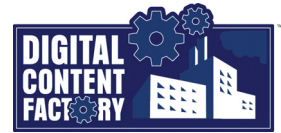


Introduction to Microsoft® 365 Quick Reference



Exploring Microsoft 365 and its Interface

Microsoft 365 is a subscription-based service that provides access to software and various services via the Internet (the cloud). Although there are different plans to accommodate large enterprises, businesses, and home users (which determine service levels and costs), the general concept of Microsoft 365 is for users to obtain cloud-based services such as business class email, web conferencing, business class file management, access to Office Online (apps), as well as security for viruses and spam. Other services and software are available based on the selected plan such as access to desktop and mobile versions of the Office applications, and/or a public website to name a few. A main advantage of Microsoft 365 (from an end user perspective) is that documents and services can be cloud-based, allowing you to share and access them while you are away from your office computer (provided you have access to a computer or mobile device with an Internet connection). Central to Microsoft 365 is the **Home** page (shown below) from where you can begin to perform any task such as launch apps, install Office desktop applications, access various storage locations and documents, get help, and change settings.

App launcher – Provides access (from any window) to the apps that are available with your Microsoft 365 subscription.

App tiles – Launches the app associated with the tile.

- Click the **Home** tile to navigate back to the Home page from other pages.
- Click the **Create** tile to create new documents, workbooks, presentations, notebooks, etc.
- Click the **All Apps** tile to display all of the apps available with your subscription. See “Launching Microsoft 365 Apps” on page 2.

Recommended – Provides access to documents related to you. For example, documents (you have created) that have been edited, documents that have been shared with you, or documents in which you have been mentioned. They appear automatically (and temporarily) based on recent activity.

Document Lists – Provides access to documents from different storage locations such as OneDrive folders or SharePoint sites. In addition, document activity such as who and when a document was edited appear, as well as with whom you have shared a document.

As required, click the **More options** button (as shown above-right) associated with a document to perform tasks.

- To add a document to the **Favorites** list (to always maintain quick access to it), select **Add to favorites**.
- To remove a document you no longer want to see in any of the lists, select **Hide**.

You can click a heading (located above the list) to display documents based on predefined criteria (explained as follows).

- **All** – Displays all the documents to which you have access, including email attachments that you receive.
- **My Recent** – Displays the documents associated with you that have been recently edited by you or someone else.

Search – Allows you to quickly locate apps, files, people, and sites.

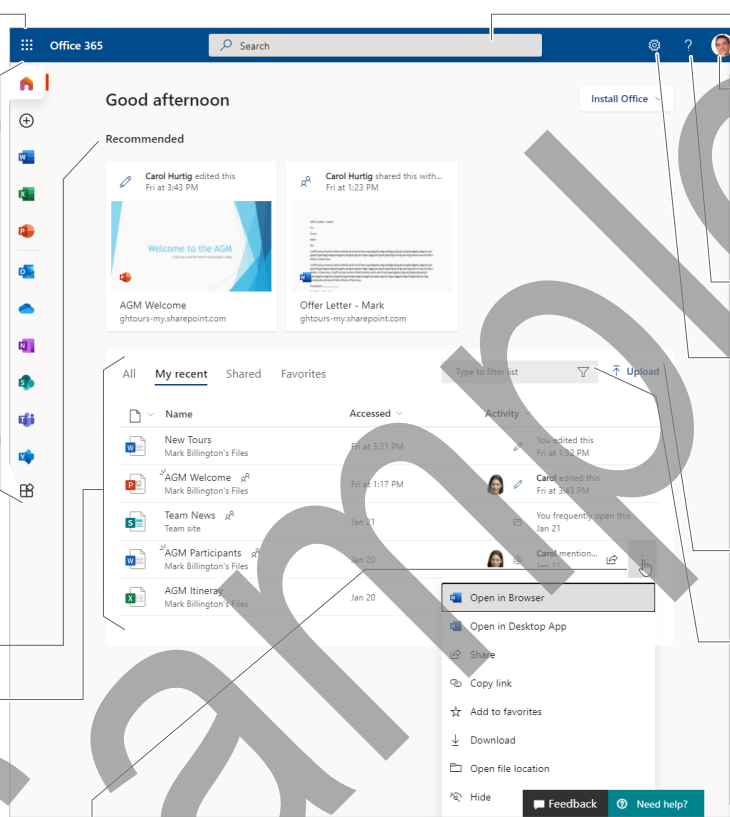
Account manager – Provides access to your profile and your account; it also allows you to sign out or sign in. When using certain apps, it also contains the Presence indicator, which provides instant awareness as to your current availability.

Help – Provides access to help, allowing you to select or search for specific topics.

Settings – Provides access to various Microsoft 365 settings and options, including general display/theme settings, password, and language settings (to name a few). See “Changing Your Microsoft 365 Settings” on page 2

Upload – Provides quick access to uploading documents to OneDrive for Business.

Type to filter list – Provides access to filtering the document list to locate and use a particular document(s).



- **Shared** – Displays the documents that other Microsoft 365 users have shared with you, as well as documents you have shared with others.
- **Favorites** – Displays all the documents that you have added to this list.

Featured Objectives

PAGE 1

Exploring Microsoft 365 and its Interface

- Learn about the Microsoft 365 user interface including the Home page, and its screen components.

PAGE 2

Getting Started

- Learn how to sign in and out of Microsoft 365, install Office desktop applications, launch apps, search for apps, as well as change your Microsoft 365 profile details, and settings.

PAGES 3

Understanding Outlook on the Web

- Learn how to create, send, and manage messages.

Understanding OneDrive for Business

- Learn how to upload Office documents, create, share, and delete files and folders.

PAGE 4

Understanding SharePoint Online and Team Sites

- Learn how to upload, create, and edit documents, as well as create a custom list, and add list items.

PAGE 6

Understanding Forms for Microsoft 365

- Learn how to create and preview a form, as well as how to share it so people can use it.

Understanding Teams for Microsoft 365

- Learn how to manage your presence status, communicate using chat conversations, audio and video calls, as well as communicate (in channels) using impromptu meetings.

PAGE 8

Understanding Planner for Microsoft 365

- Learn how to create plans, as well as create buckets, add members, and add task details.