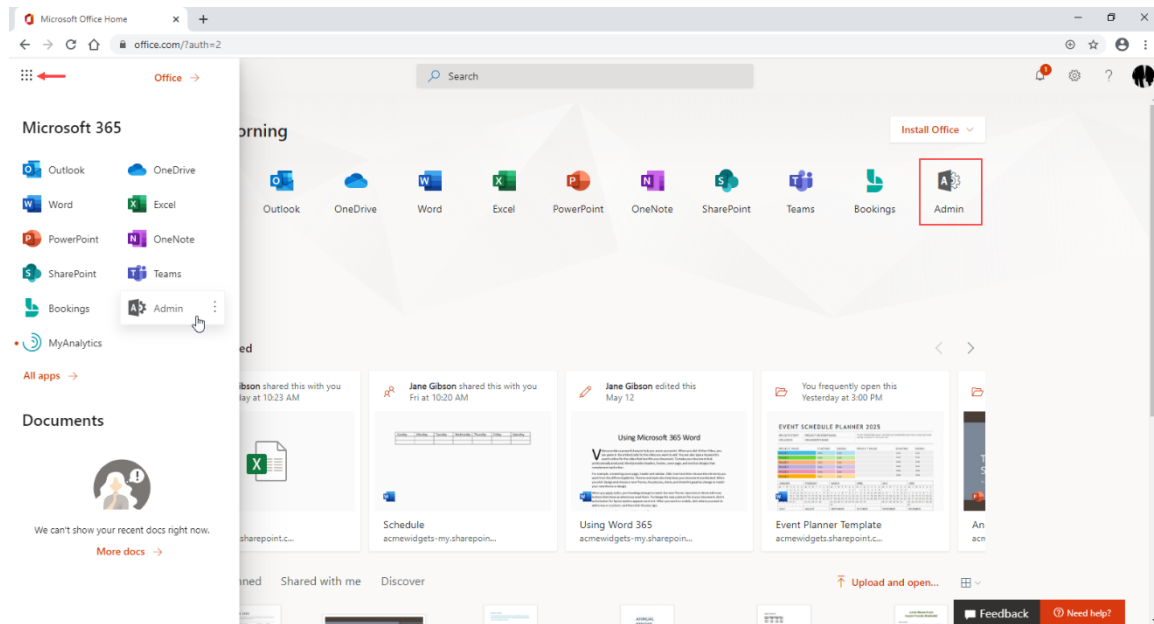
Let's take a closer look at the Admin Center:
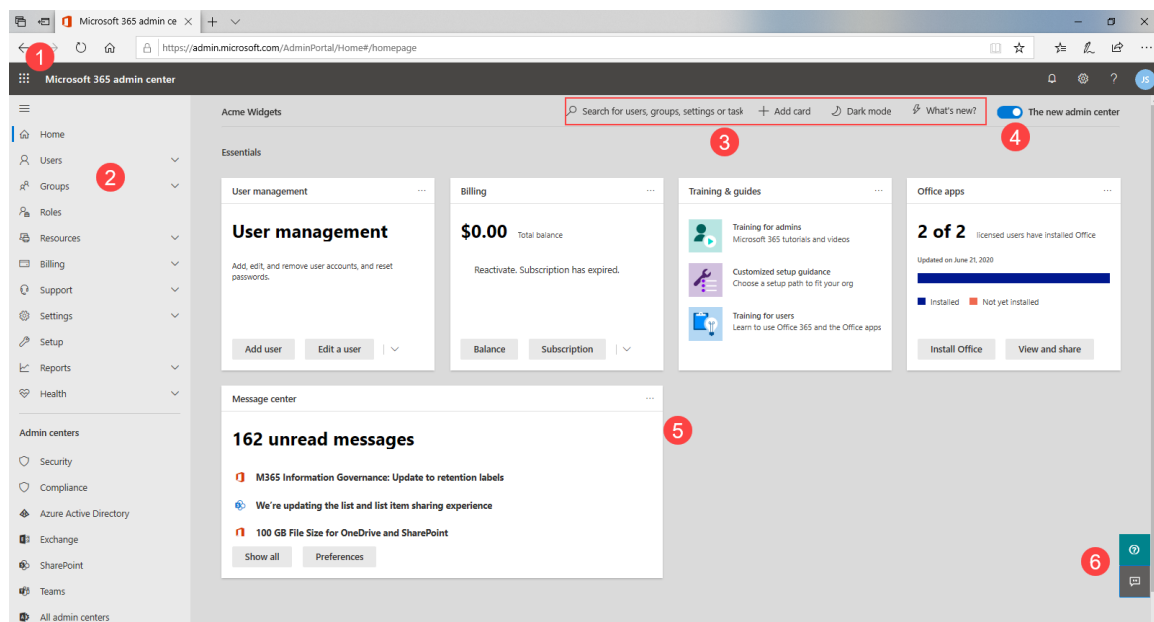
You will see the **App launcher** and **Microsoft 365 admin center shortcut (1)** in the top left corner of the window. Below this, you will see the **navigation pane (2)**. Simply click a category in this pane to see related commands, and then click a command to change your

view. You can also collapse the navigation pane to hide it using the menu button (☰) at the top.

To the right of the navigation pane, you will see a **search field (3),** the **Add card** button which allows you to add information cards to the **Essentials** display below**,** the **Dark Mode,** and **the latest update features (What's new?).** You will also find a toggle to switch to the **old Admin Center (4)**. The **center part of the window (5)** displays different cards with information, links, and tools related to the selected category.

In the bottom right corner of the window, you will see links for **help and feedback (6)**.

Use the Message Center

The Message center alerts you about changes to Microsoft 365. You can see a snapshot of it by scrolling down in the Home category of the Admin Center:
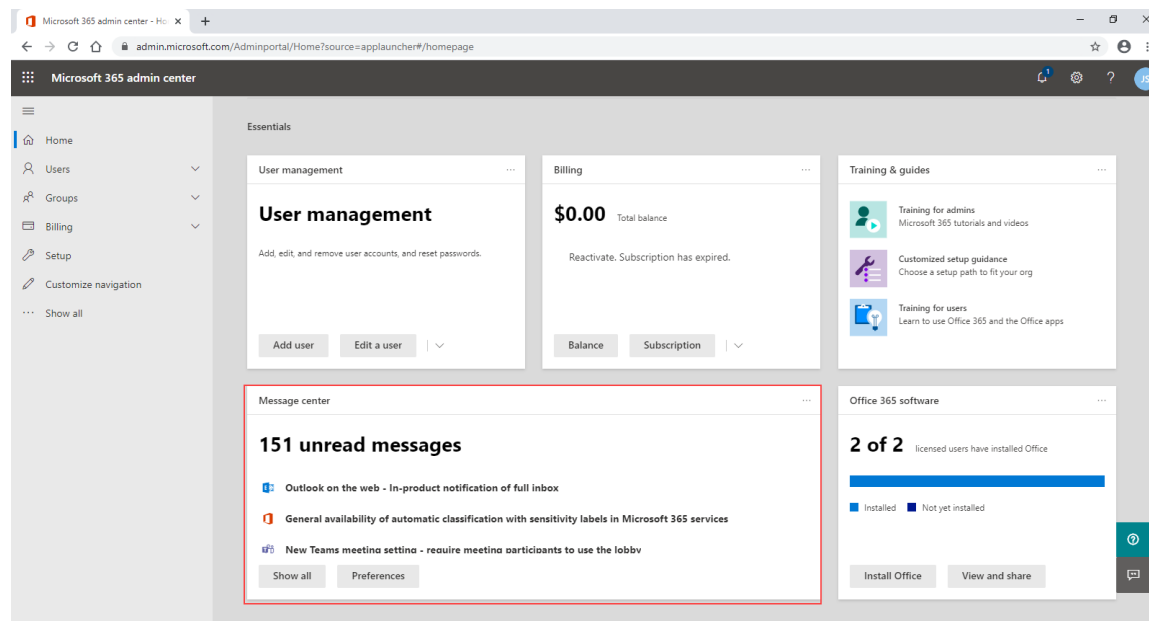
Or, you can first click the ellipsis (⋯) **Show All** to expand the navigation pane:
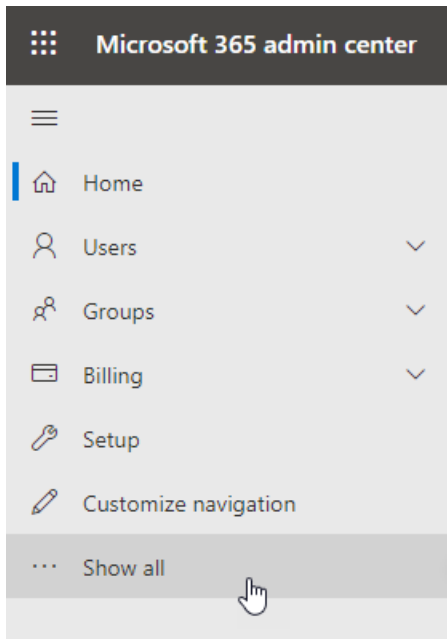
Then click the **Health** category and click **Message center** to open the full tool:
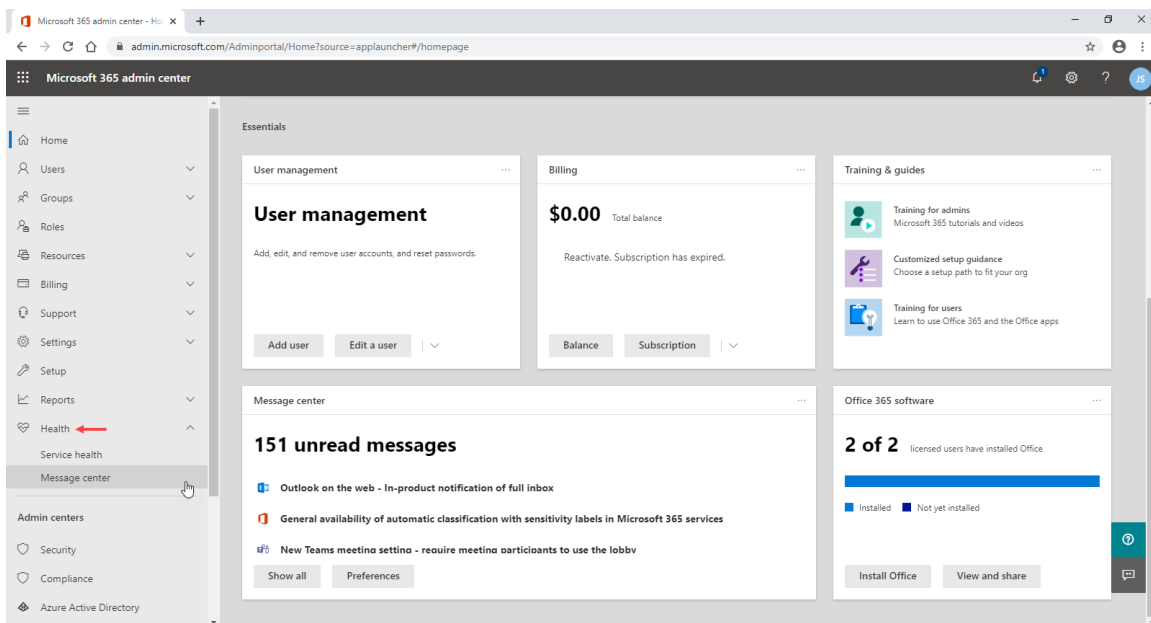
This will display a list of all active messages, sorted by date:
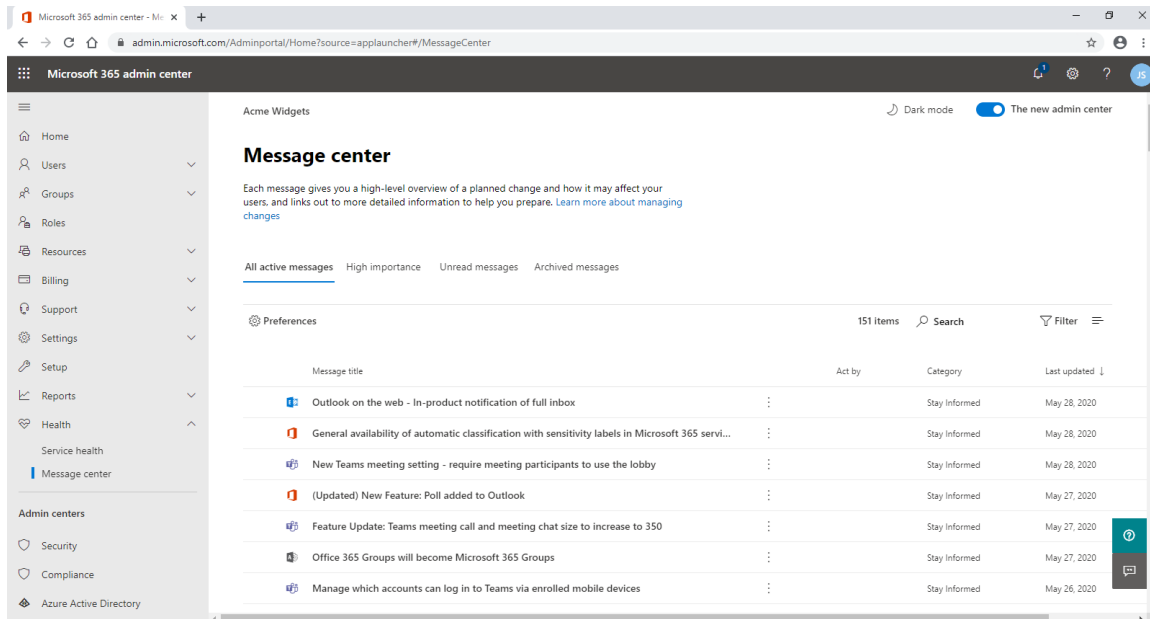
Click a message to view its contents in a new window:
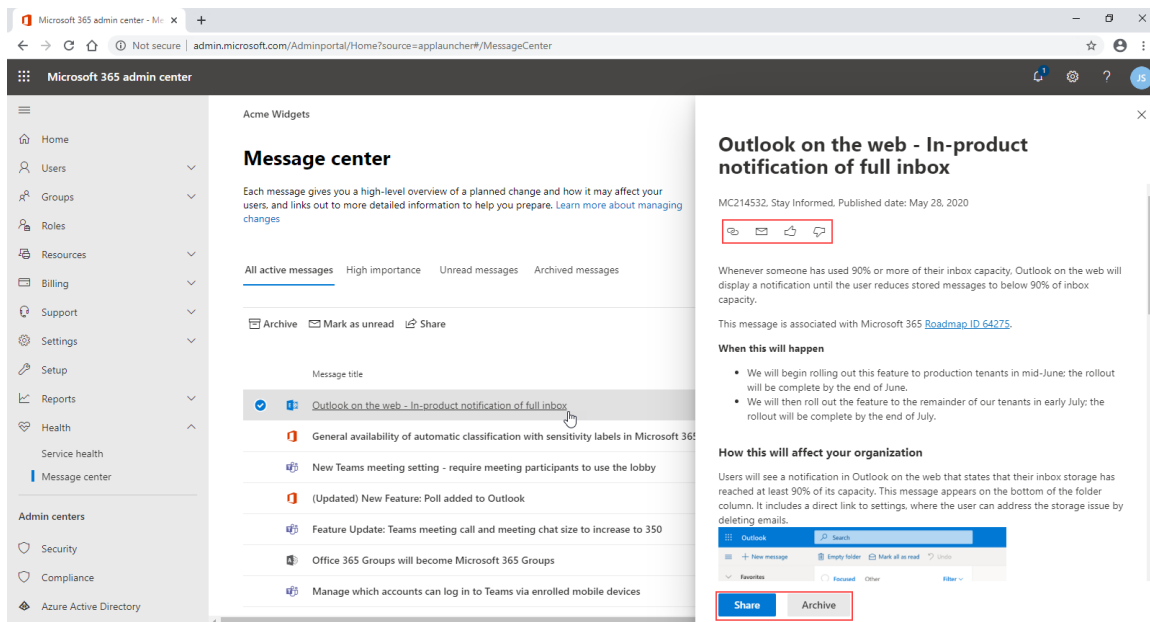
In this view, you can use the tools at the top of the message to Copy the Link, Mark the message as Unread, Like, or Dislike the message. You can also Share or Archive the message with the tools at the bottom of the message. To close the message, click the (✕) in the top right corner and you will return to the Message Center.

Use the Service Health Center

The other tool in the Health category is **Service health**. Here, you can view the status of each service, as well as any advisories:
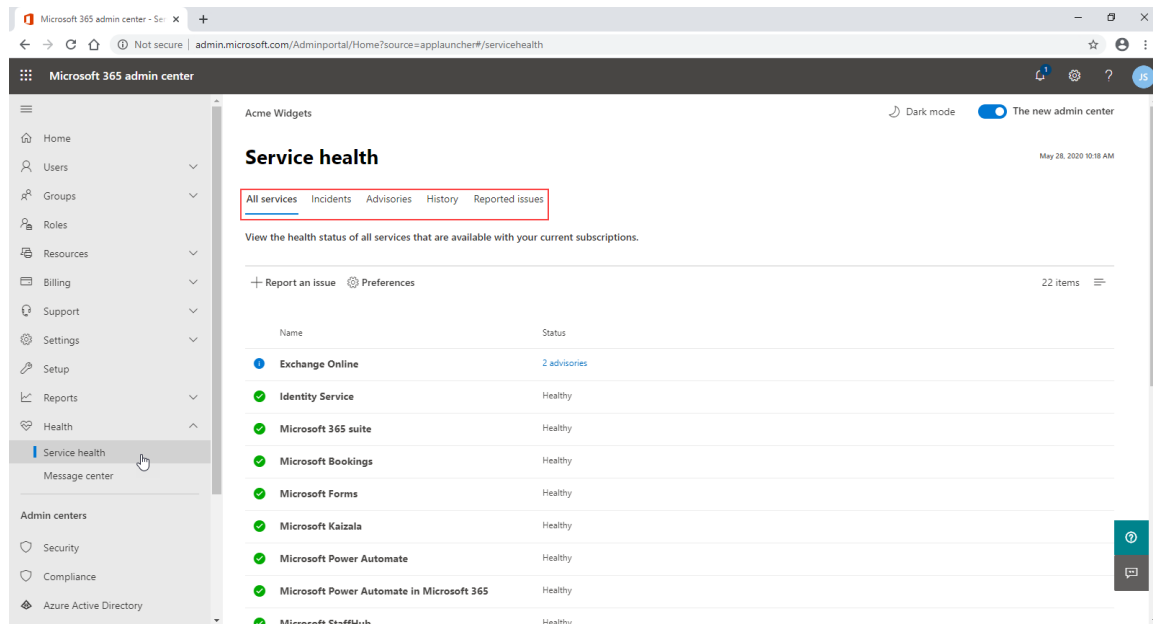
This page is helpful when assessing outages and troubleshooting user problems. The top headers allow you to view lists of All services, Incidents, Advisories, History and Reported Issues.

The **Report an issue** command allows you to file a problem for troubleshooting:
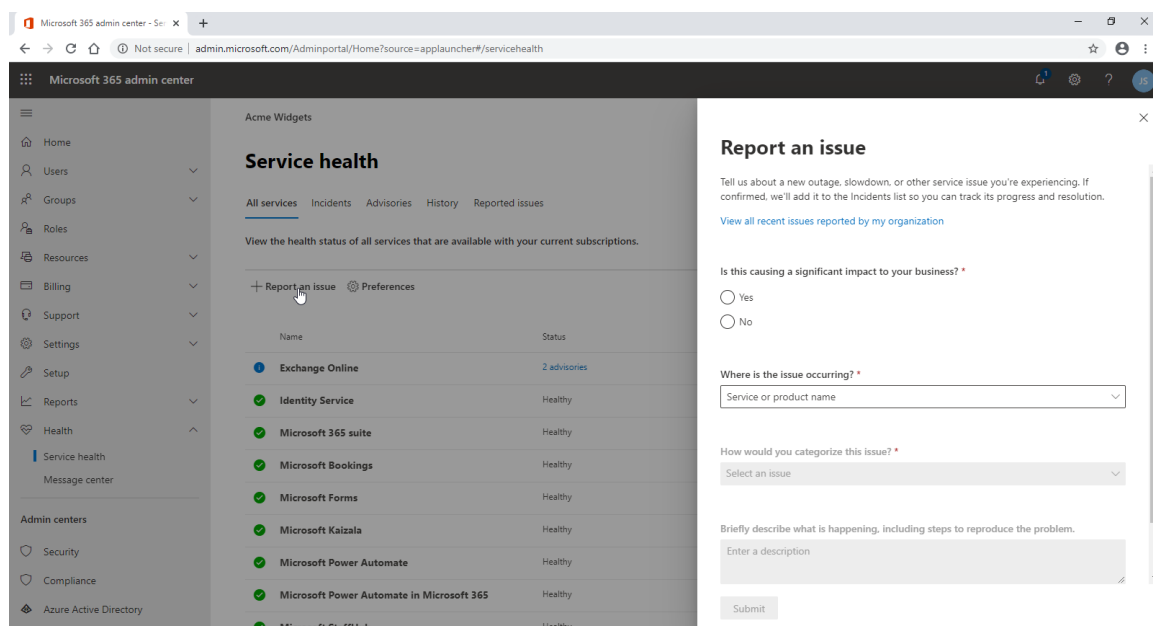
The **Preferences** command gives you the choice to receive notifications via email:

Activity 4-1: Getting Started as an Administrator

In this activity, you will explore the Admin Center.

1. Open a browser and log into your Microsoft 365 site.

2. Click the **Admin** tile on your landing page:
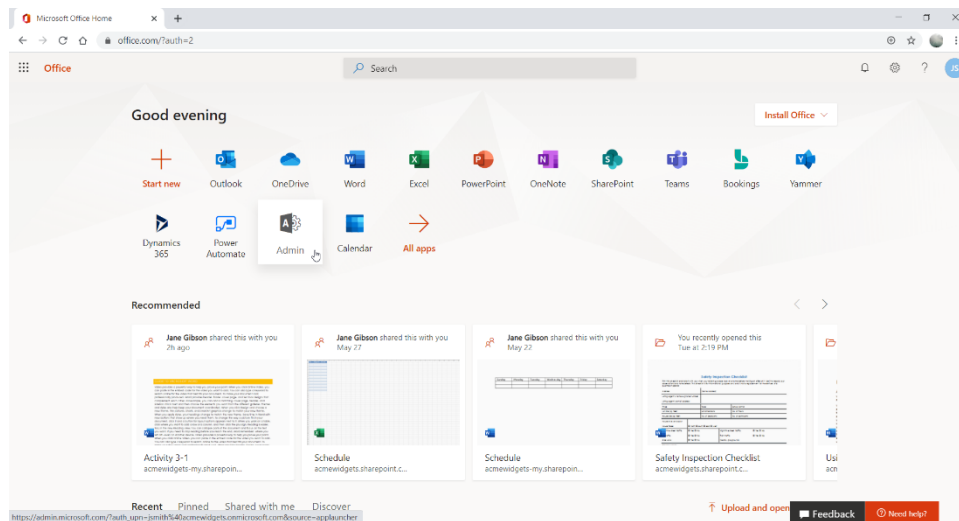
3. The Admin Center will be displayed in a new tab. Scroll down on the page and review its contents. Stop when you see the Message Center. Click **Show all** to open the full Message Center:
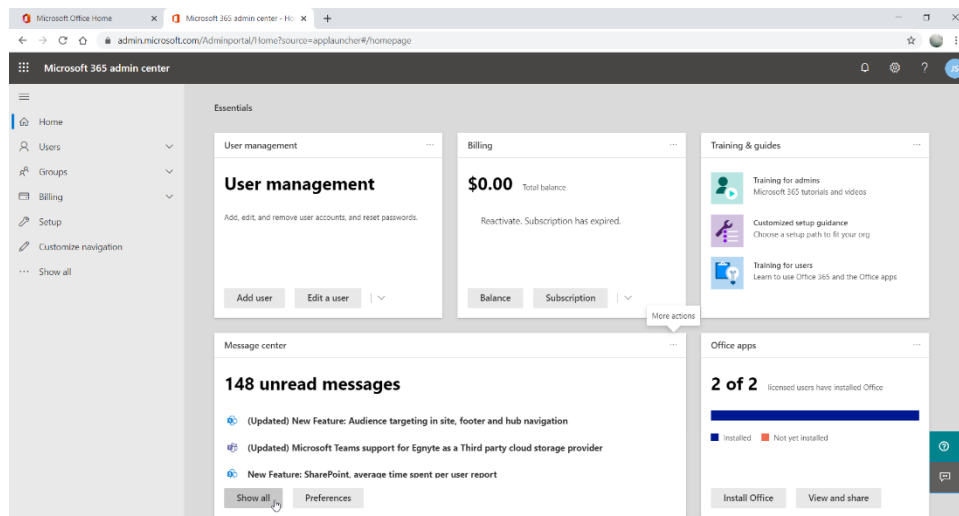
4.   Review the available alerts:
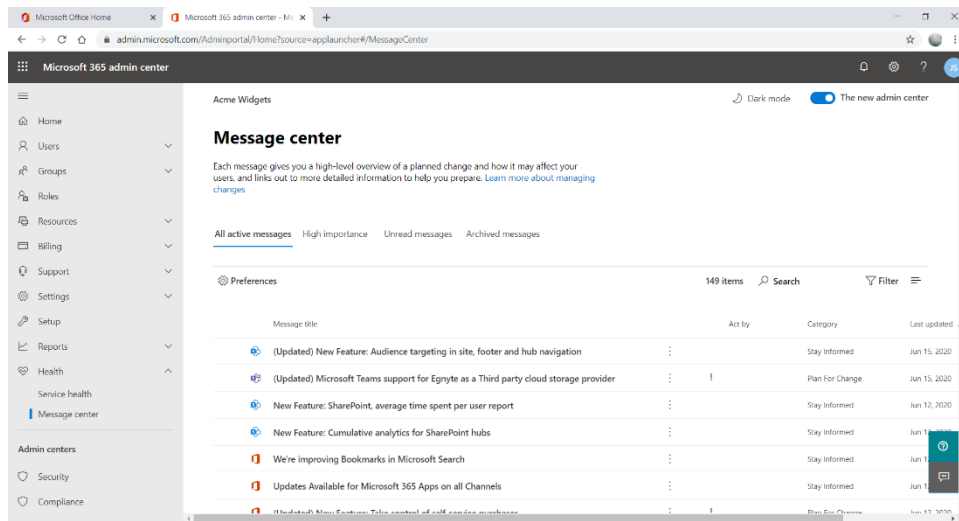
5.   Click **Service health** from the Health category in the navigation pane, which should already be open:
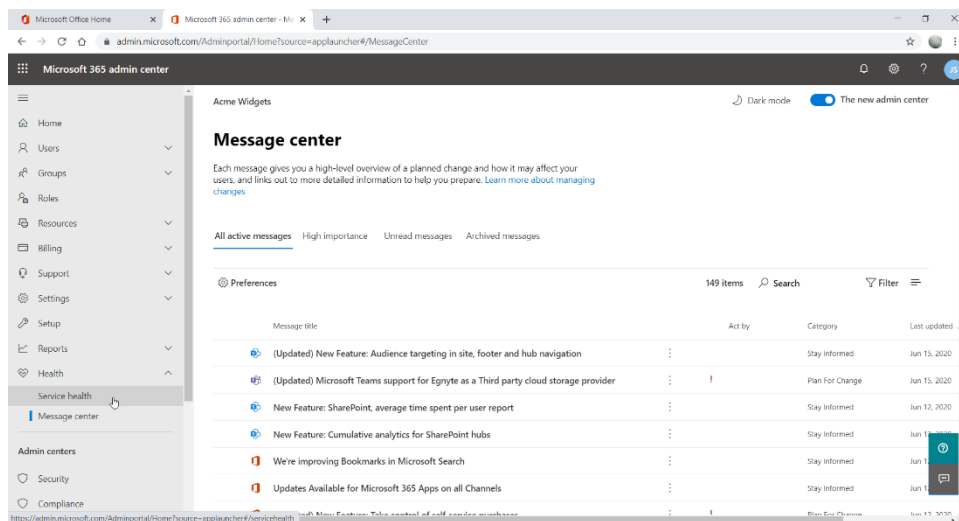
6. Review the status of your services:
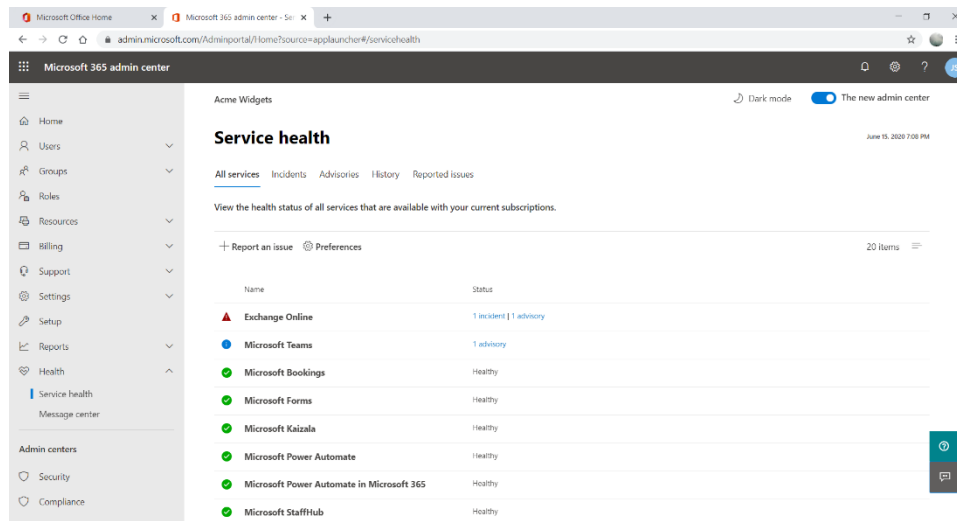
7. Click the **Home** category to return to the home page:
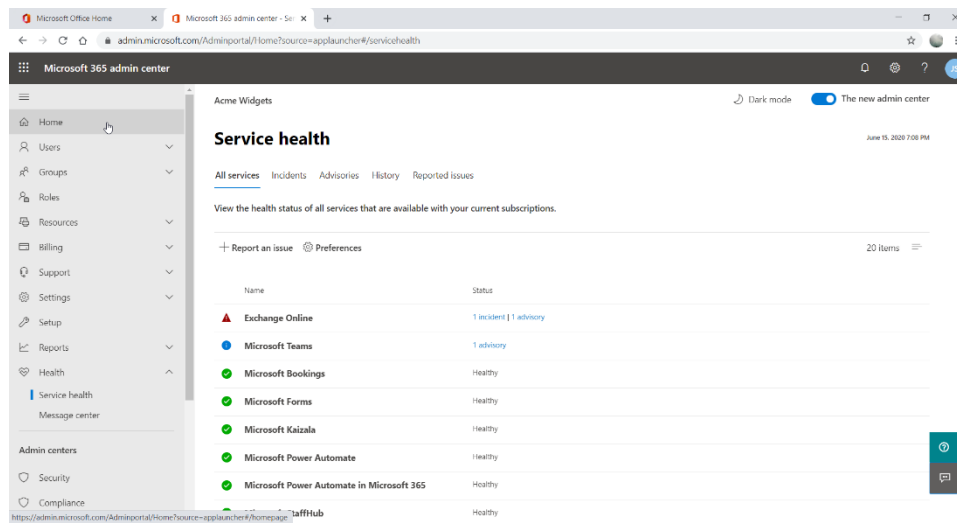
8. Leave your browser open for the next activity.

TOPIC B: Managing Users

User management is a key part of many administrative roles. Proper user management reduces downtime and improves organizational security.

Topic Objectives

In this session, you will learn how to:

- Add, edit, and delete users

- Reset a user's password

- Add organizational contacts

Add a User
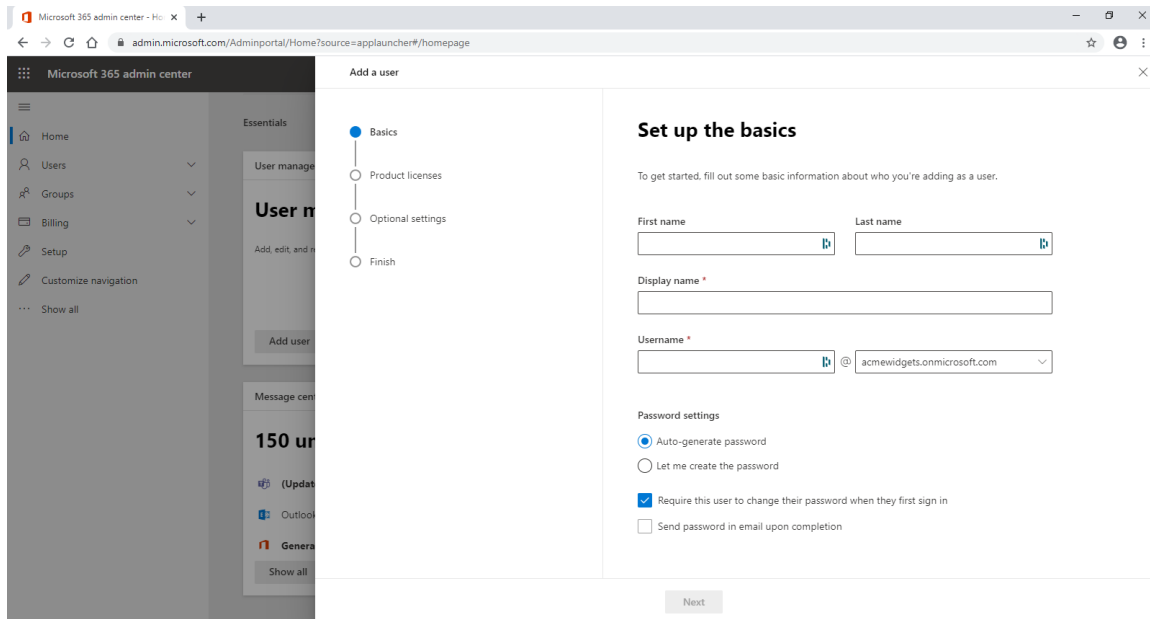
The easiest way to add a user is to click the **Add user** button from the User management card in the Admin Center home page:
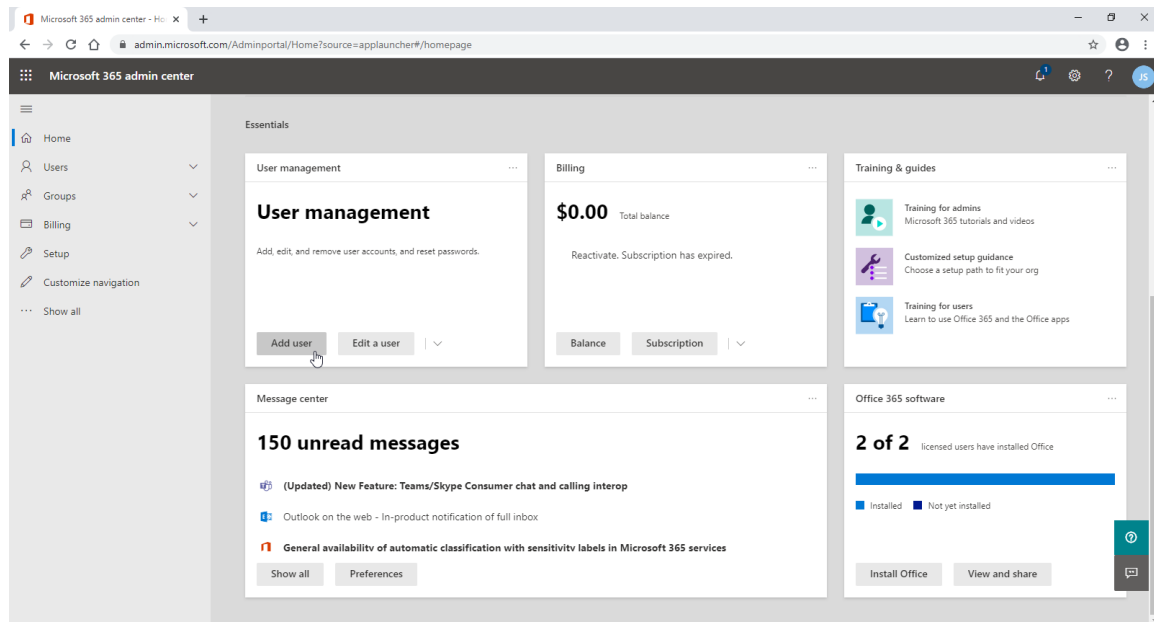
You can also click **Users → Active users** from the navigation pane, and from the resulting screen click **Add a user**:
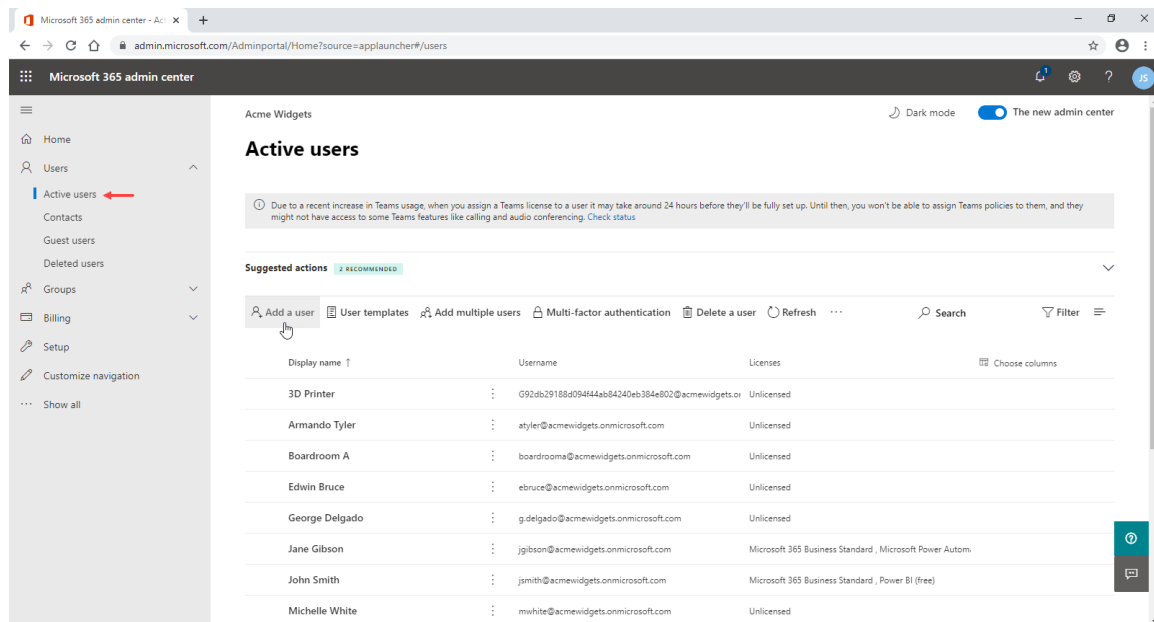
The **Add a user** window will be shown:

Here, you can enter all the user's details, including:

- First and last name

- Display name

- Username and domain (if you have multiple domains configured in Microsoft 365)

Fill in the information, then click **Next**:

Choose the **Location** and **Assign product licenses**. Then, click **Next** to continue:

Select the **Roles** and fill in the **Profile info**. By default, the roles assigned would be Users. Click **Next** to continue:

Click **Finish** to complete the process. The user will now be created, and you will see their password. Click **Close** to end the process:
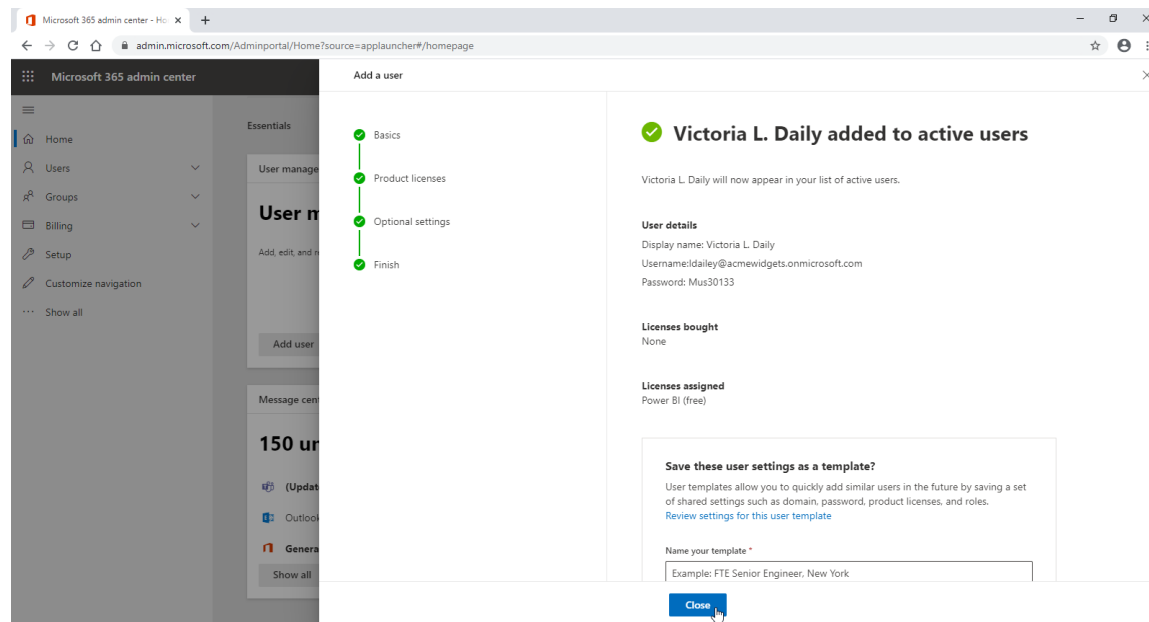
Edit a User

After adding a new user, you can edit his/her information. From the Admin Center home page, click **Edit a user** in the User management card:
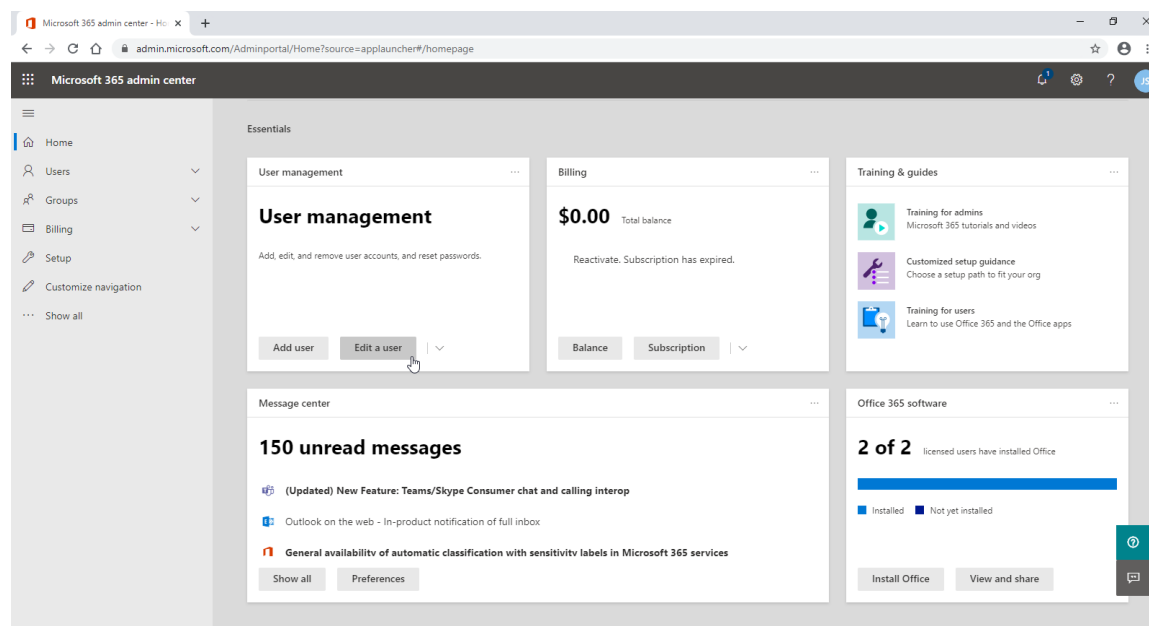
From the pop-up window, select the user you wish to edit:
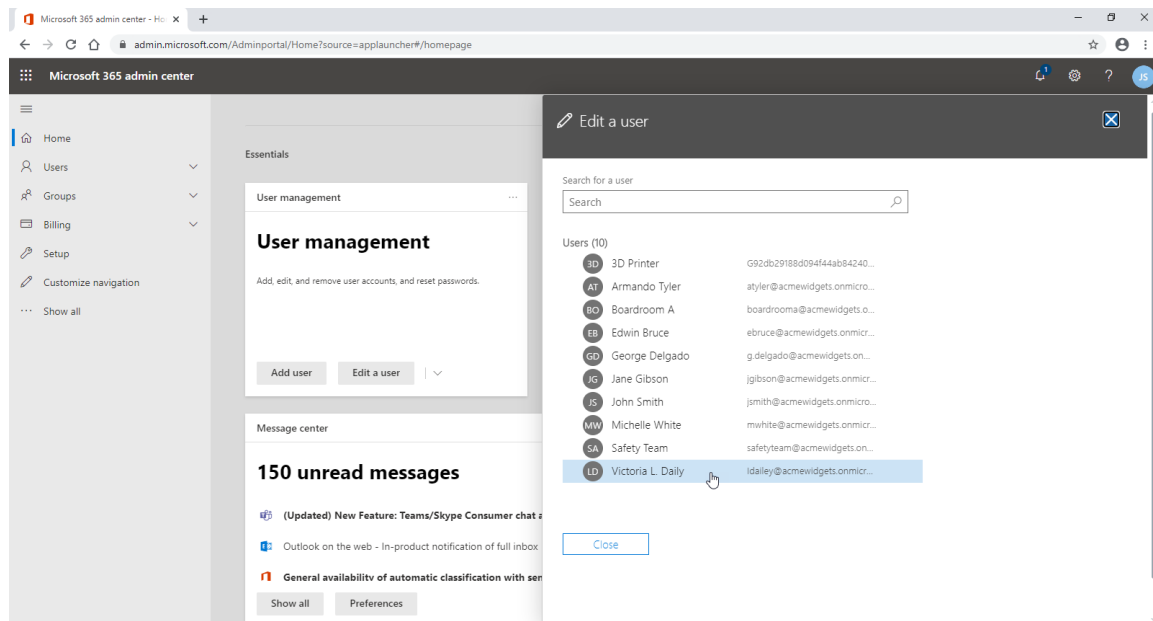
The detailed information of the user will be displayed. From there, you can **(1)** change the profile picture, reset the password, restrict sign-in, or delete the user. You can also **(2)** edit other details by clicking the **Edit** link next to the related category of information. You can **(3)** change **Mail** and **OneDrive** settings by expanding the respective category at the bottom of the window:
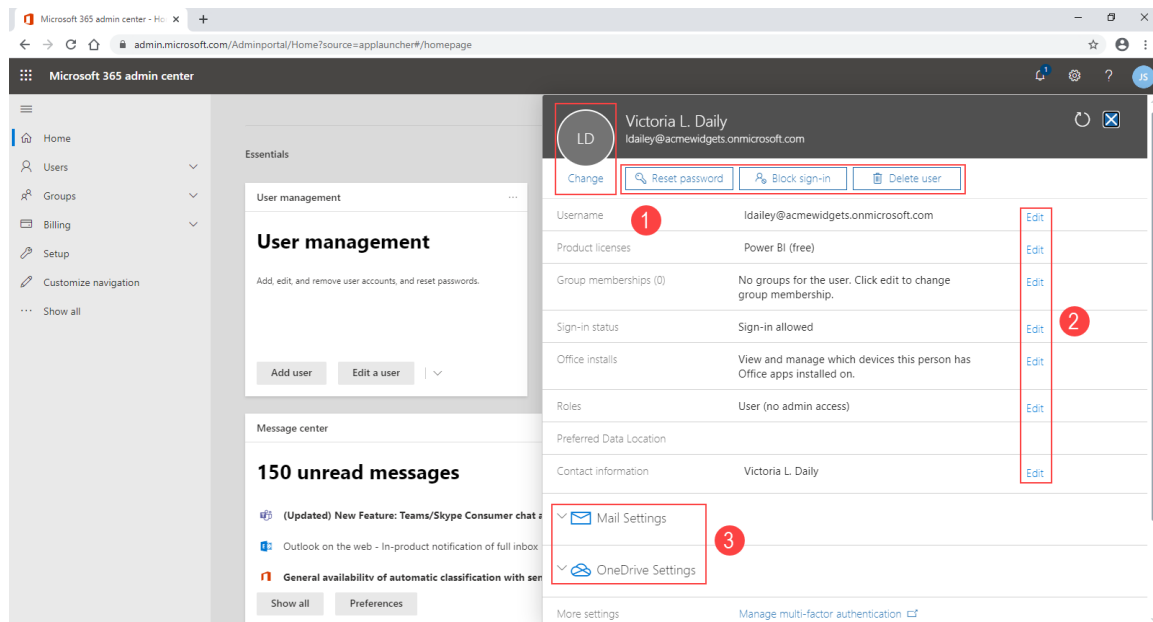
After finishing editing, you can click the **X** to close, or scroll down and click **Close**:
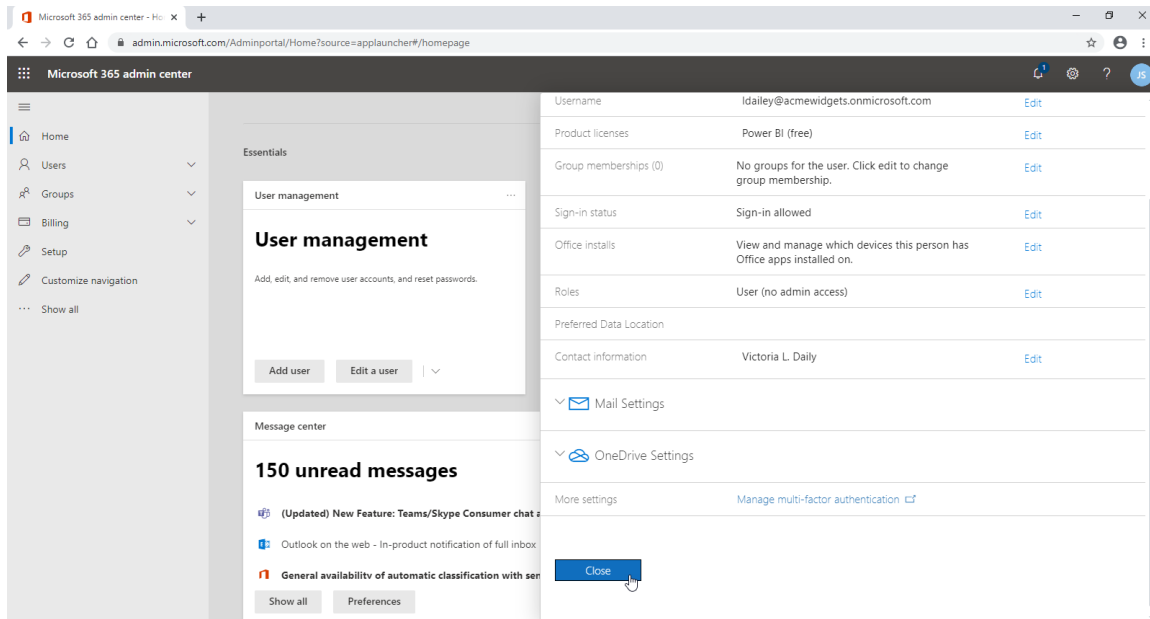
Reset a User Password

When you are editing a user, you will also see the **Reset password** command to reset their password:
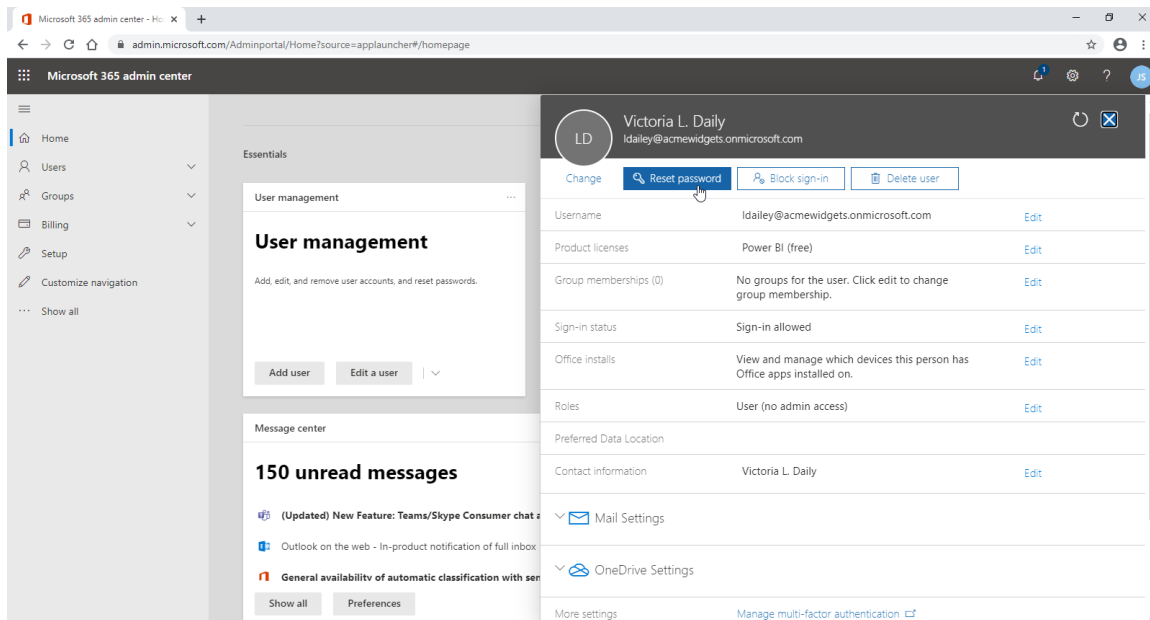
You can also find this link on the Admin Center home page:
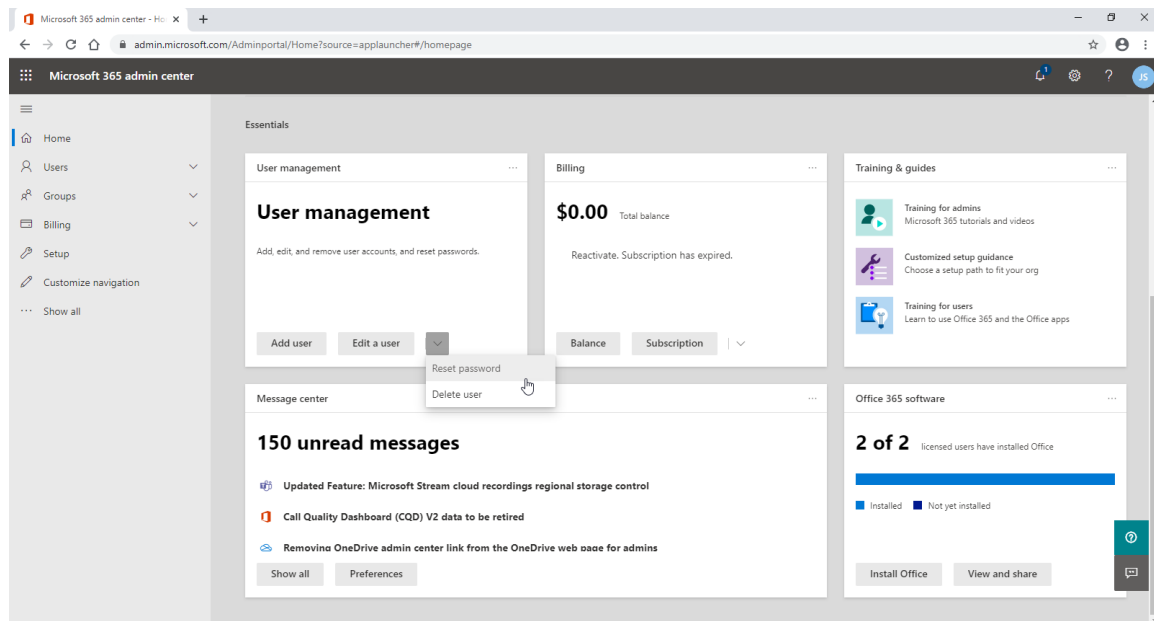
If you choose this command, you will be prompted to select a user. If you want to use the auto-generated password option, leave everything as it is, and click **Reset**:
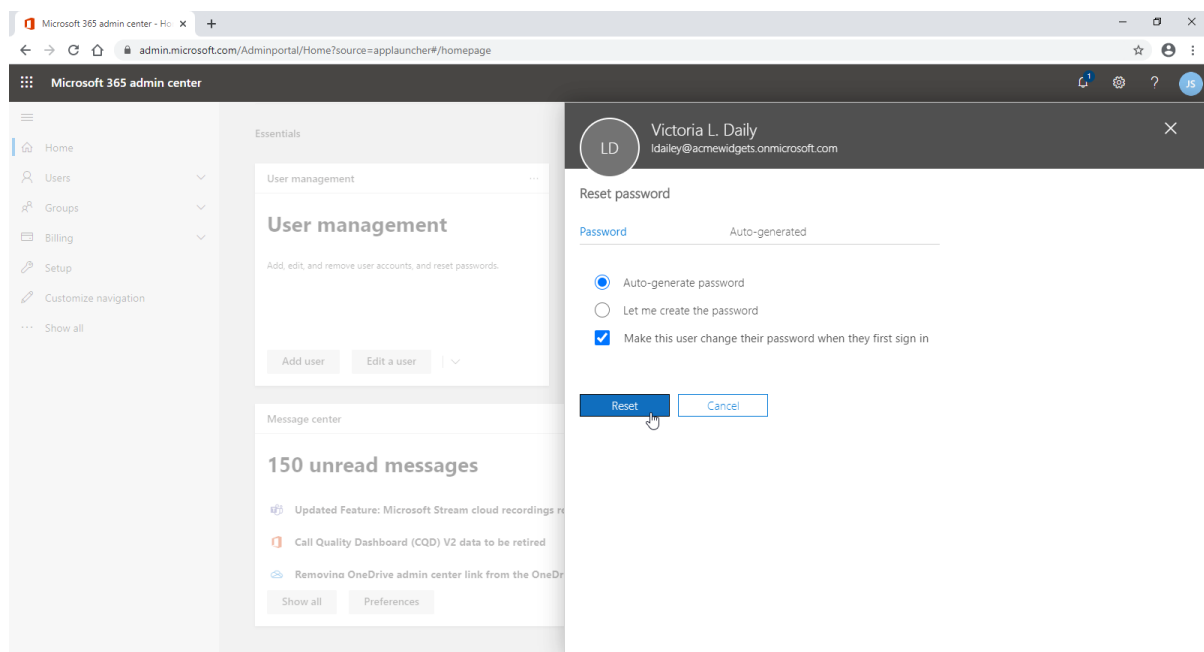
If you want to manually change the password, select the second option. A textbox will appear where you can input your new password. The password must be at least eight characters long, including at least three of the following: one upper case letter, one

lowercase letter, a number, and a symbol. An indicator will let you know whether the password strength is Strong, Medium, or Weak. Once you finish, click **Reset**:
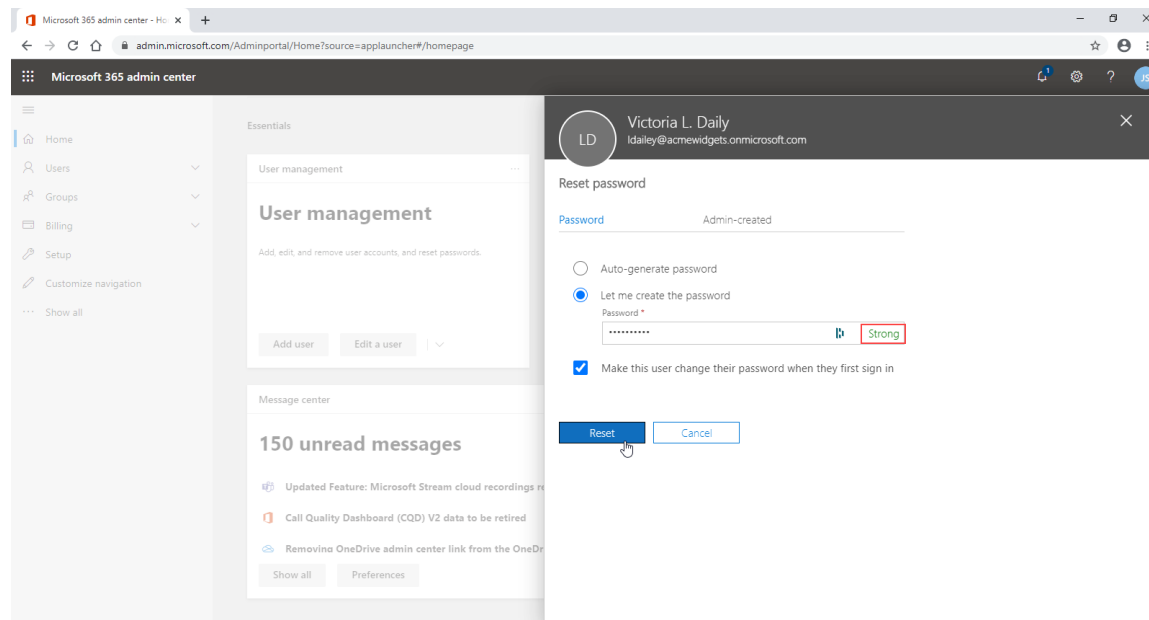
Delete a User

You can also delete a user from the editing screen:
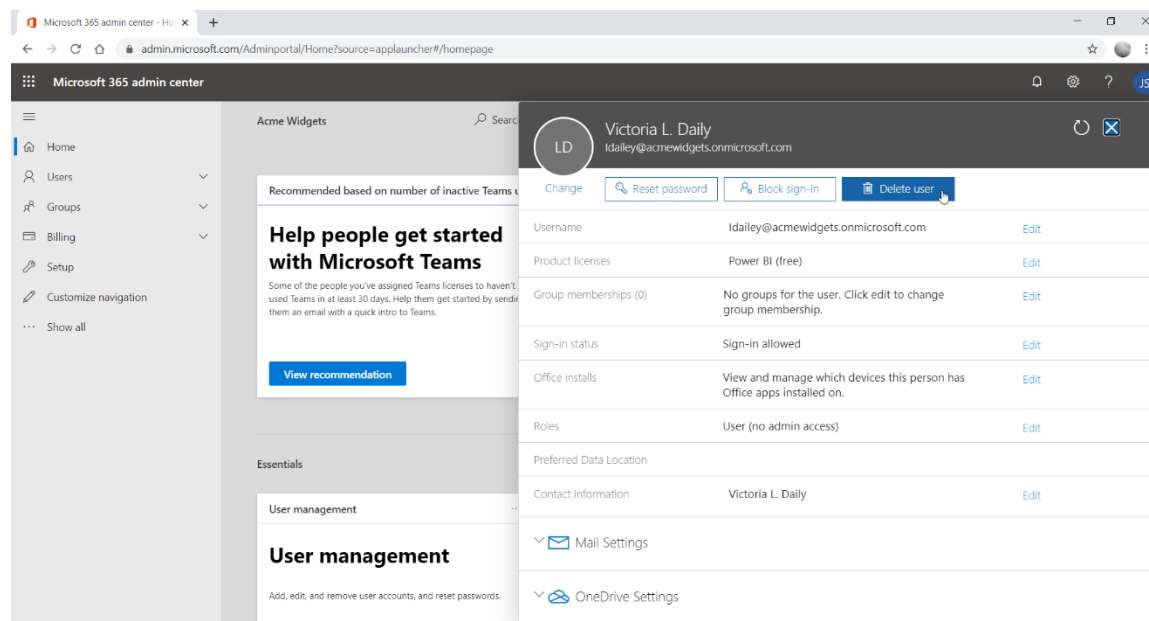
And, you can find a link to this task on the Admin Center home page:
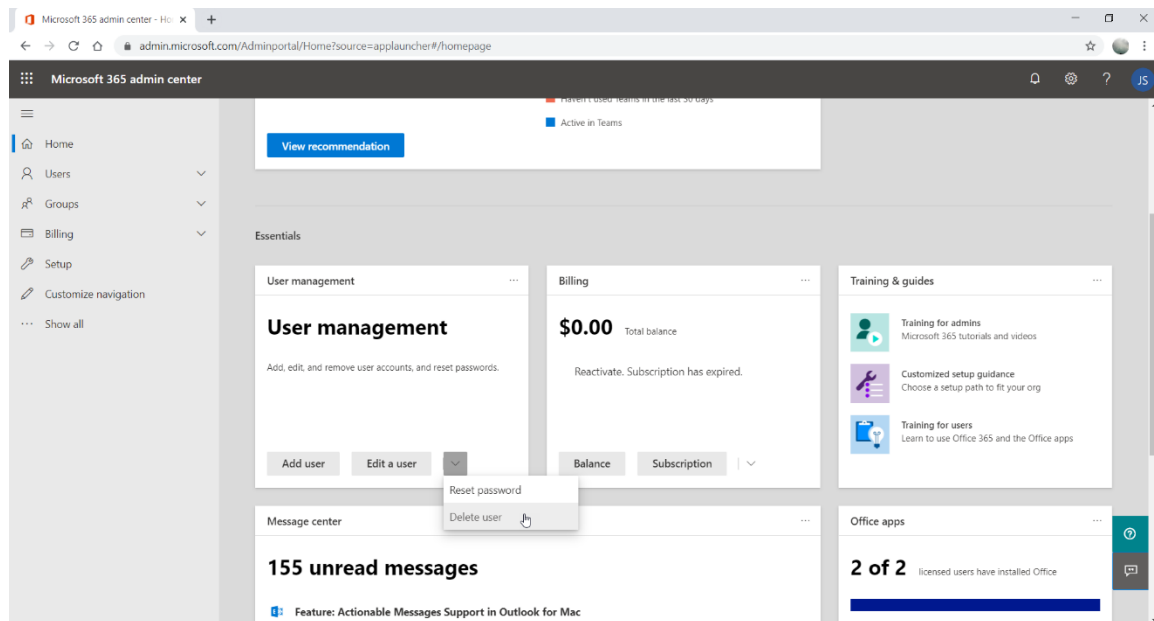
If you choose this command, you will be prompted to select a user. Choose the user, then click **Select**:
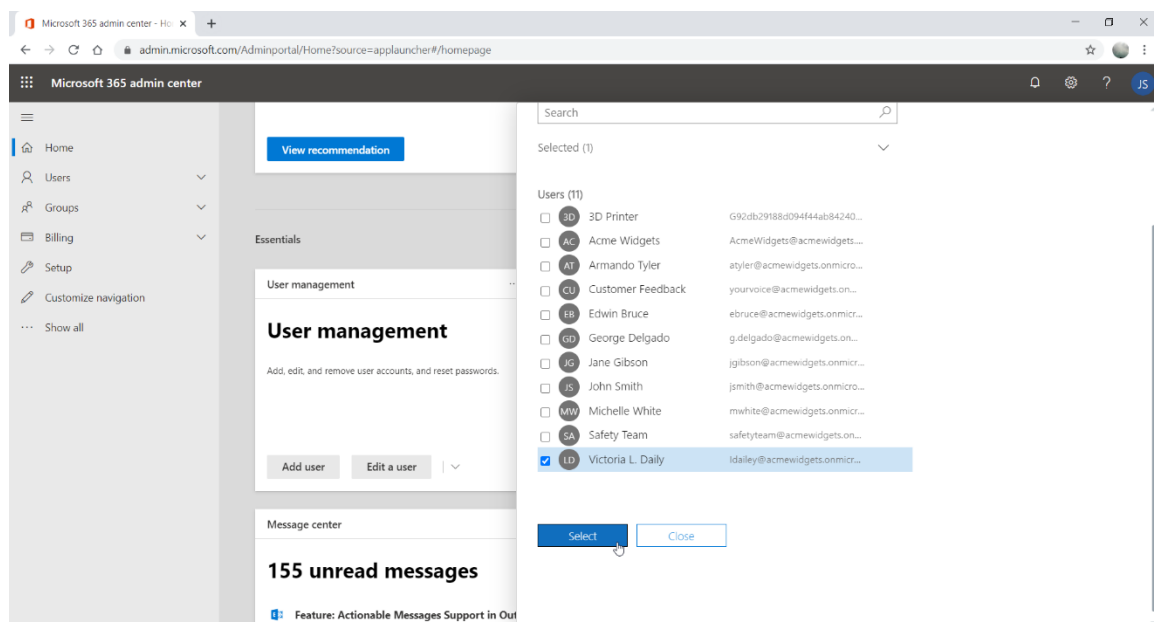
You will see a pop-up window. Read this information carefully! If you are sure you want to proceed, click **Delete user**:
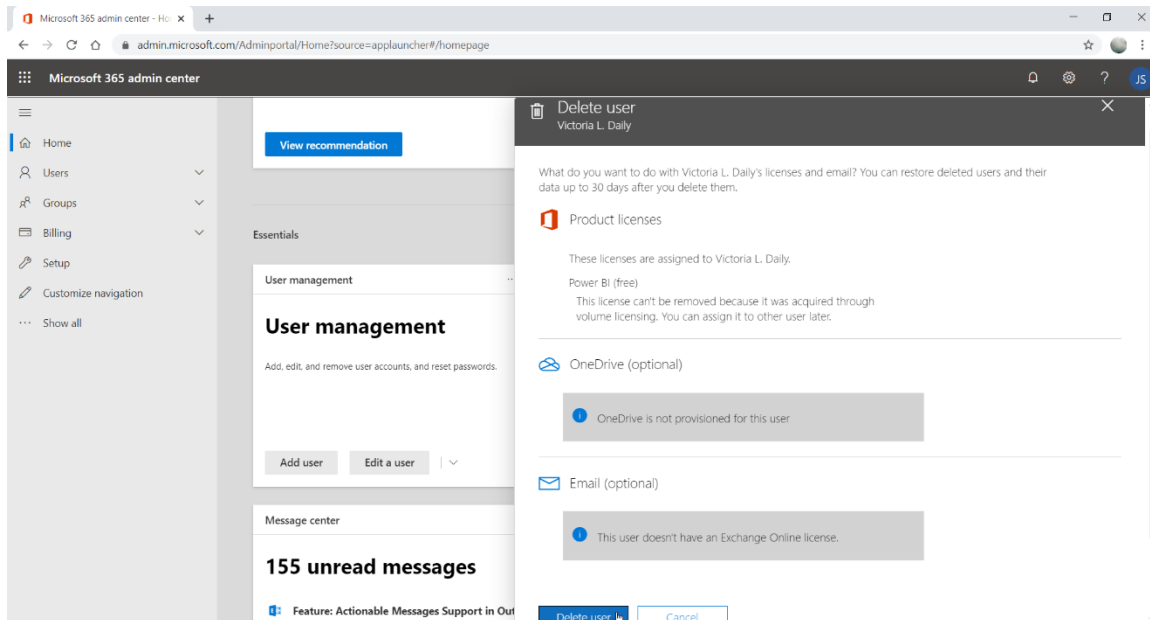
Add Contacts

You can configure a master contact list to which all Microsoft 365 users have access. To begin, click **Users → Contacts** in the navigation pane:
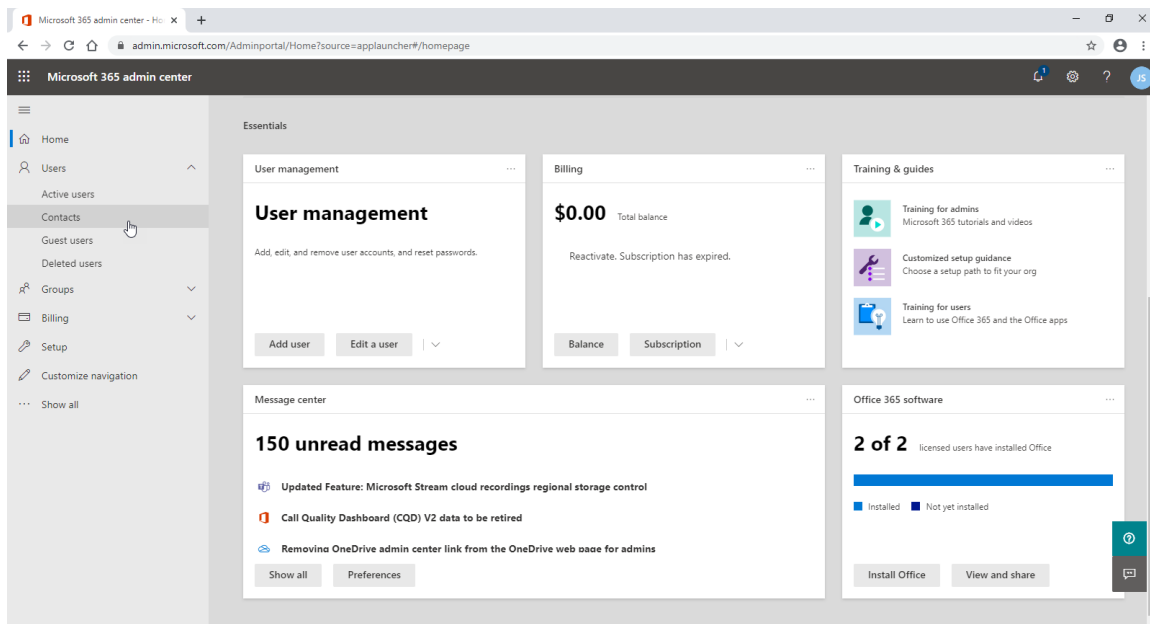
You will see the Contacts page:
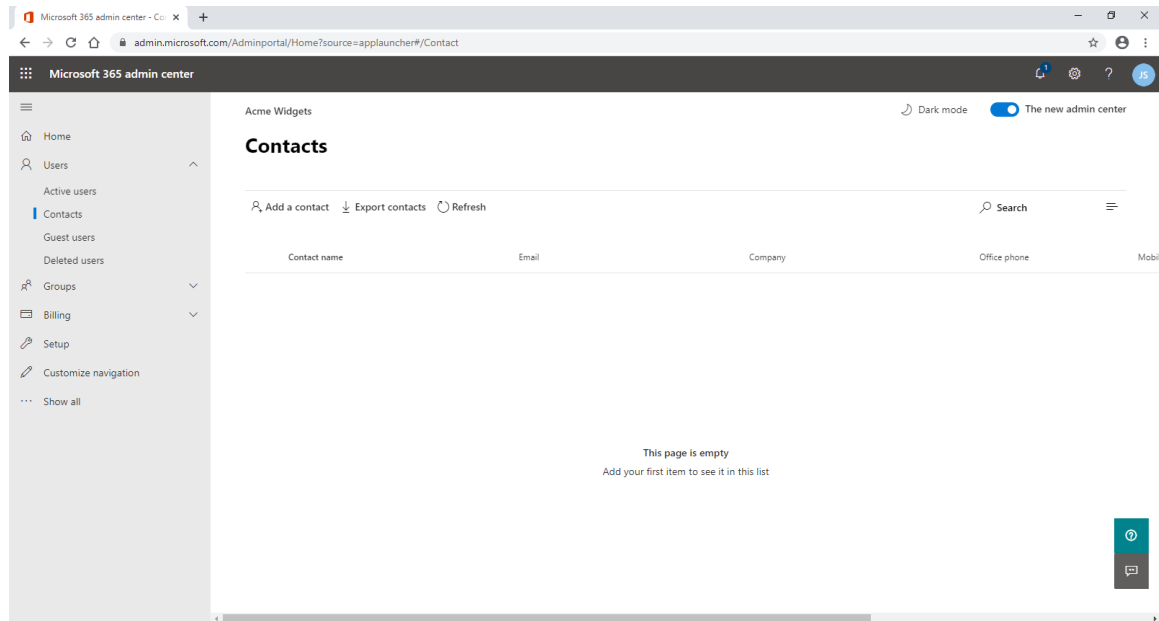
To add a new contact, select **Add a contact**:
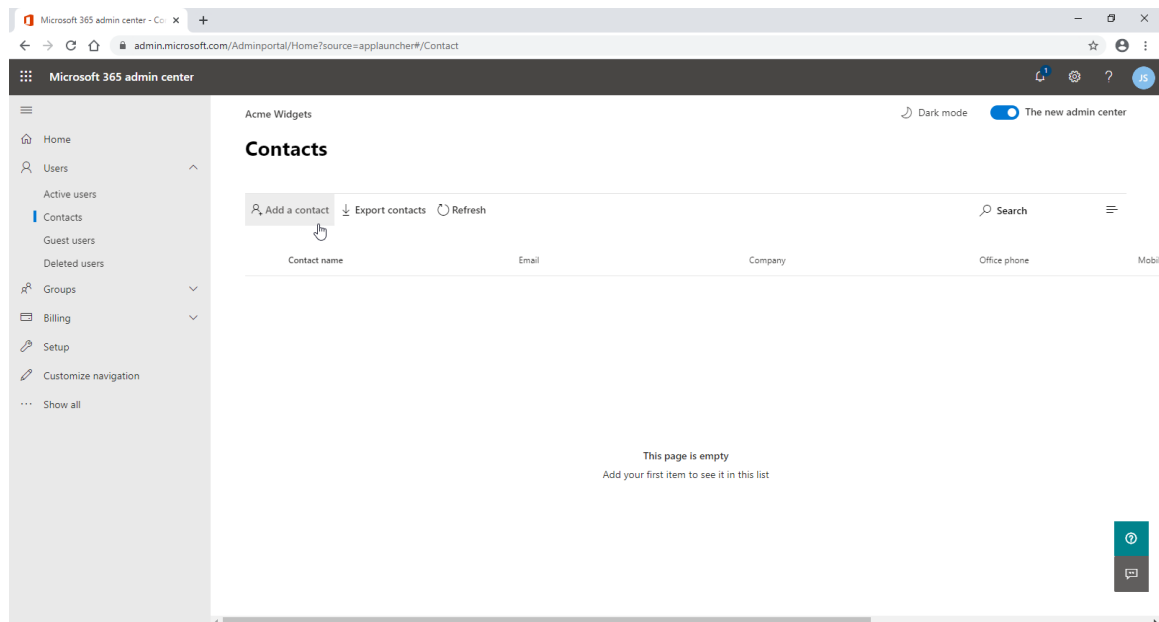
A pop-up window will be displayed, which allows you to fill in the information. You can also toggle the switch to make the address list visible to your members. Once you finish, click **Add**:

Activity 4-2: Managing Users

In this activity, you will add and edit a user.

1.   Ensure your browser is open to your Microsoft 365 Admin Center home page:
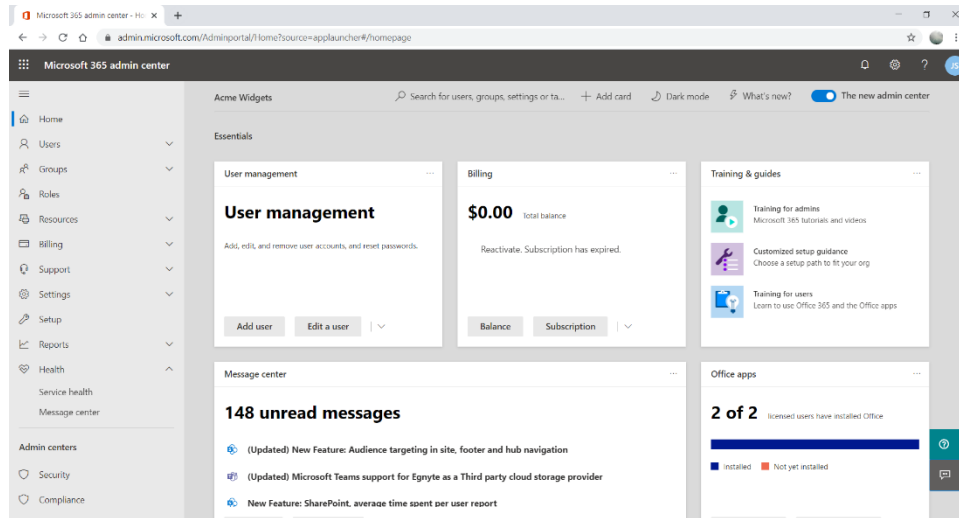
2.   Click **Add user**:
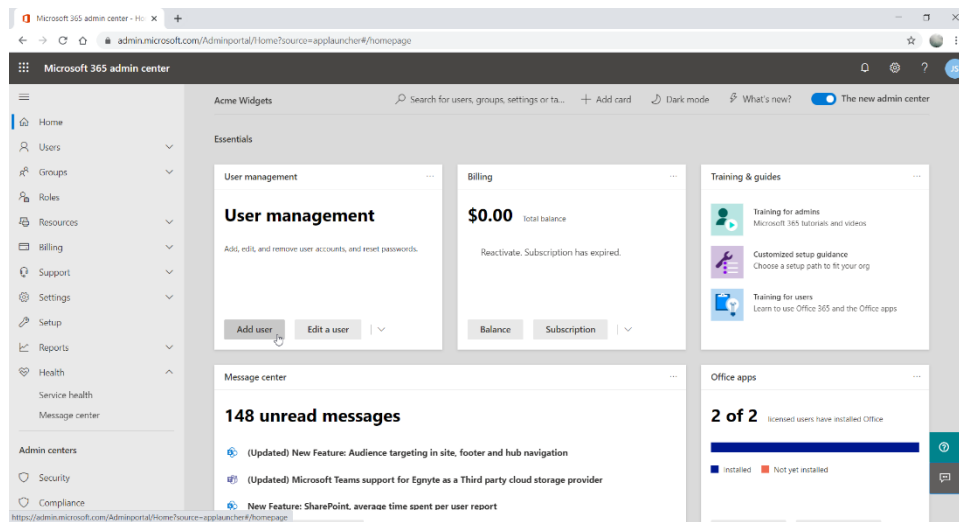
3. Enter "**George Delgado**" for the user's first and last name:

4. Click inside the **Display name** text box and leave the auto-populated display name as is. Enter "**g.delgado**" for the user name:

5.   Leave the remaining fields at the default, then click **Next** to continue:

6.   Scroll to the bottom of the window and select the **Create user without a product license** option. Then, click **Next** to continue:

7. Keep the default settings, then click **Next** to continue:

8. We forgot to add George's phone number. Scroll down to bottom and click the **Edit** link under the Profile info setting:

9. Click the **Profile info** drop-down menu and scroll down to the Mobile phone text box. Type in "**454-920-9000**" and click **Next**:

10. You will return to the Review and finish window. Click **Finish adding**:

11. Confirm the information, then click **Close** to return to the homepage:

12. Leave your browser open for the next activity.

TOPIC C: Managing Groups

Microsoft 365 groups provide an easy way to set up a particular set of tools and permissions for a group of users. Groups can also be automatically created by other Microsoft 365 tools, such as Planner and Yammer.

Topic Objectives

In this session, you will learn how to:

- Add, edit, and delete groups

- Create a shared mailbox and add members to it

Add a Group

To add a group, click the **Groups** category in the navigation pane and click **Groups**:
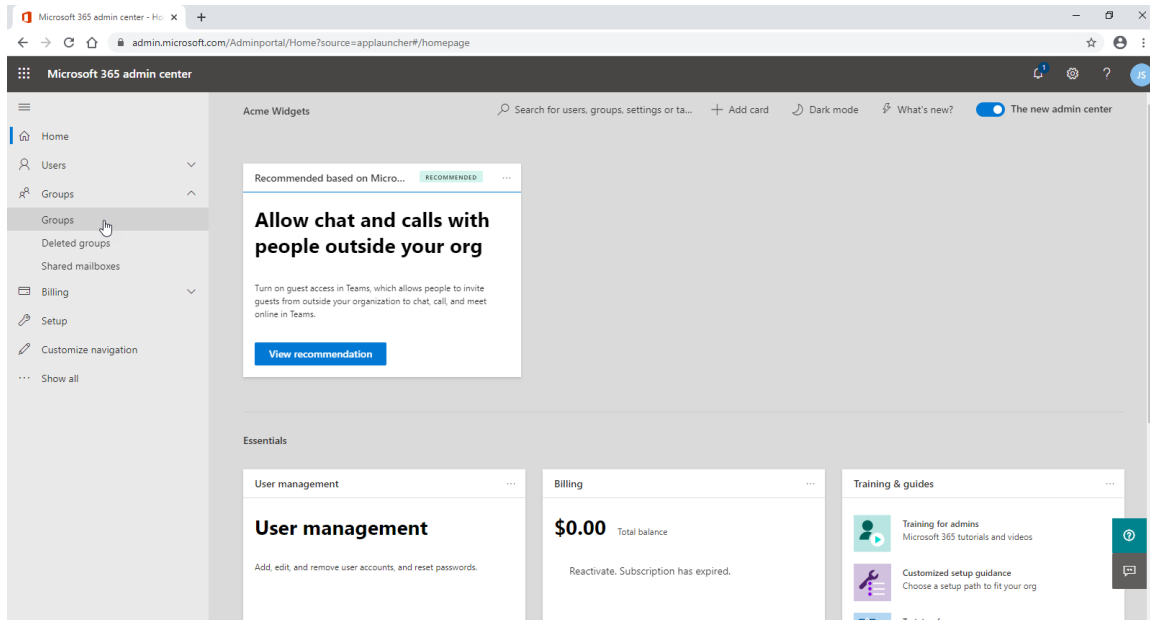
You will see the main Groups page. Click **Add a group**:
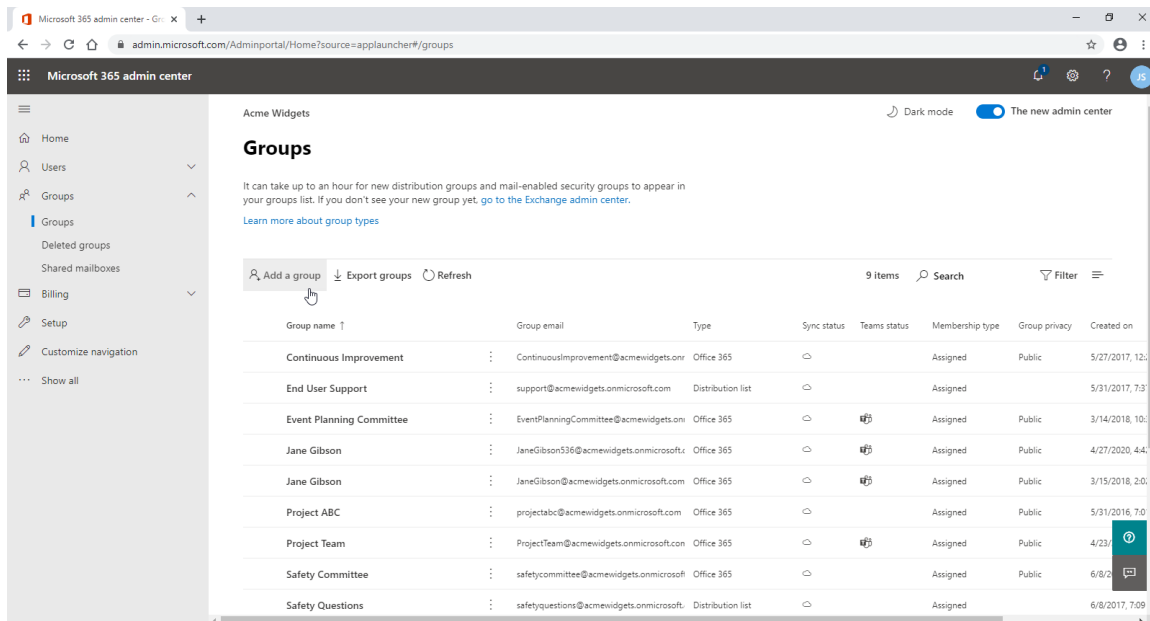
You will see the New Group window. **Select the group type**, then click **Next** to continue:
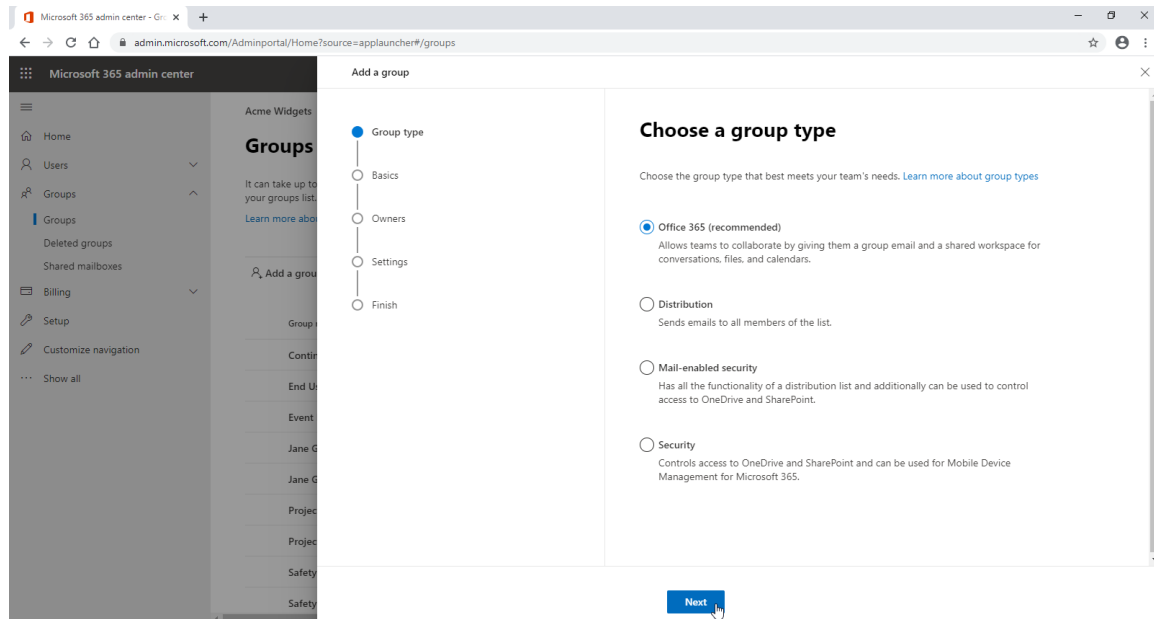
Type in the **Name** of the group and **Description**, then click **Next** to continue:
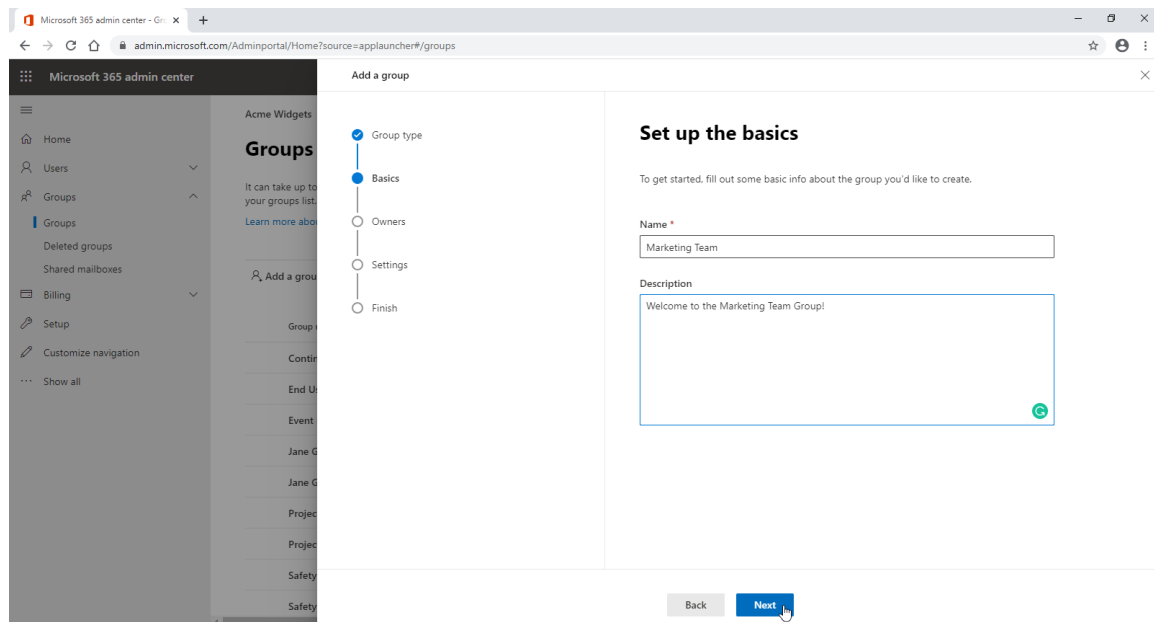
In the search box, type in the names or emails of people you want to assign as owners. If you click the search box, a results pane will show all the contacts in your organization. You can select one person or multiple people:
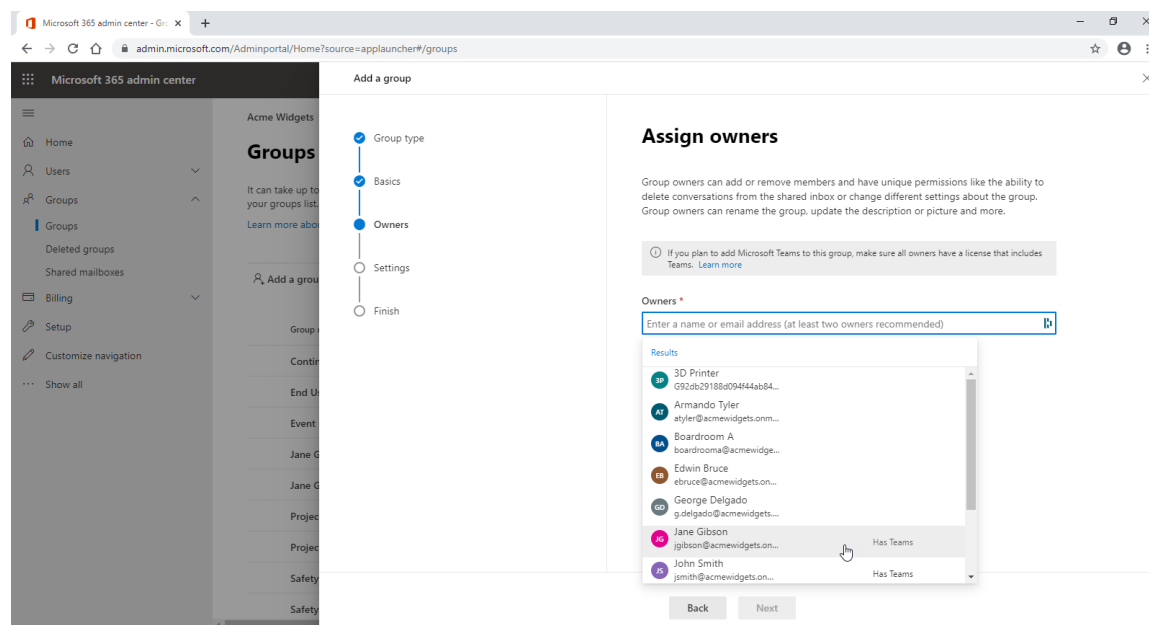
Click **Next** to continue:
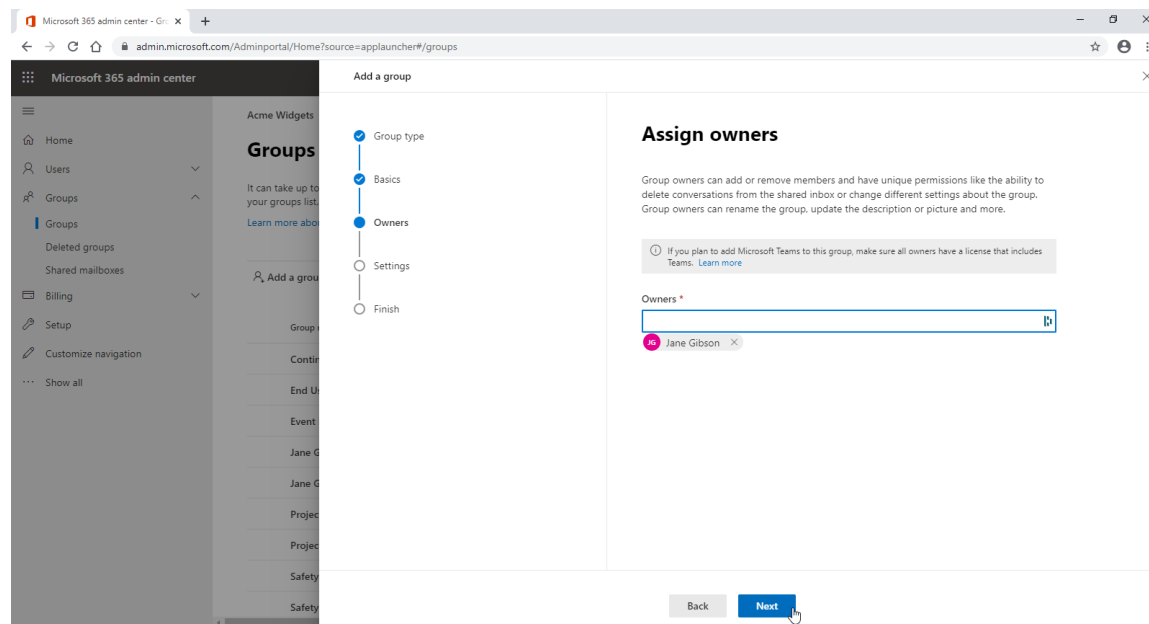
Choose an email for the group and set the privacy. Then, click **Next** to continue:

Review the details of the group. Click **Create group** to finish:

The group is now successfully created. Click **Close** to return to the main Groups page:
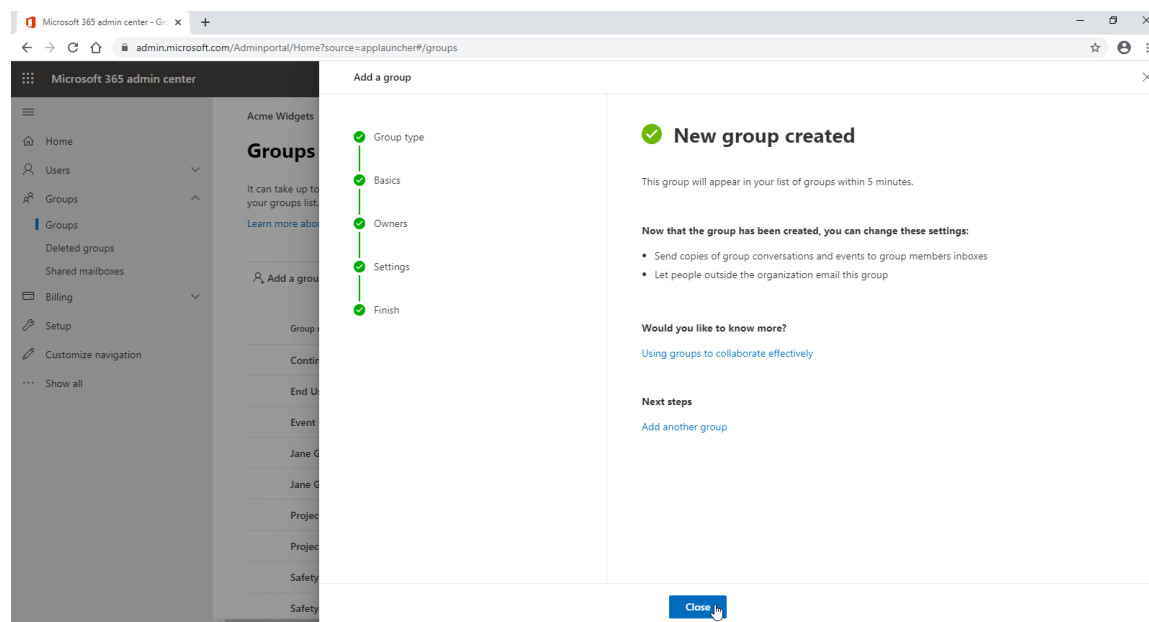
You will see the newly created group appear in the main Groups page. If you do not see the group, click **Refresh** to update the page:
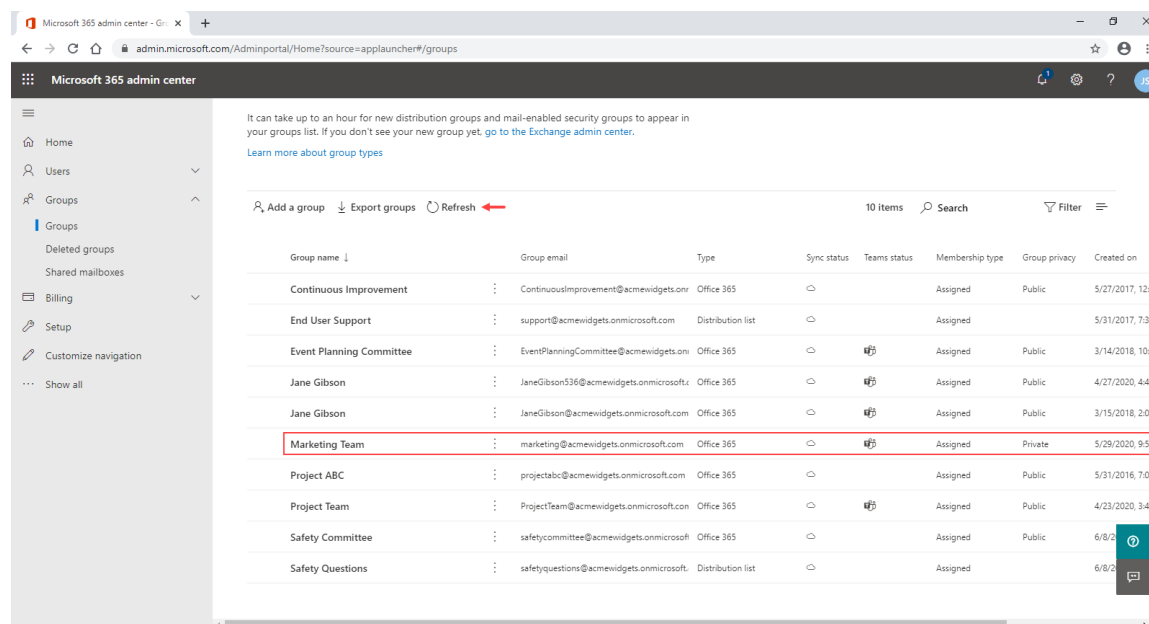
Edit a Group
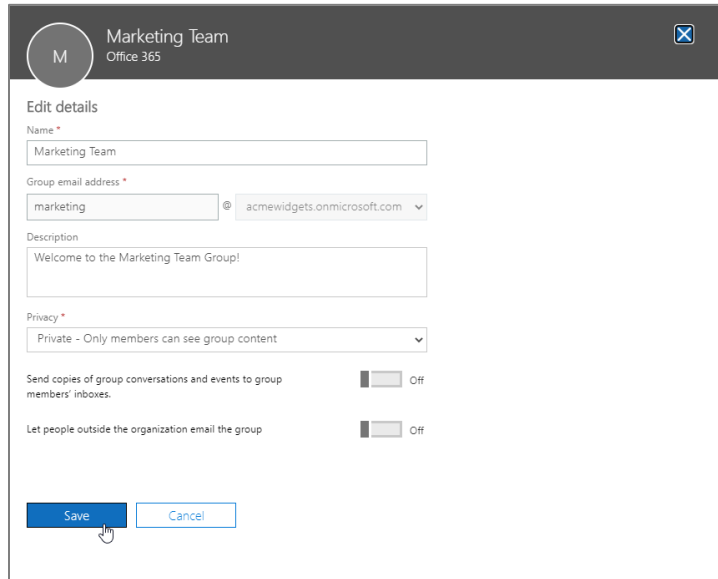
To edit a group, first go to the main Groups page by clicking **Groups → Groups** in the navigation pane. Then, select the group you want to edit:
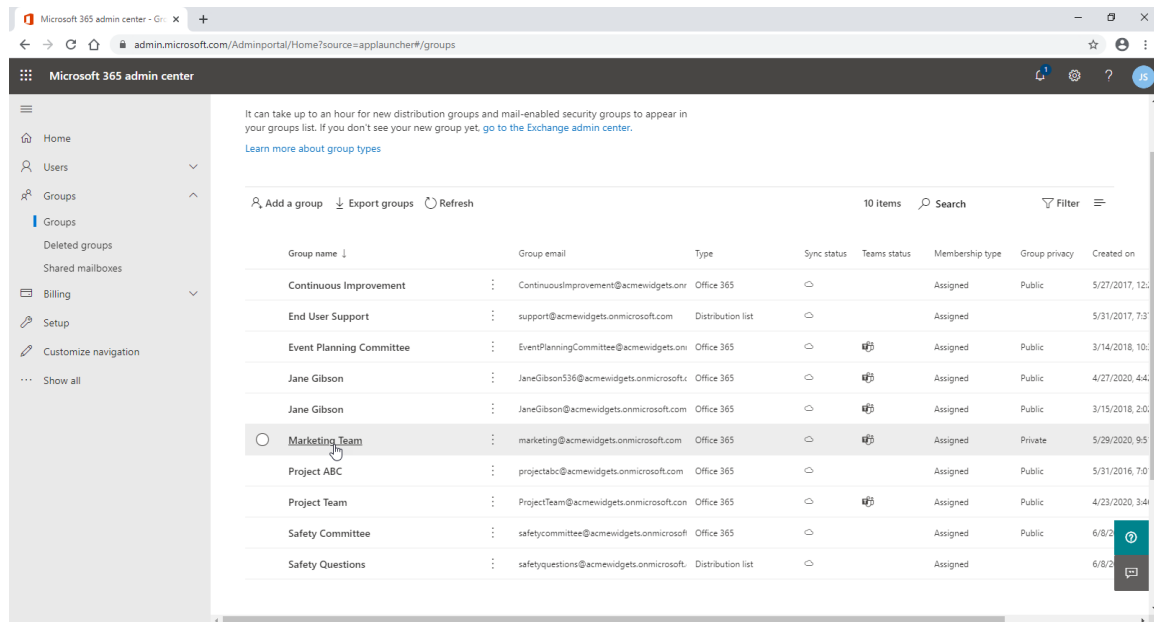
You will see the Group window. Four tabs allow you to select to update the settings. In the **General** tab, you can change the Basic information and Email addresses by clicking the **Edit** link below the related category:
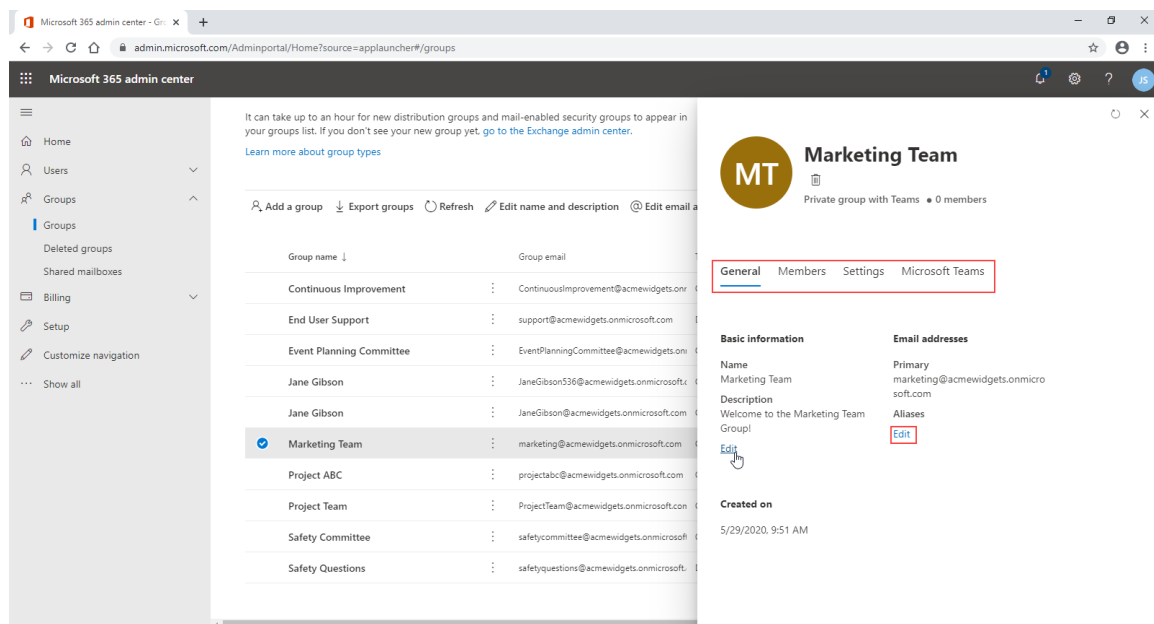
After making your changes, click **Save** to confirm:

An update confirmation will be displayed. Click **Close** or the **X** in the top-right corner to return to the main setting window:

In the **Members** tab, you can edit the Owners and Members of the team by clicking the related links:
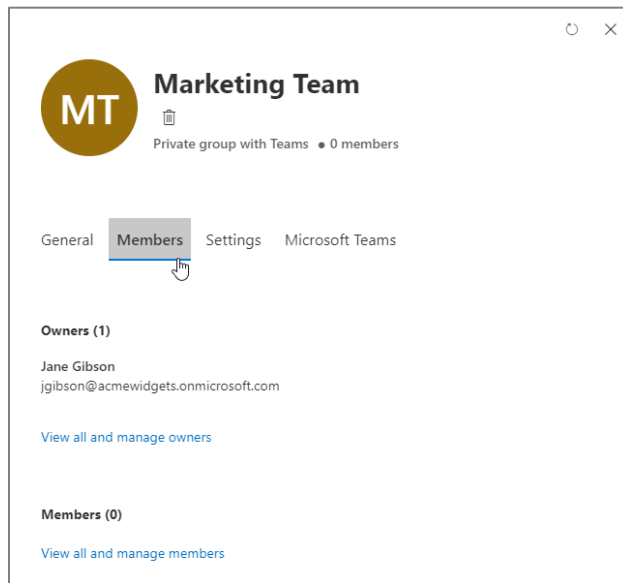
In the **Settings** tab, you can change the **General** settings or **Privacy** settings. Click **Save** to update the changes:
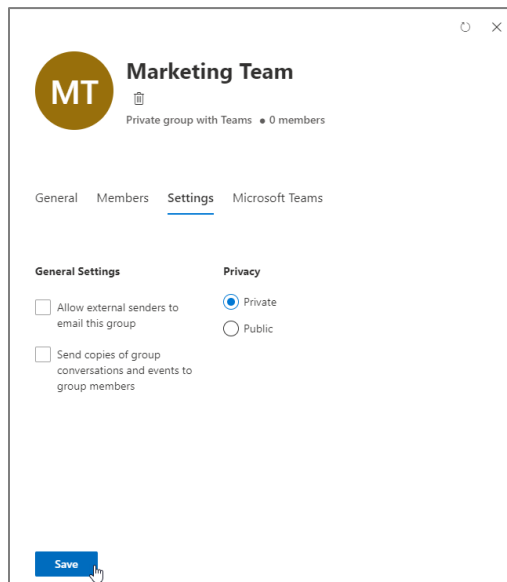
In the **Microsoft Teams** tab, you can change the settings for Microsoft Teams settings by clicking the link provided:
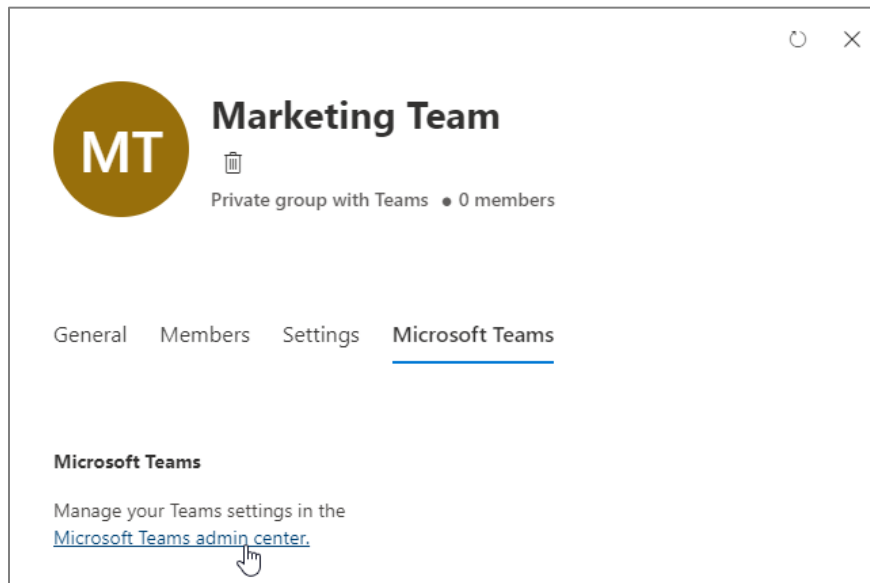
From any tab, you can click **X** to close the settings window and return to the main Groups page:
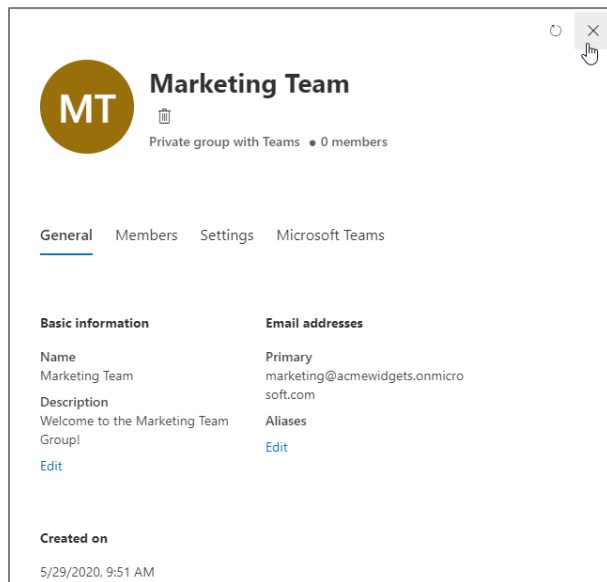
Delete a Group

To delete a group, open the editing window and click **Delete group**:
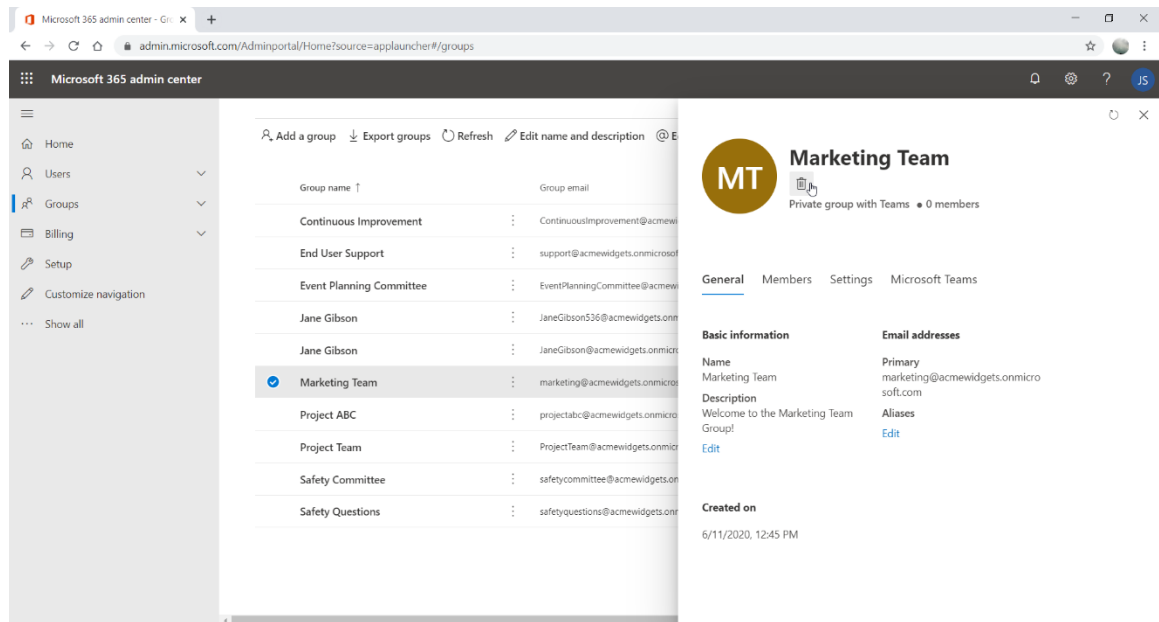
Read the information provided. Note that unlike when deleting users, deleting groups is a permanent process and **CANNOT** be undone! Click **Delete group** to confirm the operation:
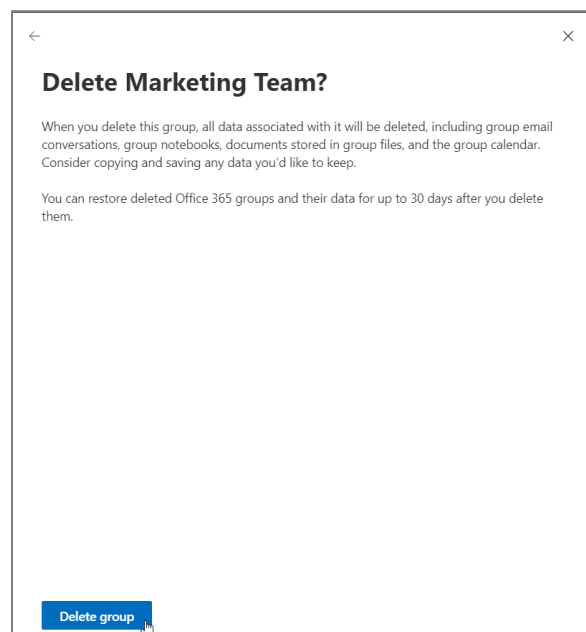
A confirmation page will be displayed. Click **Close** to return to the main Groups page:
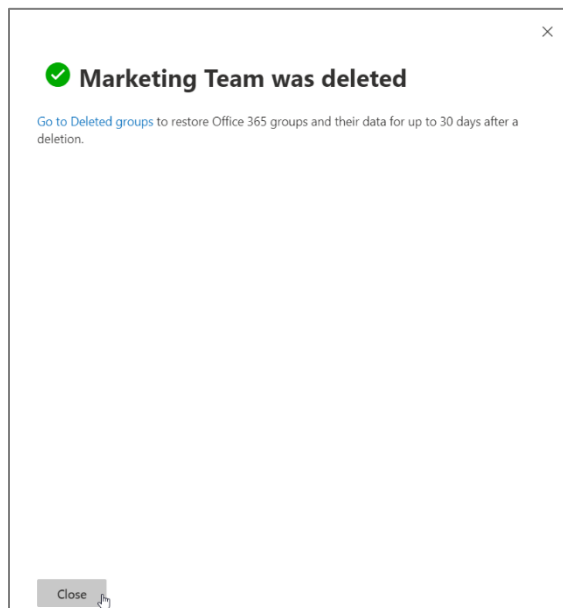
Create Shared Mailboxes

A shared mailbox allows multiple users to manage mail from a single address. For example, you might have a support mailbox where all IT team members can view and manage messages.

To create a shared mailbox, click **Groups → Shared mailboxes** in the navigation pane:
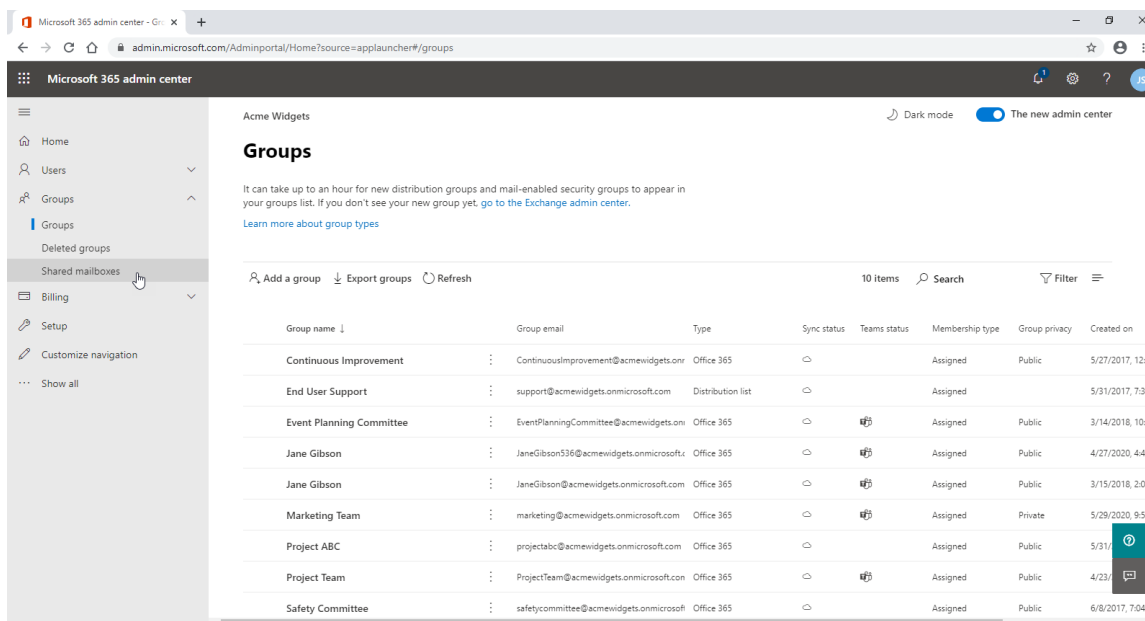
Now, click **Add a shared mailbox**:
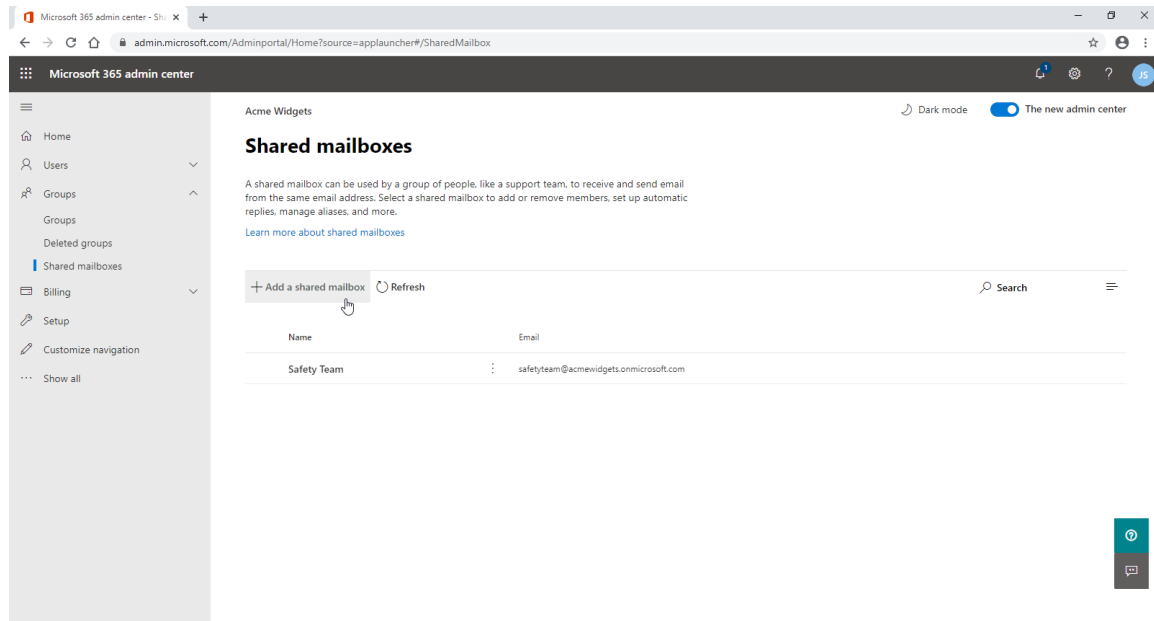
You will now see a window where you can enter the name and email address of the mailbox. Click **Add** when you are finished:
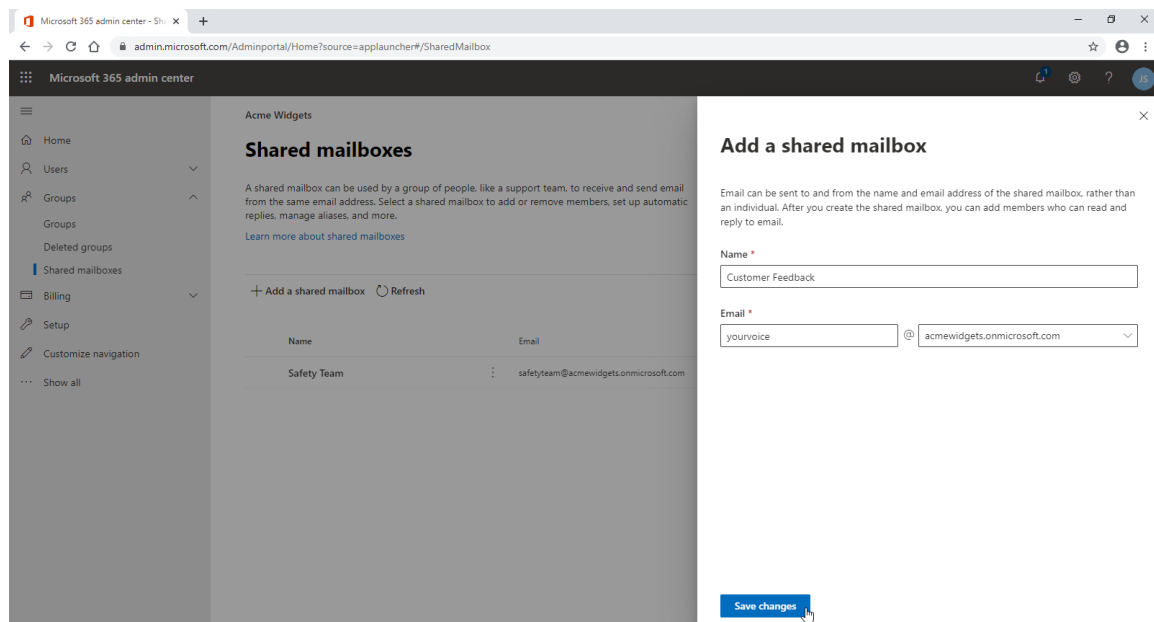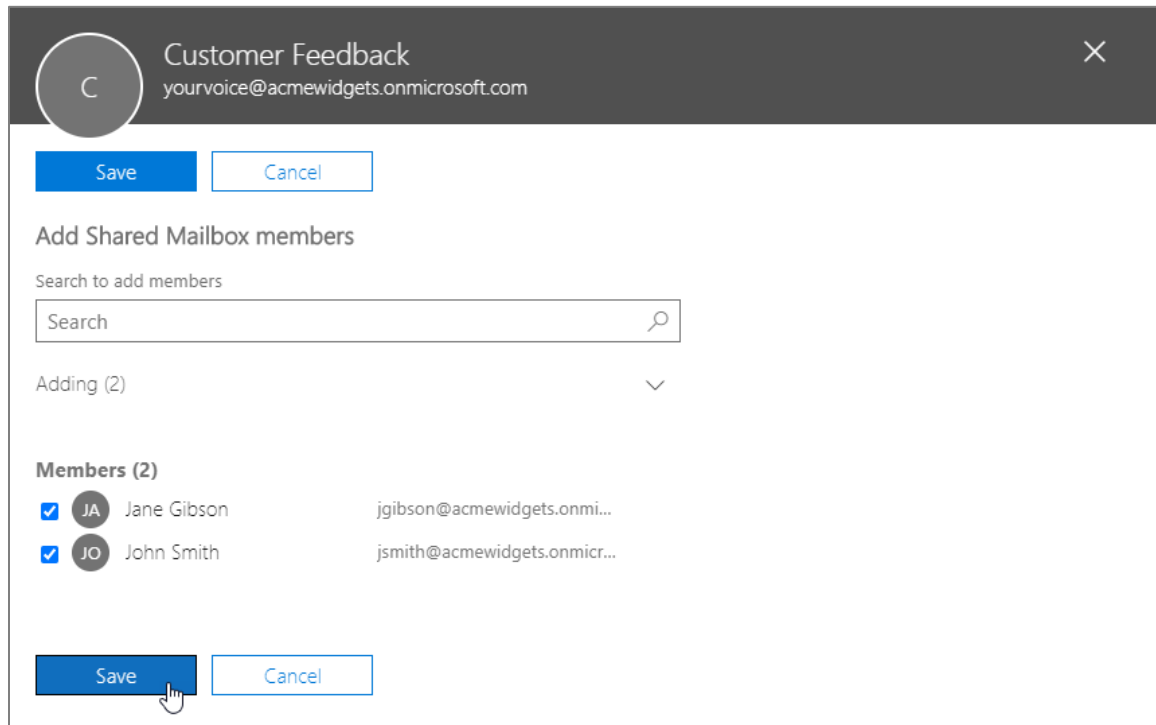
The mailbox will be created, and you will see suggestions for the next steps. Click **Add members to your shared mailbox**:
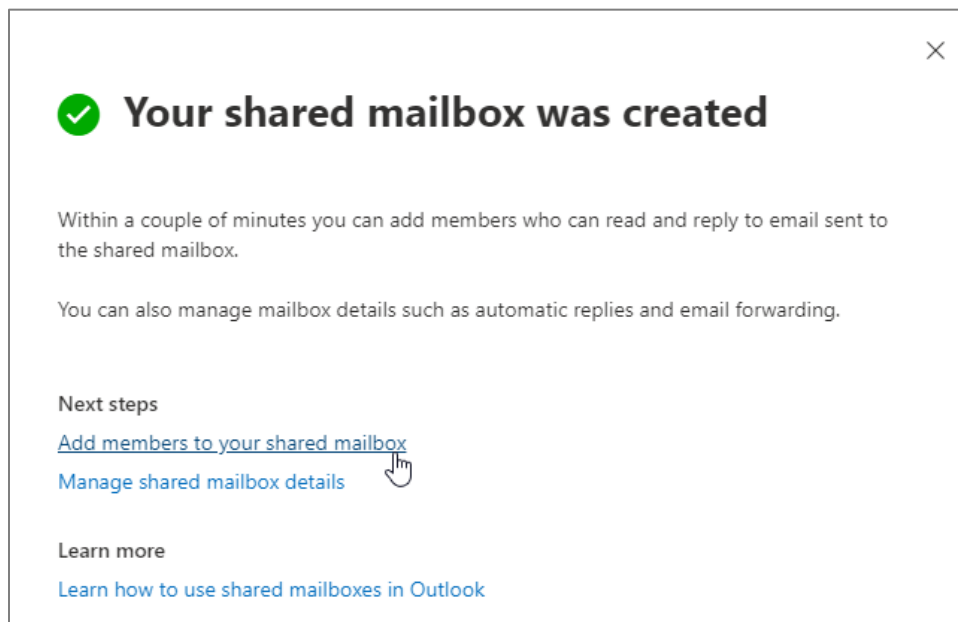
This link will open the Shared Mailbox members window. To start, click **Add members**:
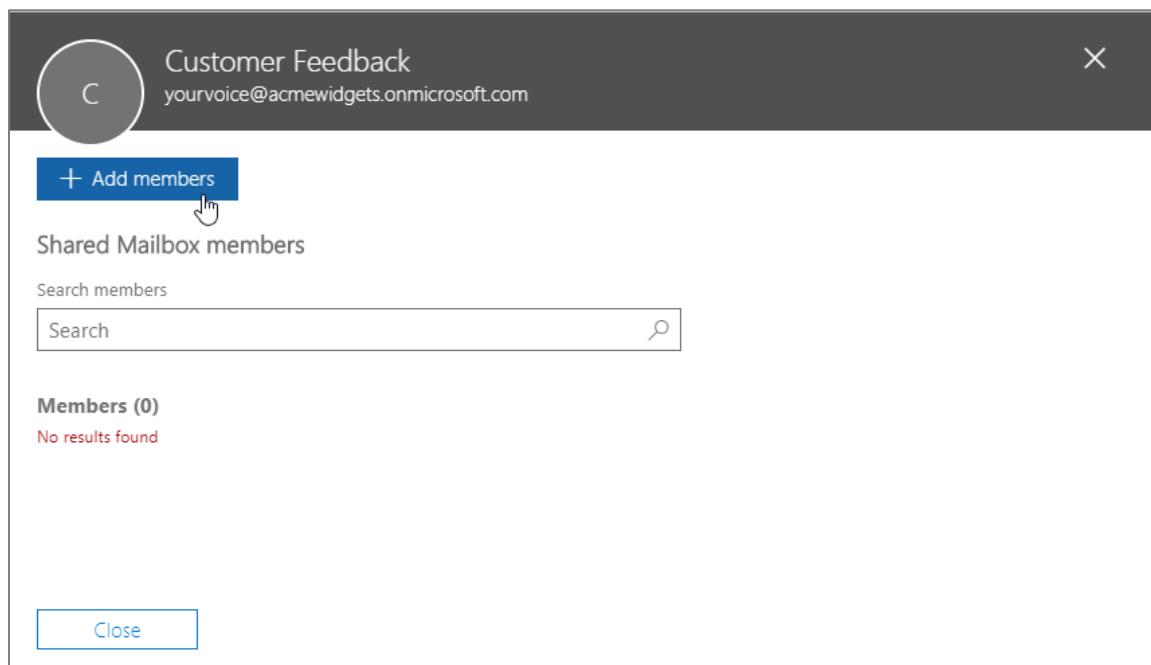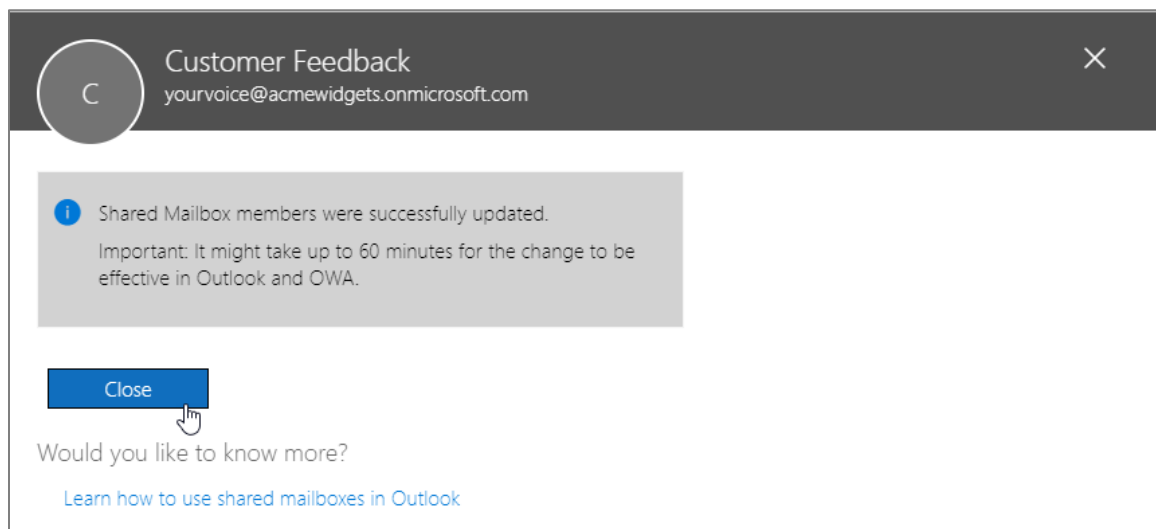
A list of available members will appear. Check the desired users to add and click **Save**:

You will receive confirmation when the operation has completed. Click **Close** to return to the View Shared Mailbox Members page:

Here, you can continue to add or remove members. If you are finished modifying the mailbox, click **Close** or the **X** in the top-right corner to return to the main shared mailboxes page:
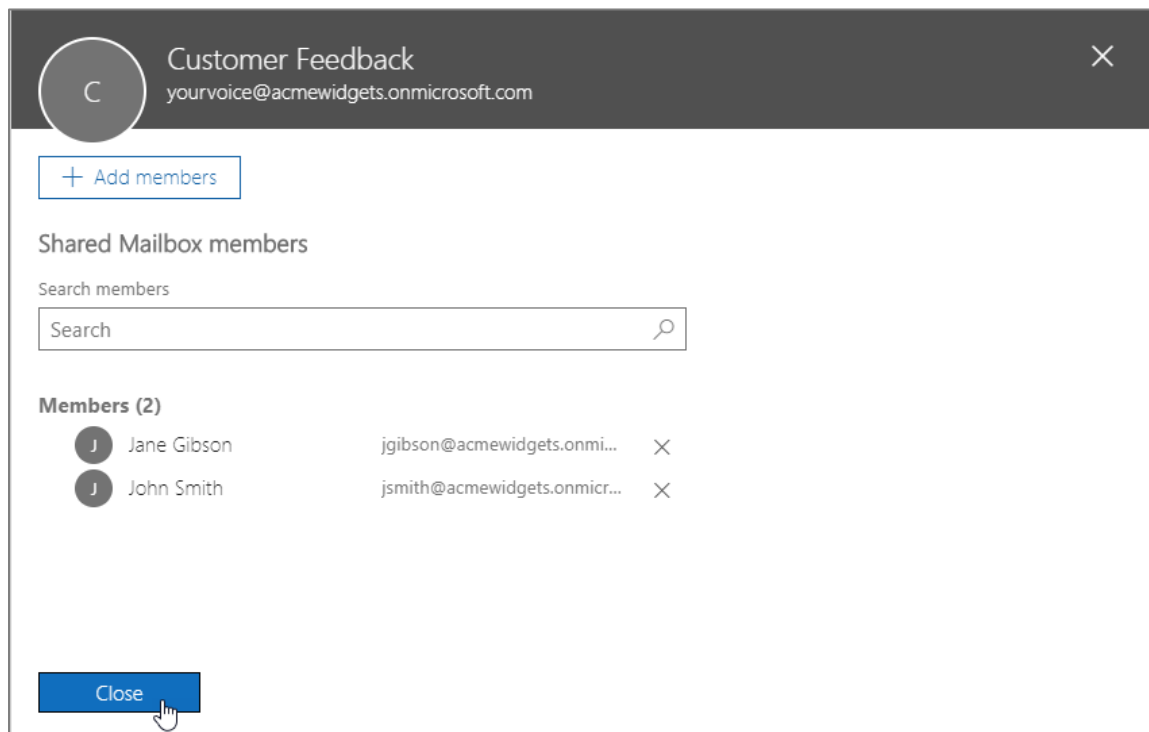
You will see the newly created mailbox appear in the **Shared mailboxes** main page. If you do not see it, click **Refresh** to update:
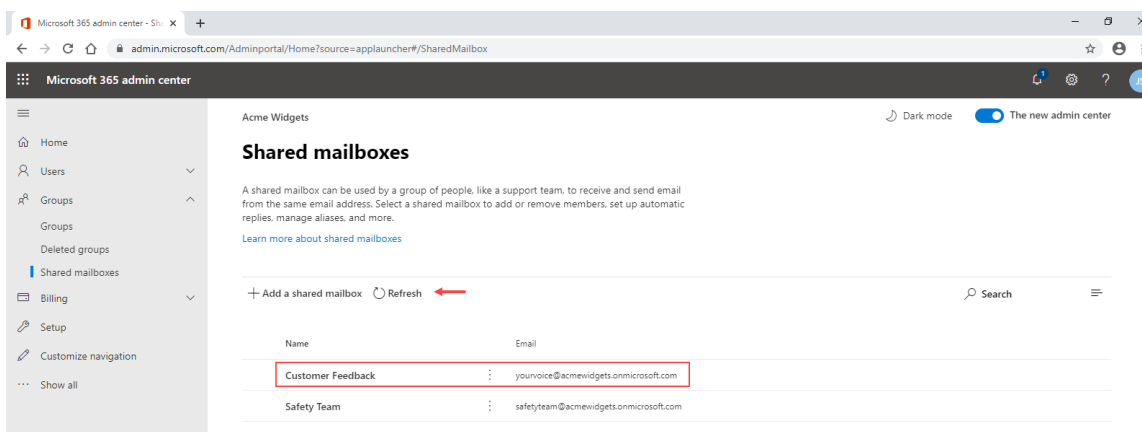
Activity 4-3: Managing Groups

In this activity, you will create a group and a shared mailbox.

1. Ensure you have completed Activity 4-2. Your browser should be open to your Microsoft 365 Admin Center home page:
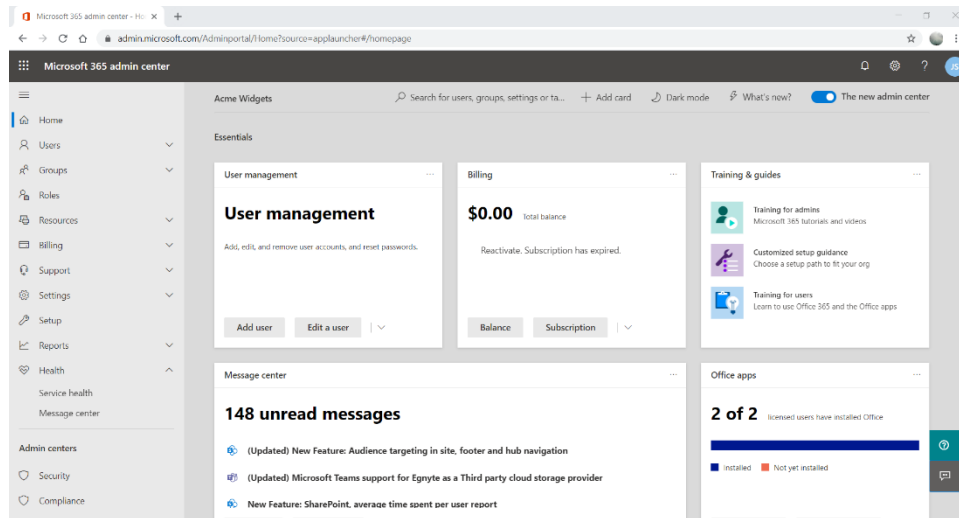
2. First, let's add a group. Click the **Groups** category in the navigation pane and click **Groups**:
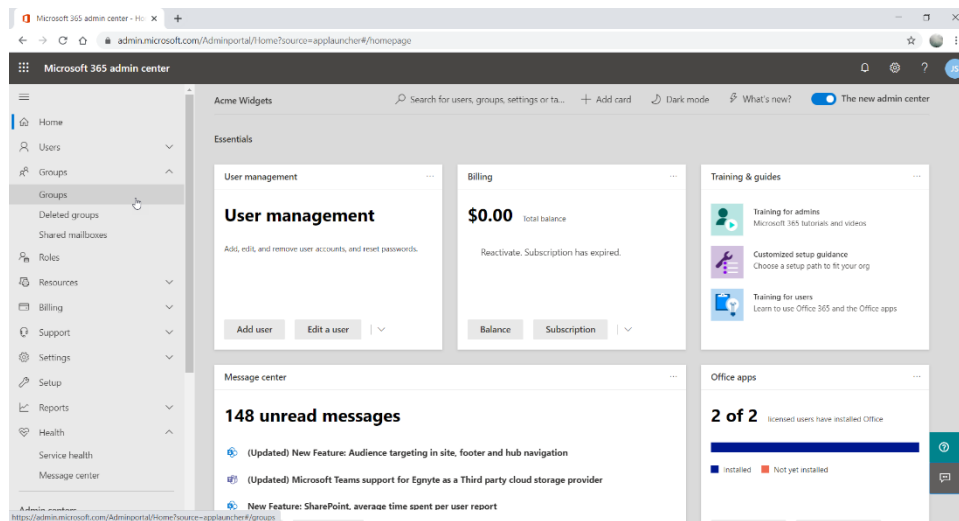
3. Click **Add a group**:
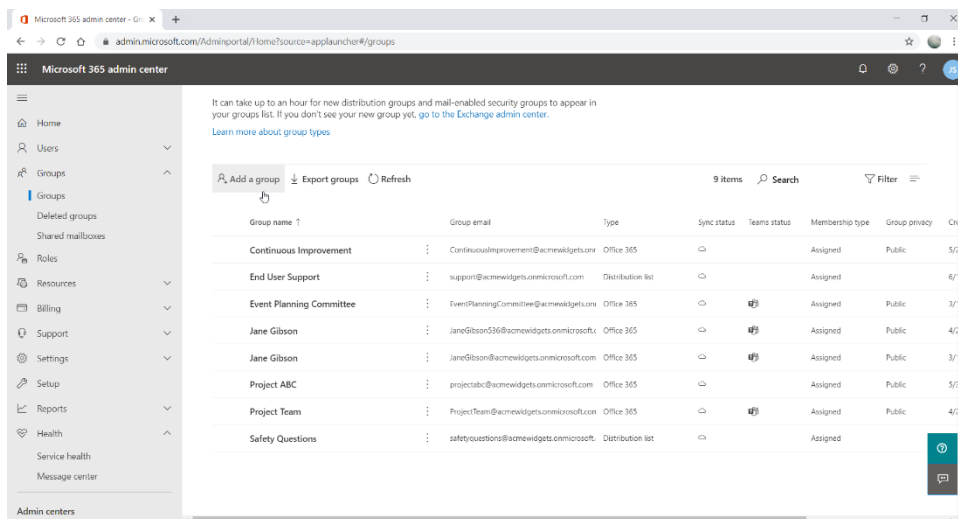
4. **Add a group** will open. Leave the **Office 365 (recommended)** radio button checked and click **Next**:
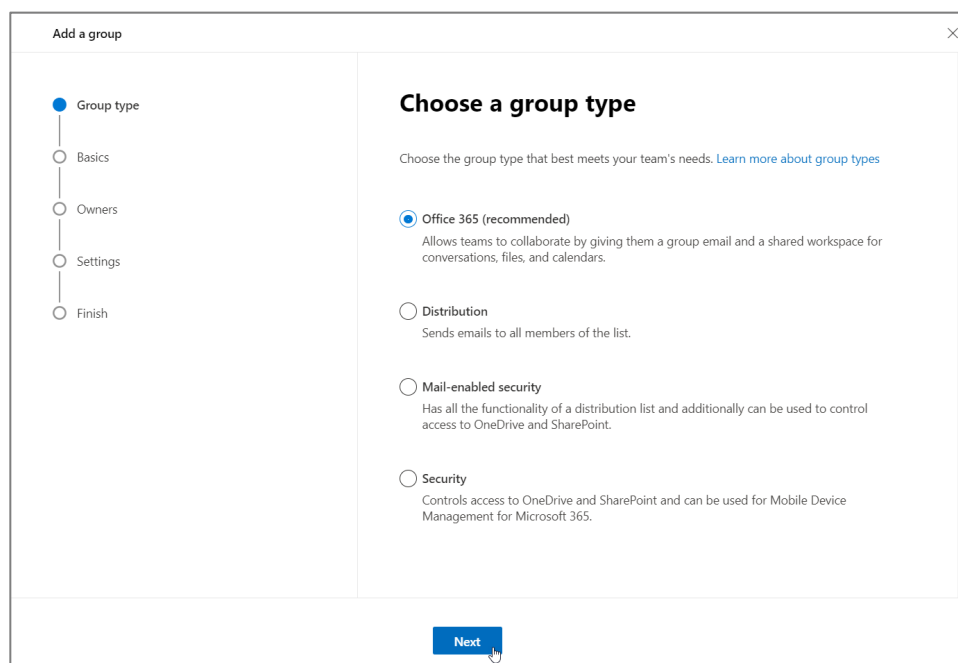
5.   Enter "Safety Committee" as the name. In the Description, type, "**Core members of our Safety Committee**". Click **Next** to continue:

6.   **Type your name** in the textbox. From the search result, **click your name** to select:

7. Click **Next** to continue:

8. Type "**safetycommittee**" in the Group email address. Then click **Next** to continue:

9. Confirm the information, then click **Create group** to complete the process:

10. Click **Close** to return to the homepage:

11. If you do not see the new group, click **Refresh** to update:
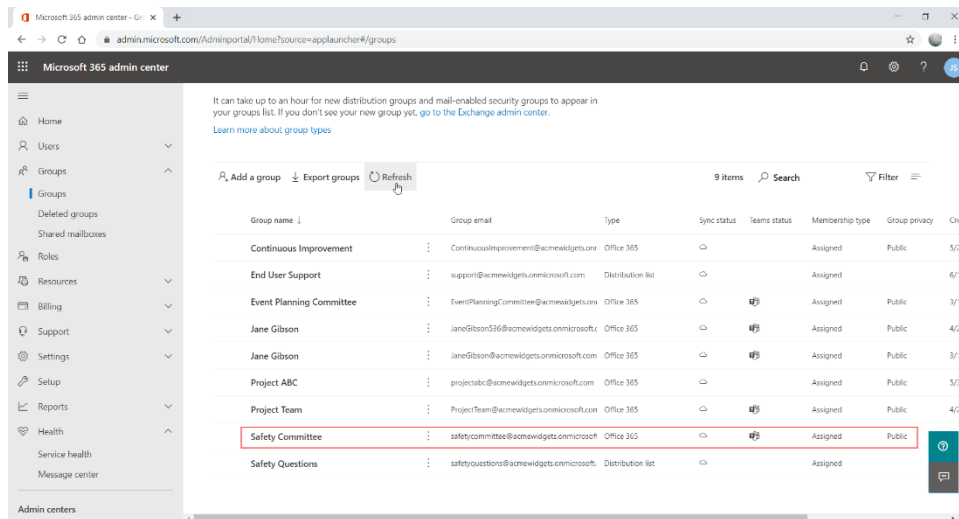
12. In the navigation pane, click the **Shared mailboxes** sub-category under Groups:
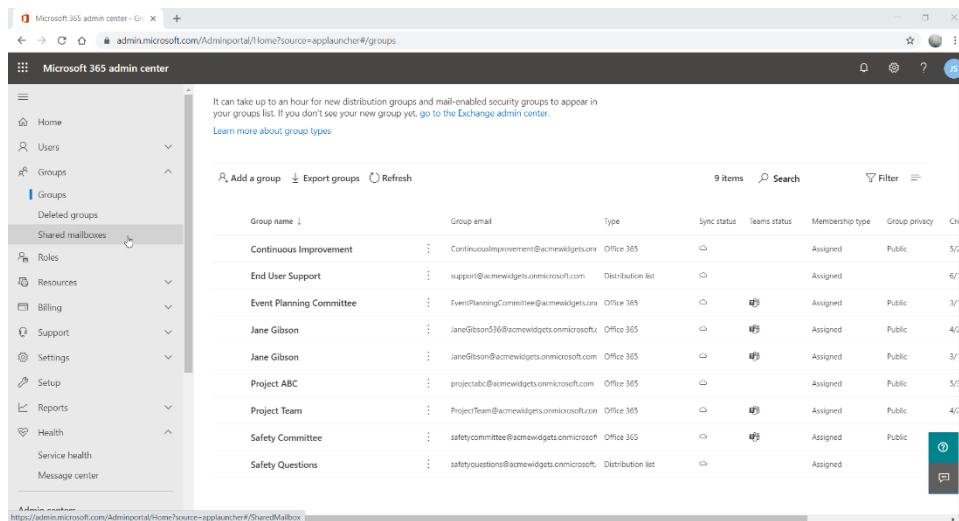
13. Click **Add a shared mailbox**:
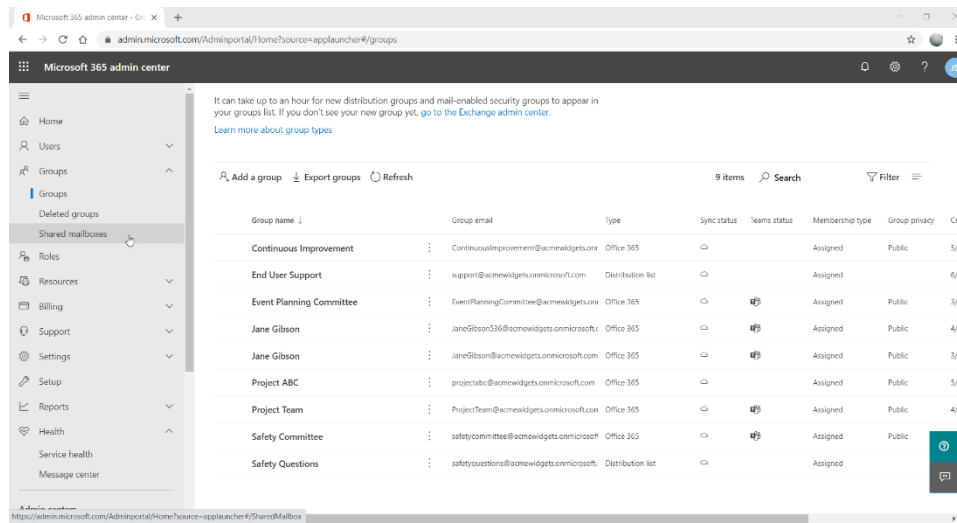
14. In the mailbox details window, type "**Safety Team**" for the name. Click the **Email field** and it will auto-populate. Then, click **Save changes** to complete the process:

15. Read the instruction carefully. Then, click **X** to return to the homepage:
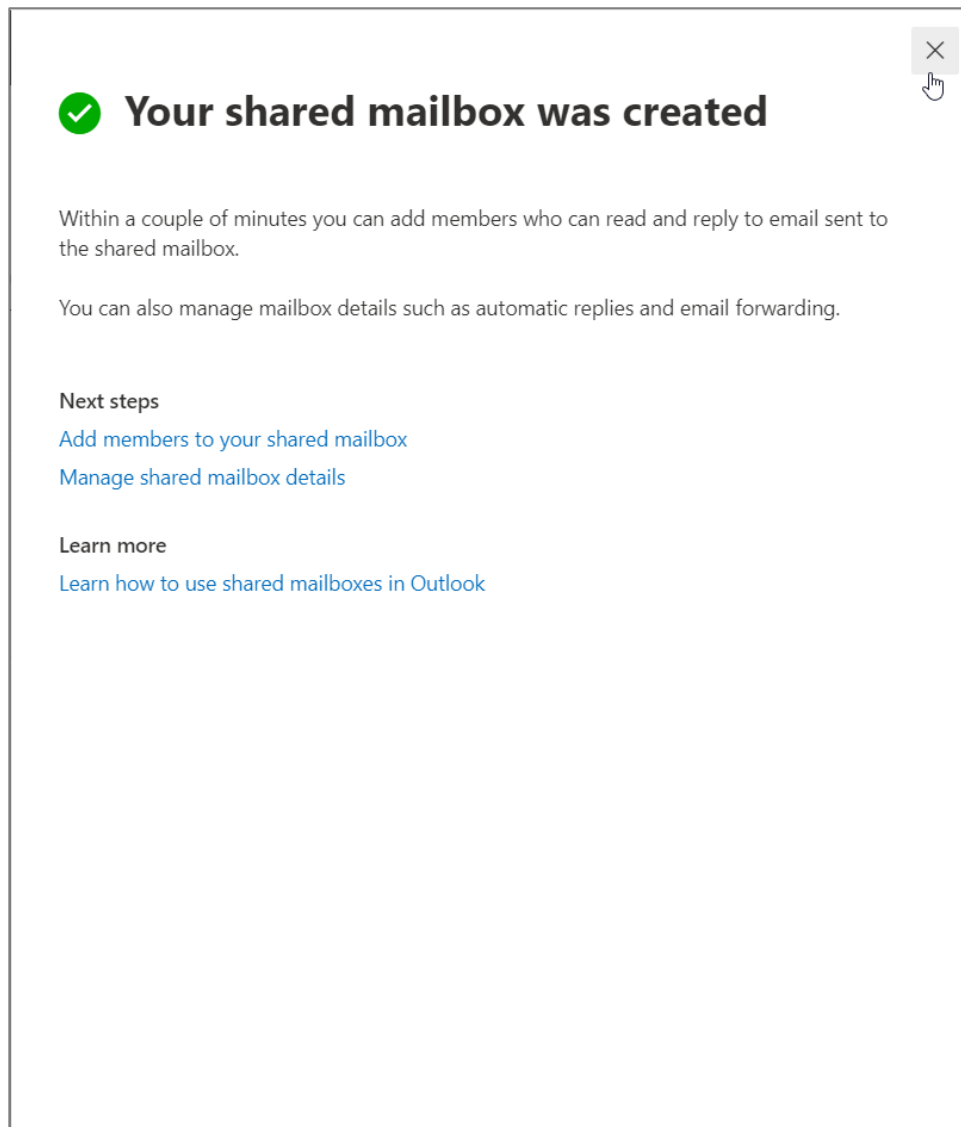
16. Click the Home category and leave your browser open for the next activity.

TOPIC D: Managing Resources

Microsoft 365 also allows you to set up a list of resources (such as rooms and equipment), that can be managed and used with Outlook and Exchange. For example, you could use this feature to book a boardroom or reserve special equipment. You can also link other sites with your organization's Microsoft 365 infrastructure to facilitate website management.

Topic Objectives

In this session, you will learn how to:

- Add rooms and equipment to Microsoft 365

- View and add sites

- Change site sharing settings

Add Rooms or Equipment

To add a resource to Microsoft 365, click **Resources → Rooms & equipment** from the navigation pane.
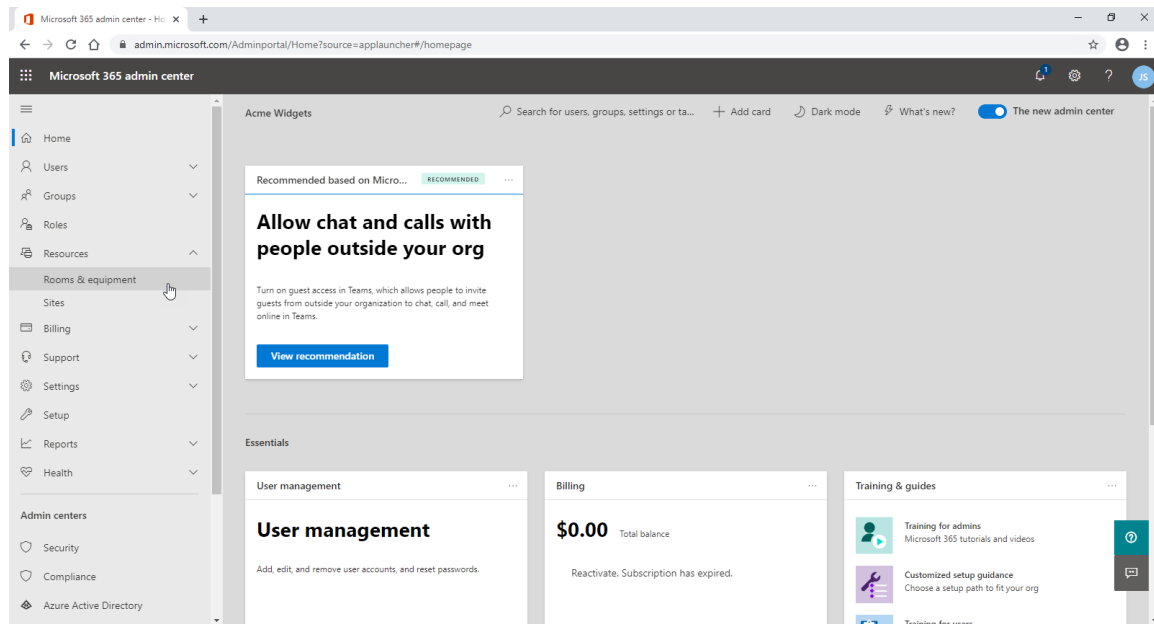
Now, click the **Add a resource mailbox** button:
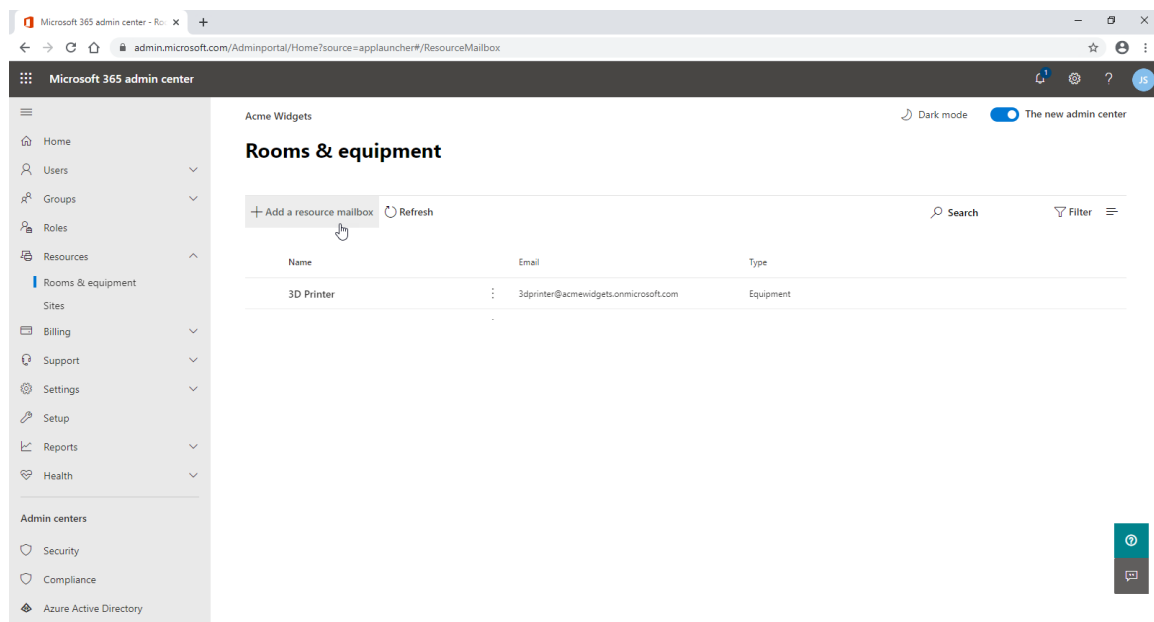
This will open a window where you can add the resource's details:

You can specify the resources:

- Type (room or equipment)

- Name

- E-mail address

- Capacity

- Location

- Phone number

You can also incorporate other Microsoft 365 licenses to the resource.

When you finish, click **Add**:

The resource will then be added. Click the **X** to return to the Rooms & equipment main page:
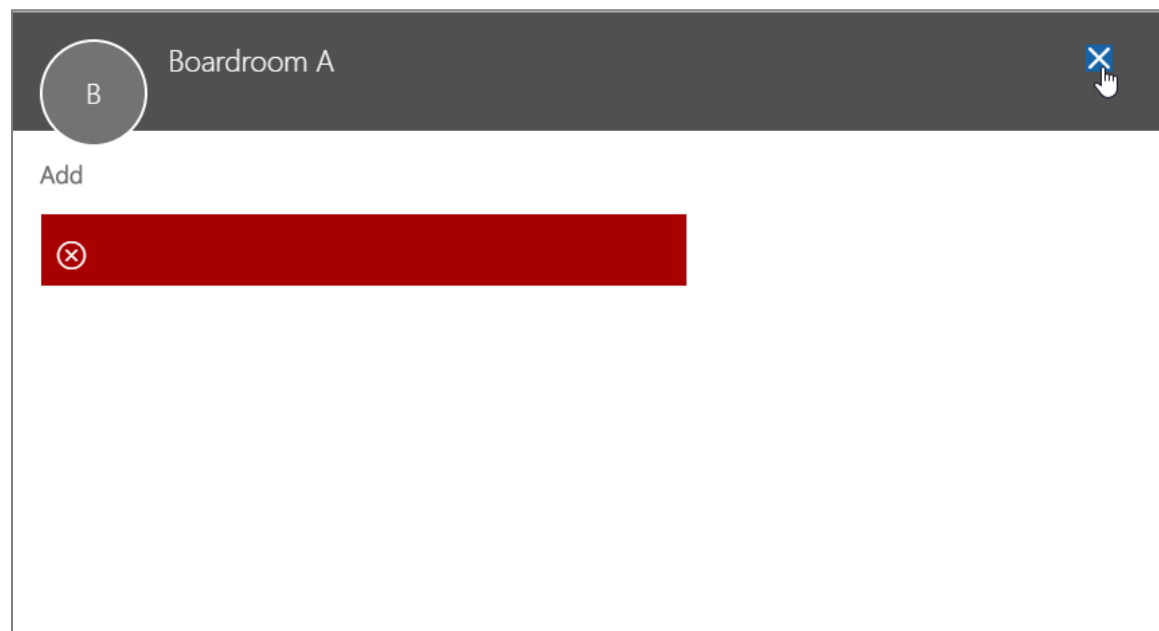
You can now see **Boardroom A** is listed on the main page:
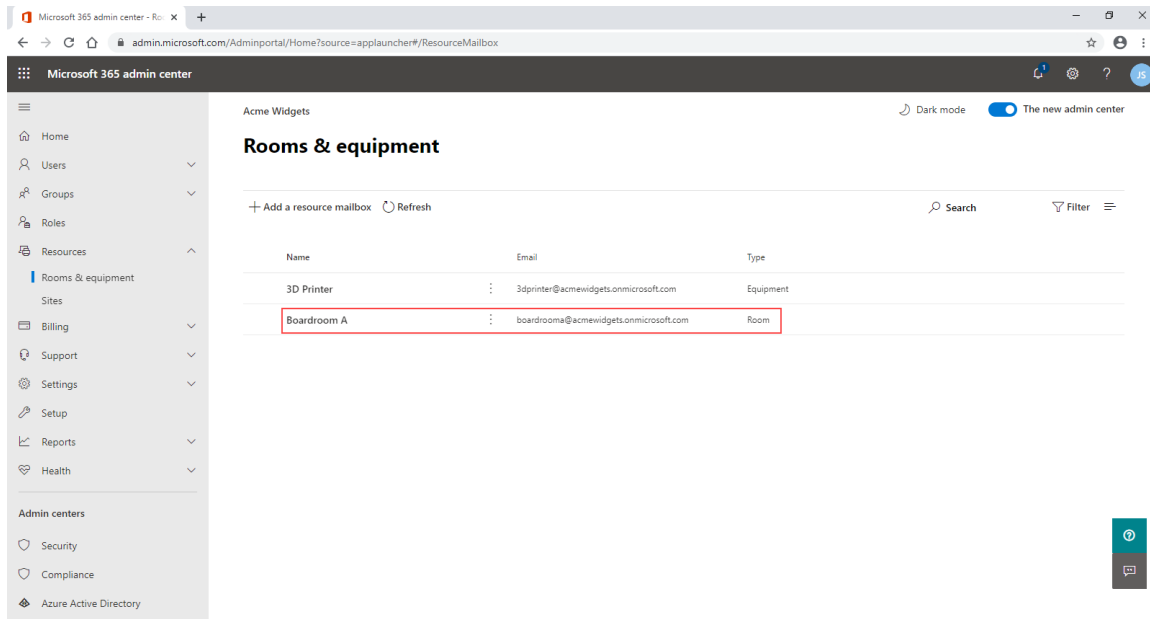
View Sites

To view the sites currently associated with your organization's Microsoft 365 infrastructure, click **Resources → Sites** from the navigation pane:
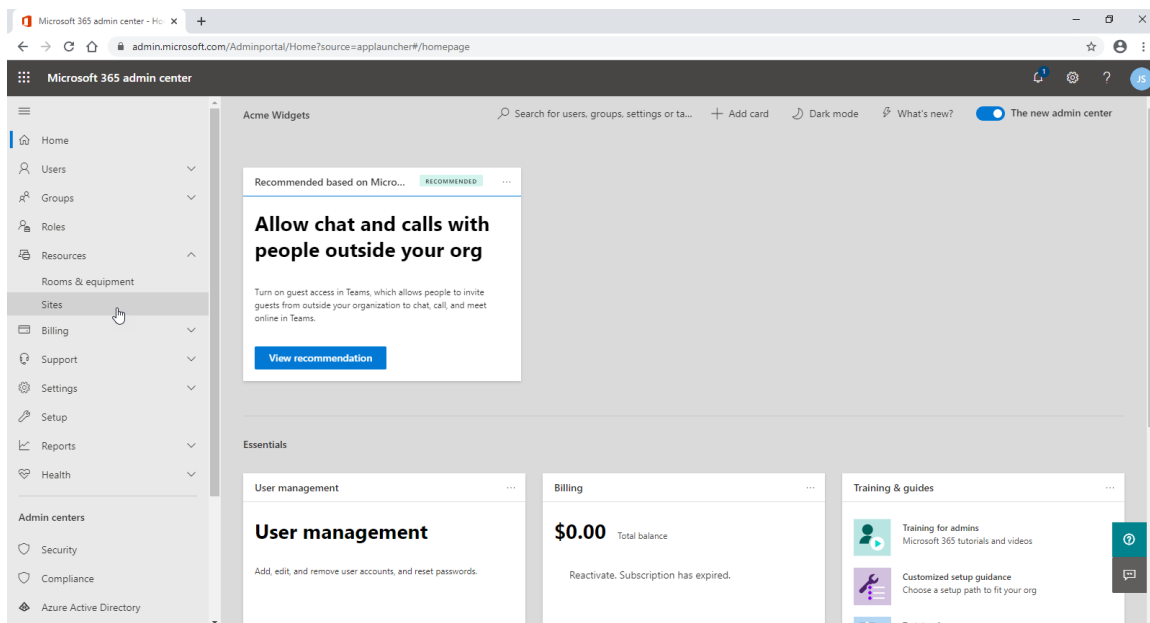
You will then see the Sites page, which provides an overview of all sites and their external sharing policy:
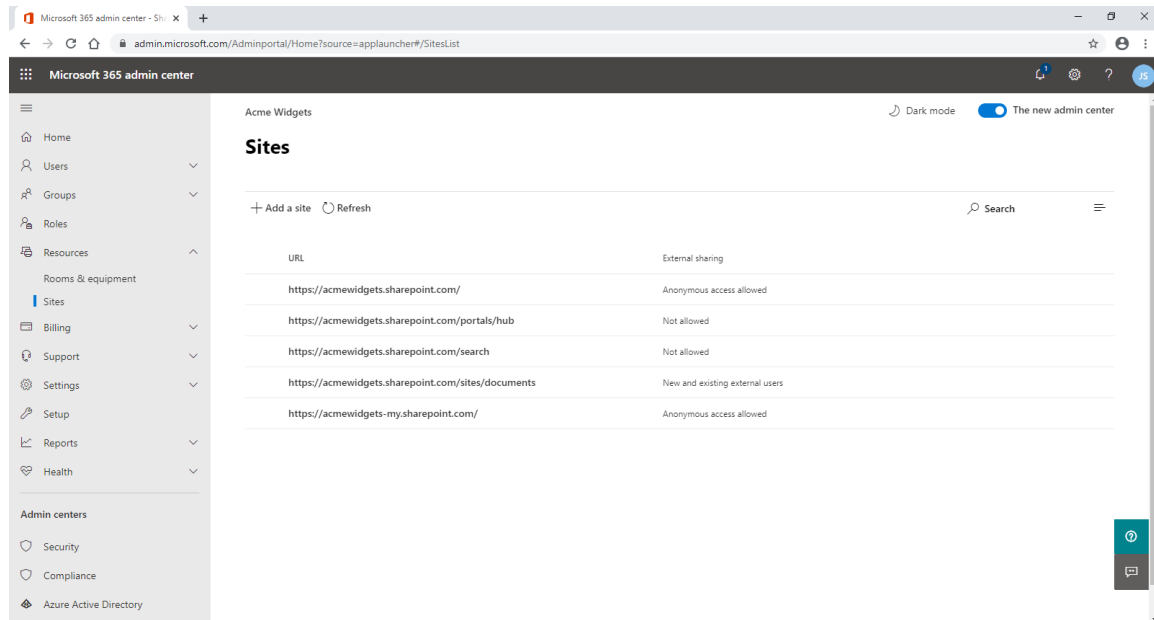
Change Site Sharing Settings

To change a site's sharing settings, click its name in the list on the Sites page:
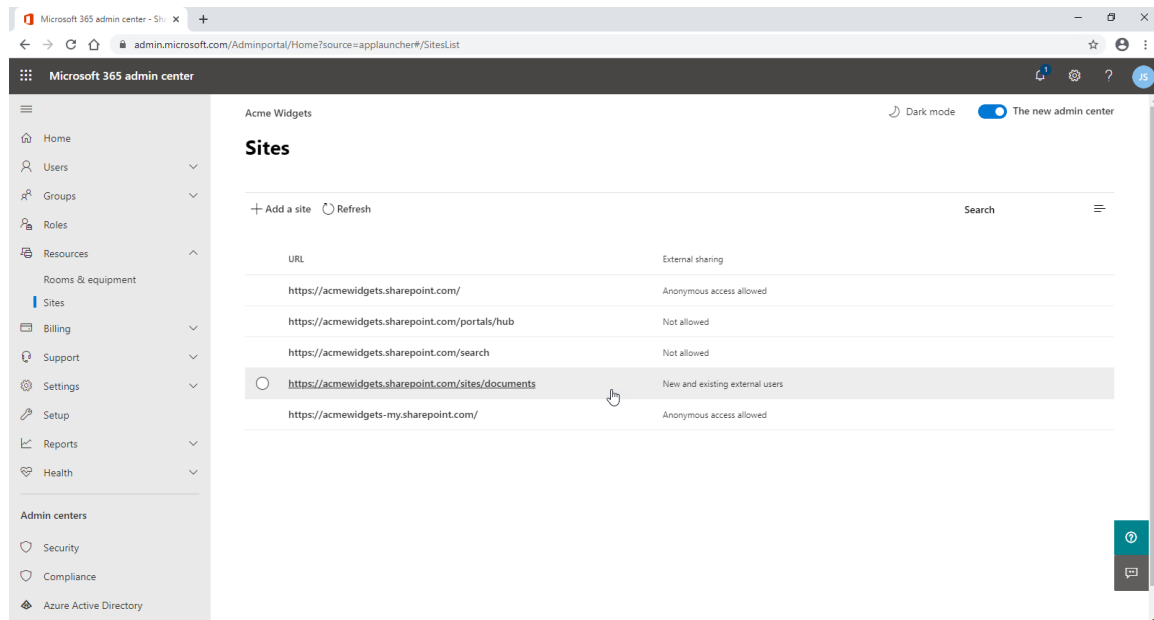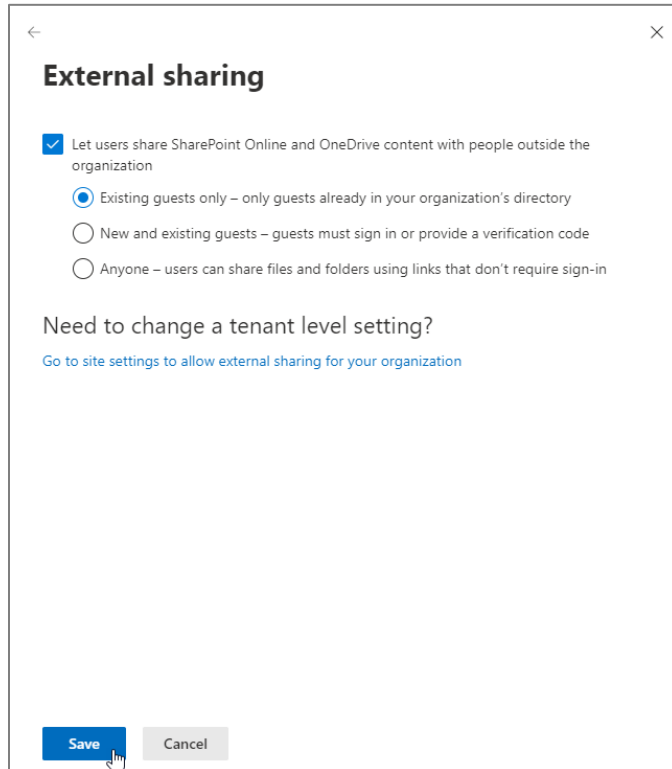
This will open an editing window. Click **Edit** in the Sharing status column:
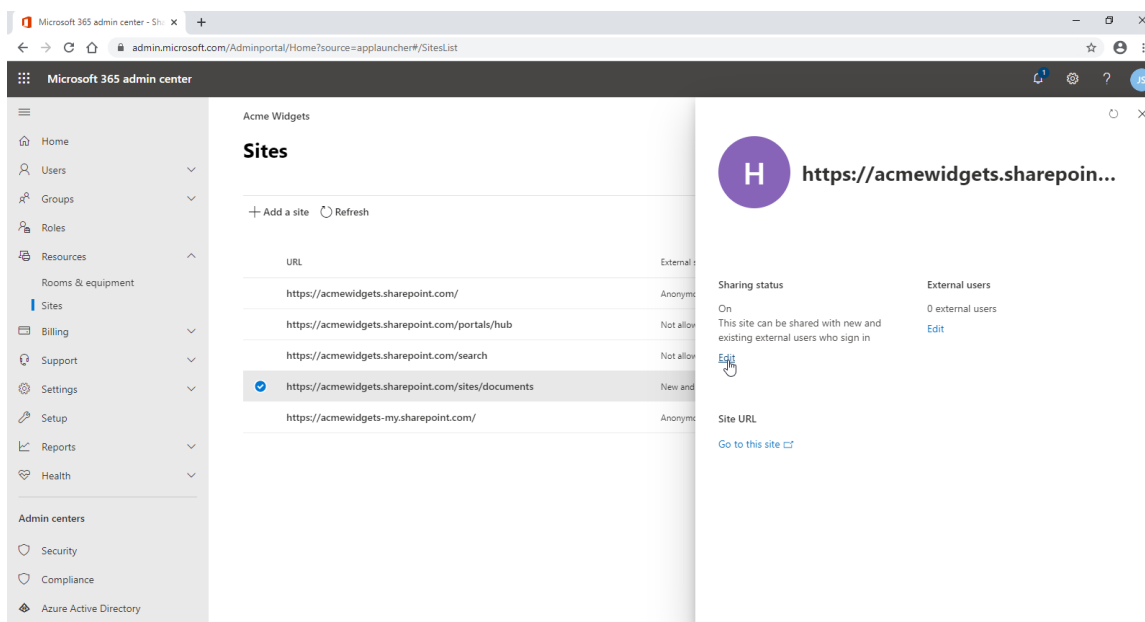
The related options window will open. You have three sharing options to choose from:
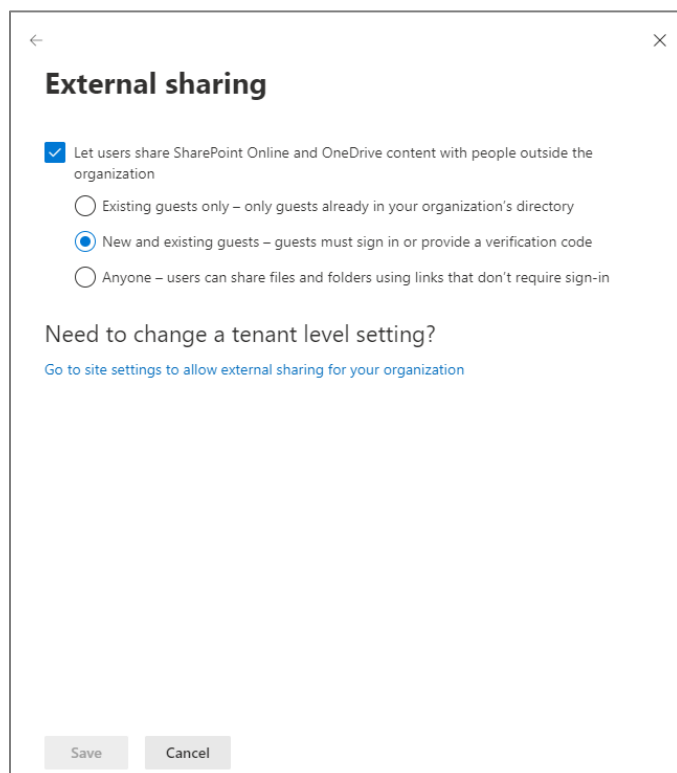
Select any option, and click **Save** to continue:
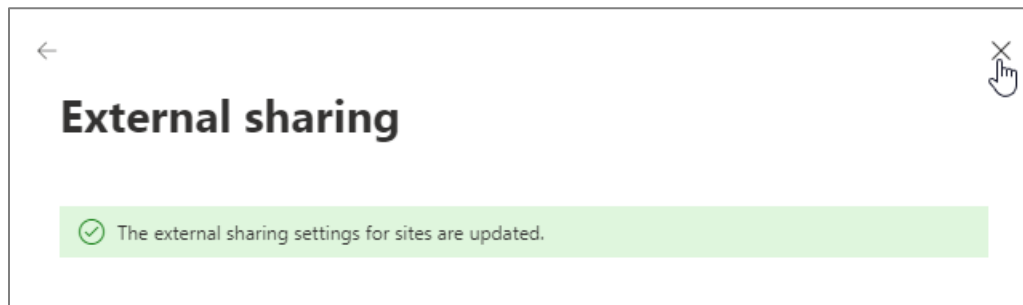
When the confirmation window appears, click the **X** in the top-right corner to return to the main Sites window:

You can now see the sharing policy has been updated:
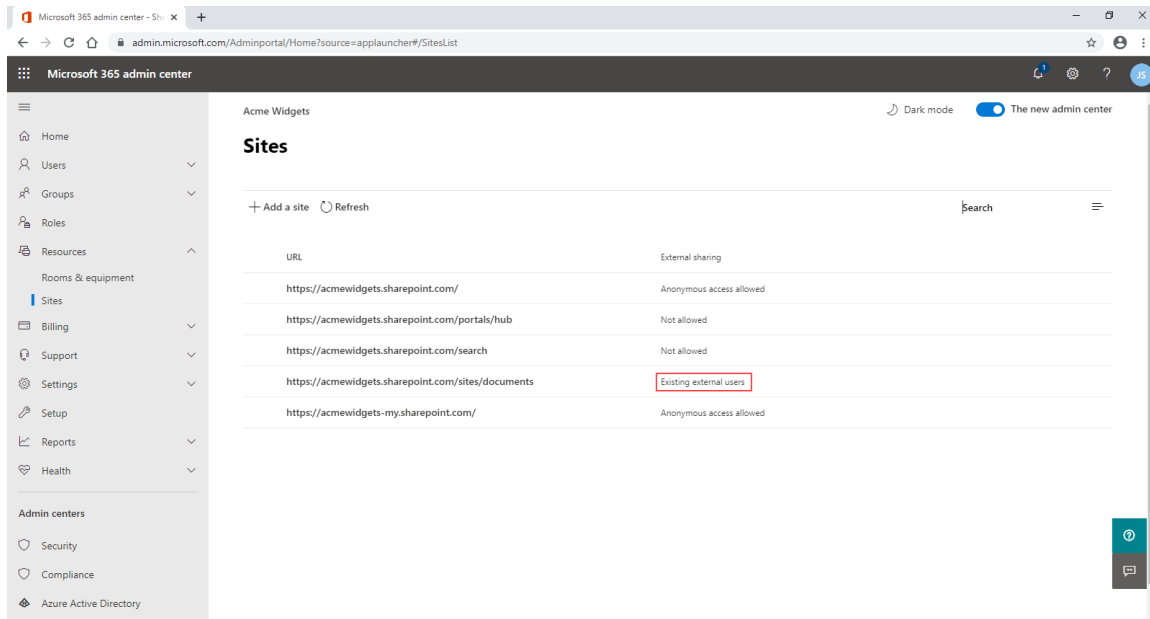
Add Sites

To add a site to the Sites page, click **Add a site**:
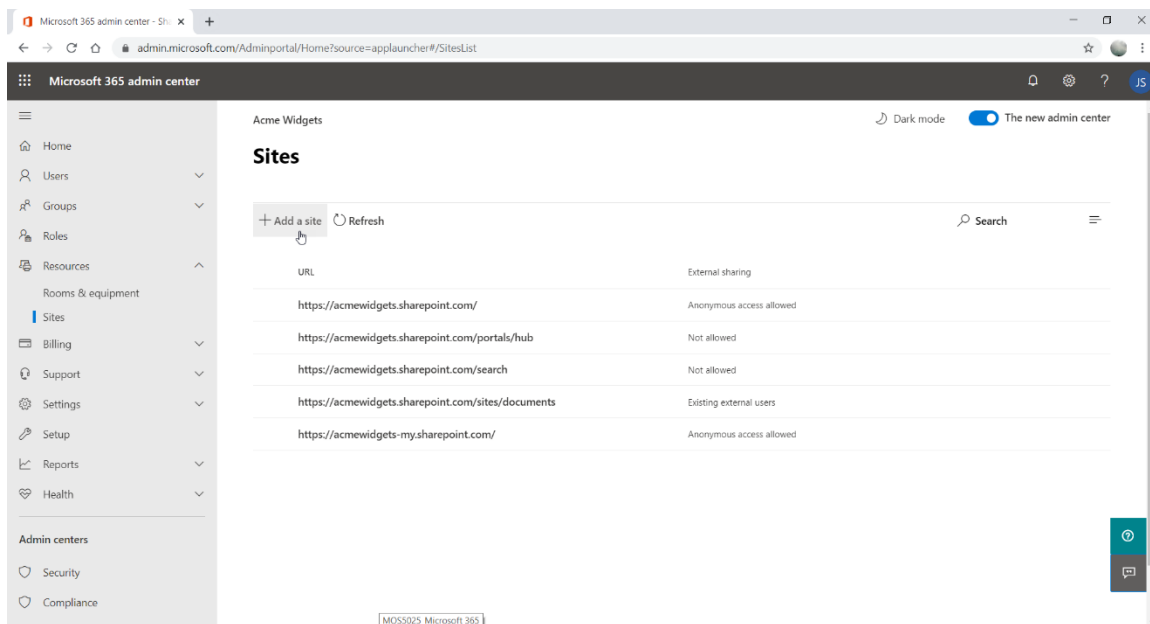
This will open a new window to the **Create Site Collection** page:

Here, you can create a new SharePoint site collection.

Activity 4-4: Managing Resources

In this activity, you will add a resource and then review site sharing settings.

1. Ensure you have completed Activity 4-3. Your browser should be open to your Microsoft 365 Admin Center home page:
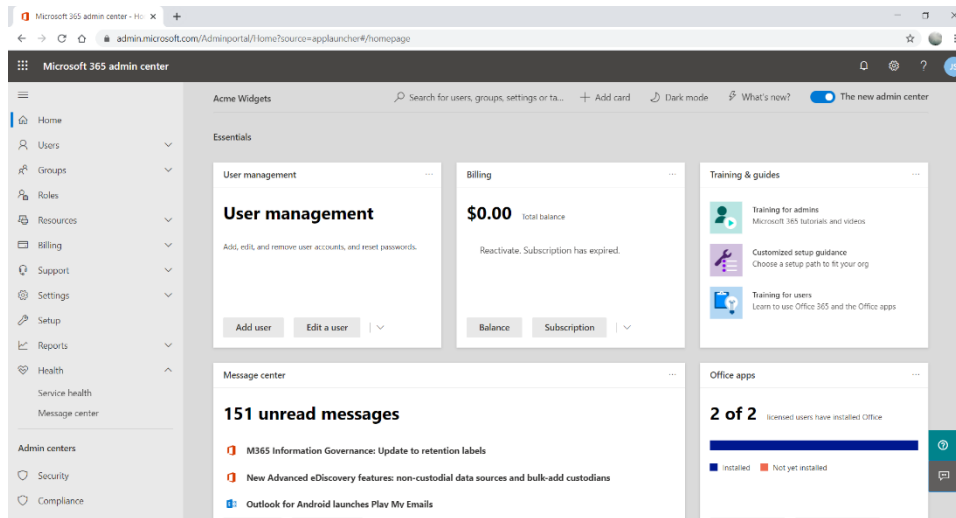
2. Click **Resources → Rooms & equipment** from the navigation pane:
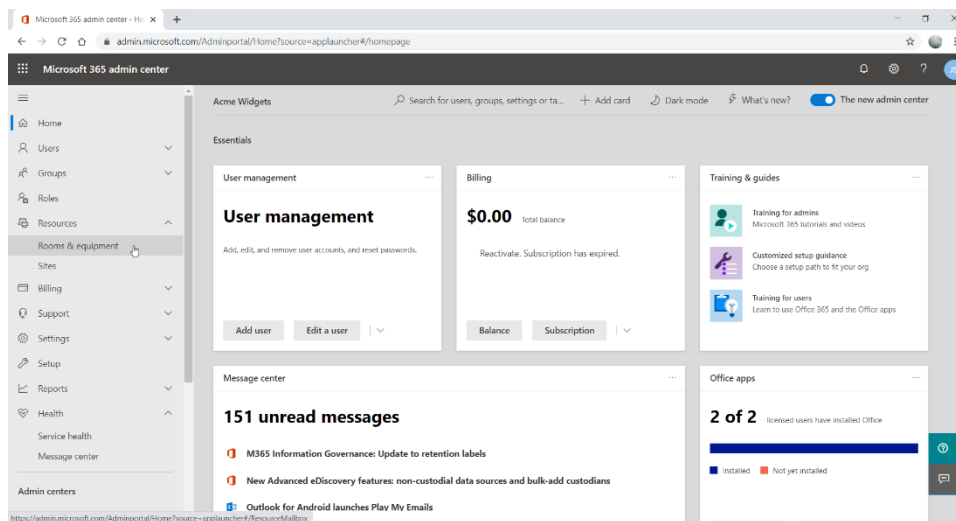
3.   Click **Add resource**:
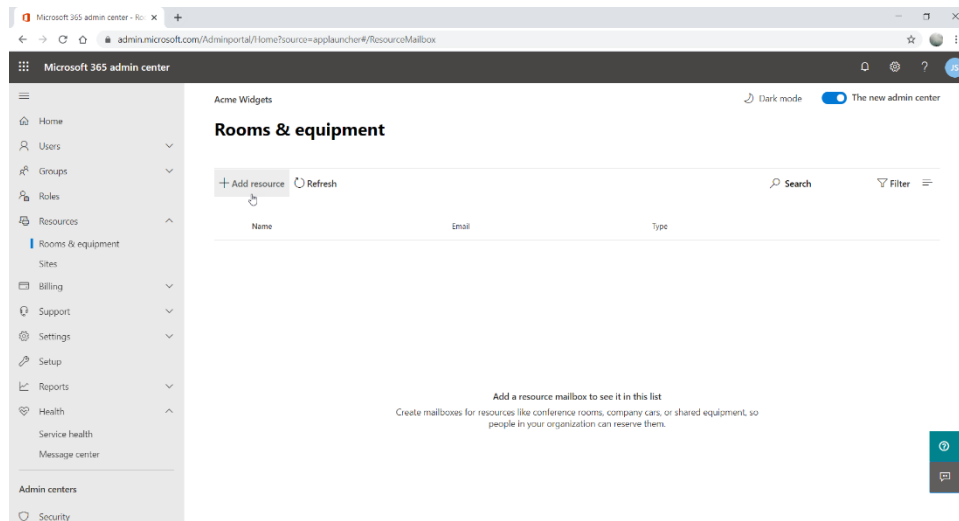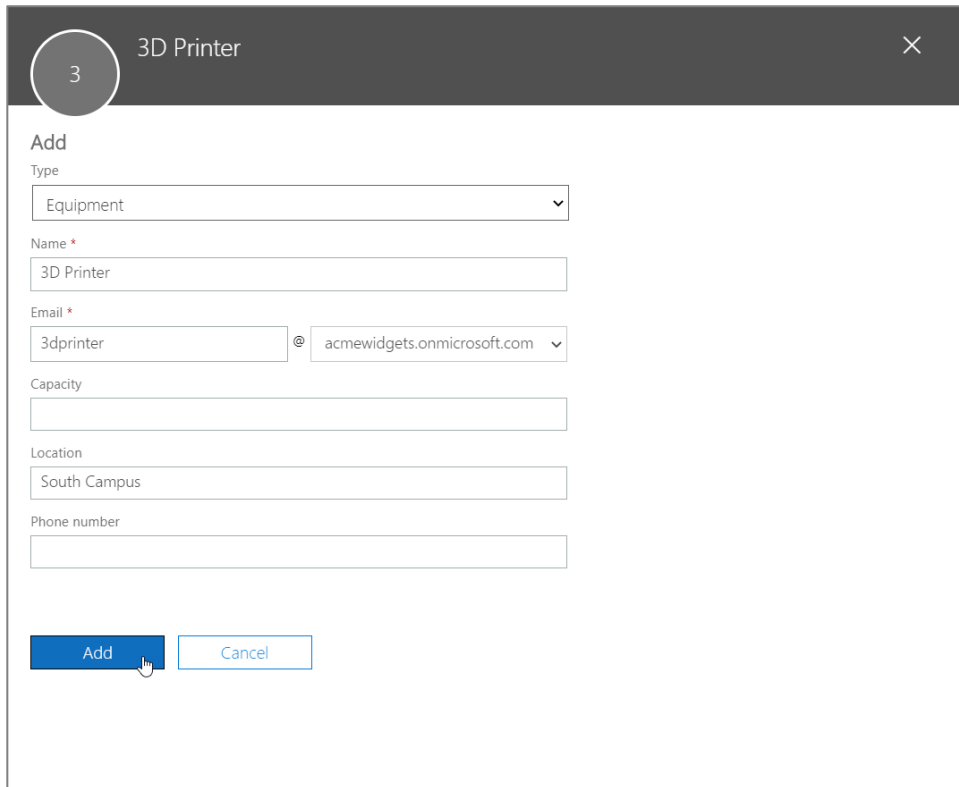
4.   A pop-up window will open. Click the **drop-down menu** at the top of the window
and click **Equipment**:
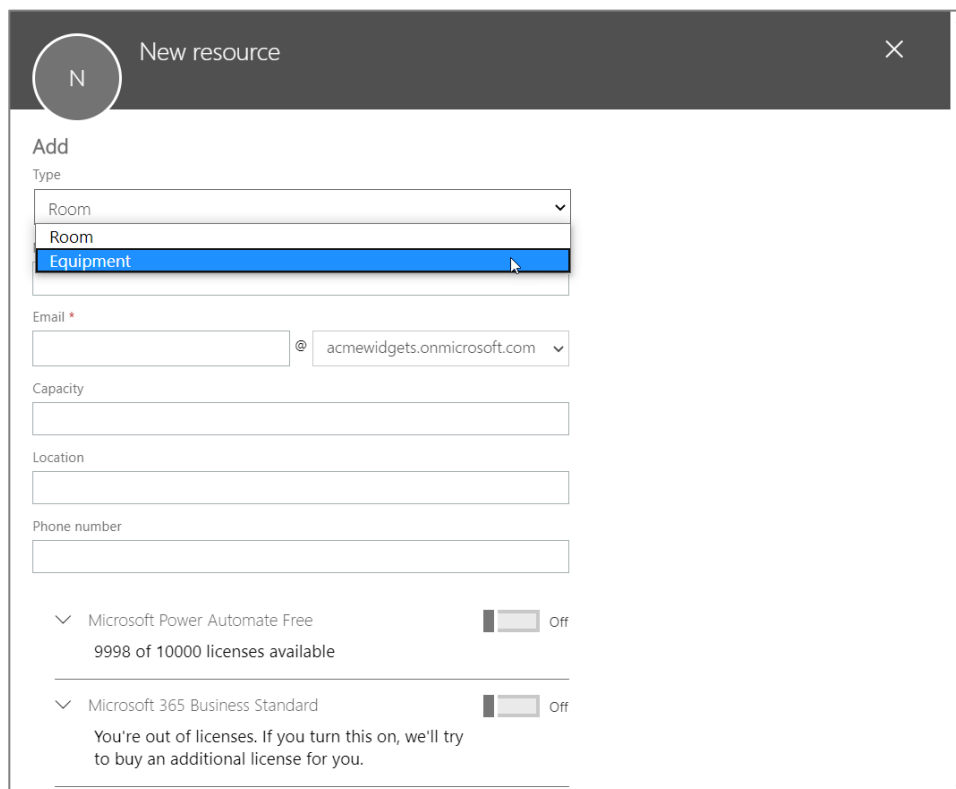
5. Enter "**3D Printer**" for the name. Click the **Email** field and it will auto-populate, leave the Capacity and Phone number fields blank. For the location, type "**South Campus**:"

6. Click **Add**:

7.   Once the equipment has been added, click **Close** to close the pop-up:
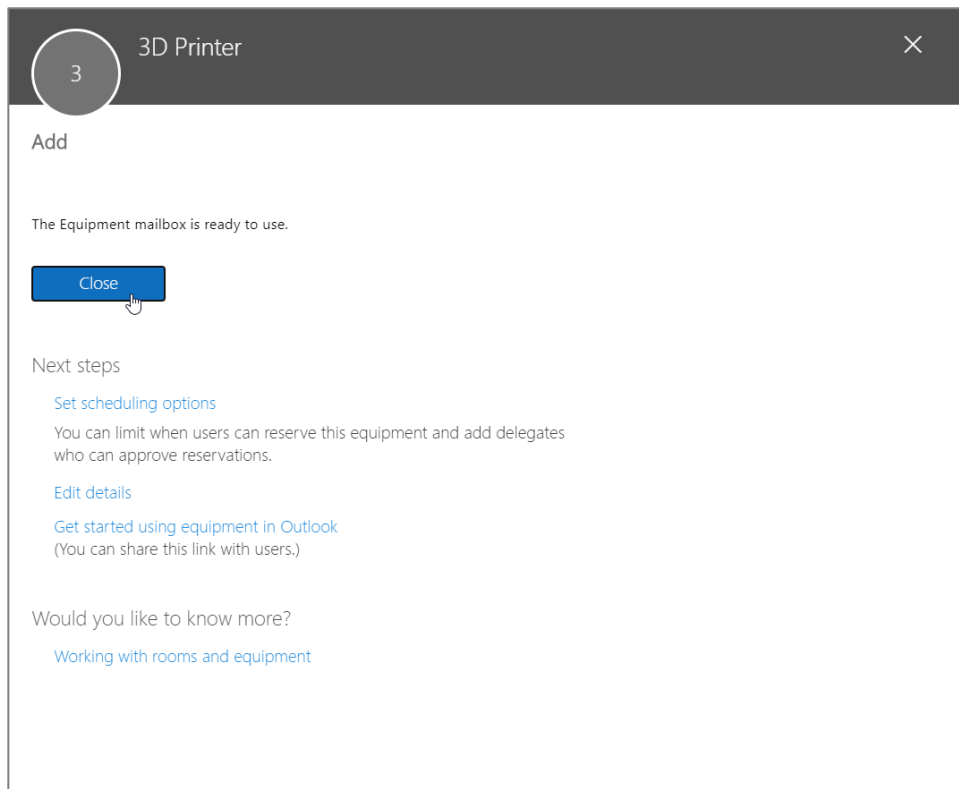
8.   Now, let's review the site sharing settings. Click the **Sites** sub-category from the Resources category in the navigation pane:
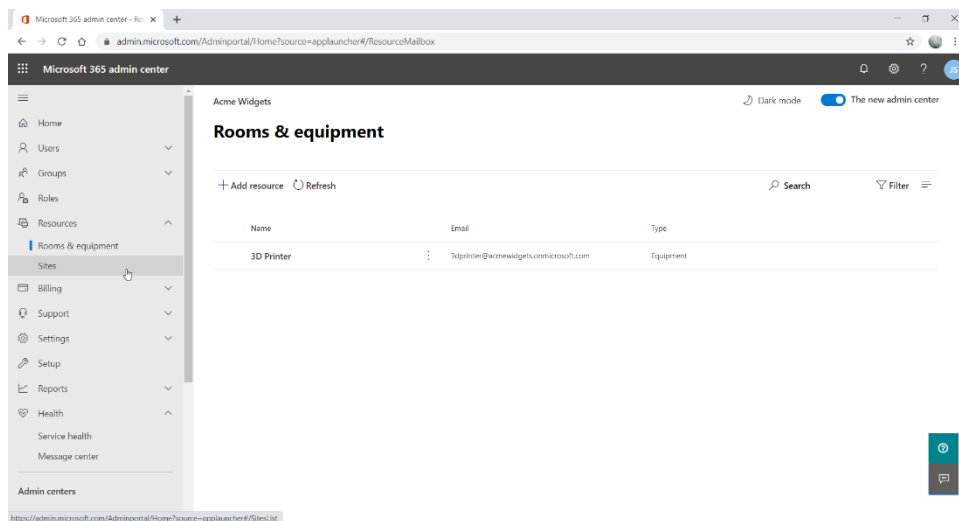
9. Review the list of sites and their sharing policies:
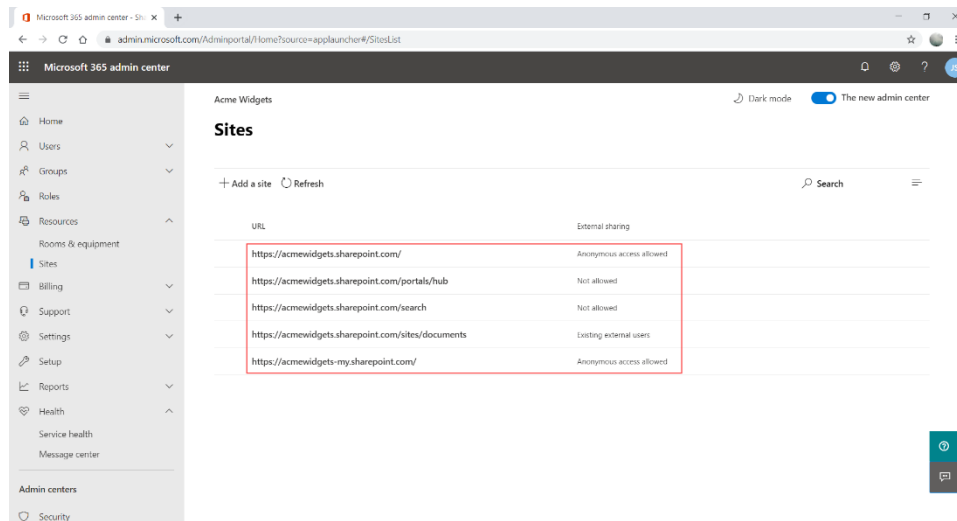
10. Close your browser to complete this activity.

Summary

In this lesson, we began exploring the tools that Microsoft 365 administrators will use most frequently. We learned about the Admin Center and some of its key components, including the Message Center, Service Health Center, Groups page, Rooms & Equipment page, and Sites page. We also learned about basic user management tasks.

Review Questions

1. **True or False: There is only one administrator type in Microsoft 365.**

2. **How do you access the Admin Center?**

3. **How do you access the main Groups page?**

4. **What is the command sequence to begin creating a shared mailbox?**

5. **Which user management commands are available from the Admin Center home page?**

LESSON 5:
MANAGING SECURITY

Lesson Objectives

In this lesson you will learn how to:

- Manage domains

- Monitor Microsoft 365 security and compliance

TOPIC A: Managing Domains

Microsoft 365 also gives you the ability to add and manage multiple domains. This allows users to manage their entire digital infrastructure from a single Microsoft 365 location.

Topic Objectives

In this session, you will learn:

- What a domain is

- How to view and add domains

- How to add a domain to e-mail accounts

What is a Domain?

The term "**domain**" is specific to a Windows network where all assets (such as user accounts, PCs, and printers) are registered with a central database. The domain may be managed by one central server, or in the case of larger organizations, management may be delegated to sub-servers, called **domain controllers**.

These domains are often given a network name and function as a Domain Name Server (DNS), which also controls website and email functions. More commonly, domains are used for user management while email and web services are outsourced to other servers.

View Current Domains

To view the domains associated with your Microsoft 365 infrastructure, open the Admin Center. Then, click **Settings → Domains**:
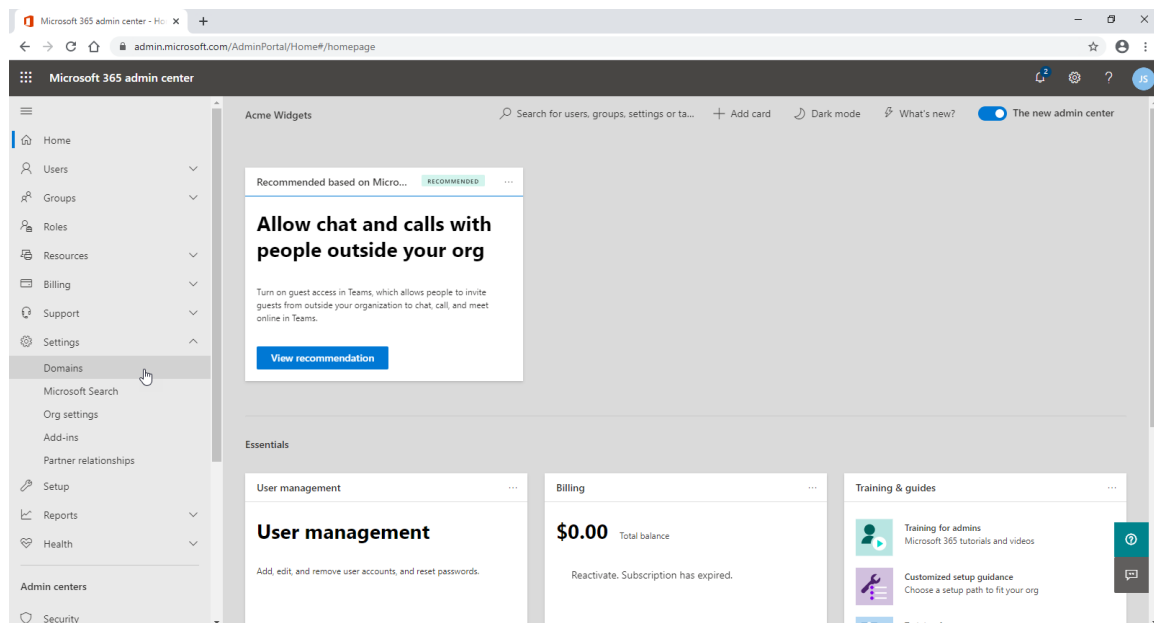
You will now see the domains associated with your organization's Microsoft 365 infrastructure:
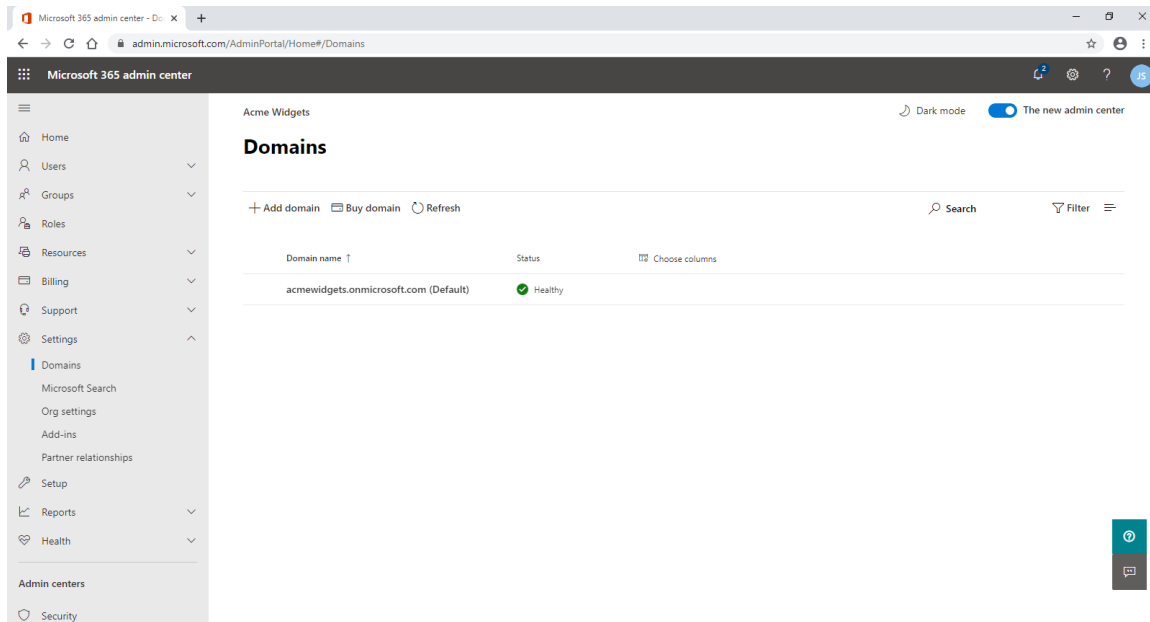
Add a Domain

To add a new domain to your Microsoft 365 organization, click **Add domain** at the top of the Domains page:
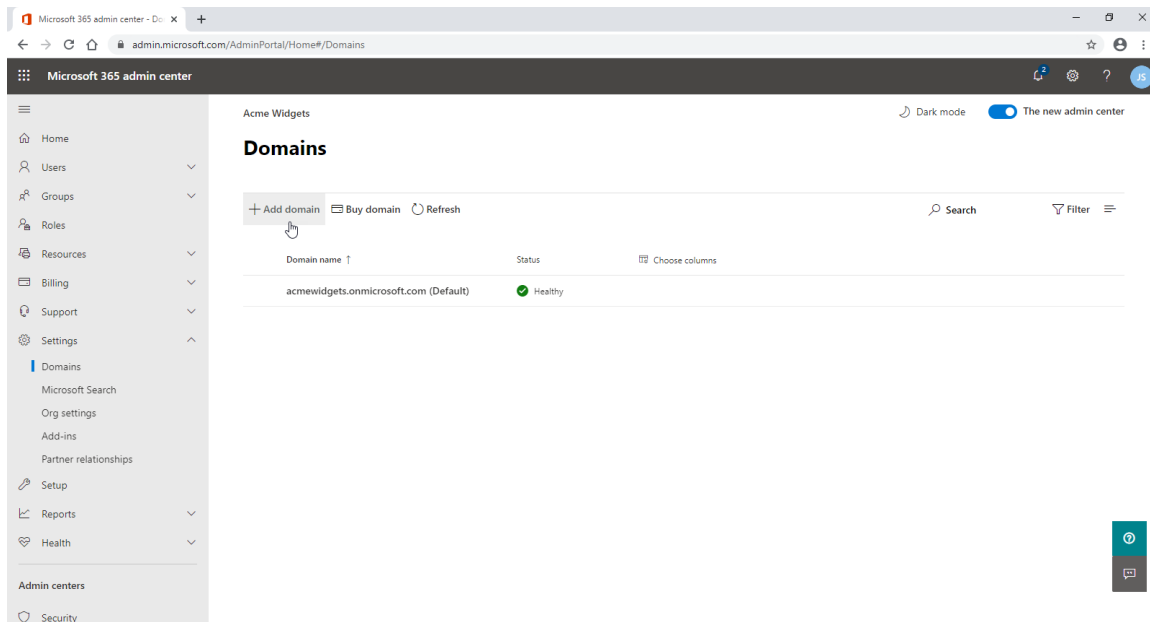
Using the provided wizard, you can now enter the details of the domain your organization owns:
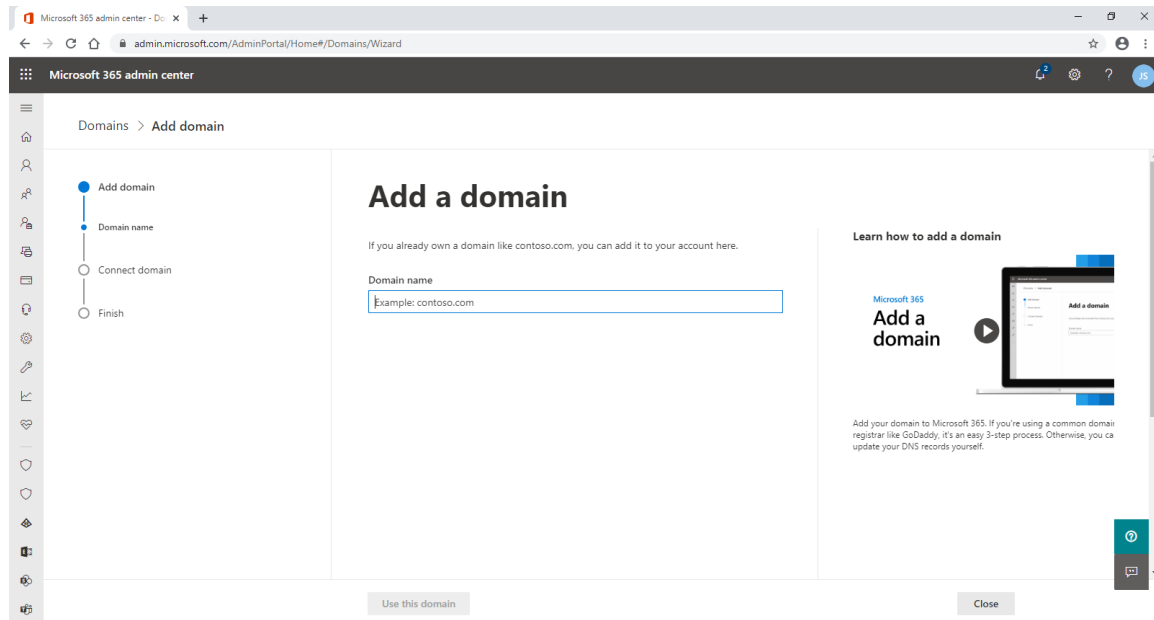
If you need to purchase a domain, note that you can do so from the Domains window:
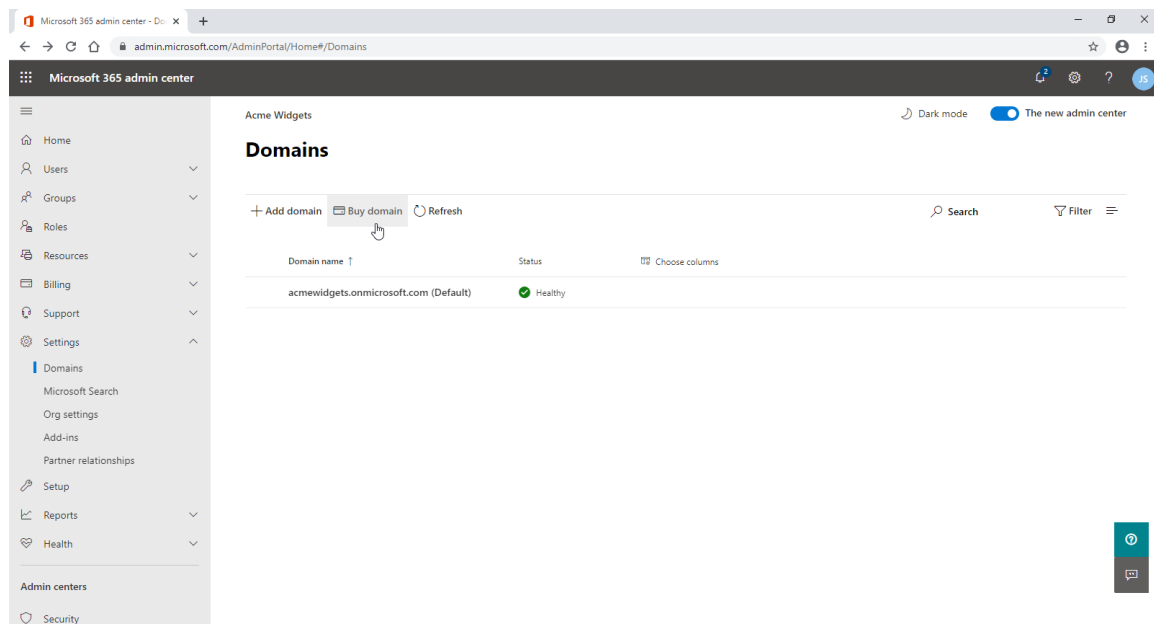
Add a Domain to Email Accounts

Once you have set up your domain, you can add its users to Microsoft 365. To start, from the home page, click **Setup**:
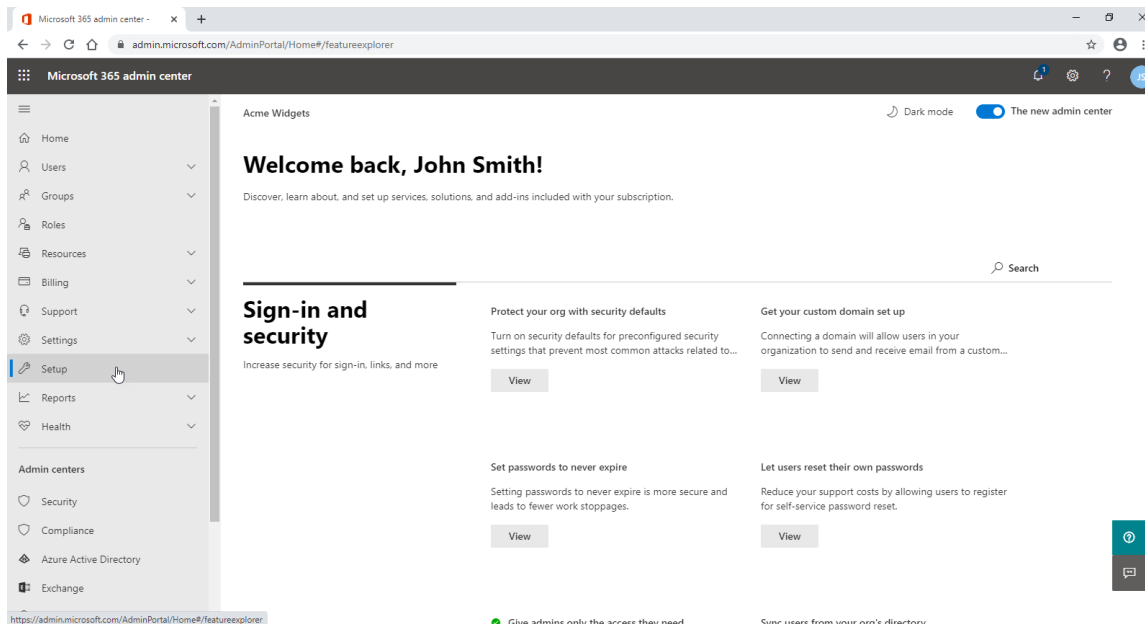
Scroll down to **Data Migration**, then click the **View** link under the **Migrate your users' data** category:
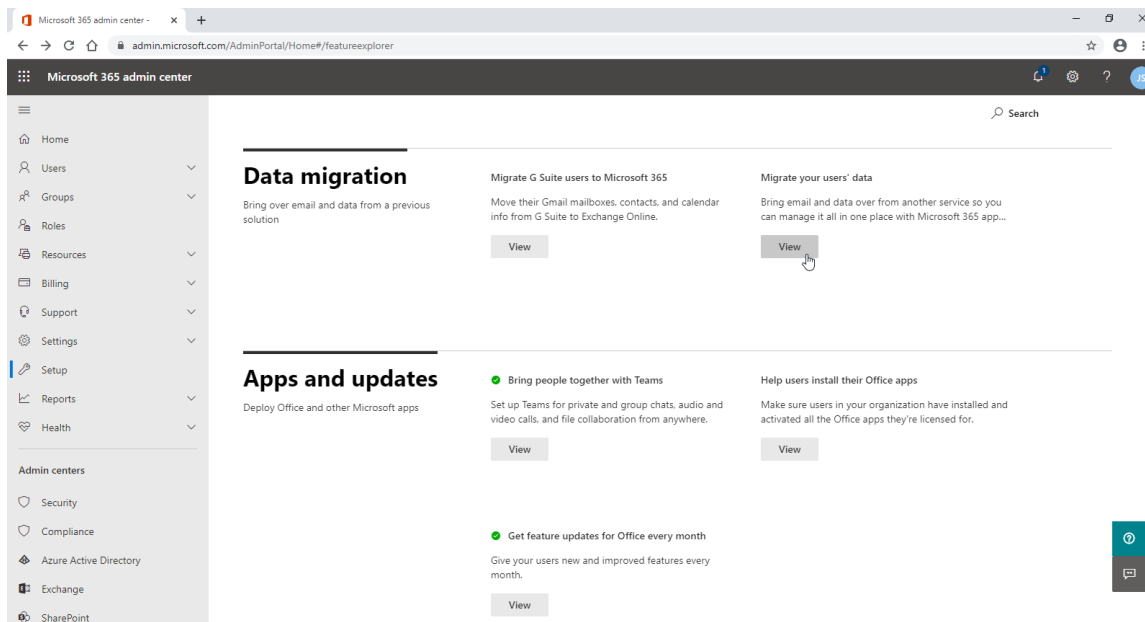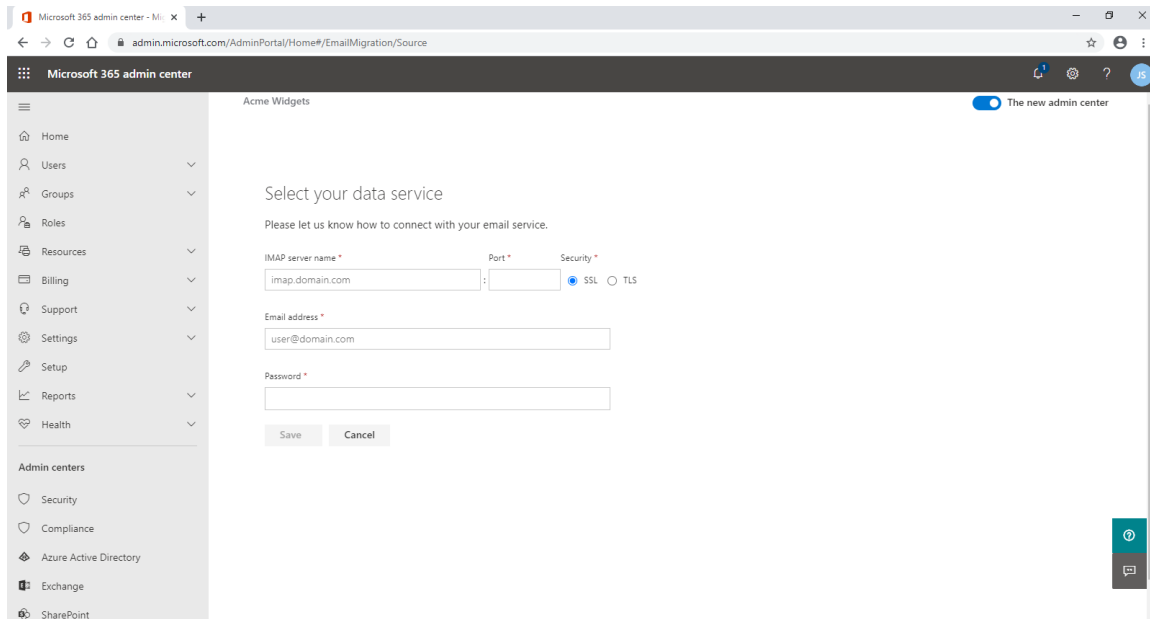
In the new window, click **View migrations**:
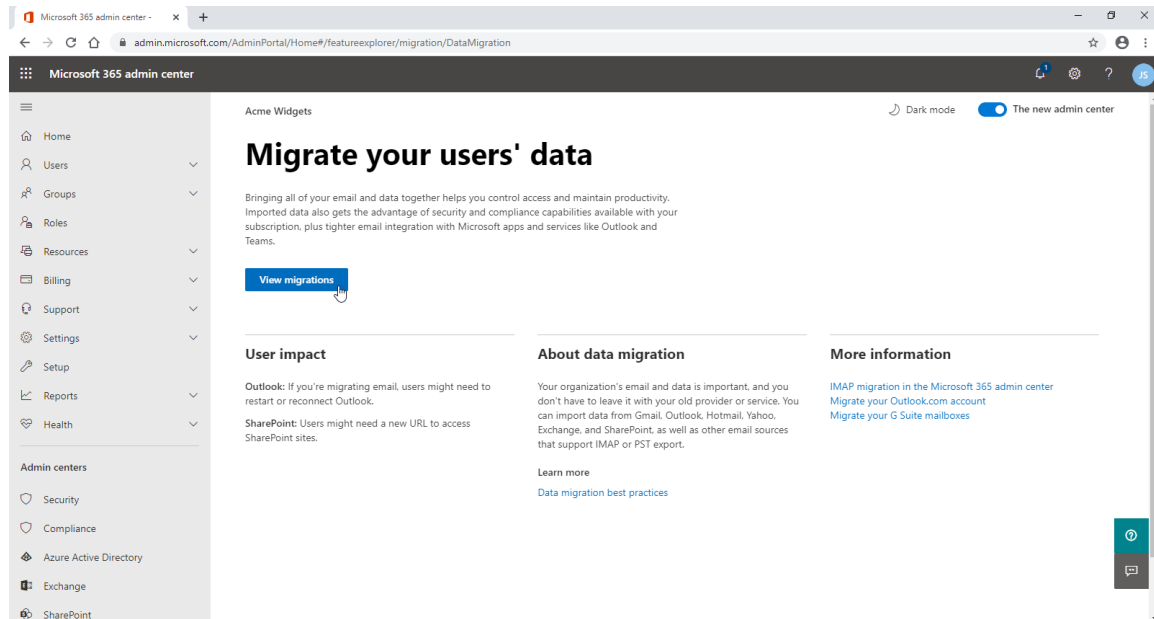
Then, in the new window, click **Other email sources**:
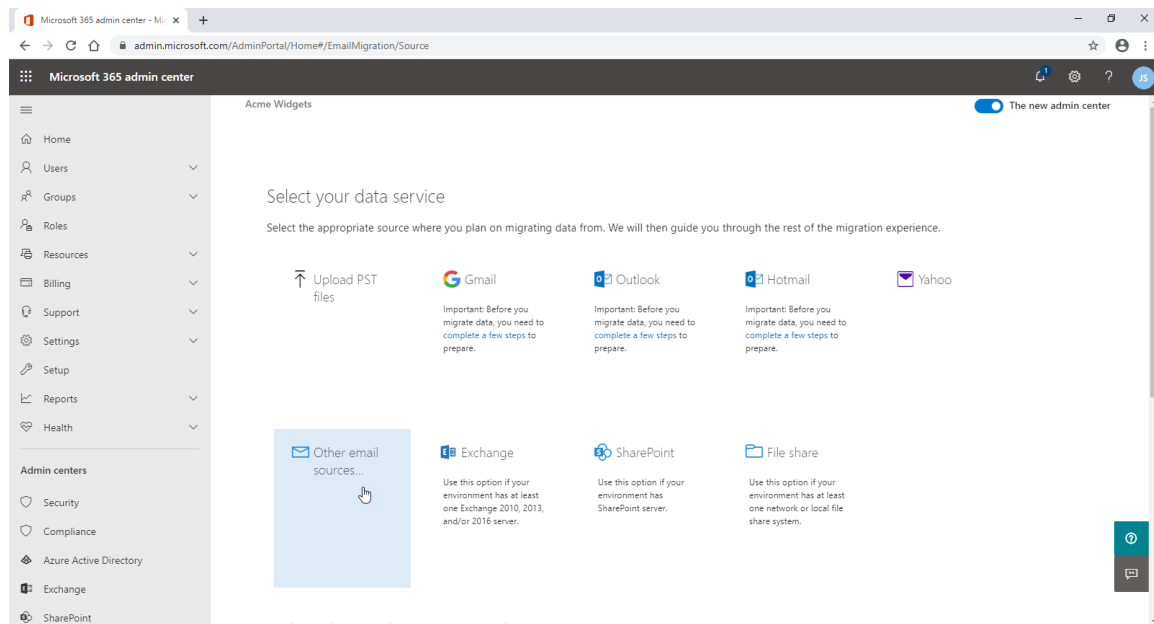
In the resulting window, you can enter the details of the email service to migrate:

When you have completed entering the details, click **Save** to complete the process.

Activity 5-1: Managing Domains

In this activity, you will review the domains linked to your organization's Microsoft 365 infrastructure.

1.   Open a browser and log into your Microsoft 365 site.

2.   Click the **Admin** tile on your landing page:
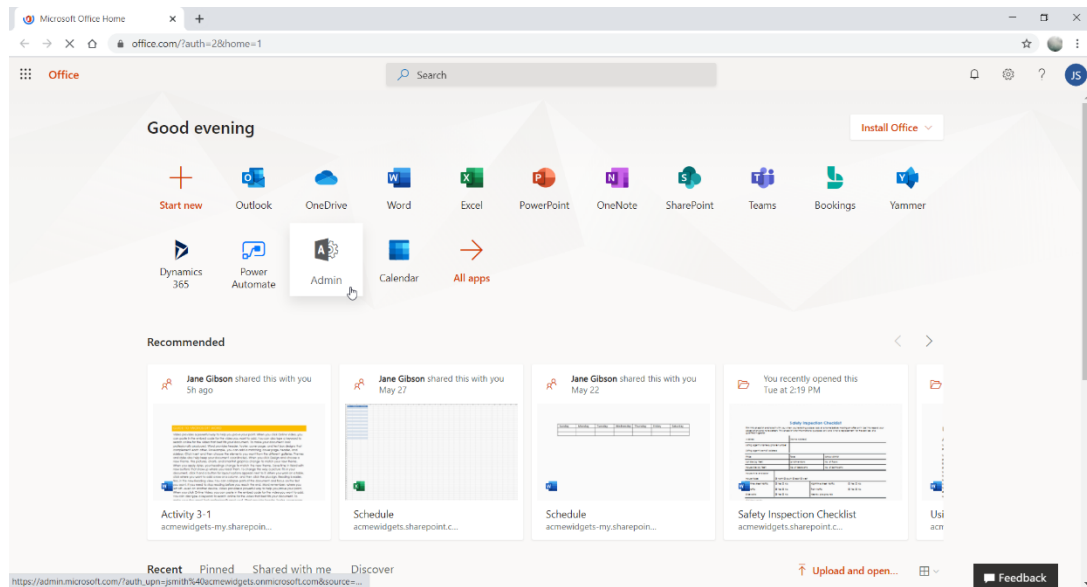
3.   The Admin center homepage will be opened in a new tab. Click **Settings →
      Domains**:
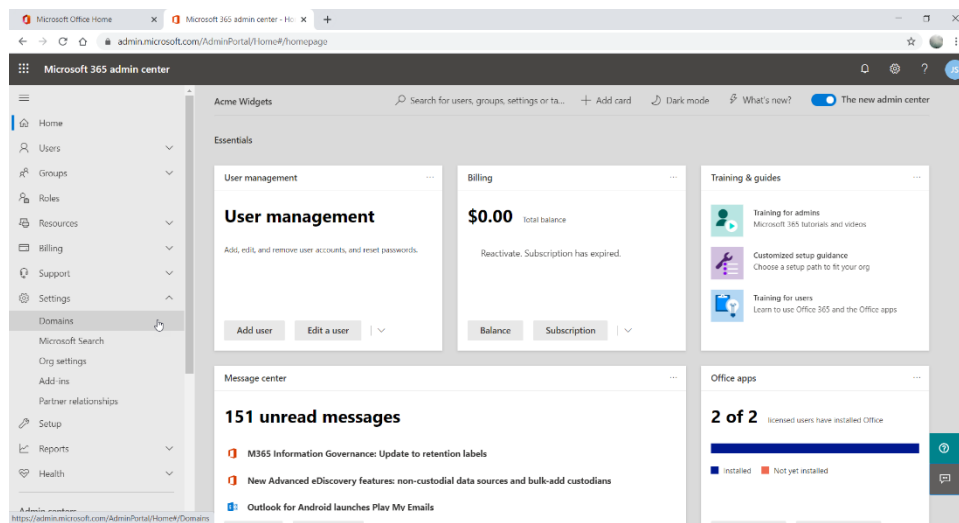
4.   Review the domains associated with your organization:
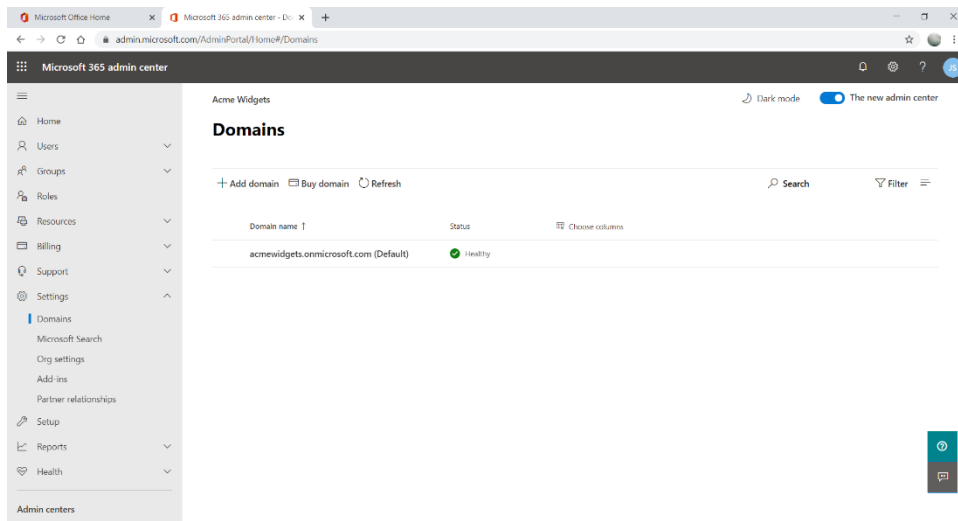
5.   Click **Setup** in the Navigation pane:
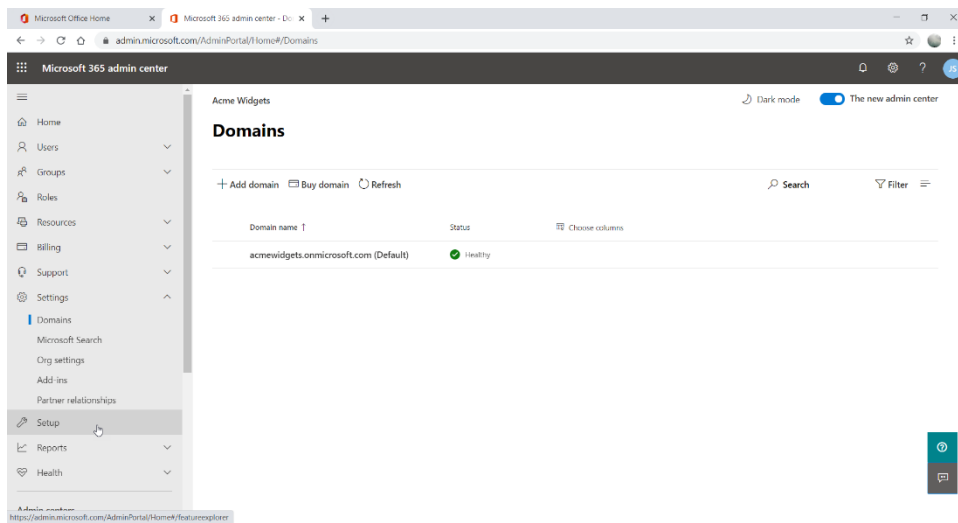
6. Scroll down to the Data migration menu. Click the **View** link under the **Migrate your users' data** sub-menu:
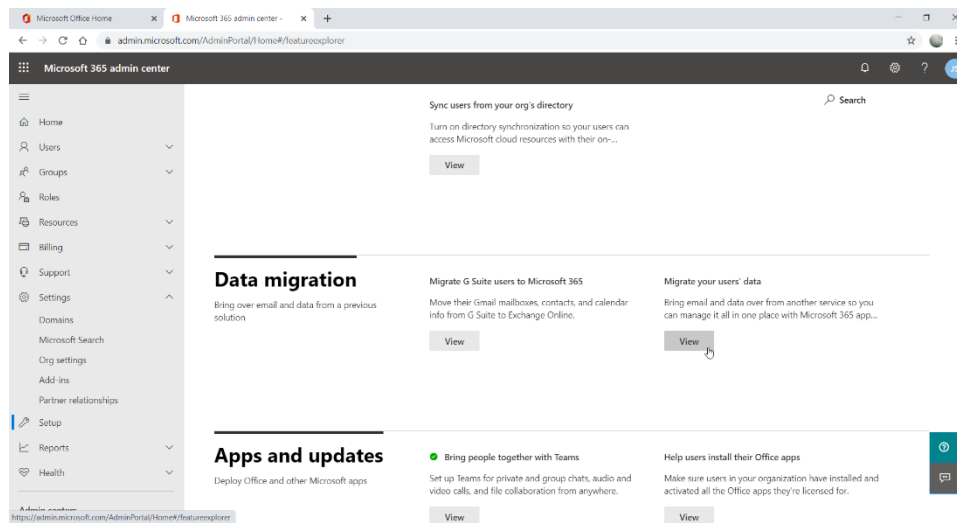
7. Click **View migrations** to continue:
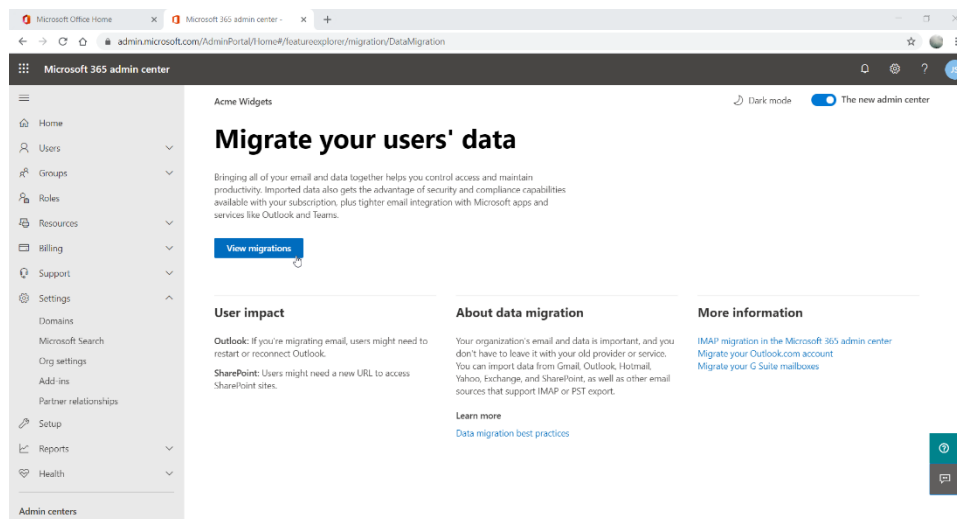
8. Review the migration options:
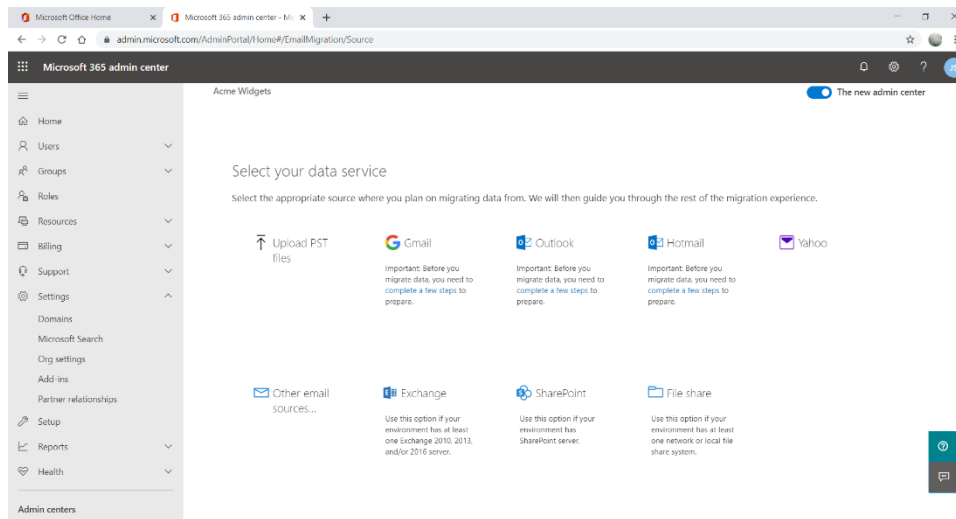
9. Click the **Home** category and leave your browser open for the next activity:
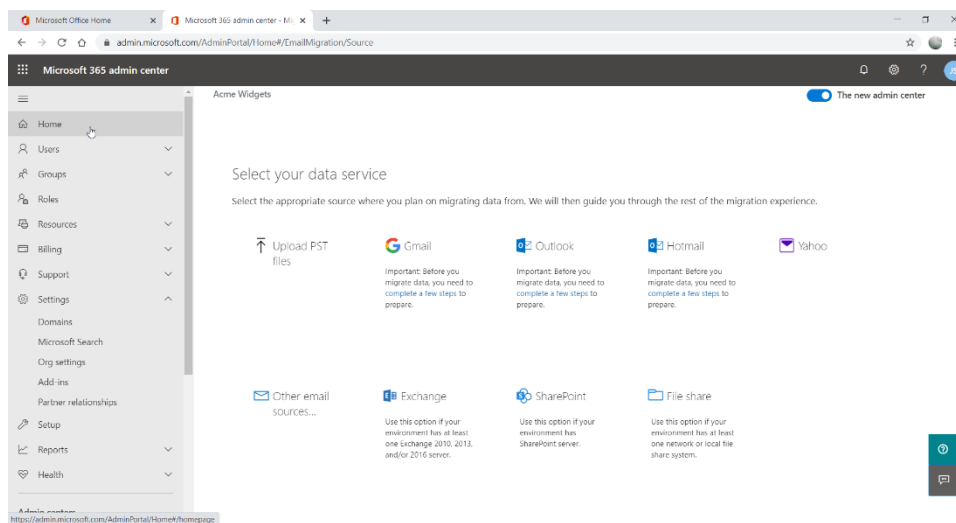
TOPIC B: Security and Compliance

Keeping your organization's Microsoft 365 data secure will be a key part of your role as an administrator. The Security & Compliance Center provides a central location to review and manage security options, as well as set policies to ensure compliance and prevent data loss.

Topic Objectives

In this session, you will learn how to:

- Open and navigate the Security & Compliance Center

- Create and manage alerts

- Manage user permissions

- Create data loss prevention policies

Navigate the Security & Compliance Center

From the Navigation pane, click **Security** under the Admin centers menu:
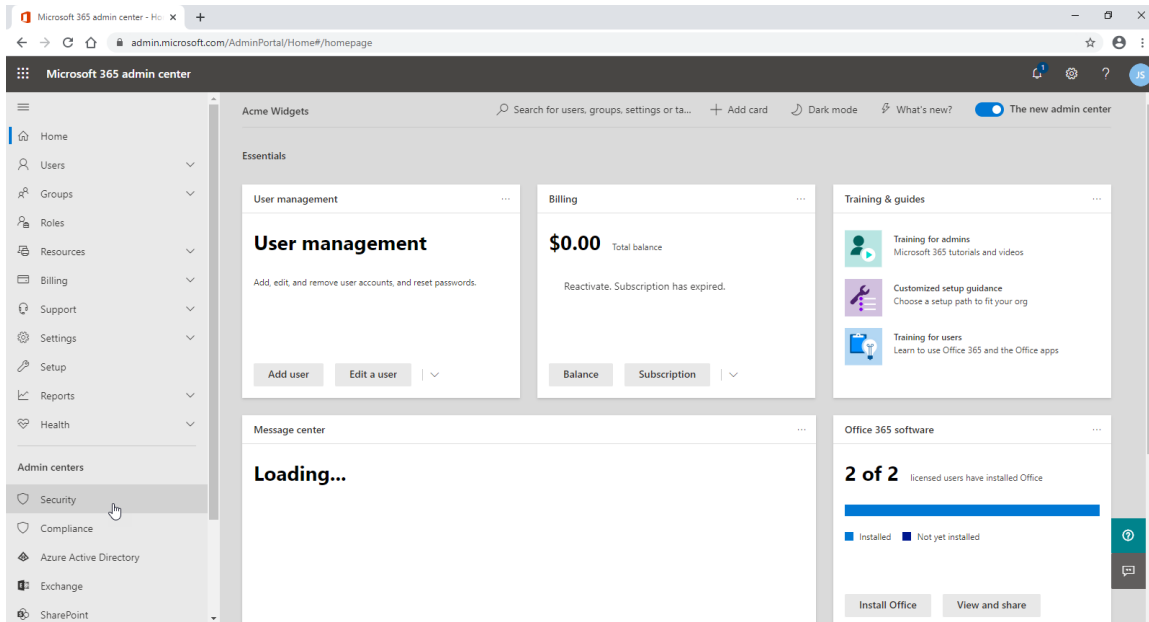
The Security and Compliance Center will open in a new tab:
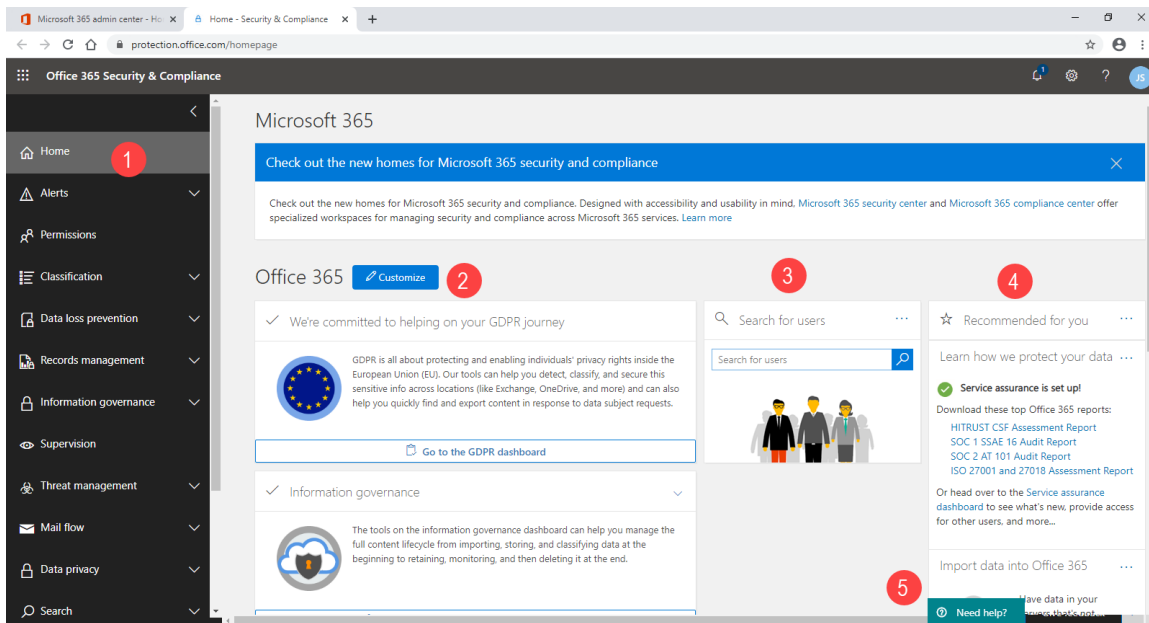
You can navigate through the Security & Compliance Center by clicking the categories and sub-categories in the **navigation pane (1)** on the left side. The **main part of the window (2)** displays the contents of the currently selected sub-category. The right side of the window

provides a **search field (3)** and the **recommendations** (4) that might be useful to you. Below is the **Need help (5)** link.

Create Alerts

Alerts will automatically notify you of security issues or changes. To create an alert, click **Alerts → Alert policies** in the navigation pane:
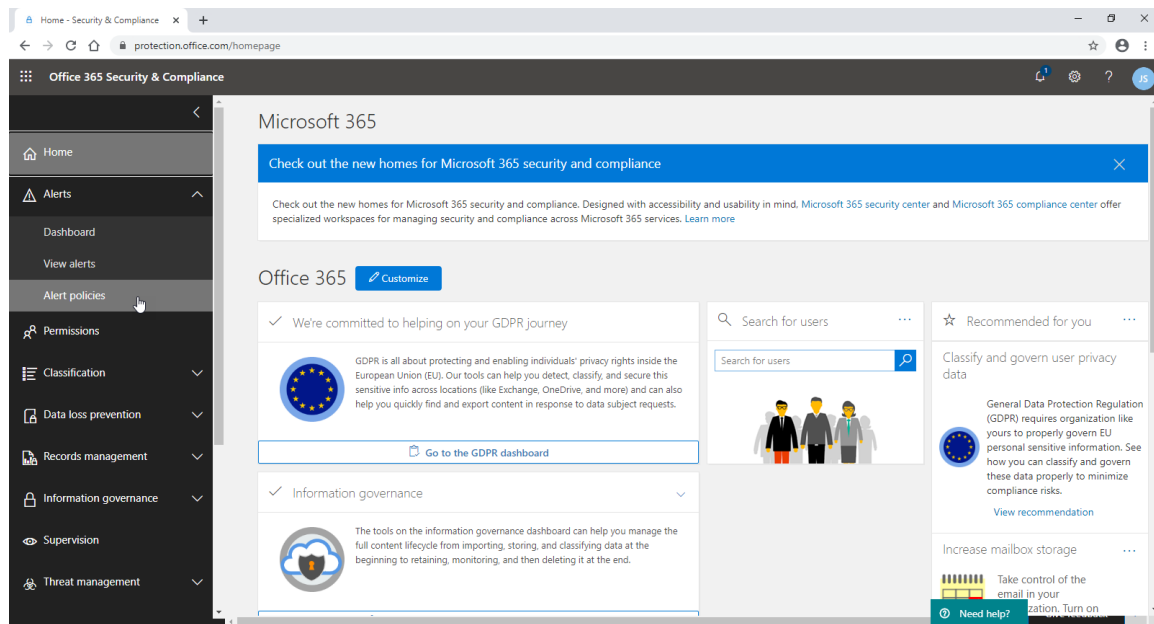
Now, click **New alert policy**:
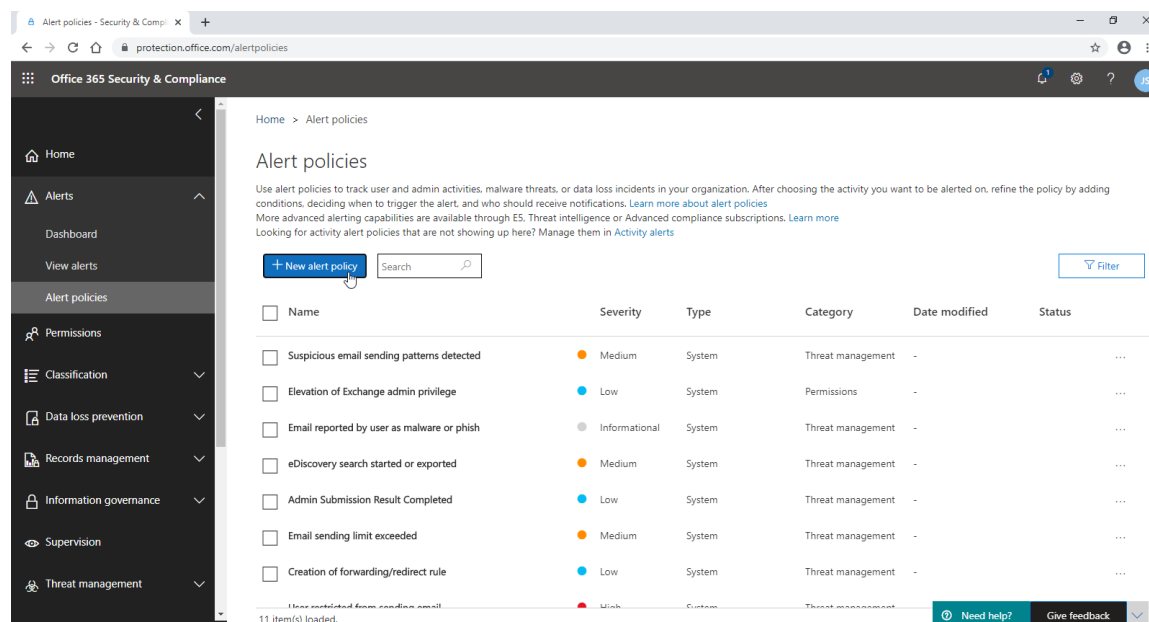
The New Alert Policy window will open. At the top, enter the name and description of the alert. Then, click the drop-down boxes to choose the Severity (the importance of the alert) and the Category. Click **Next** to continue:
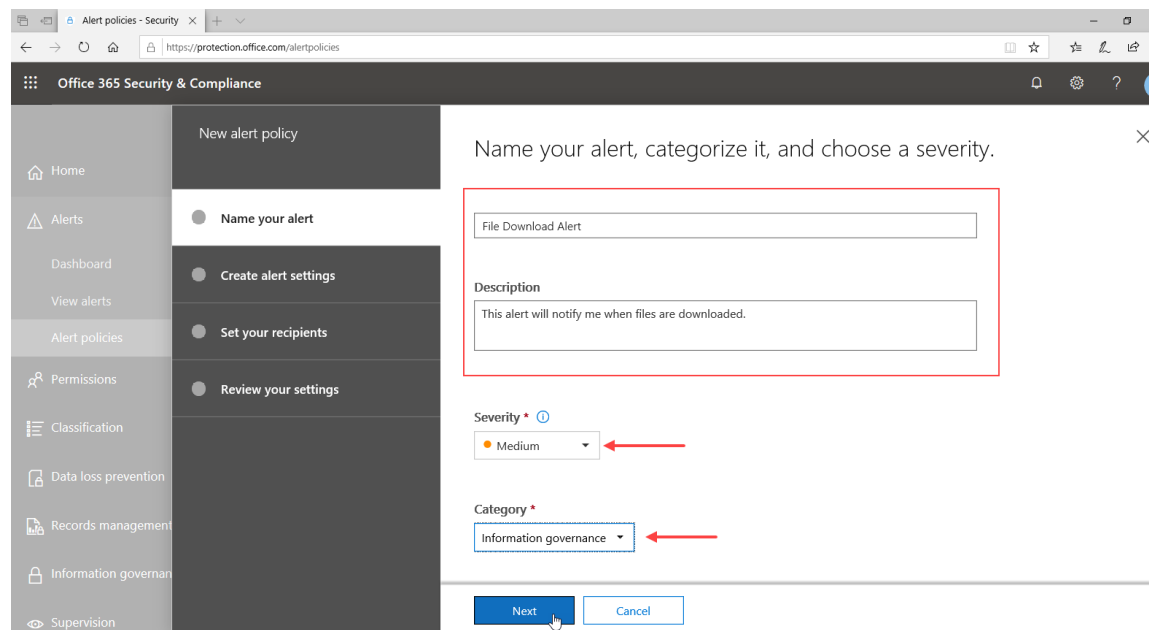
Choose the **activity** from the Activity drop-down box that will trigger this alert:
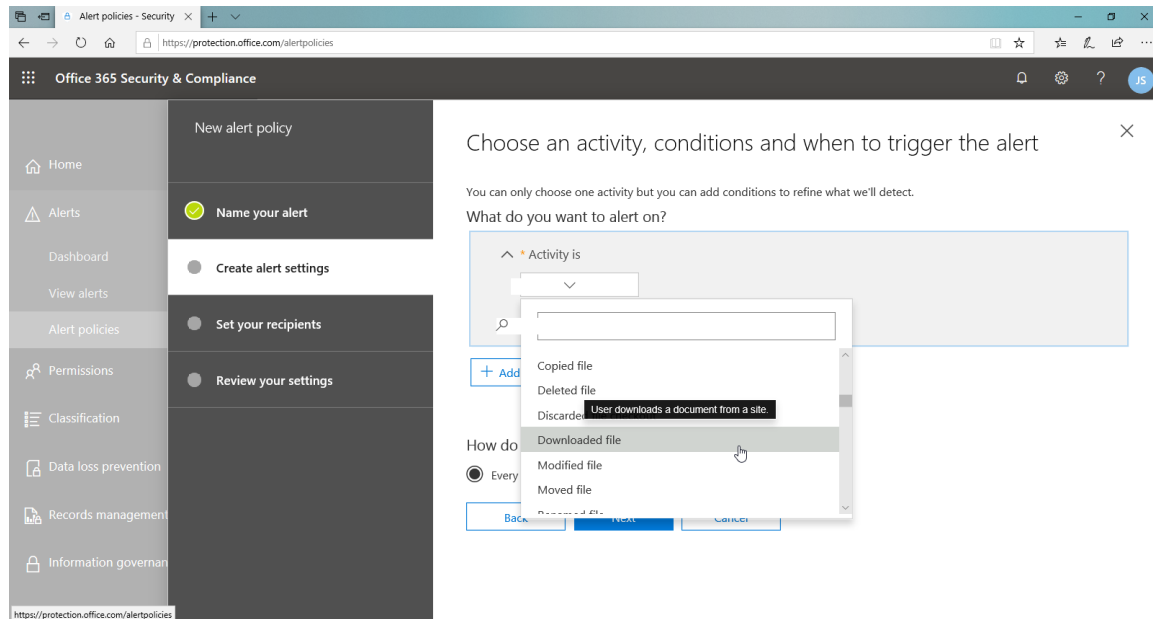
Once you have selected the desired activity, click the arrow next to the **Choose activities to alert** section header to close it. Next, **add any conditions** you wish to use. Here we have selected the **User** field:
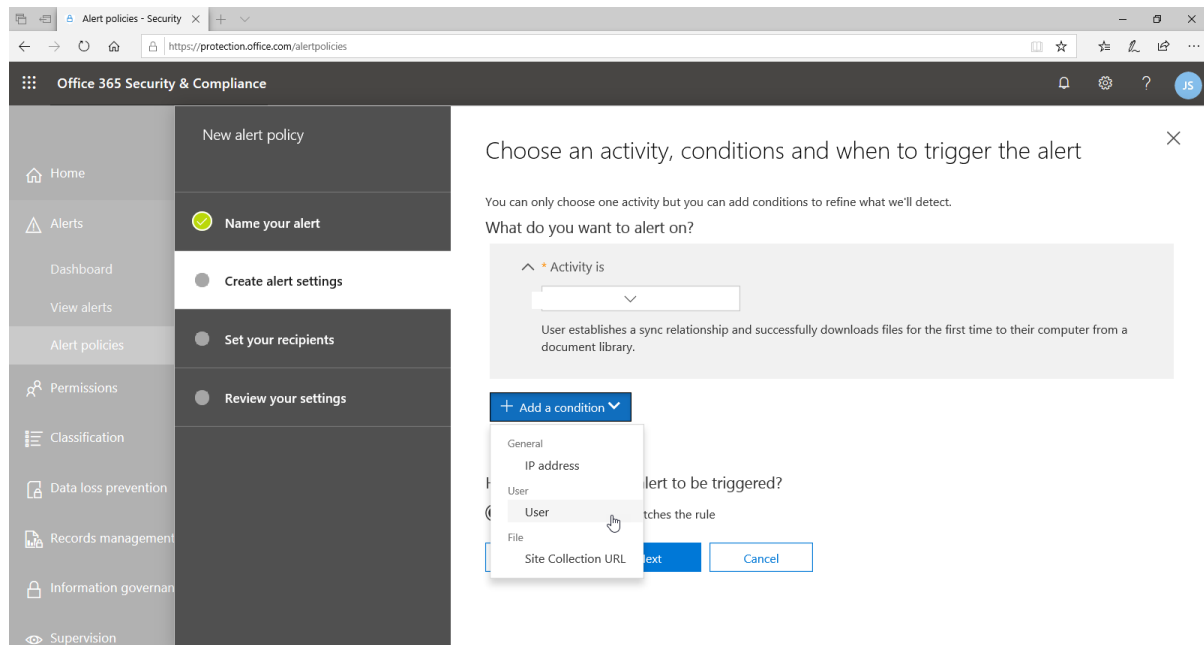
Next, choose which user this will alert:

(Or you can leave this field blank to have the alert triggered when any user performs the selected action[s].) Click **Next** to continue:

Select the recipients and set the daily limit. Then, click **Next** to continue:

Review your settings and click **Finish** to complete:

You can see the newly added alert and its active status in the homepage:
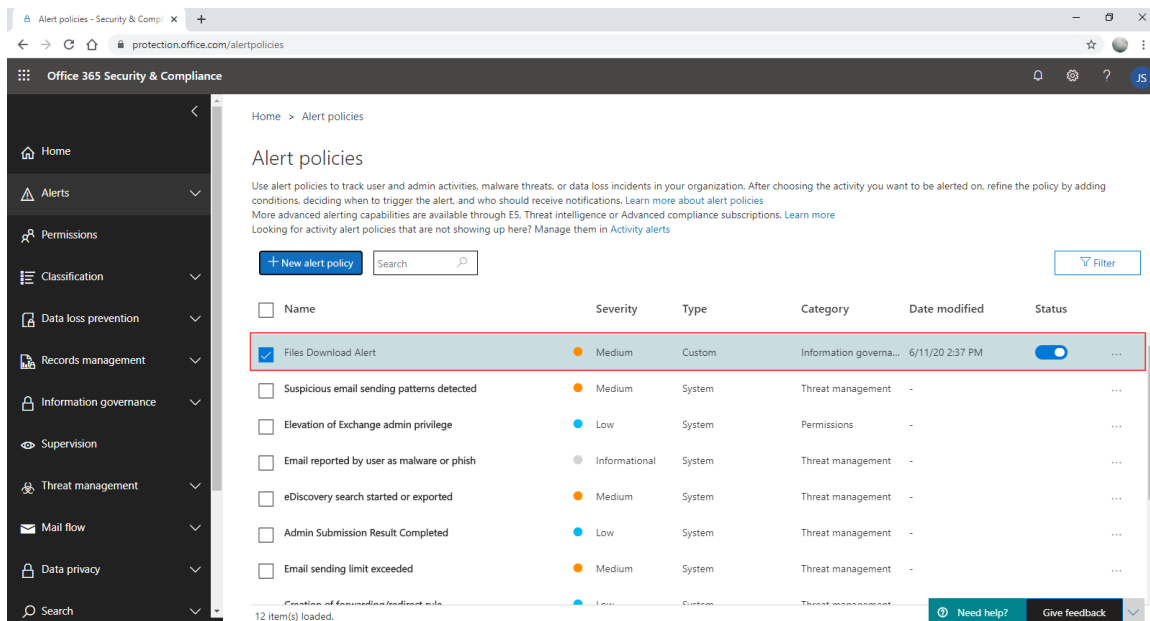
Manage Alerts

To change an alert's settings, click the **ellipsis** (⋯) and select **Edit**:
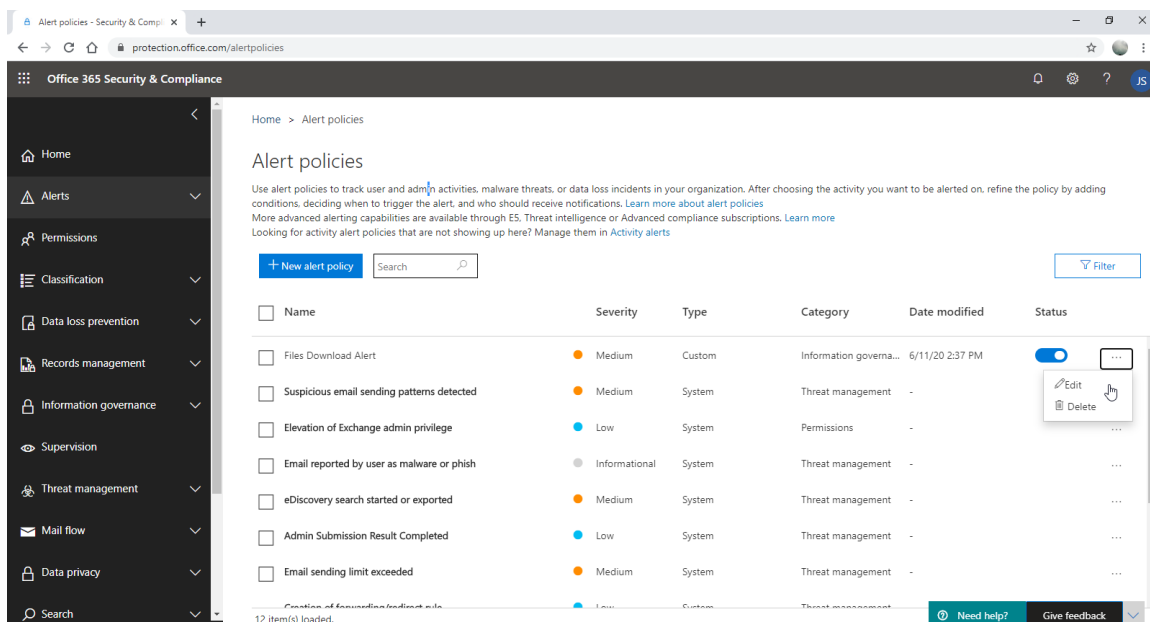
This will open the Edit Alert pop-up window, where you can make the necessary changes.
You can toggle it On/Off to activate/deactivate the alert, change the description, and more.

You can also go through different menus in the navigation column to the left for more options. Click **Save** to close the window:
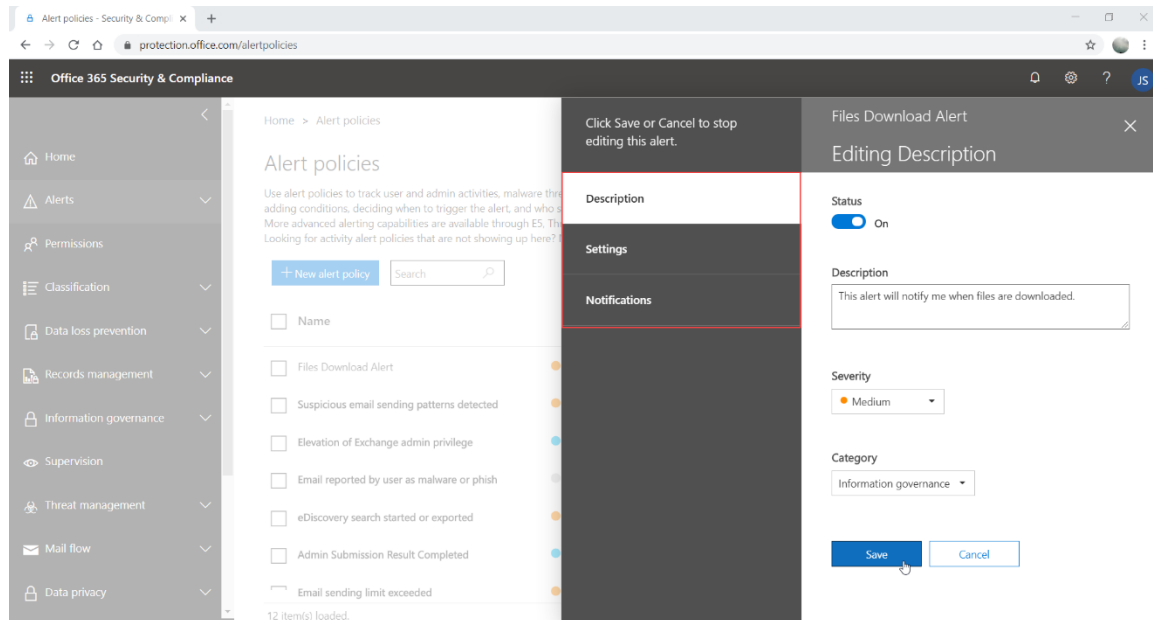
Manage User Permissions for the Security & Compliance Center

You can set specific permissions for the Security & Compliance Center. This is useful if you want to restrict access to it or assign a specific administrator.

To view these permissions, click the **Permissions** category in the navigation pane:
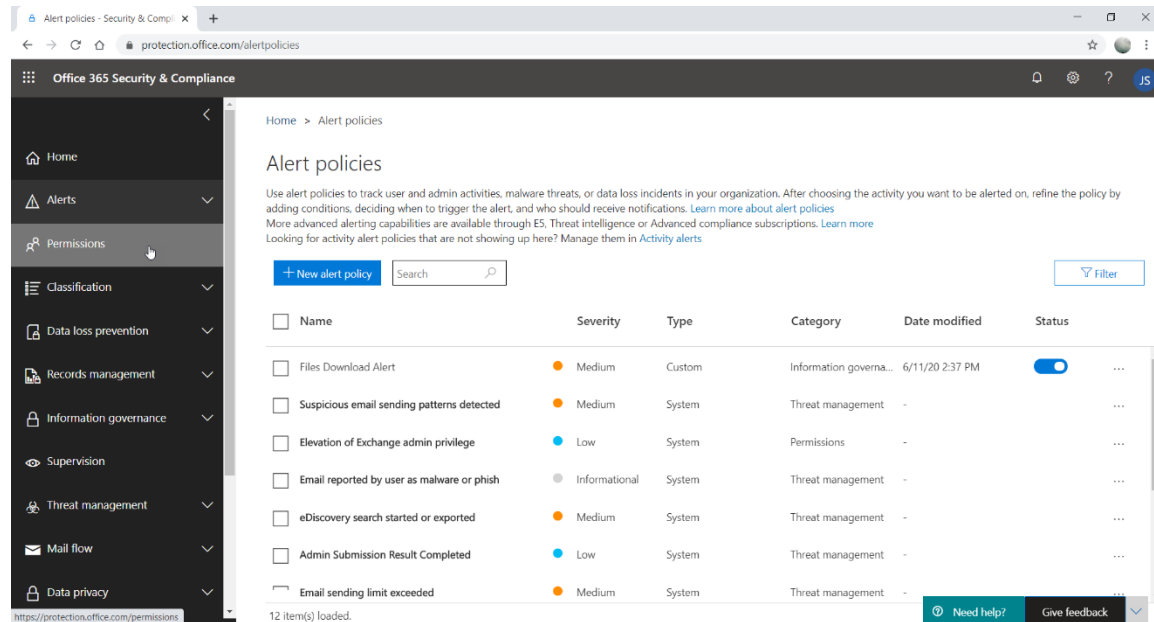
The Permissions page will be displayed:
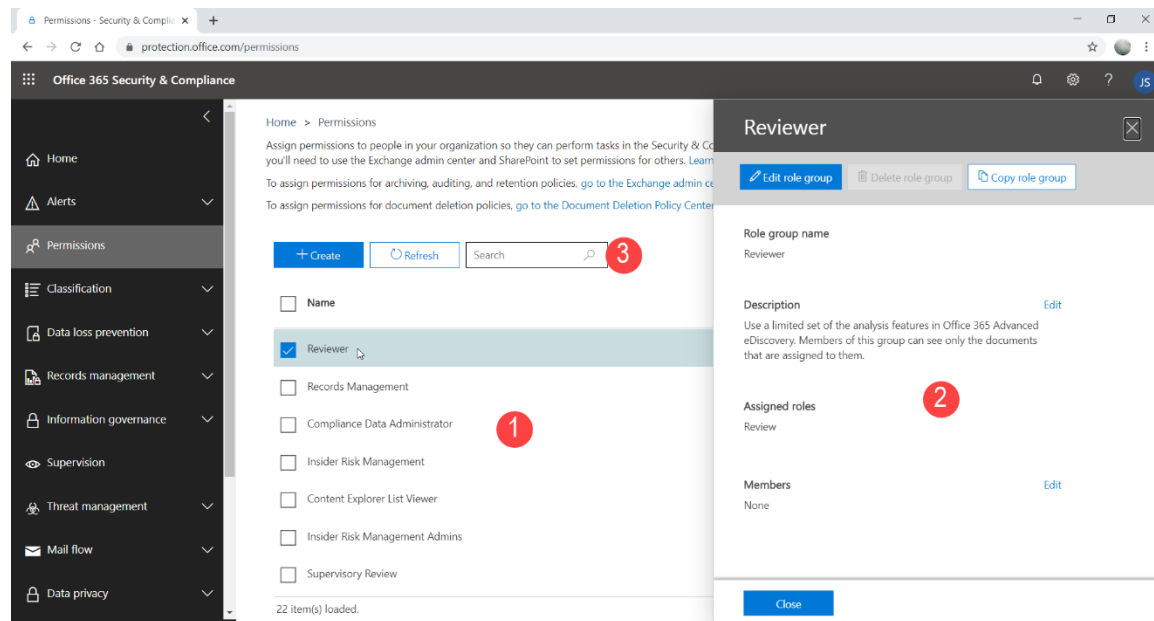
Here, you can click a **user role (1)** from the list on the left to view its **details (2)** on the right. The **icons (3)** at the top of the user role list allow you to create, refresh the list, and search for user roles.

Manage Data Loss Prevention Policies

To view your organization's data loss prevention policies from the Security & Compliance Center, click **Data loss prevention → Policy** from the navigation pane:
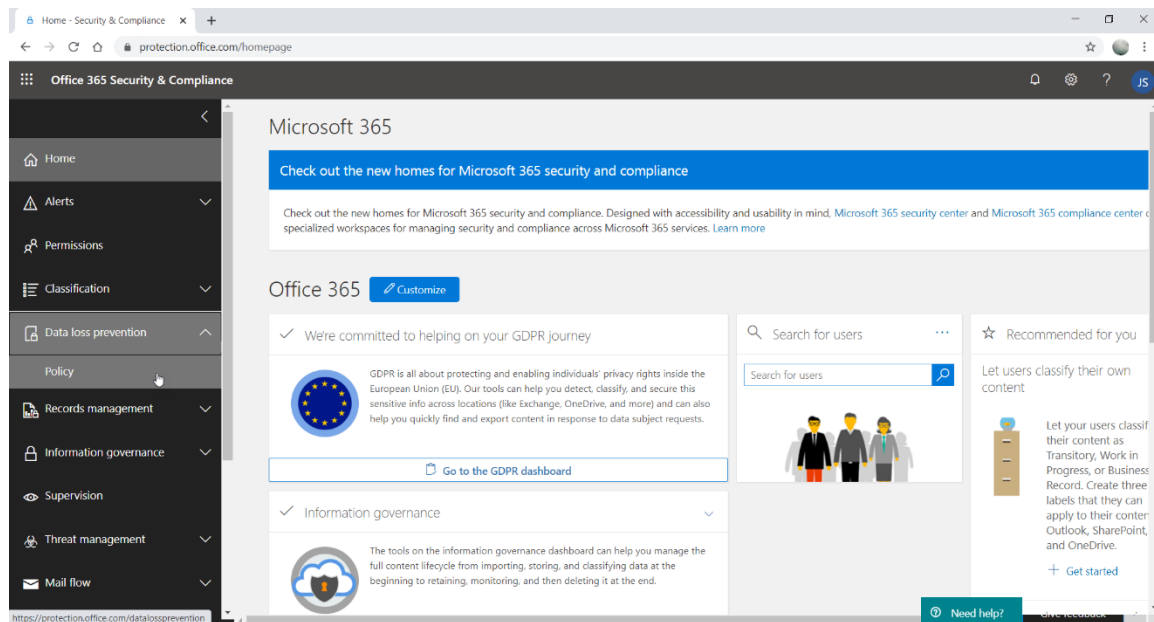
The Data Loss Prevention window will open:
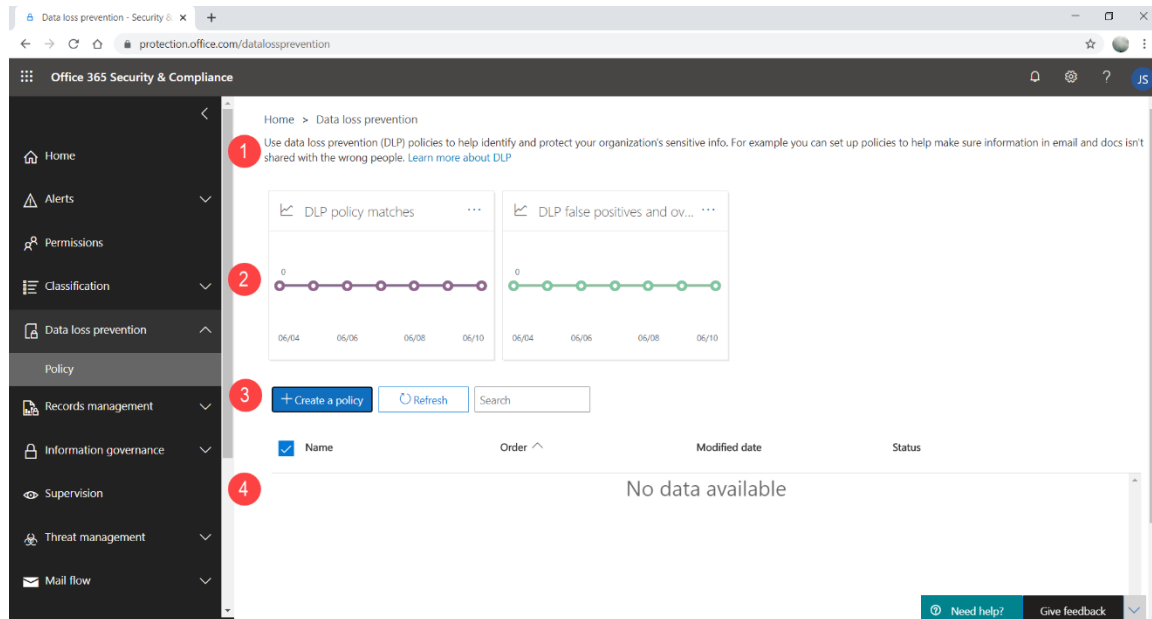
At the top of the window, you will see a **description (1)** of data loss prevention and how its policies can benefit your organization. Below this information you will see two **graphs (2)** tracking policy matches and false positives. Next, you will see **commands (3)** to create a policy, refresh the list, and search policies. Finally, you will see a **list of policies (4)**.

Activity 5-2: Managing Security and Compliance

In this activity, you will explore the Security & Compliance Center.

1. Ensure you have completed Activity 5-1. Your browser should be open to your Microsoft Admin Center home page:
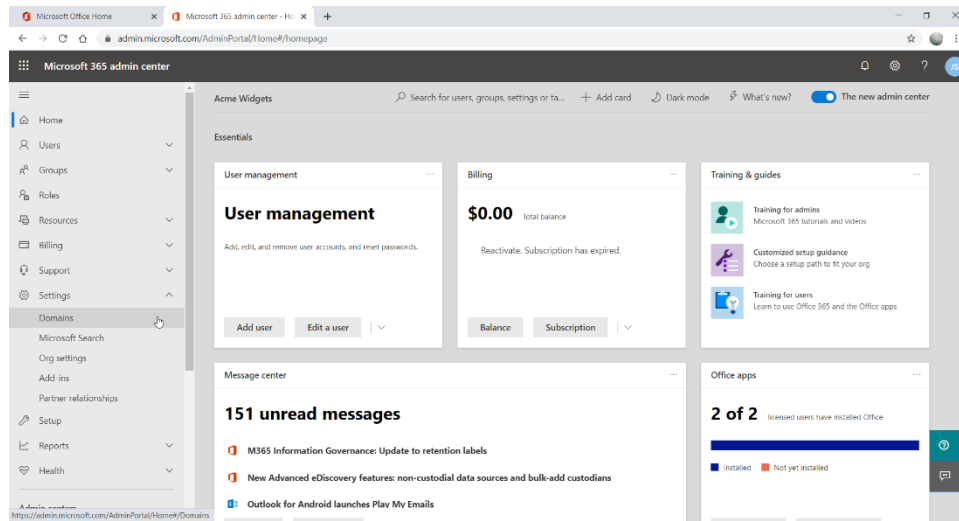
2. Scroll down the Navigation pane and click **Security** under the Admin centers menu:
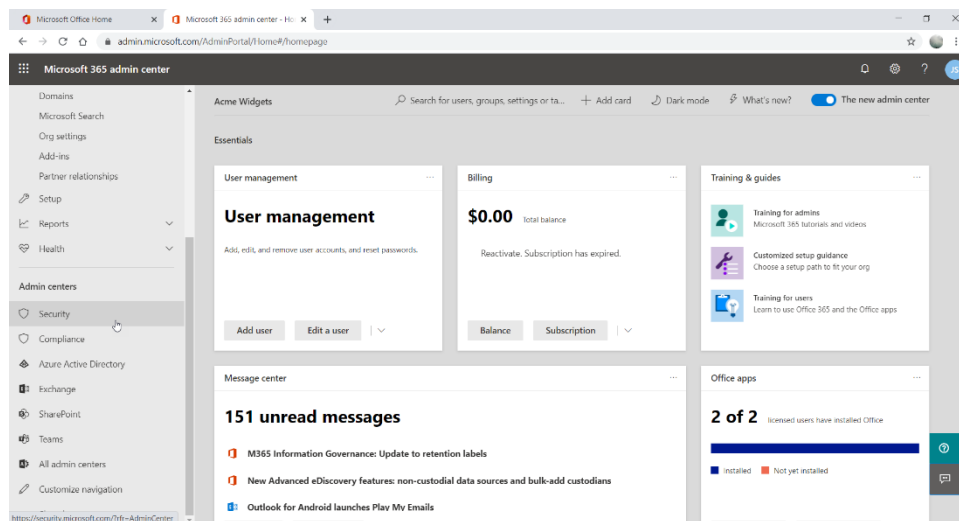
3. The Security & Compliance homepage will open in a new tab. Review the information on the home page:
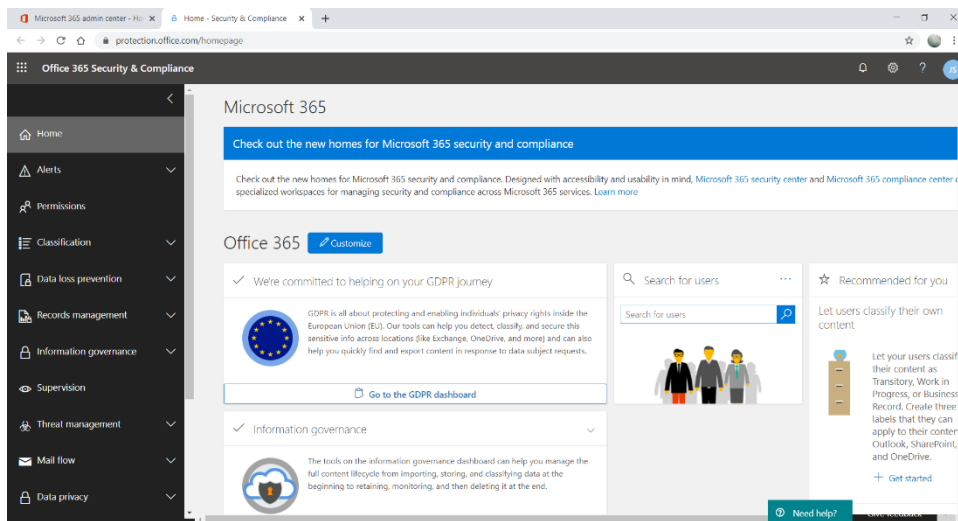
4. Click the **Permissions** category:
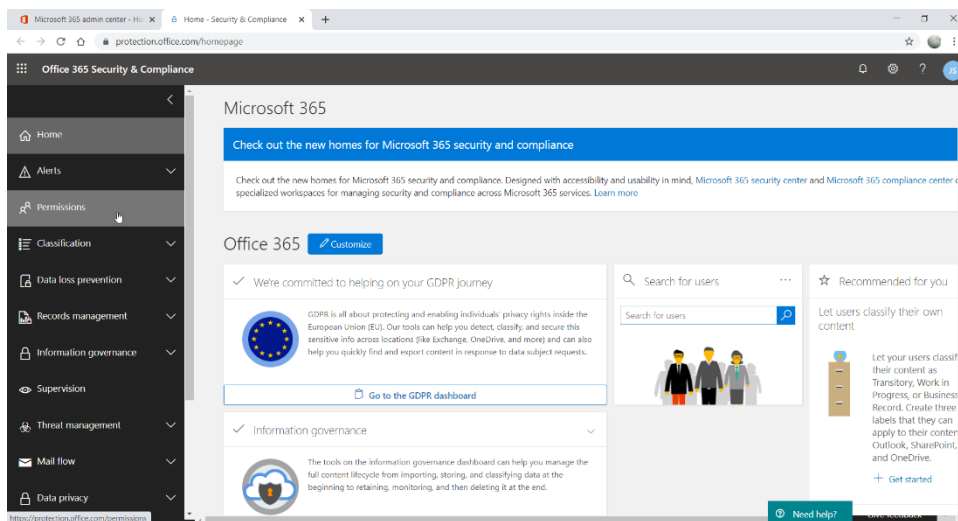
5.   Review the currently configured user roles:
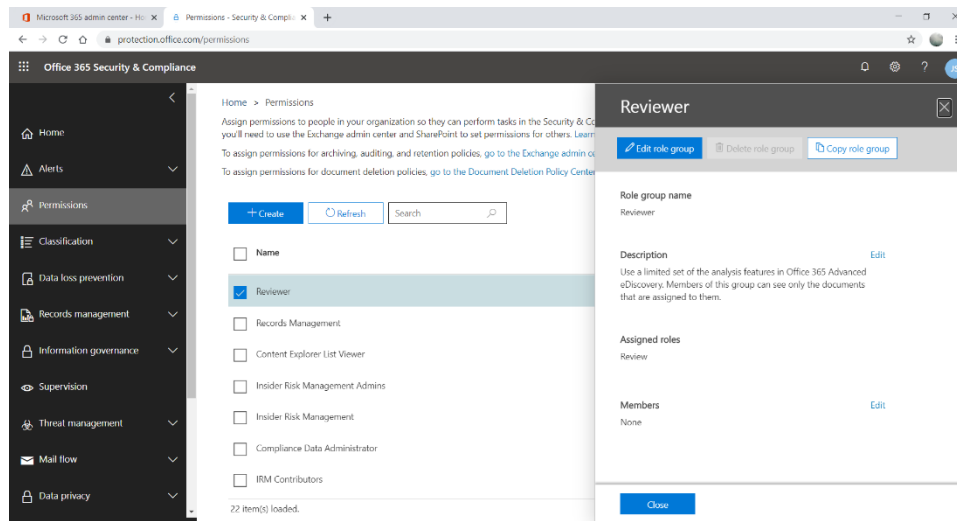
6.   Click **Data loss prevention → Policy**:
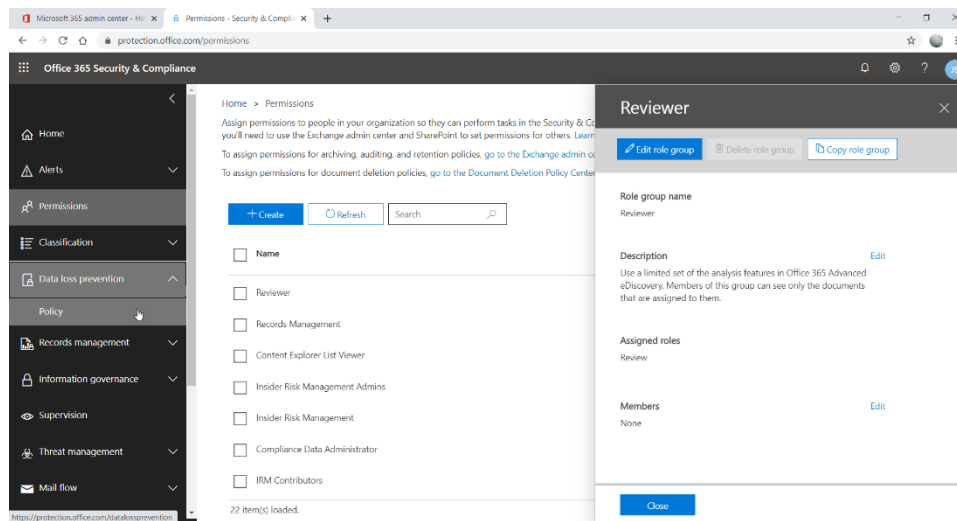
7. Review the information in this category:
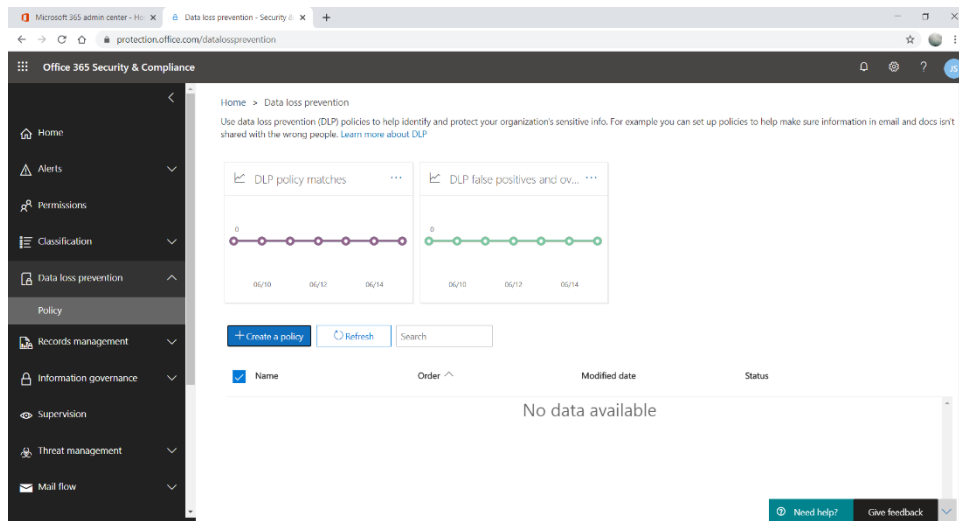
8. Finally, click **Alerts → Alert policies**:
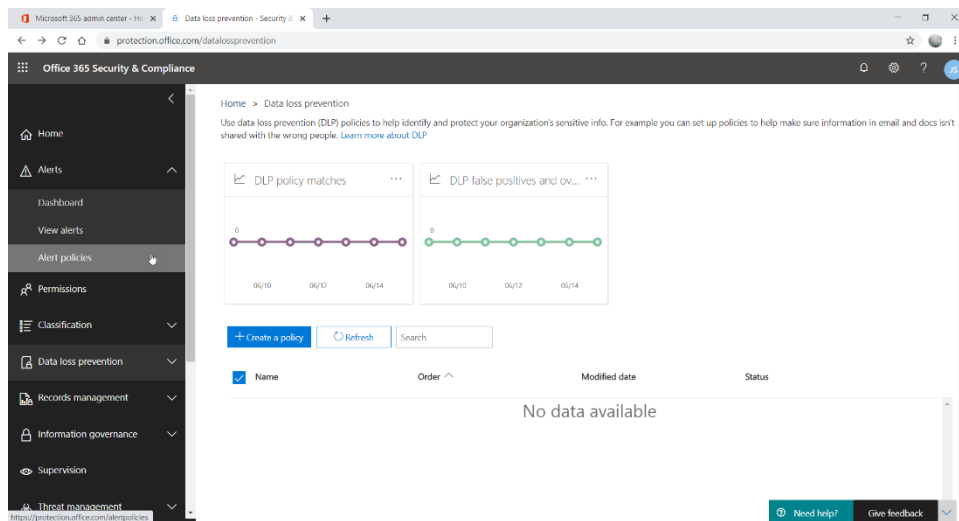
9.   Click **New alert policy**:
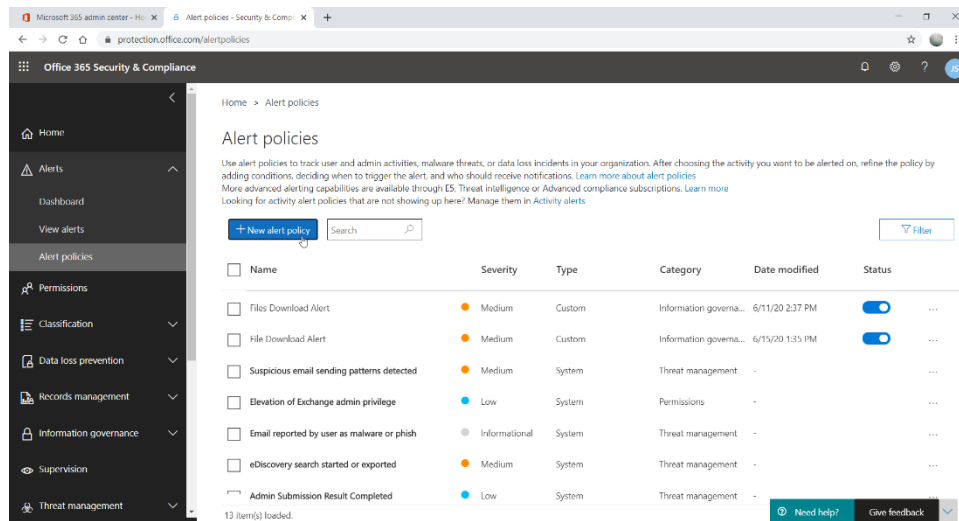
10.   The New Alert Policy window will open. For the Name, type "**Activity 5-2**." For the
            Description, type, "**This is a sample alert for Activity 5-2**." Select **Low** for the
            Severity setting and **Others** for the Category setting. Then, click **Next** to continue:

11. Select **Deleted file** in the Activity fieled:
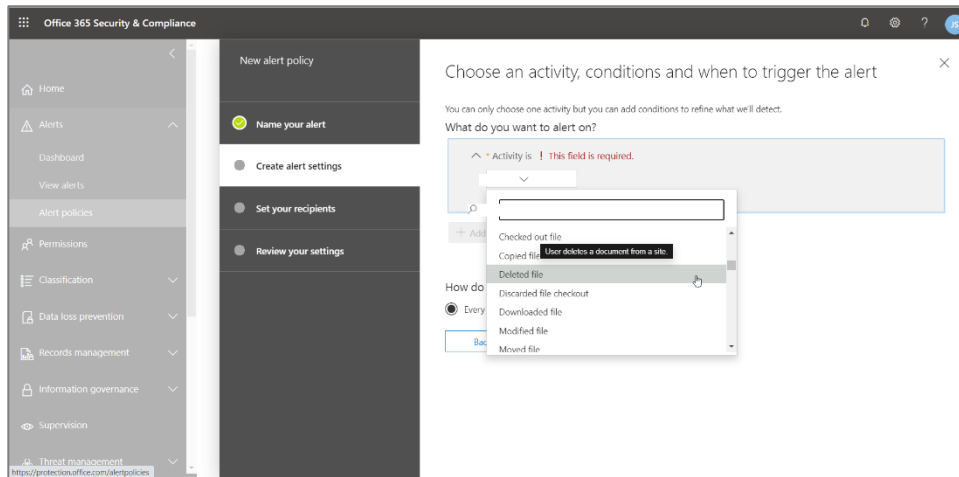
12. Click **Next** to continue:
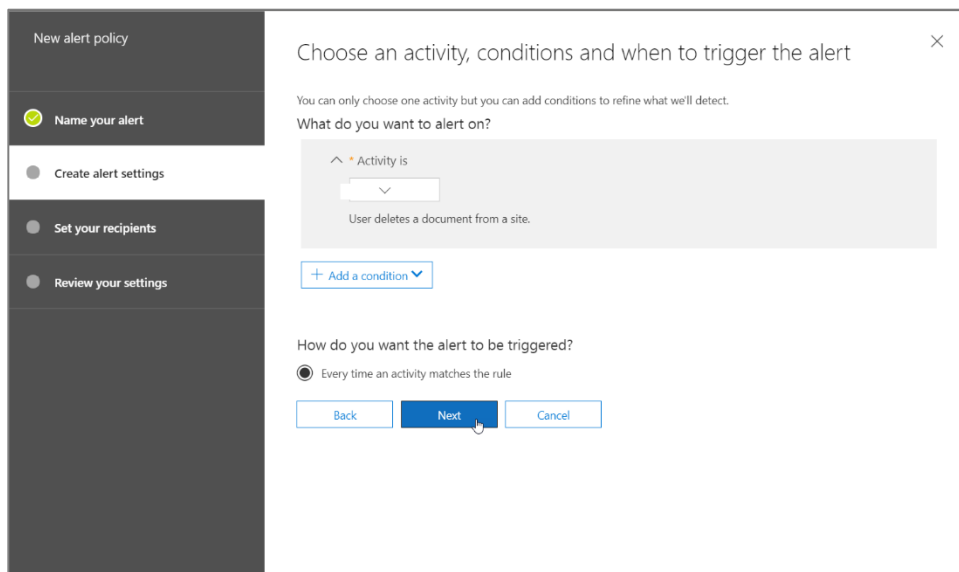
13. Keep the Email recipients field set to the default. Then, click **Next** to continue:

14. Review the settings and click **Finish** to complete the process:

15.   You will now see the alert in the Alerts window:
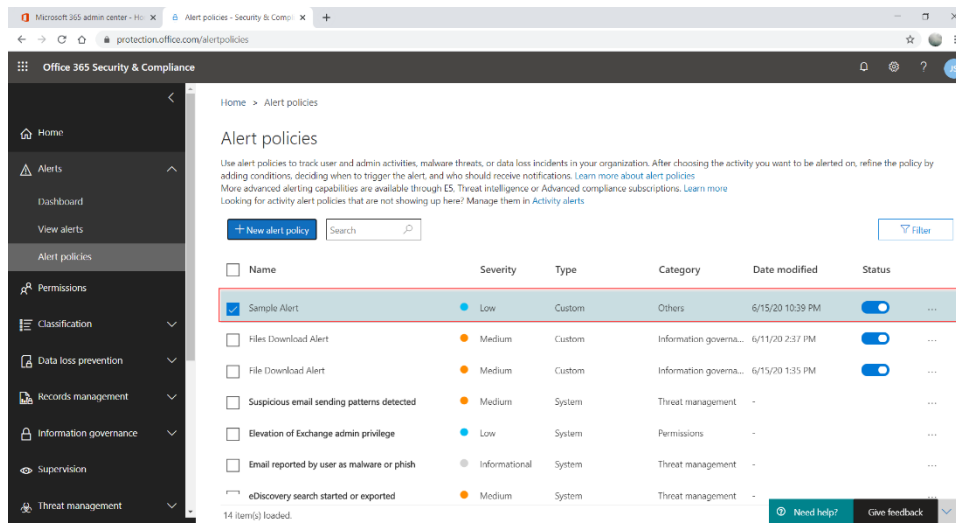
16.   Log out of your Microsoft 365 account to complete this activity.

Summary

This lesson introduced you to Microsoft 365 features that allow administrators to manage security, compliance, and domain settings. You learned about the Domains category in the Admin Center as well as the Security & Compliance Center.

Review Questions

1. **What is a domain?**

2. **How do you open the Security & Compliance Center?**

3. **When creating an alert, how do you set the alert to be triggered when any user performs the selected action(s)?**

4. **True or False: User permissions for the Security & Compliance Center are inherited from the Admin Center and cannot be modified.**

5. **How do you view the domains associated with your organization's Microsoft 365 infrastructure?**

LESSON LABS

Lesson 1

Lesson Lab 1-1

Objective   To understand how to get started with Microsoft 365.

Briefing   Your organization has just implemented Microsoft 365 and you have been tasked with teaching other users how to complete some basic tasks.

Task   Log into your Microsoft 365 account.

      Update and fill out your profile information to ensure that it is up-to-date and complete.

      Open the Settings task pane and update your password.

      Open the Settings task pane and ensure that the language, date, and time format settings are set appropriately.

      Log out of your Microsoft 365 account.

Hints   To access the Settings task pane, click the Setting icon (⚙) that appears in the top right-hand corner of the page.

Lesson 2

Lesson Lab 2-1

Objective	To become familiar with the basic Office apps of Microsoft 365.
Briefing	You have to introduce the fundamental Office apps to your members and help them understand which app serves which purpose.
Task	Log into your Microsoft 365 account.
	Open and navigate Microsoft Word Online, Excel Online, PowerPoint Online, Outlook Online, and OneNote Online.
	Download and install desktop Office apps.
	Open and navigate Access and Publisher desktop apps.
	Log out of your Microsoft 365 account.
Hints	To download the desktop Office apps, click the **Install Office** drop-down button, then click the **Premium Office apps** option that appears near the top right-hand corner of the landing page.

Lesson Lab 2-2

Objective   To understand what the basic services of Microsoft 365 are.

Briefing   You have to introduce the fundamental services to your
                                 members and help them understand how each service can
                                 support your organization's operation.

Task   Log into your Microsoft 365 account.

                                 Open and navigate Microsoft Teams, OneDrive, and
                                 SharePoint.

                                 Log out of your Microsoft 365 account.

Hints   To switch between apps and services easily, use the app
                                 launcher (▦) on the top-left corner of every app and service's
                                 landing page.

Lesson 3

Lesson Lab 3-1

Objective	To familiarize yourself with your organization's cloud-based file storage.
Briefing	You have just been informed that you will be responsible for moving some of the organization's documents to OneDrive for Business and sharing those files with relevant members.
Task	Open your OneDrive for Business.
	Upload documents to OneDrive.
	Organize documents in different folders.
	Share files/folders with your members.
Hints	To upload a large number of files to OneDrive, select multiple files and drag them into OneDrive.
Follow-up Questions	After sharing files with your members, sync OneDrive for Business to your computer.

Lesson 4

Lesson Lab 4-1

Objective	To become familiar with the Admin Center.
Briefing	You want to familiarize yourself with your Microsoft 365 Admin Center.
Task	Open your Admin Center and navigate through it. Be sure to review the home page, Message Center, and Service Health Center.
Hints	You can access the Message Center and Service Health Center from the home page.
Follow-Up Questions	Locate user management commands on the home page.

Lesson Lab 4-2

Objective   To prepare for a company expansion.

Briefing   Your organization is expanding and you have been asked to set up the Microsoft 365 infrastructure they will need.

Task   Open the Lesson Lab 4-2 spreadsheet. Perform the following tasks:

- Set up user accounts with the provided information. Auto-generate all passwords.

- Create groups for each department.

- Create a distribution list with all users called "Building 2 Employees."

- Create a shared mailbox for the Engineering team.

Since the team will be operating in a newly rented space, add the following resources:

- Teleconference Room 204

- Boardroom 209

- Lunch Room (Building 2)

- 3-D Printer

- CarShare Van

Sample Data   Lesson Lab 4-2
Microsoft Excel Worksheet
12.5 KB

Follow-Up Questions Andy Wanden will not be moving to the new building. Change his office location to Building 1. Then, remove him from the group, distribution list, and shared mailbox you created.

Lesson 5

Lesson Lab 5-1

Objective	To become familiar with advanced options in the Admin Center.
Briefing	You need to review the domains associated with your organization's Microsoft 365 infrastructure, as well as its security settings.
Task	Open the Admin Center. Review the domains associated with your organization's Microsoft 365 infrastructure. Then, navigate to the Security & Compliance Center. Review the information on the home page, existing alerts, user permission roles, and data loss prevention policies.
Hints	Remember, you can open the Security & Compliance Center from the Admin Center, Microsoft 365 landing page, or app launcher pane.
Follow-Up Questions	If there are any activities you would specifically like to monitor, create alerts from the Admin Center.

COURSE WRAP-UP

Post-Course Assessment

1. **Which of the following apps and services is not offered as an online version?**

    a. OneDrive

    b. Access

    c. OneNote

    d. Microsoft Teams

2. **What set of apps is used to create new files via OneDrive?**

    a. Office Online

    b. Delve

    c. SharePoint

    d. Outlook

3. **What is the highest level of the password strength?**

    a. Confidential

    b. Secure

    c. Strong

    d. Safe

4. How do you open the Security & Compliance Center?

    a. "Admin centers" category of the Admin Center navigation pane

    b. Microsoft 365 landing page

    c. App launcher pane

    d. Any of the above

5. Which user management commands are available from the Admin Center home page?

    a. Add users

    b. Delete users

    c. Edit users

    d. Reset passwords

    e. All of the above

6. When creating an alert, how do you set the alert to be triggered when any user performs the selected action(s)?

    a. Enter "All Users" in the Users field

    b. Check the "When any user performs this action" option Answer

    c. Leave the Users field blank

7. **What Microsoft 365 app is the Tasks app a shortcut to?**

    a. OneNote

    b. Outlook

    c. Publisher

    d. PowerPoint

8. **How do you configure a master Office 365 contacts list?**

    a. Add contacts to the Contacts page in the Admin Center

    b. Create a group

    c. Add contacts to your personal Outlook Contacts folder

9. **Which icon on a Delve item allows you to add it to your favorites?**

    a. Stacked icon

    b. Three dots

    c. Bookmark

    d. The item name

10. **True or False: If you open an app from the Office desktop app, any apps available in desktop versions will open in the desktop version of the app.**

Course Summary

Congratulations on completing the Microsoft 365 training. During this course, you learned how to:

- Navigate your Microsoft 365 account

- Find help and change your settings

- Use desktop apps with Microsoft 365

- Navigate apps and services included in the subscription package

- Get started with OneDrive for Business

- Collaborate using OneDrive for Business

- Use the Delve app

- Get started as an Microsoft 365 administrator

- Manage users, groups, and resources

- Manage domains

- Use the Admin Center and Security & Compliance Center

You should now feel comfortable completing advanced tasks using Microsoft 365 apps and services.

ANSWER KEYS

Lesson 1 Review Questions

1. **What is Microsoft 365?**

   Microsoft 365 is a subscription-based and online ("cloud") version of the popular Microsoft Office suite of software.

2. **What is the cloud?**

   The cloud is a commonly used term to describe an off-site file hosting service.

3. **What navigational element will you always see along the top of a page while logged into your Microsoft 365 account?**

   This navigational element is the navigation toolbar.

4. **What are the requirements that make your password more secure?**

   Your password must be between eight and 256 characters, with uppercase and lowercase letters, numbers, as well as symbols.

5. **What happens when you click the Install Office button on your Microsoft 365 landing page?**

   A download will appear in your browser.

Lesson 2 Review Questions

1. **What is Microsoft Word?**

   Microsoft Word is Microsoft's word processing program where you can create professional documents.

2. **What are the workspaces found on the Folder/Navigation pane in Outlook?**

   They are Mail, Calendar, People, and To Do (Task) workspaces.

3. **What do Access and Publisher have in common?**

   They are both dekstop-only applications.

4. **What are the differences between public and private settings in Microsoft Teams?**

   While **public** mode is open to everyone, the **private** setting is restricted to invited users only.

5. **What is SharePoint?**

   SharePoint is Microsoft's collaboration platform where your organization's members can communicate, exchange information and collaborate seamlessly.

Lesson 3 Review Questions

1. **Is the OneDrive for Business account separate from your personal OneDrive account?**

   Yes, the OneDrive for Business is separate from personal OneDrive accounts.

2. **What is the purpose of the Discover feature in OneDrive?**

   The Discover feature provides easy access to other documents within your organization that are relevant to you.

3. **What is Delve?**

   Delve is an Office app that provides quick, easy access to documents, people, conversations, and activities linked to your user account.

4. **How do you create a board in Delve?**

   Click the Manage Boards icon. In the pop-up dialog box that appears, type the new board name and press **Enter**.

5. **What set of apps is used to create new files via OneDrive?**

   Office Online.

Lesson 4 Review Questions

1. **True or False: There is only one administrator type in Microsoft 365.**

   False. Microsoft 365 has several **specialized administrator types** that have administrative access to only specific areas.

2. **How do you access the Admin Center?**

   Click the Admin Center tile on the Microsoft 365 landing page or in the app launcher pane.

3. **How do you access the main Groups page?**

   From the Admin Center, click Groups → Groups.

4. **What is the command sequence to begin creating a shared mailbox?**

   Click Groups → Shared mailboxes → Add a mailbox.

5. **Which user management commands are available from the Admin Center home page?**

   You can add, edit, and delete users, and reset passwords.

Lesson 5 Review Questions

1. **What is a domain?**

   A Windows network where all components (such as user accounts, PCs, and printers) are registered with a central database.

2. **How do you open the Security & Compliance Center?**

   Use the **Admin centers** category of the Admin Center navigation pane, the Microsoft 365 landing page, or the app launcher pane.

3. **When creating an alert, how do you set the alert to be triggered when any user performs the selected action(s)?**

   Leave the Users field blank.

4. **True or False: User permissions for the Security & Compliance Center are inherited from the Admin Center and cannot be modified.**

   False. You can set specific permissions for the Security & Compliance Center.

5. **How do you view the domains associated with your organization's Microsoft 365 infrastructure?**

   Open the Admin Center and click Settings → Domains.

Post-Course Assessment

1. **Which of the following apps and services is not offered as an online version?**

    a. OneDrive

    b. Access

    c. OneNote

    d. Microsoft Teams

   Access, along with Publisher, is offered as a desktop-only Office app.

2. **What set of apps is used to create new files via OneDrive?**

    a. Office Online

    b. Delve

    c. SharePoint

    d. Outlook

   If you wish to create new files via OneDrive, you will use Office Online.

3. **What is the highest level of the password strength?**

    a. Confidential

    b. Secure

    c. Strong

    d. Safe

   There are three levels that indicate the password strength: strong, medium, and, weak.
   Strong is the highest level.

4. **How do you open the Security & Compliance Center?**

    a. "Admin centers" category of the Admin Center navigation pane

    b. Microsoft 365 landing page

    c. App launcher pane

    d. <mark>Any of the above</mark>

You can open the Security & Compliance Center from the "Admin centers" category of the Admin Center navigation pane, the Office 365 landing page, or the app launcher pane.

5. **Which user management commands are available from the Admin Center home page?**

    a. Add users

    b. Delete users

    c. Edit users

    d. Reset passwords

    e. <mark>All of the above</mark>

You can add, edit, and delete users, and reset passwords, from the Admin Center home page.

6. **When creating an alert, how do you set the alert to be triggered when any user performs the selected action(s)?**

    a. Enter "All Users" in the Users field

    b. Check the "When any user performs this action" option Answer

    c. <mark>Leave the Users field blank</mark>

When creating an alert, leave the Users field blank if you want it to be triggered when any user performs the selected action(s).

7. **What Microsoft 365 app is the Tasks app a shortcut to?**

   a. OneNote

   b. <mark>Outlook</mark>

   c. Publisher

   d. PowerPoint

   The Tasks app is a shortcut to your Outlook Tasks folder.

8. **How do you configure a master Office 365 contacts list?**

   a. <mark>Add contacts to the Contacts page in the Admin Center</mark>

   b. Create a group

   c. Add contacts to your personal Outlook Contacts folder

   To configure a master contacts list to which all Office 365 users will have access, click Users → Contacts in the Admin Center navigation pane.

9. **Which icon on a Delve item allows you to add it to your favorites?**

   a. Stacked icon

   b. Three dots

   c. <mark>Bookmark</mark>

   d. The item name

   To add any Delve item to your favorites, click the bookmark icon in the bottom left corner.

10. **True or False: If you open an app from the Office desktop app, any apps available in desktop versions will open in the desktop version of the app.**

   True.

APPENDICES

Keyboard Shortcut Quick Reference Sheet

File Management	**Open a new workbook**	Ctrl + N
	Save a file	Ctrl + S
	Open a file	Ctrl + O
	Print worksheet	Ctrl + P
	Close Microsoft Excel	Alt + F4
Worksheet	**Switch between worksheet tabs (left to right)**	Ctrl + Page Up
	Switch between worksheet tabs (right to left)	Ctrl + Page Down
	Insert cells	Ctrl + Shift + +
	Delete cells	Ctrl + -
Text Editing	**Select all items in current worksheet**	Ctrl + A
	Copy text	Ctrl + C
	Cut text	Ctrl + X
	Paste text	Ctrl + V
Open Dialogs	**Open Find tab of Find and Replace dialog box**	Ctrl + F
	Open Replace tab of Find and Replace dialog box	Ctrl + H

	Open Go To dialog box	Ctrl + G
	Open Font tab of Format Cells dialog box	Ctrl + Shift + F
	Check spelling	F7
	Get Help	F1
Text Formatting Tools	**Apply bold formatting**	Ctrl + B
	Apply underlining	Ctrl + U
	Apply italic formatting	Ctrl + I
	Align text to center	Ctrl + E
	Align text to left	Ctrl + L
	Align text to right	Ctrl + R
	Justify text	Ctrl + J
	Increase font size	Ctrl + Shift + .
	Decrease font size	Ctrl + Shift + ,
	Undo last action	Ctrl + Z
	Redo last action	Ctrl + Y

Glossary

Admin Center

Microsoft 365 app only available to administrators. Provides central access to all permitted administrative tools.

administrator

User role with the highest level of privileges in a particular system or software application.

alert

Automatically generated notification that is created and displayed based on user settings.

apps

Individual components that provide specific functionality in Office 365. Can also refer to specific programs within a larger application (such as SharePoint apps).

app launcher

Icon in the top left corner of the Office 365 window that opens the app launcher pane.

app launcher pane

Menu that opens from the icon in the top left corner of the Office 365 window. Displays all Microsoft 365 apps which the user has access to.

Delve

Microsoft 365 app which provides quick access to documents, people, conversations, and activities linked to the user's account.

Delve Board

Folder-like tool that allows users to manage search results and frequent documents in Delve.

domain

A Windows network where all assets (such as user accounts, PCs, and printers) are registered with a central database.

domain controller

Child machine belonging to a domain server which manages network assets on the parent server's behalf.

global administrator

In the context of Microsoft 365, the top-level administrator.

group

A set of users in a particular system or software application who all have the same attributes (such as system privileges).

landing page

Page initially displayed upon logging into Microsoft 365.

Message Center

Admin Center tool that alerts users about changes to Microsoft 365.

OneDrive

Microsoft's cloud-based storage feature.

owners

User group that typically has a high level of permissions.

permissions

Framework defining the level of control that a user or group has over a particular component.

resource

In the context of Microsoft 365, rooms or equipment added to the system for scheduling purposes.

Security & Compliance Center

Microsoft 365 app only available to specified users. Provides central access to security and compliance tools.

Service Health Center

Admin Center tool that allows users to view service status and advisories.

shared mailbox

Feature that allows multiple users to manage mail from a single address.

user

Individual profile within a particular system or software application that typically has limited privileges.