Microsoft®
Online Services

Trial Guide

Office 365 from Microsoft Online Services

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For the latest information, please see http://office365.com

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Introduction

Microsoft® Office 365 for enterprises is a set of web-enabled tools that lets you access your email, important documents, contacts, and calendars from virtually anywhere and on almost any device. With a range of subscription plans designed to meet the needs of businesses of all sizes, the service brings together online versions of the best communications and collaboration tools from Microsoft plus Microsoft Office 2010 Professional Plus. Office 365 works seamlessly with the programs you already know and use—Microsoft Outlook®, Microsoft Word, Microsoft Excel®, and Microsoft PowerPoint®. This much-anticipated cloud service gives enterprises the capabilities and efficiencies to grow and target more rapid success.

Powerful security features from Microsoft help protect your data, and when the service is released for general availability, it will be financially backed with a 99.9 percent uptime guarantee. Office 365 was designed to give enterprise IT departments the control they need over policies and configuration, while leaving server maintenance and upkeep to Microsoft.

Who Should Read This Guide

This guide is intended for administrators and technical decision makers in your company who want to gain experience with Office 365 to evaluate better its benefits for your company. You can create up to 25 user accounts for other decision makers in your company who want to experience the Office 365.

Assumptions

To use this guide, you need to have acquired a trial account, or be ready to acquire a trial account to start working with the Office 365 environment. The guide assumes that you are using an E3 trial or subscribing to one of the "E" plans for Office365. The guide can also be used effectively with the Small Business Plan, but there are differences in capabilities that affect step-by-step instructions.

Note

The trial lasts for 30 days, which begins on the day you activate the account. If, within the 30-day trial period, you decide to convert your trial to a paid subscription, see Scenario 11: Converting a Trial Account to a Paid Subscription for information about how to perform the conversion. If you need more time, submit a support request to ask for a trial extension.

As the account administrator, you should have general administrative skills in Microsoft Windows®. You should also be able to work in management control panels to create users, allocate resources, and perform other common administrative tasks.

To use your company domain or a test domain name on your Office 365 account, you should be familiar with managing your domain name and records, and have access to your current domain's Domain Name System (DNS) records.

What's in This Guide

This guide begins with a review of the services that are available in Office 365, and a description of their capabilities. The rest of the guide is designed to be used as a real-time road map that provides step-by-step instructions to help you understand quickly how to configure your environment, manage your company's account, and then work with the services that are available in Office 365.

These step-by-step procedures are grouped into the following scenarios:

- Scenario 1: Signing Up for a 30-Day Trial
- Scenario 2: Performing the "Start Here Tasks"
- Scenario 3: Adding a Custom Domain to Office 365
- Scenario 4: Managing Exchange Online
- Scenario 5: Managing a SharePoint Site Collection
- Scenario 6: Preparing Your System for Office 365
- Scenario 7: Using Exchange Online
- Scenario 8: Using SharePoint Online
- Scenario 9: Using Lync Online
- Scenario 10: Getting Support
- Scenario 11: Converting a Trial Account to Paid Subscription

This document does not include content migration directory synchronization, or coexistence scenarios. Please refer to the Office 365 Deployment Guide for details on these advanced scenarios.

Office 365 Services Overview

Email, Calendar and Contacts

Microsoft Exchange Online

Office 365 provides you with access to email, calendar, and contacts from virtually anywhere at any time on desktops, laptops, and mobile devices, while helping to protect against malicious software and spam.

- Easily manage your email with 25 GB mailboxes, and send emails up to 25 MB in size.
- Work from almost anywhere with automatically updated email, calendar, and contacts across devices you use most, including PCs, Macintosh computers, iPhone, Android phones, BlackBerry Smartphones,[1] Microsoft Windows Mobile, and Windows Phones.[2]
- Connect with Microsoft Outlook 2010 or Office Outlook 2007, and use all of the rich Outlook functionality you already know and use, whether you are connected to the Internet at home or in the office, or are working offline.
- Access your email, calendar, and contacts from nearly any web browser while keeping a rich, familiar Outlook experience with Outlook Web App.
- Use your existing domain name to create customized email addresses powered by Exchange Online (for example, mark@contoso.com).

[1] Users of BlackBerry Internet Service get push email and can add calendar and contacts to their BlackBerry device through a wired sync with Outlook on the PC.
[2] Access from mobile devices depends on carrier network availability.

- Easily schedule meetings by sharing calendars and viewing them side-by-side, seeing your colleagues' availability and suggested meeting times from your calendar.
- Help protect your organization from spam and viruses with Microsoft Forefront® Online Protection for Exchange, which includes multiple filters and virus-scanning engines.

Team Sites and Public Websites

Microsoft SharePoint Online

Microsoft SharePoint® Online helps you create sites to share documents and information with colleagues and customers. It lets you do the following:

- Work together effectively by sharing team documents and tracking project milestones to keep everyone in sync.
- Keep your team's important documents online, so the latest versions are always at hand.
- Provide all team members with online access to critical business information whenever and wherever they need it.
- Easily protect critical business information by controlling who can access, read, and share documents and information.
- Share information with people outside your organization, including customers and business partners.

Office Web Apps

Microsoft Office Web Apps

Office Web Apps are convenient online companions to Word, Excel, PowerPoint, and Microsoft OneNote®, that offer you an easy way to access, view, and edit documents directly from your web browser.

- Simultaneously edit Excel spreadsheets and OneNote notebooks with others in real time, and see exactly who is editing and viewing your documents.
- Access and view files from your mobile device.
- View documents in high fidelity.
- Ensure that viewers see files with consistent formatting when moving between Office Web Apps and desktop Office applications.

Instant Messaging and Online Meetings

Microsoft Lync Online

Microsoft Lync™ helps you find and quickly connect with the right person from within the Office applications you already use.

- Find and connect with colleagues and customers from virtually anywhere via rich presence, instant messaging, audio-video calls, and online meetings.
- Use the presence indicator to see when co-workers and partners are online and available.
- Make PC-to-PC voice and video calls with colleagues and customers.
- Conduct rich online meetings, including audio-, video- and web conferencing, with people both inside and outside your organization.
- Share your desktop, online whiteboards, and presentations with colleagues and partners inside and outside your organization.
- Click to communicate with other users of Office 365, Microsoft Windows Live® and MSN® Messenger.

Office Professional Plus

Microsoft Office Professional Plus

With Office Professional Plus, your people are equipped with powerful ways to do their best work from more places—whether they're using a PC, phone, or web browser. As part of Office 365, Office Professional Plus delivers the complete, familiar, and intuitive applications you need to keep your business connected.

- Master your Inbox and calendar with Conversation View and other advanced management tools in Outlook.
- Leverage the power of business and social networking right within Outlook with the Outlook Social Connector.
- Collaborate with control and confidence with co-authoring.
- Instantly share slideshows, across town or around the world with PowerPoint Broadcast Slide Show.
- Create presentations that are as brilliant to watch as they are easy to create with new video and photo editing tools in PowerPoint.
- Quickly work with hundreds of millions of rows of data in Excel. Transform enormous quantities of data into meaningful information.

What You Need for the Guided Tour

Works Best with Two Systems

This guide is written so that most tasks can be completed on one system. Some collaboration and communications features of Office 365 features can only be demonstrated using two systems. Virtual system can be used, but if hosted on the same system, you will not be able to make a phone call using Lync Online.

Software Requirements

You can access the Office 365 services using a variety of software, such as Internet browsers and Microsoft Office 2007 and Microsoft Office 2010. For the complete list of supported operating systems and requirements for each service, see http://onlinehelp.microsoft.com/en-us/Office365-enterprises/ff652534.aspx#BKMK_RecommendedOperatingSystemsAndSoftware.

Current Business Productivity Online Suite Users

When you configure a system for use with Office 365, the system may no longer work with Business Productivity Online Suite. For this reason, use a different workstation for working with the Office 365 Trial than the one you use to access Business Productivity Online Suite. Also, note that a custom domain in use with Business Productivity Online Suite cannot be used with Office 365 as well.

Documents and Photos

Before you begin, locate a few files so that they are ready when you need them.

1. Locate a few Office documents that are typical for your business, and have them available. These documents will be uploaded to SharePoint Online.
2. Identify a PowerPoint slide deck to use with a Lync Online meeting. This deck will be uploaded to Lync Online. It can be one of the documents used for SharePoint Online.
3. When working with Lync Online, you can optionally add pictures of your co-workers to improve the experience, and more closely simulate the actual experience of using Lync Online in an Enterprise environment. Locate a male and female picture no larger than 30 KB in size, and approximately 1 to 1.5 inches square.

Voice and Video

If your organization allows it, and your hardware is set up for it, you can use Microsoft Lync Online communications software to communicate with your contacts using voice and video. To make a video call, you need a webcam, and either speakers and a microphone, a headset, or a USB audio device. You do not need a webcam to receive a video call from someone else.

Guided Tour

The following step-by-step tour is a fast way to become familiar with the features available in Office 365. This section contains information about how to register for the Office 365 30-day trial, set up your account, and install and set up the necessary software components on your computer.

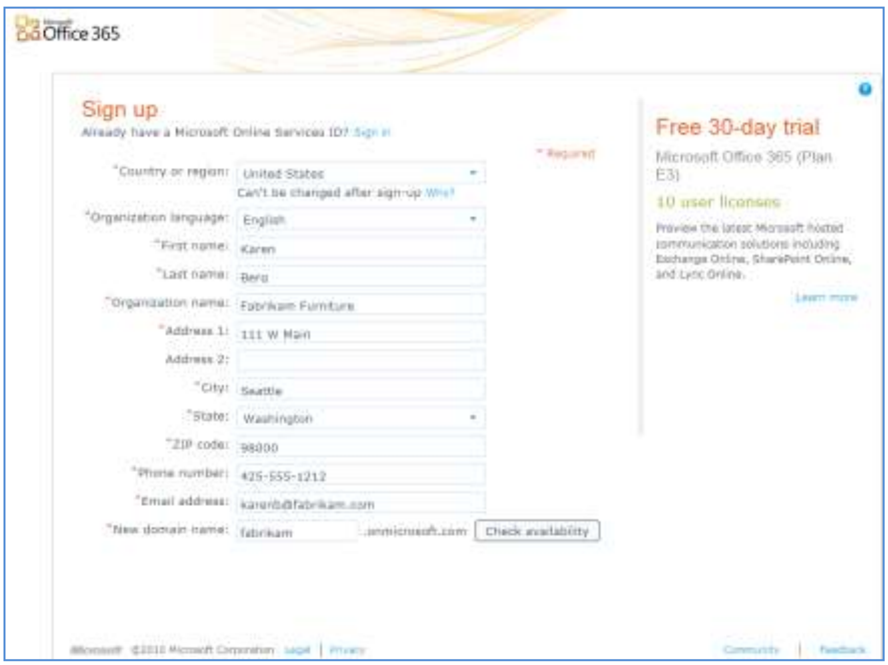
Because each scenario builds on the previous scenarios, we strongly recommend that you complete the scenarios in order. Doing so helps ensure that your system is configured with the appropriate users, permissions, and components for subsequent tasks.

Scenario 1: Signing Up for a 30-Day Trial

Your organization can sign up to use Office 365 for a 30-day trial at http://office365.com.

Task 1: Signing Up for the Trial

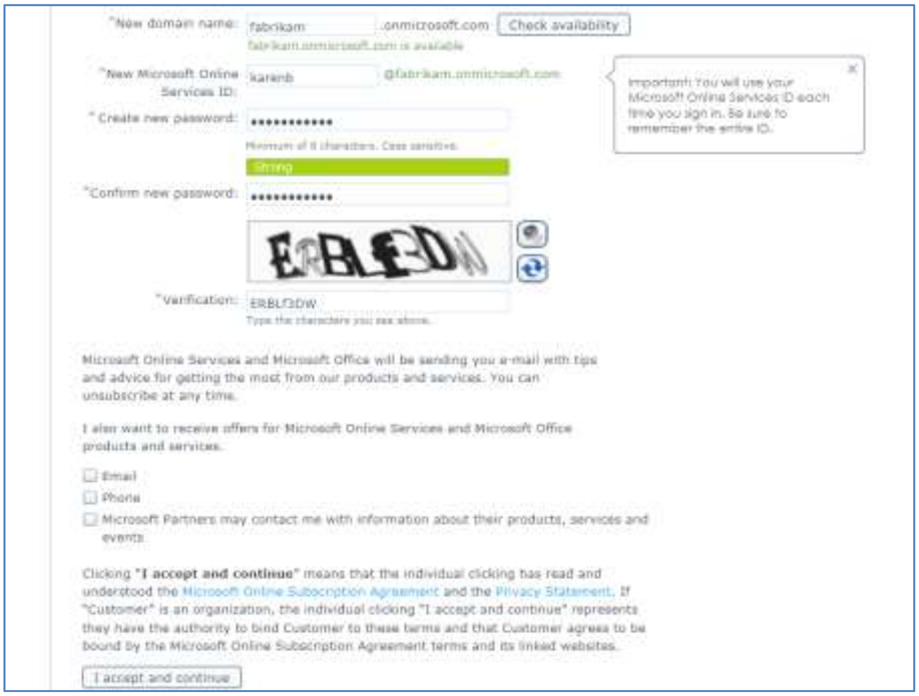
1. Browse to https://Office365.com and click **Free Trial**.
2. Complete the **Sign Up** page with your company information**.**



3. In text box labeled **New domain name**, enter your company name or the domain that you want to use with Office 365.

📝**Note**
The name you enter here will be used to create your default logon identity. In this example, the logon will be karenb@fabrikam.com. Take a moment to consider the domain name to use. Once the account is created, the name cannot be changed. Creating the trial account with your company or domain name will not affect your current DNS or email settings in any way.

4. Click **Check availability.** If the domain entry is not unique, you will be asked to re-try.
5. Optionally, change the **New Microsoft Online Services ID**.
6. In **Create new password**, enter a new password of at least 8 characters and at most 16 characters. The page will inform you if the password you enter does not meet complexity requirements.
7. Click the **Microsoft Online Subscription Agreement** link, and read the document.
8. Click the **Privacy Statement** and read the document.

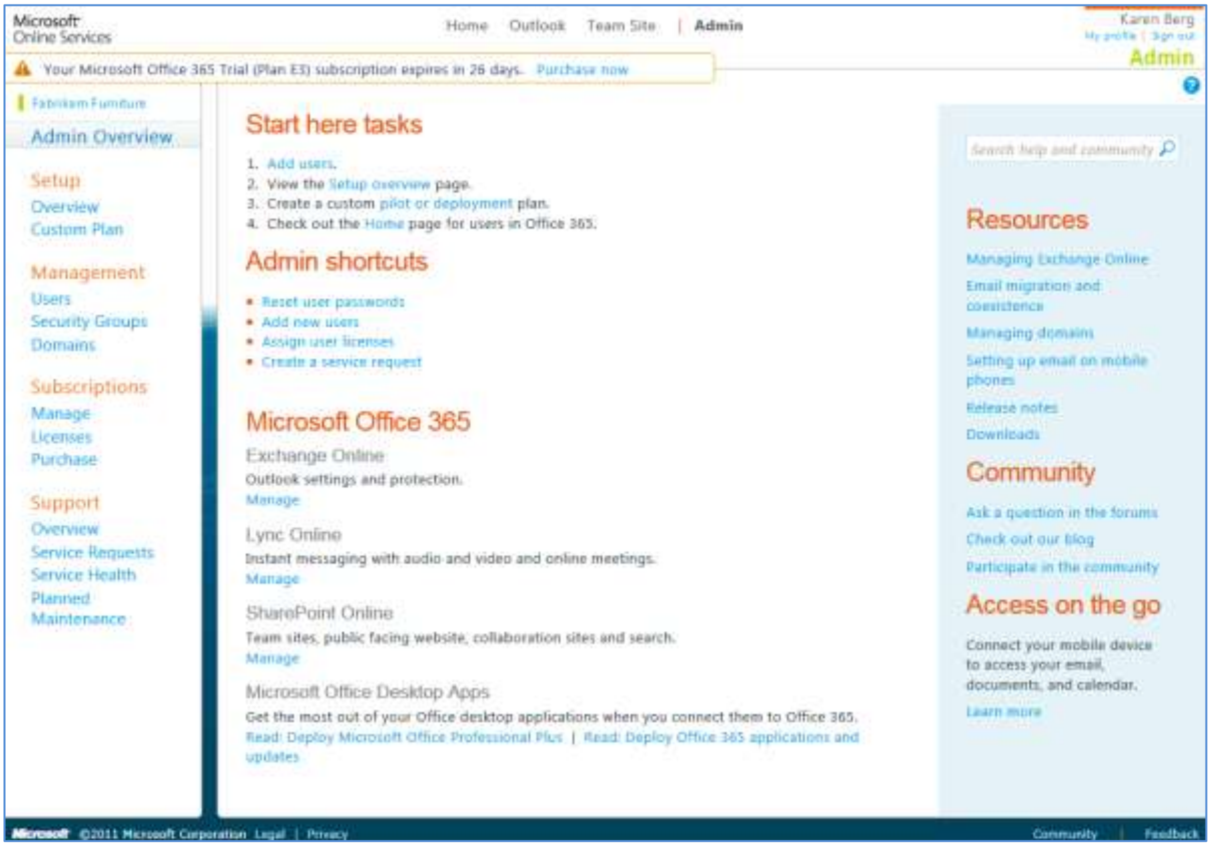


9. If you accept the **Microsoft Online Subscription Agreement** and the **Privacy Statement**, click **I accept and continue.** You will be logged into the services.

Note
After your 30-day trial ends, you have an additional 30 days to convert your account to a paid subscription before your account, data, and customizations are deleted. For more information about converting your account to a paid subscription, see Scenario 6: Converting a Trial Account to a Paid Subscription, later in this document.

Scenario 2: Peforming the “Start Here Tasks”

In the Office 365 trial, administrators are provided with a recommended workflow called “Start here tasks.”



In this section of the tour, you will:

- Add and edit user accounts
- Reset user account passwords
- View the **Setup Overview** page
- Create a custom pilot or deployment plan
- Review the Home page for users

Task 1: Adding Users to the Trial

As a best practice, when you first sign in to the Office 365 portal, you should create a second Global administrator account. In situations where the administrator is unavailable due to unexpected circumstances, or the password is forgotten, having a second global administrator account ensures access to all configuration and setup capabilities.

First, you will create Kim Akers' account and make her a Global administrator. Then, you will create a standard user account for Chris Gray.

1. Under **Start here tasks** click **Add users**.

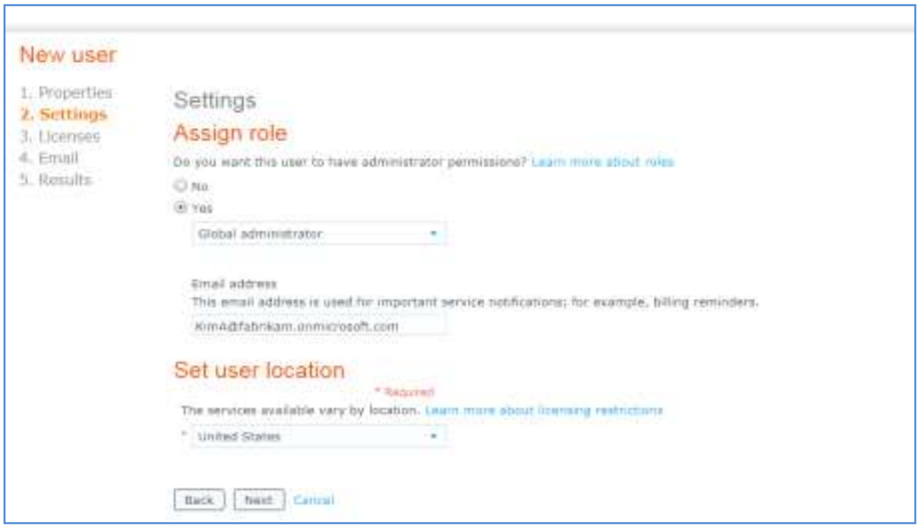
2. For **First name**, enter *Kim*; for **Last name**, enter *Akers*; for **Display name**, enter *Kim Akers*; and for **User name**, enter *KimA.*

Note

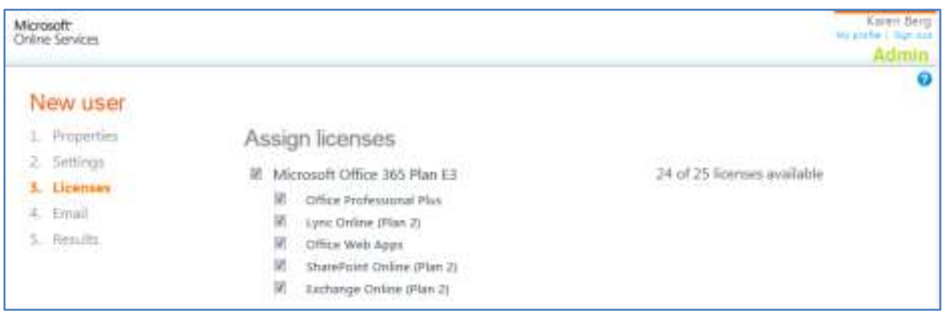
(Optional) You can enter other details by clicking **Additional Properties**. These details appear in the Global Address List for Microsoft Exchange Online and Lync Online. This additional information can be useful in day-to-day business operations. For example, if you need to reach someone who is not online, you can easily lookup his or her phone number.

3. Click **Next**.

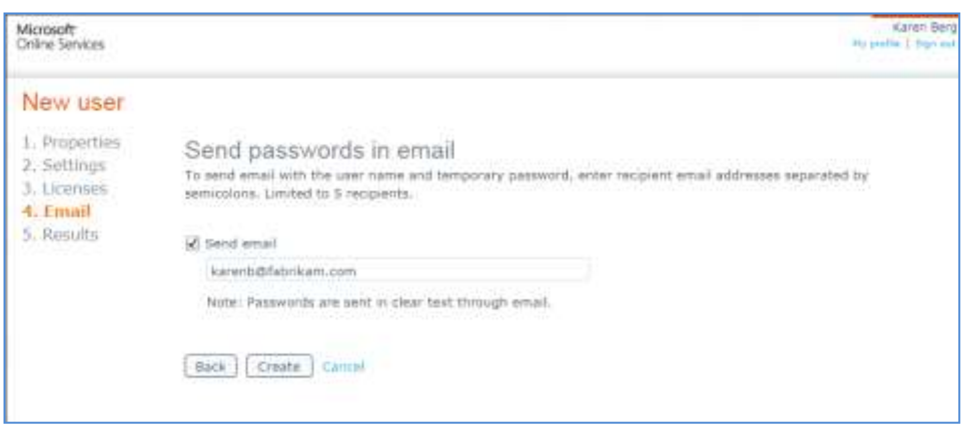
4. In the **Settings** page, under **Assign Role**, select **Yes** in response to **Do you want this user to have administrator permissions?**



5. Click the link **Learn more about administrator roles**, and review the type of administrator roles available in Office 365.
6. Set the administrator type of **Global administrator** in the pull-down list.
7. Under **Set user location**, set the location for the user.
8. Click **Next**.
9. On the **Assign licenses** page, click **Microsoft Office 365 Plan E3,** and then click **Next**.

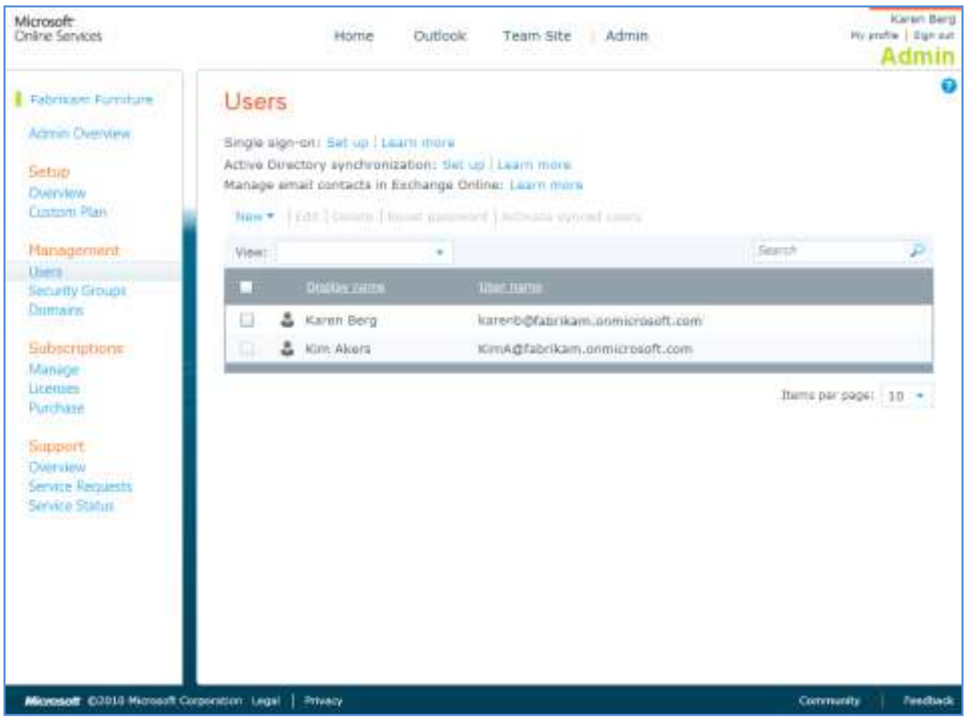


10. (Optional) On the **Send password in email** page, select the **Send email** box, enter your email address in the text box, and then click **Create**.



11. For later use, write down the password for Kim.

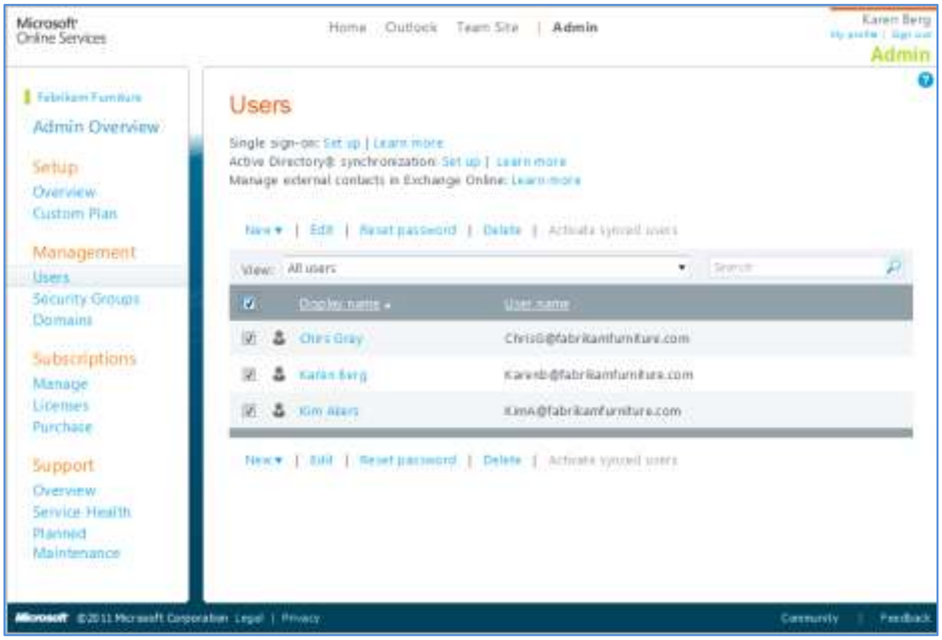
12. Click **Finish**. Kim is now listed as a user.



13. Click **New**, and then click **User**.
14. Repeat steps 3-12 to add a second user, **Chris Gray** (assign the user name **ChrisG**)—but do not make Chris Gray an administrator.
15. Click **Admin** at the top of the screen to return to the main administration page.

Task 2: Working with User Accounts: Using Bulk Editing

1. On the **Users** page, click the **Select All** check box at the top of the column of check boxes, and then click **Edit**.



2. On the **Bulk edit users** page, click the **Select All** check box at the top of the column of check boxes, and then click **Edit**.
3. In **Domain**, select the custom domain you validated earlier in the guide.
4. Complete the form by adding your company information.
5. Click **Next**.
6. On the **Settings** page, click **Next**.
7. On the **Assign licenses** page, click **Submit**.

Note
Note the warning stating "You can't edit yourself through bulk edit."

8. Click **Finish**.

Task 3: Working with User Accounts: Resetting a User's Password

One of the most common administrative tasks is resetting a user's forgotten password.

1. On the **Users** page, select the check box next to **Chris Gray**.
2. Click **Reset password**.
3. On the **Send Result in email** page, click **Reset Password**.
4. On the **Results** page, note the temporary password for later use, and then click **Finish**.

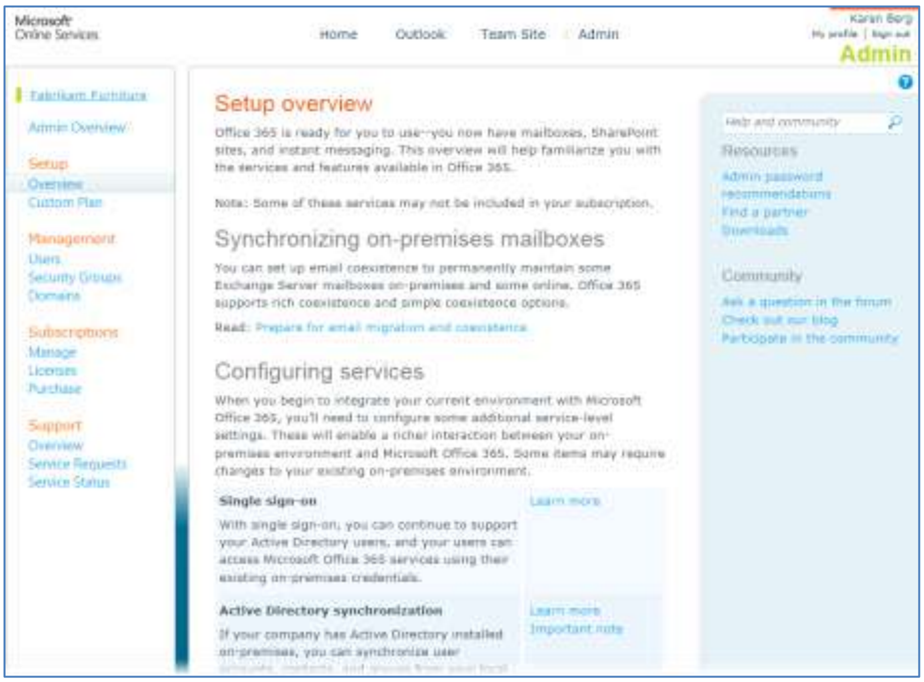
Note

You can assign the “password administrators” role to designated individuals. Password administrators can reset passwords but do not have the authority to make other changes in the Office 365 administration portal.

Task 4: Viewing the Setup Overview Page

The **Setup Overview** page has useful information and links to features including Single sign-on, Active Directory synchronization, mailbox migration and service configuration.

1. At the top of the page, click the **Admin** menu option.
2. Under the **Start here tasks**, click **Setup Overview** in step 2.



3. After reviewing this page, click **Admin** at the top of the screen to return to the main administration page.

Task 5: Creating a Custom Pilot or Deployment Plan

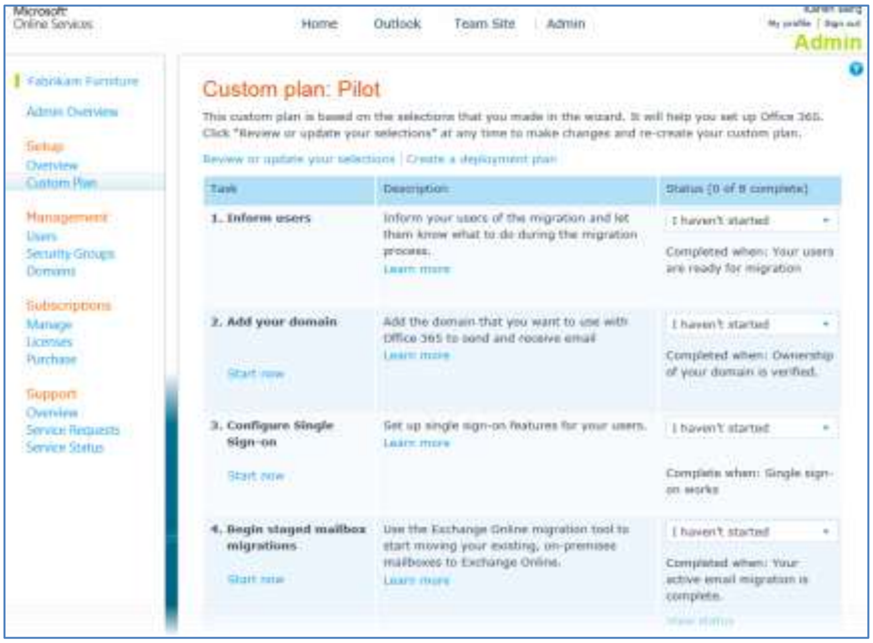
The Office 365 administration portal can assist you in producing a plan for piloting or deploying Office 365. You can run the wizard as often as you want. In this task, you will step through creating a plan for a pilot of Office 365.

1. Under **Start here tasks**, click the **pilot or deployment** Overview in step 3.
2. On the **Select a plan** page, select **Pilot** and then click **Next**.
3. Under **Services**, select all the services and then click **Next**.
4. On the **Existing email environment** page, note that an on-premise **Exchange 2007 or Exchange Server 2003 is selected**. Select the settings that best describe your requirements and then click **Next**.

5. On the **Email coexistence** page, select **Simple coexistence** and then click **Next**.

Note
The administration portal often has links labeled *learn more*. Look for these links next to important topics.

6. On the **Users and credentials** page, select **On-premise users with Microsoft Online Services ID sign-on**, and then click **Next.**
7. Review the **Summary** page, and then click **Finish.**

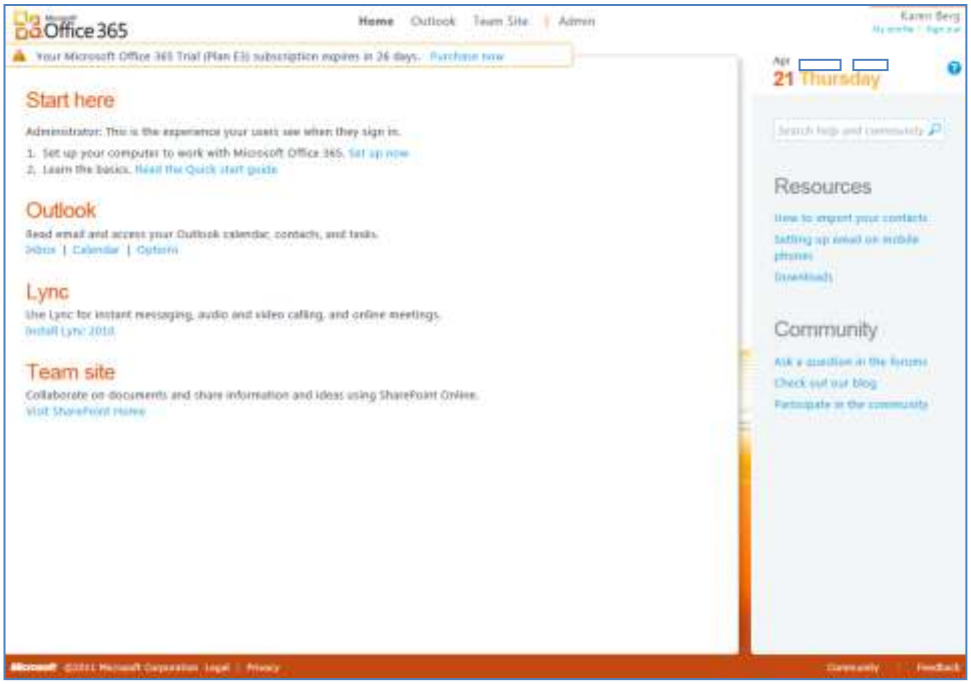


8. Review the contents of the plan. Notice the plan includes not only tasks related to configuring the services, but also communications with users and deployment of client software.
9. Click **Admin** at the top of the page to return to the main administration page.

Task 6: Reviewing the Home Page for Users in Office 365

When Administrators log on to http://portal.office365.com, they see the main administrator page. Regular users (that is, users who are not assigned an administrator role) are shown the **Home** page instead of the **Admin** page.

1. Under the **Start here** tasks, click **Home** in step 4.



This page allows users to download software needed for their workstation, access SharePoint Online, and launch Outlook Web Access. The **Start here** workflow at the top of the page provides an easy to find, easy to understand reference for user's to follow. Also, note that **Resources** are available, such as guidance for **Connecting a mobile device.**

Scenario 3: Adding a Custom Domain to Office 365

This recommended, but optional, exercise is for administrators who want to associate a company domain name (such as *contoso.com*) with Office 365. By following these steps, you can configure mailboxes with a format similar to *kim@contoso.com* instead of your initial assigned domain, which resembles *kim@contoso.microsoftonline.com*.

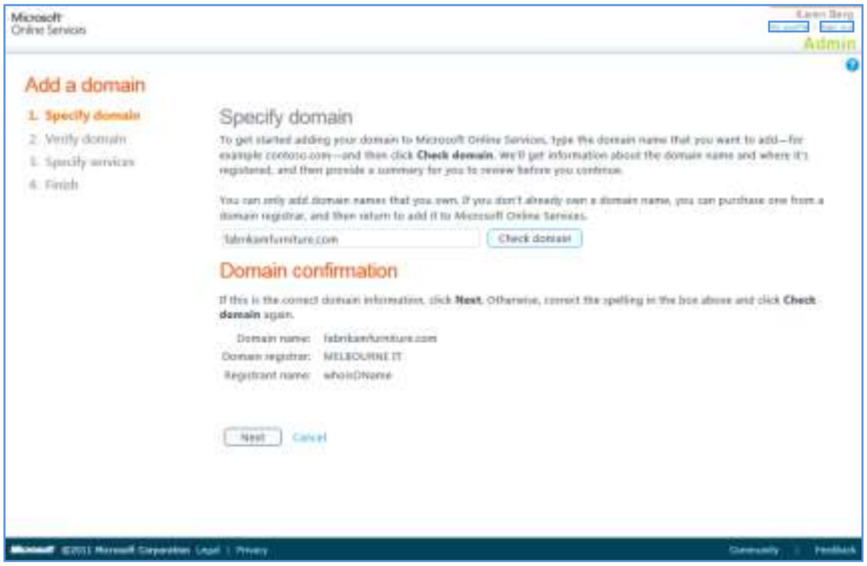
Before you can use a custom domain with Office 365, you must prove that you own the domain. This is done completely online through a process called *validation*. The validation process requires you to update the DNS settings for the domain with a unique marker issued to you. Office 365 will then query the DNS server to see if the marker is present. If found, the domain is validated.

Validating a domain does not affect your current email routing or any other DNS settings other than those you adjust.

Note
The following steps configure Office 365 to be the sole mail server for the domain you select. The Office 365 trial can be configured for coexistence with an on-premise mail server, but that is out of scope for this document. See http://onlinehelp.microsoft.com/en-us/office365-enterprises/ff652556.aspx for more details.

Task 1: Adding a Custom Domain

1. Browse to https://portal.microsoftonline.com and sign in with your administrator credentials.
2. In the column on the left under **Management**, click **Domains.**

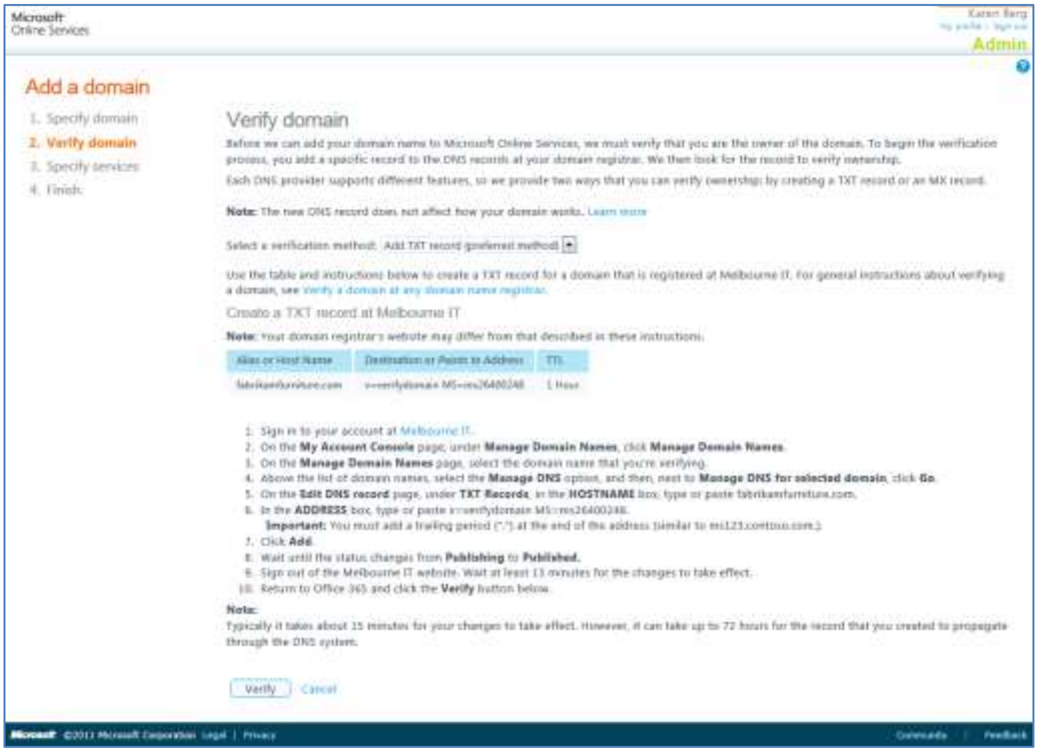


3. On the **Domains** screen, click **Add a domain**.
4. Type the domain name to use with Office 365 in the text box, and then click **Check Domain.**
5. Read the **Domain Confirmation** information. If the information appears correct, click **Next.** If the information is incorrect, select another domain or contact the party responsible for managing your domain registrations.

Task 2: Verifying a Domain

The **Verify domain** page provides instructions on how to make the required DNS entries.

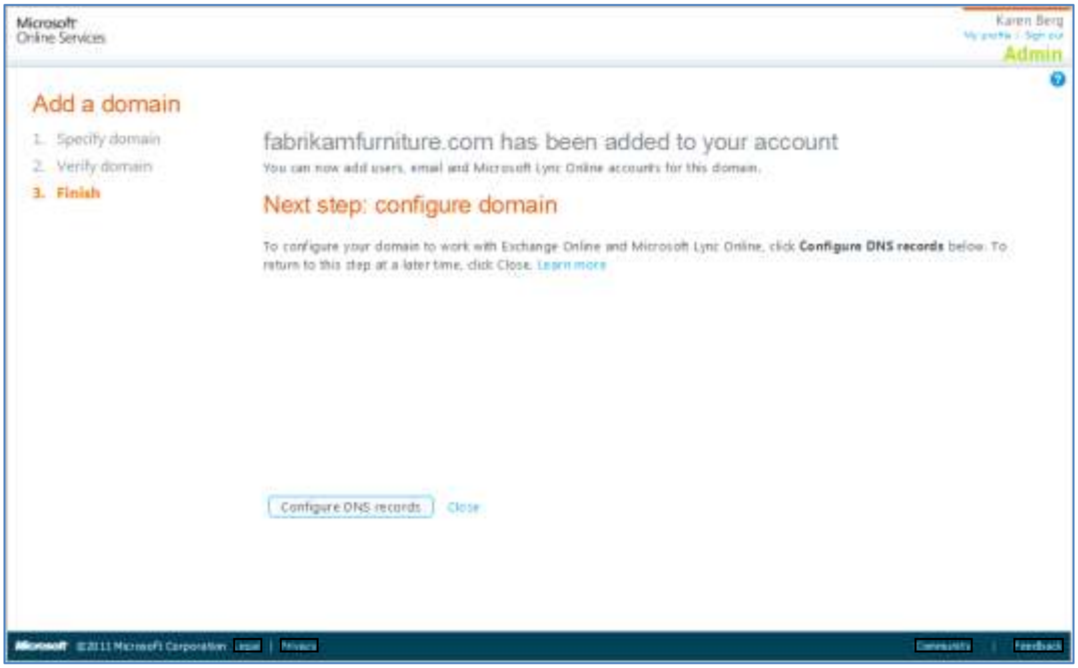
When the specific instructions for your registrar are on file, the **Verify domain** page will contain more detailed instructions specific to your DNS provider. For more information, click the **Verify a domain at any domain registrar** link in the **Verify Domain** page.



Log on to your DNS provider's site, and access the page where you can add and edit DNS settings for the specified domain as instructed. Note that because DNS providers support different features, there are two ways you can verify ownership: by creating a TXT record or an MX record. The TXT record is the preferred method. The verification DNS record will not affect how your name domains work.

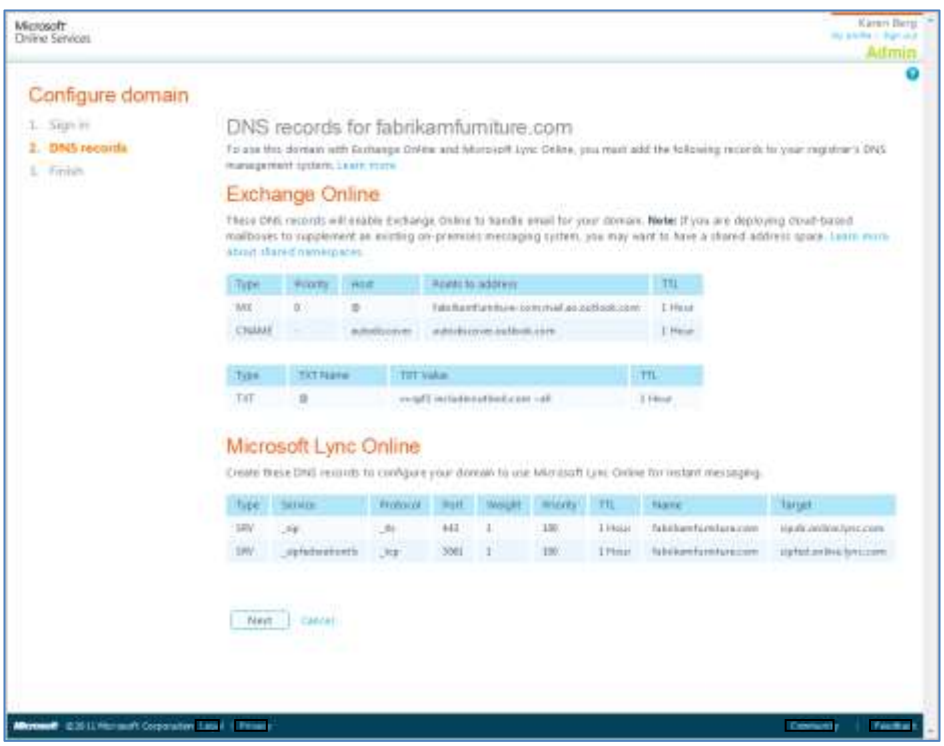
1. Sign in to your DNS provider's administration page.
2. Configure the settings as provided in the instructions, and save your entry.

   Return to the verification page on the Office 365 administration portal, and click **Verify**. If verification fails, double-check your entries and try again. Your registrar may implement DNS in such a way as to require a waiting period ranging from a few minutes up 72 hours for the DNS entries to be update.



At this stage you are ready to add users. DNS setup will be completed when you are ready to start routing mail to Office365.

3. Click **Configure DNS records**.



4. Add the remaining DNS records to your DNS settings for the custom domain.

IMPORTANT
By adding an MX record to the DNS settings, you are directing all mail for the domain to be routed to Exchange Online. You can choose to do this now, or add the MX record later. If you do not add the MX record, you can still send and receive mail using <domain>.onmicrosoft.com email address.

5. When completed, click **Next**.
6. On the **Finish** page, click **Finish**.

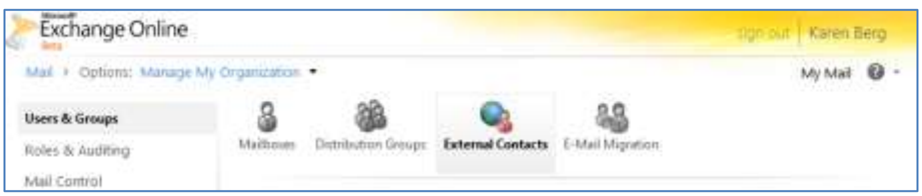
Scenario 4: Managing Exchange Online

In this scenario, you will configure some of the most popular features of Exchange Online.

Task 1: Creating External Contacts

External contacts represent people outside your organization who can be added to distribution groups and displayed in your organization's address book and other address lists. External contacts have email addresses outside your organization, and can't sign in to your domain.

1. From the Exchange Online **User and Groups** page, click **External Contacts**.



2. Under **External Contacts**, click **New**.
3. In the **New External Contact Form**, enter the following information:

   First Name: *Andy*

   Last Name: *Byrne (Consultant)*

   Display Name: *Andy Byrne*

   Alias: c-*andyb*

   External Email Address: [*Abyrne@contoso.com*](mailto:Abyrne@contoso.com)

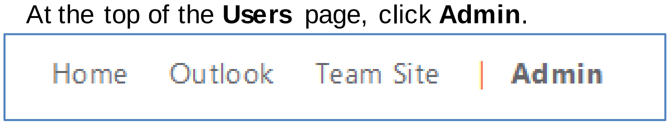
1. Press **Save**.

Task 2: Creating a Distribution Group

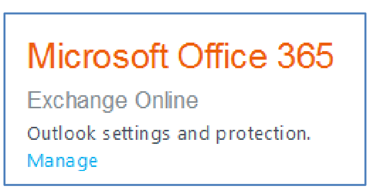
A distribution group, also called a public group, is a collection of two or more people that appears in the shared address book. When an email message is sent to a group, it goes to all members of the group. Using a group, instead of typing individual email addresses, saves time and ensures that everyone is on the same page.

In this task, you will create a distribution group that includes Kim Akers and Chris Gray. A distribution group can optionally be configured to receive email from external users. This allows you to create a list such as “support,” “sales,” or “inquiries” designed for the public to use.

1. At the top of the **Users** page, click **Admin**.

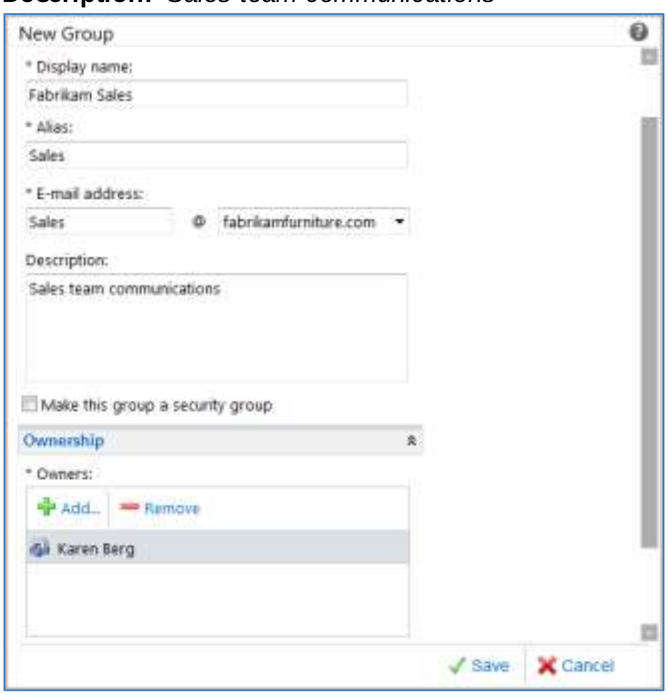


2. Under **Microsoft Office 365**, under **Exchange Online**, click **Manage**.



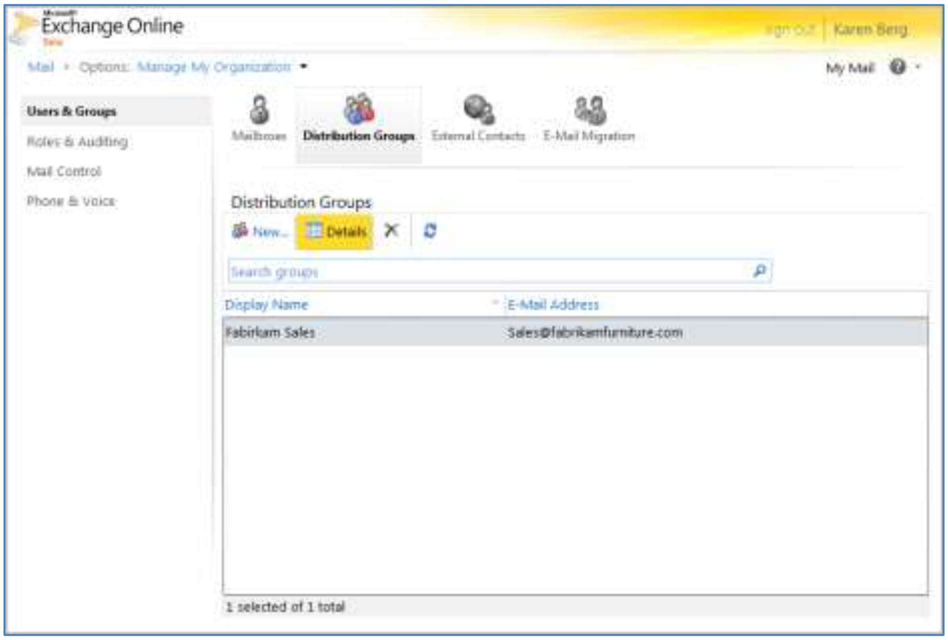
3. In the **Exchange Online** administration page, click **Distribution Groups**.

4. Under **Distribution Groups**, click **New**.
5. In the **New Group** form, add the following information.
   Display Name: *Fabrikam Sales*
   Alias: *Sales*
   Email-address: *sales@<your domain name>*
   Description: *Sales team communications*



6. Set the check box named **Make this group a security group**. Setting this box allows you to restrict access to content in SharePoint Online to just the members of the Sales team.
7. Read the message in the **Information** box, and then click **Close.**

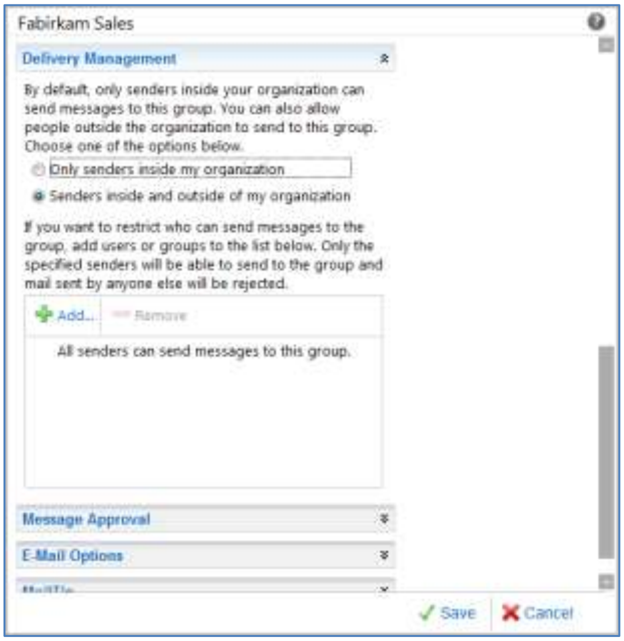
8. Note the options available for distribution groups. By selecting to make the distribution group a security group as well, users cannot self-add, or self-remove their membership. Click **Save.**
9. From the Exchange Online administration console, select the **Fabrikam Sales** distribution group, and then click **Details** in the menu under **Distribution Groups**.



10. In the **Fabrikam Sales** window, click **Membership** and then click **Add**.
11. Add Kim Akers, Chris Gray, and Andy Byrne to the distribution group, and then click **OK.** Note that external contactors can be members of a distribution list.

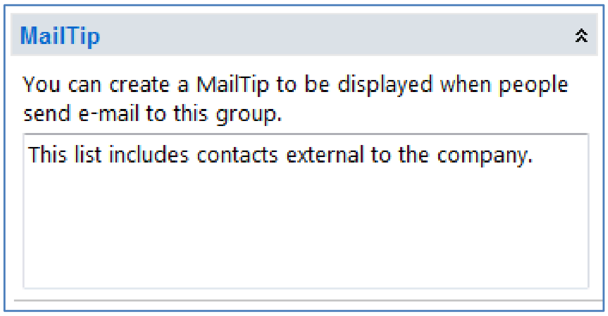
12. Scroll down till you see **Delivery Options**.
13. Click **Delivery Options**.

14. Select **Senders inside and outside my organization**.



15. Scroll down until you see **MailTip.**
16. Click **MailTip**.
    Mail tips warn users of potential issues if they send an email message to the group. MailTip text appears when the group is added to the **To**, **Cc** or **Bcc** fields of a new email message.

17. In the text box under **MailTip,** type *This list includes contacts external to the company*.

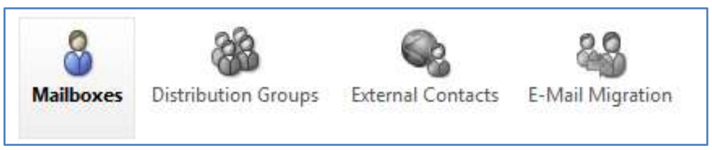


18. Click **Close**.

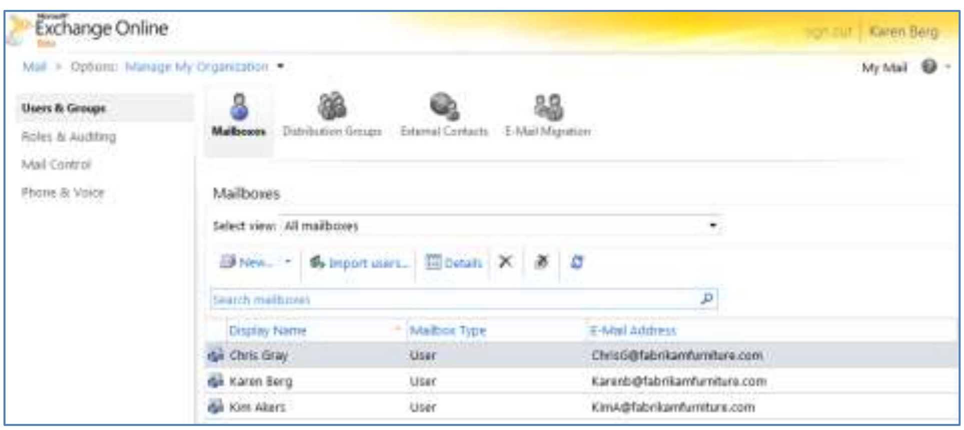
Task 3: Adding an Alias to a Mailbox

A mailbox is assigned to an email address associated with a user. Often, a mailbox needs additional email addresses to serve a business purpose, such as receiving the results of survey, customer feedback, or support requests. This allows you to provide contact information to the general public such as "for more information, contact us at info@contoso.com," without exposing an user's actual email address. This task shows you how to add an alternate email address to a user's mailbox.

1. At the top of the **Exchange Online administration** page, click **Mailboxes**.

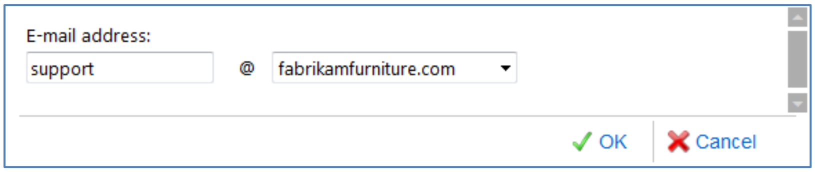


2. Double-click **Chris Gray**.



3. In the **Chris Gray** form, click **Email Options** and then click **Add**.
4. In the **Add an email** address webpage dialog box, in the **Email address** entry, type *support*.

5. Set the domain to your custom domain using the pull-down list, and then click **OK**.

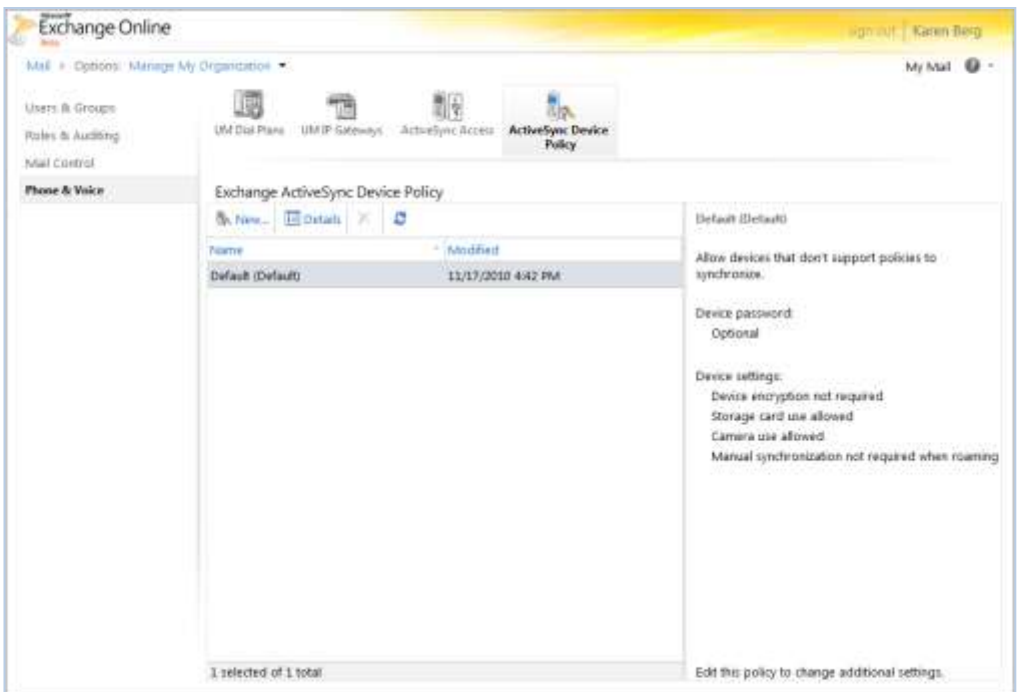


6. Note support@(domain).com is now listed for Chris Gray under **Other e-mail addresses**. Click **Save.**

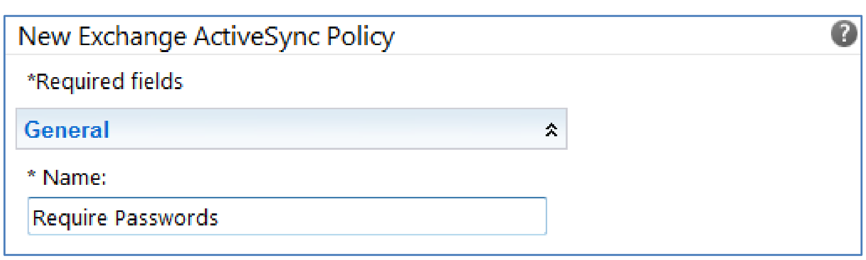
Task 4: Configuring Mobile Device Policy in Exchange Online

Many enterprises enforce security policies on mobile devices that connect to the corporate email system. With Office 365, IT is in control of this and many other Exchange Online policies and configurations. Follow these steps to set a mobile device security policy.

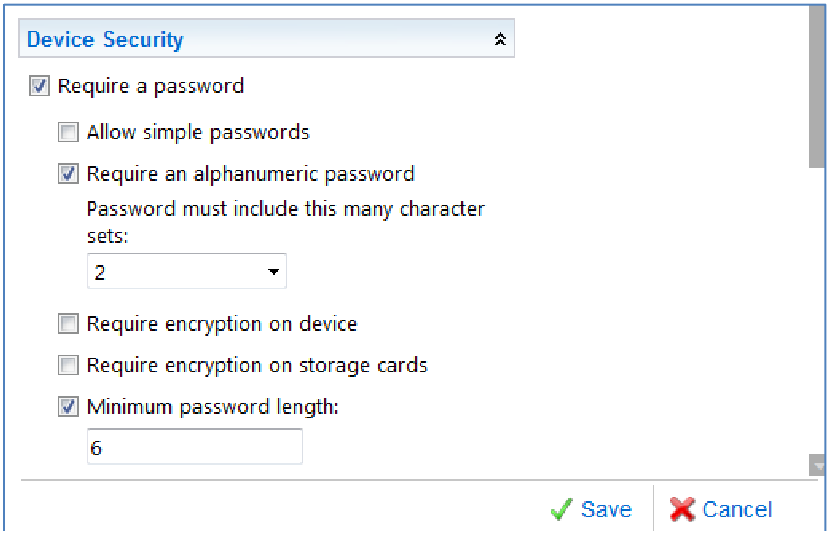
1. On the **Exchange Online administration** page, in the column on the left, click P**hone and Voice**.
2. Click **Active Sync Device Policy** at the top of the page.



3. Click **New**.



4. In the **Name** field, type **Require Passwords**.
5. Expand **Device Security**.



6. Select **Require a password**.
7. Select **Require an alphanumeric password**.
8. Set **Password must include this many character sets:** to **2**.
9. Set **Minimum password length** to **6**.
10. Click **Save**.

Scenario 5: Managing a SharePoint Site Collection

SharePoint Online provides a single, integrated location where employees can efficiently collaborate with team members, share knowledge, and find organizational resources and information. For more details about SharePoint Online, go to http://www.office365.com.

When your account is created, a SharePoint site collection is created by default. In this scenario, you are the service administrator setting up a SharePoint site collection that will be used by information workers. You will learn how to do the following:

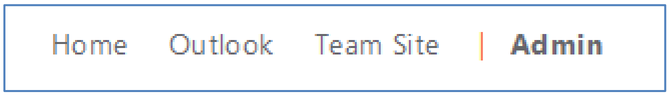
- Access SharePoint Online
- Assign user permissions to the SharePoint Site collection
- Turn on document versioning

Task 1: Accessing your Default SharePoint Online Site Collection

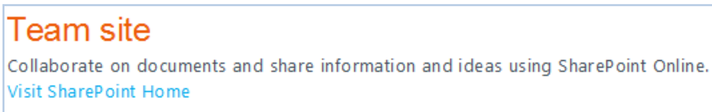
You access a SharePoint Online site using a web browser by browsing to the SharePoint Online site URL. You can locate the available URLs at any time from the Office 365 portal.

1. If you have not done so already, browse to the Office 365 portal (https://portal.microsoftonline.com). and sign in using global administrator credentials.

2. In the menu at the top of the portal, click **Home**.



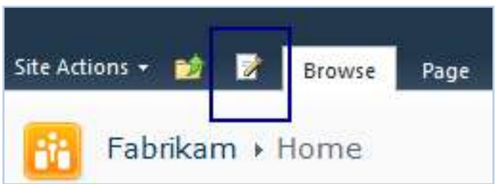
3. Under **Team Site**, click **Visit SharePoint Home**.



Task 2: Customizing the Home Page

You can easily update the content on a SharePoint Online site to suit your requirements.

1. On menu bar next to **Site Actions**, click the **Edit** icon.



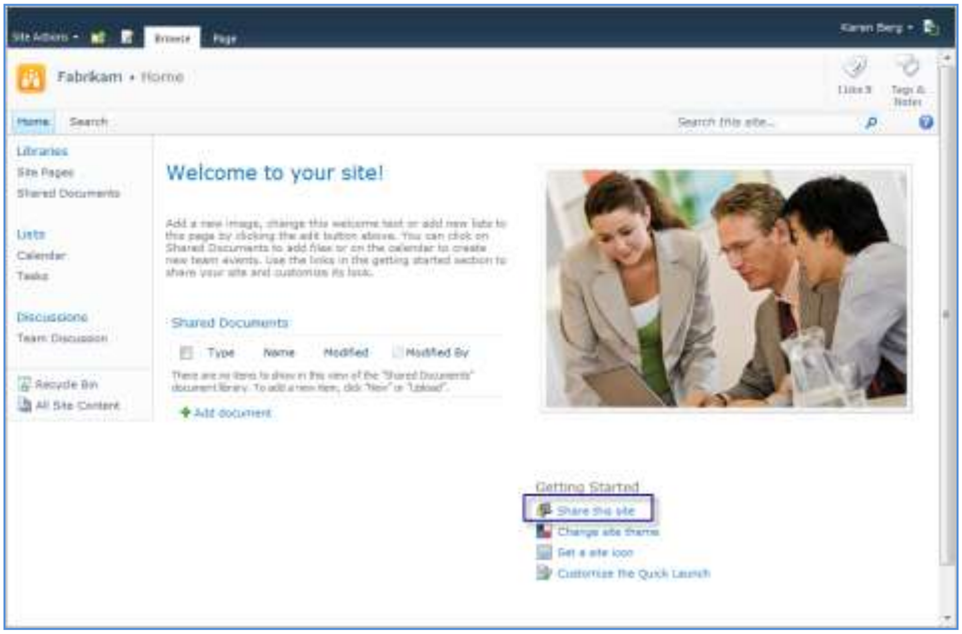
2. Replace **Welcome to the Team Site!** with *<Your Company Name> is in the Cloud!*
3. Click **Save and Close** on the menu.

Task 3: Assigning User Permissions to the SharePoint Site Collection

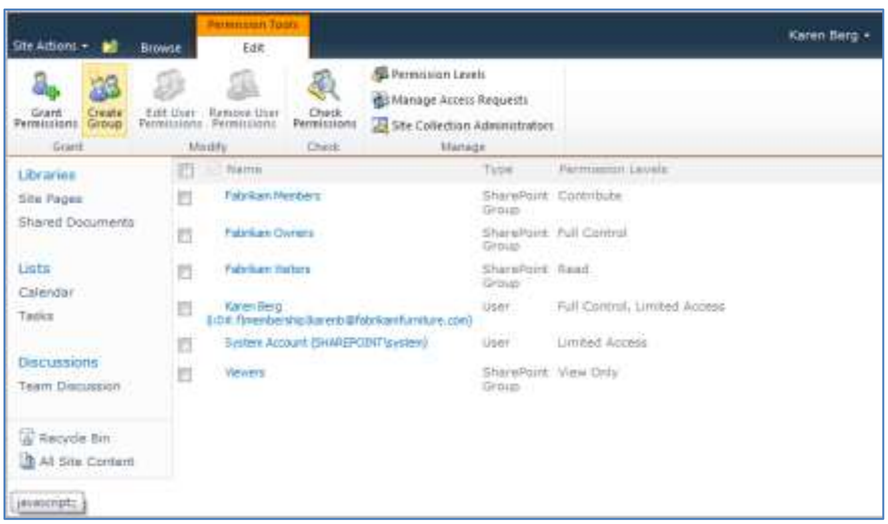
A central part of managing site collections is ensuring that users have the correct level of access to information. Users must be given permission to access a SharePoint site collection or subsite. To help maintain security, users are not allowed access to SharePoint sites automatically.

Administrators work from within the SharePoint site to assign specific permission levels to individual users or to groups. As a best practice, provide users with the minimum level of permissions necessary to do their work. Groups are collections of users who have been combined for ease in managing permission levels.

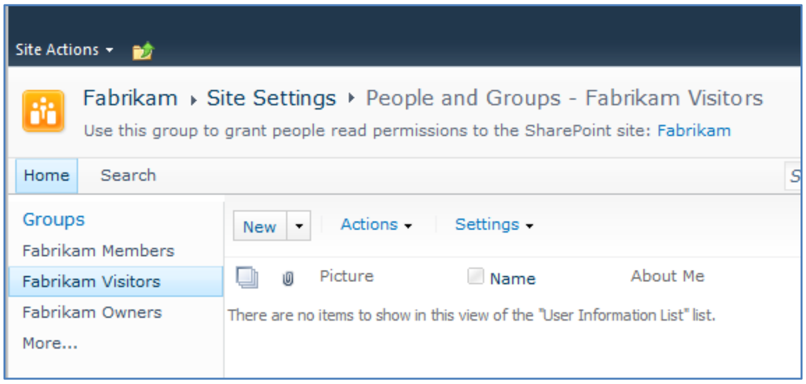
1. On the **Home** page, click **Share this site**.



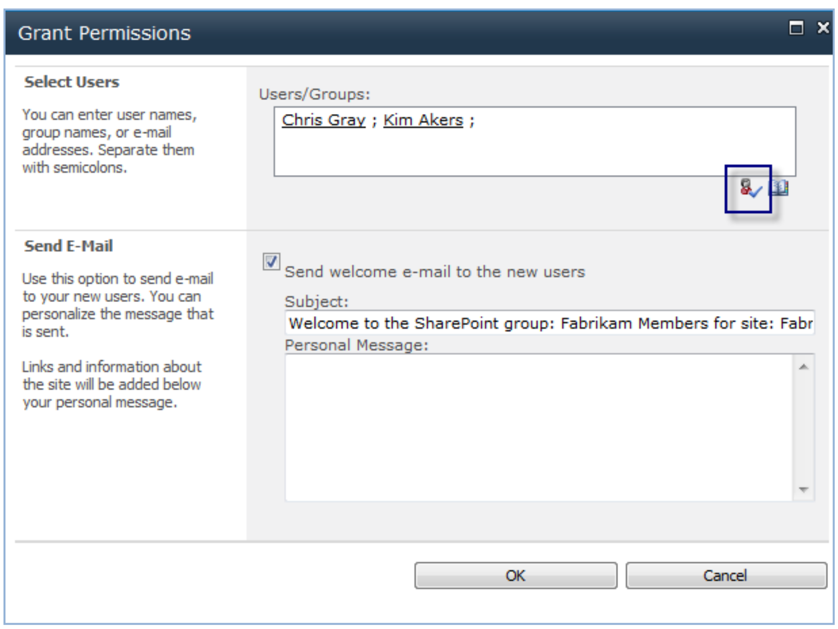
2. On the **Permission Tools** page, double-click the **Visitors** group. In the following example, the Visitors group is listed as **Fabrikam Visitors**.



3. In the -**Site Settings - People and Groups** –**Visitor** page, click **New**.



4. To grant read permission to all users in your company, in the **Grant Permissions** form under **Users/Groups** type **All Authenticated Users.**
5. Clear the check box labeled **Send welcome e-mail to the new users**.
6. Click **OK.**
7. Now you will give specific individuals Contributor rights on the site. On the **Permission Tools** page, double-click the **Members** group.
8. Click **New**.
9. In the **Grant Permissions** form, type **Chris Gray; Kim Akers**, and then click the **Check Names** control to confirm that the entry is recognized.



10. Click **OK**. Kim and Chris now have permission to contribute to the SharePoint Online site, and will receive an email with a link advising them of their access.
11. Click **Home** in the **Site** menu to return to the **Home** page.

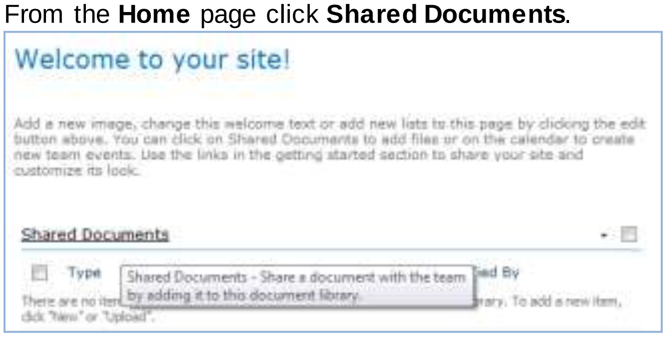
Task 4: Configuring a Document Library

SharePoint Online uses a document library to store files. A document library can be placed on a single page, or be added as part of a composite page. By default, a document library is created for you on the **Home** page in the **Shared Documents** section. You can find out more about document libraries at http://technet.microsoft.com/en-us/library/cc262215.aspx.

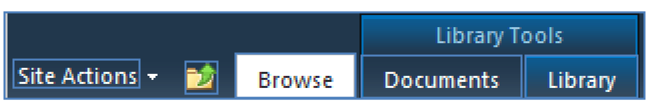
When enabled, a document library will automatically increment the version number for every document you check in. In addition, a copy of the each version can be kept in case you need to revert to a previous version. Checking documents in and out, as well as reverting to previous version, can be managed in Microsoft Office, without the need to access your SharePoint Online site in a browser. Combined, these feature help to eliminate versioning issues that arise when multiple contributors collaborate on a document using email.

Note
Retained versions of documents count as disk space used toward your SharePoint Online quota.

1. From the **Home** page click **Shared Documents**.

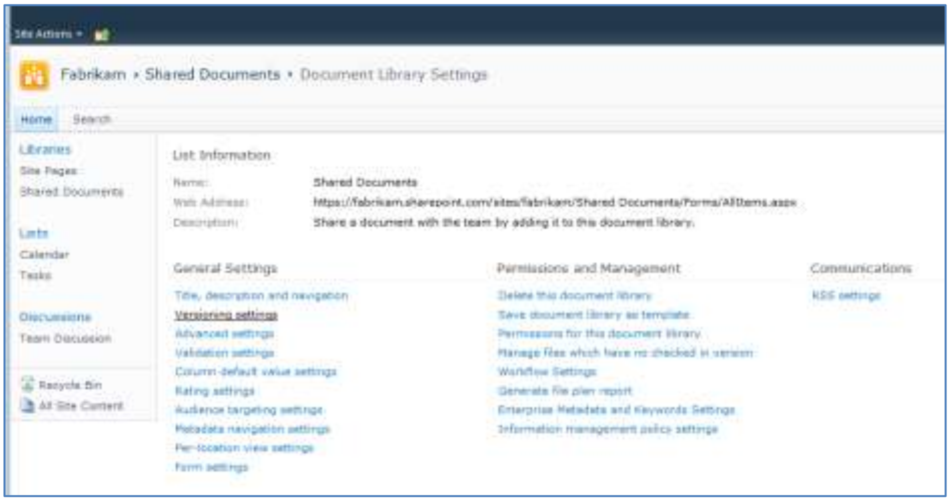


2. At the top of the page, under **Library Tools**, click **Library**.

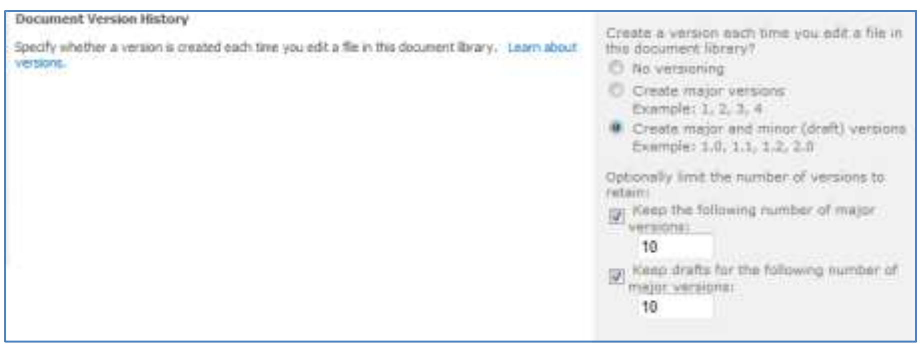


3. On the **Library Tools** ribbon, on the far right side, click **Library Settings**.

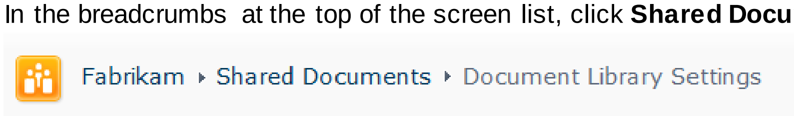
4. In the **Document Library Settings** page, click **Versioning settings.**



5. In the **Versioning settings** page, select **Create major and minor (draft) versions**.
6. Set the check box labeled **Keep the following number of major versions** and enter *10* in the textbox.
7. Set the check box labeled **Keep the following number of minor versions** and enter *10* in the textbox.

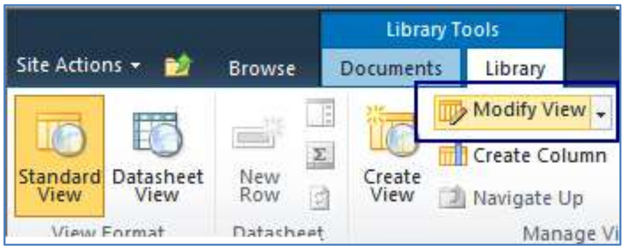


8. Click **OK**.
9. In the breadcrumbs at the top of the screen list, click **Shared Documents**.



10. On the top menu, click **Library**.

11. Under **Library**, click **Modify View**.



12. On the **Modify View** page, in the section named **Columns,** find **Version** under **Column Names**, and select the **Display** check box.
13. Click **OK**.

You will now see a column labeled **Version** that will display the automatically managed version number for all documents in the document library. Later in the document, you will see this feature in action.

Task 5: Creating a New SharePoint Site (Subsite)

In this task, you will create a new site in the site collection. The new site is sometimes called a subsite.

1. In the upper left side of the screen, click **Site Actions**, and then click **New Site**.

2. Browse the **Featured Items** display site templates. You can easily create a site based on any of these templates.

3. Click **Browse All**.

4. Review the available templates. Select the **Decision Meeting Workspace**.

5. In the **Title** box, enter *EOY Marketing Campaign.*.

6. In the **URL name** box, enter *Marketing*.

7. Click **Create.** You have now created a site for meeting notes and decision tracking.

Scenario 6: Preparing Your System for Office 365

Now that you have users and services configured, you can begin to use the services with Outlook Web App, and SharePoint Online. To use Microsoft Office with Office 365, you download and run the Office 365 setup utility and Lync 2010 from the Office 365 portal. Then, you configure Outlook for use with Exchange Online. This scenario will take you through installing the following software.

- **Lync 2010:** A unified communications application that helps increase productivity for information workers by enabling them to communicate and collaborate more easily with others in different locations or time zones, using a range of communication options that include instant messaging (IM), voice, desktop sharing, and video.

> **Note**
>
> Lync Online requires the Lync 2010 client. Uninstall Office Communicator if present on your system before installing Lync 2010. If you are using a custom domain, the DNS settings provided in Task 1 must be applied before running the Office Setup client.

- **Office 365 Setup client:** Checks your PC for required updates and configures your Office desktop applications to work with Microsoft Office 365. After setup, you will be able to:
    - Send email from Outlook 2007 or 2010.
    - Save files directly to SharePoint Online from your Office desktop applications.

> **Note**
>
> If present, uninstall the Microsoft Online Sign In application before installing the Office 365 Setup client.

- **Office Professional Plus (optional):** With Microsoft Office Professional Plus, you get the latest version of the Office applications, seamlessly connected and delivered with cloud services, so that you can access your documents, email, and calendars from virtually any device.

Task 1: (Optional) Installing Microsoft Office Professional Plus

Your trial account includes the rights to download and use Microsoft Office Professional Plus for the duration of the trial. Before installing Microsoft Office Professional Plus, identify a computer you can use for the trial, and review the system requirements for Office 2010 at http://technet.microsoft.com/en-us/library/ee624351.aspx.

IMPORTANT

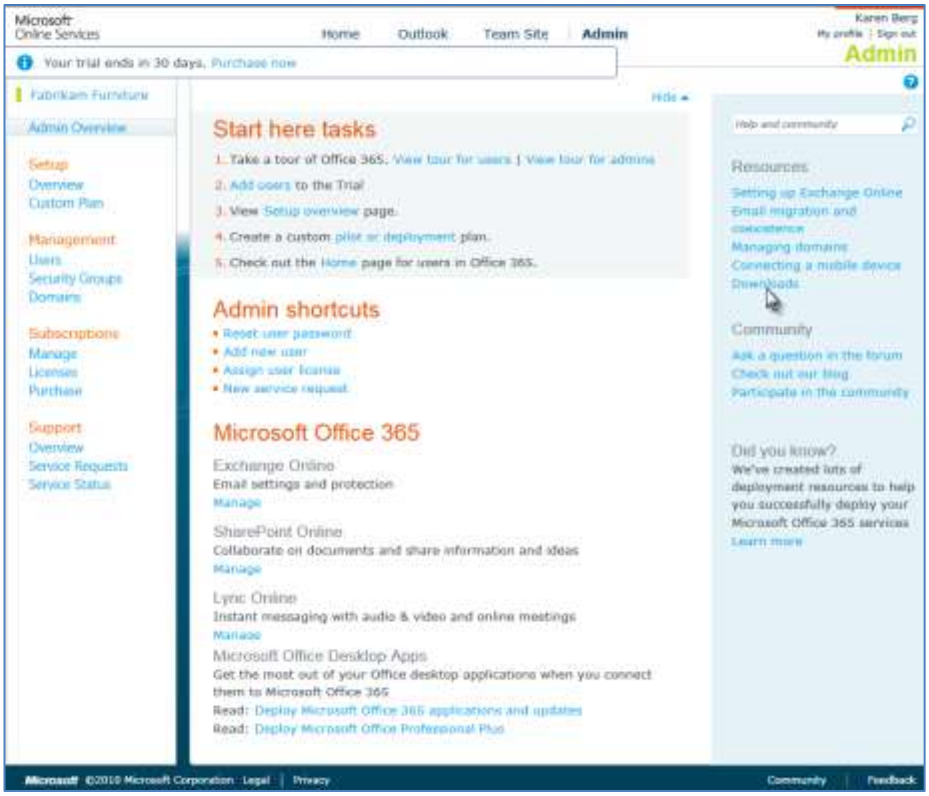
Installing Microsoft Office Professional Plus will upgrade your existing version of Office. If, at the end of the trial, you do not buy a subscription that includes Microsoft Office Professional Plus, you would need to uninstall Microsoft Office Professional Plus and reinstall your current version of Office. For the purposes of the trial, consider installing Microsoft Office Professional Plus on a different system than your main computer.

1. If you have not done so already, sign in to the Office 365 administration portal at https://portal.microsoftonline.com using your administrator name and password.
2. Under **Resources**, click **Downloads**.
3. Select the **Language** and **Version** required for your system (32-bit or 64-bit) .
   Click **Install** and select to **Run** the setup program. If you have multiple systems to install, select to **Save** the setup program, and then run the program on each system to upgrade.

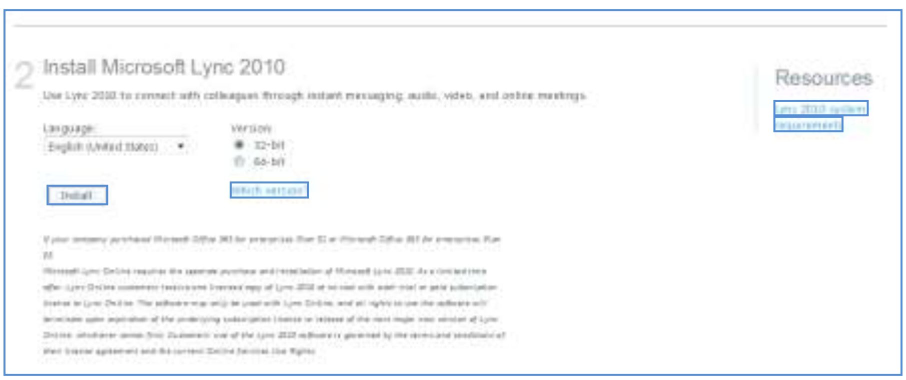
Task 2: Installing Lync 2010

The following steps explain how to install the Lync 2010 client on your computer from the user's landing page on the Office 365 portal. Alternatively, you can place the Lync 2010 setup program on a local share, and provide users with a link to the share.

1. If you have not done so already, sign in to the Office 365 administration portal at https://portal.microsoftonline.com using your administrator name and password.
2. Under **Resources**, click **Downloads**.



3. If necessary, scroll down to **Lync Online**.



4. Under **Resources**, click **Lync 2010 system requirements** and confirm that your system meets the listed requirements.
5. Select the **Language** and **Version**, and then click **Install**.
6. Your browser may ask for permissions to download or run the Lync 2010 client. Approve the action if necessary. When prompted, select **Run**.
   Depending on your operating system and how it is configured, you may see a **User Access Control** prompt. Click **Yes**.
7. In the **Install Microsoft Lync 2010** window, click **Browse** if you want to select the location where you install the software. Click **Install.**

8. On the **Microsoft Update** window, if permitted by your organization, click **OK** to enable the default setting of **Use Microsoft Update when I check for updates (recommended)**.

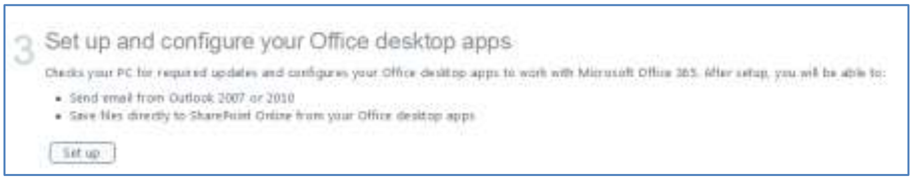
9. When the setup is complete, clear the **Start Lync** check box and click **Close**.

For more information about using the Microsoft Online Services Sign In application, see *Using the Sign In Application* in Scenario 4.

Task 2: Install Office 365 Setup

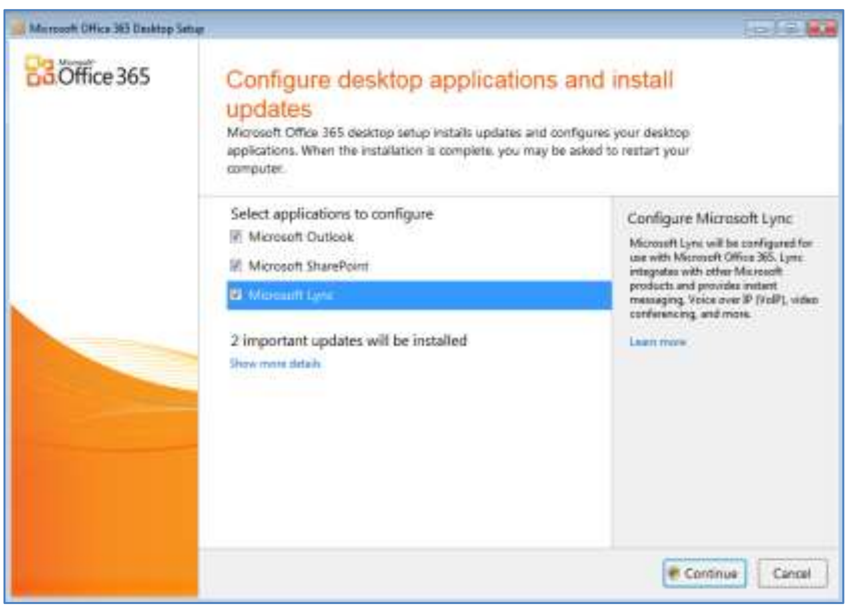
Office 365 setup checks your PC for required updates and configures your Office desktop applications for use with Office 365.

1. In the Office 365 administration portal, scroll down to **Set up and configure your Office desktop apps**.
2. Click **Set up**.

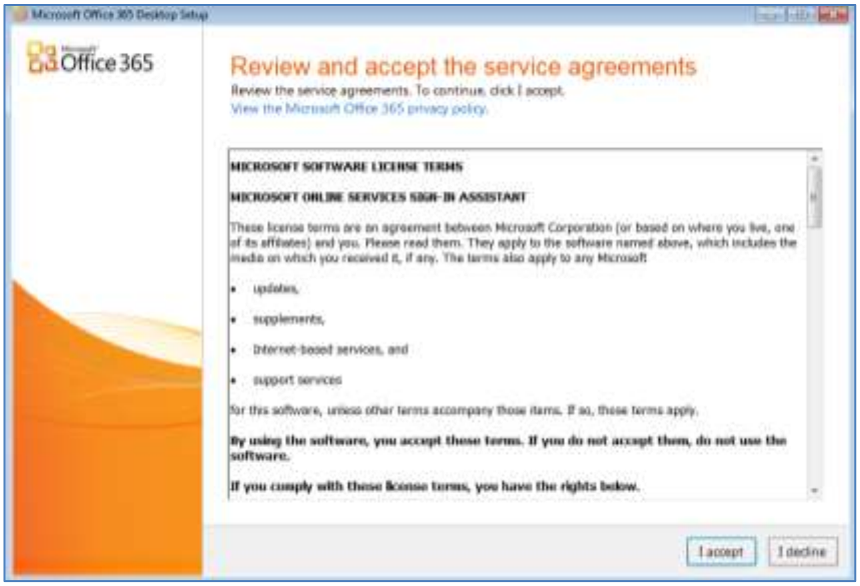


3. If prompted, provide permission to run the software.
4. When prompted, click **Sign in** on the **Microsoft Online Services** sign in screen.

5. On the **Configure desktop application and install updates** screen, click **Continue**.



6. If prompted, click **Yes** to the User Access Control prompt to provide installation permission.
7. On the **Review and accept the service agreements** screen, review the agreement and if you approve, click **I accept.**



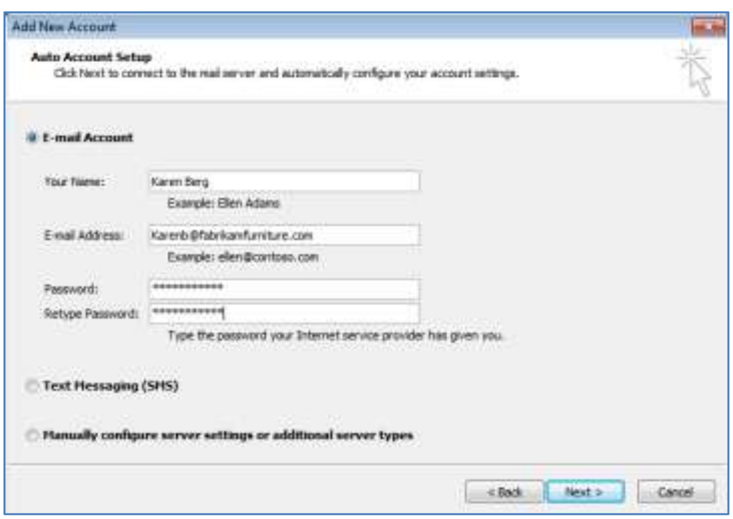
8. When the installation is complete, click **Finish**.

Task 3: Complete the Setup

When you launch Outlook 2010 and Lync 2010 for the first time after installing the preceding software, they will execute a "first time" setup procedure. This task takes you through these one-time setup routines. Afterwards, your system is ready for use with Office 365.

Complete the Setup of Outlook 2010

1. Launch Outlook 2010.
2. On the **Outlook 2010 Startup** page, click **Next**.
3. Click **Next** to answer **Yes** to **Would you like to configure an email account?**
4. In the **Auto Account Setup** form, add the requested information and then click **Next**.



5. Outlook 2010 will locate and communicate with Office 365, and automatically configure your local system. When completed, click **Finish**.
6. Outlook 2010 will launch into the Exchange Online mailbox, which is ready for use.

Complete the Setup of Lync 2010

1. Launch **Lync 2010**.
2. In **Lync 2010** enter the User name to match the sign-in address**,** and type in the user's password.
3. Click **Sign In**.

4. Lync 2010 will log on and an introduction to Lync 2010 will launch.

Note

The Lync 2010 introduction application contains useful information about how to configure and use Lync 2010. Not all the features contained in the tutorial are available with Lync Online.

5. Close the Lync 2010 introduction when completed.

Task 4: (Optional) Repeat Setup for Chris Gray

Office 365 has many collaboration features that require two or more users to fully appreciate.

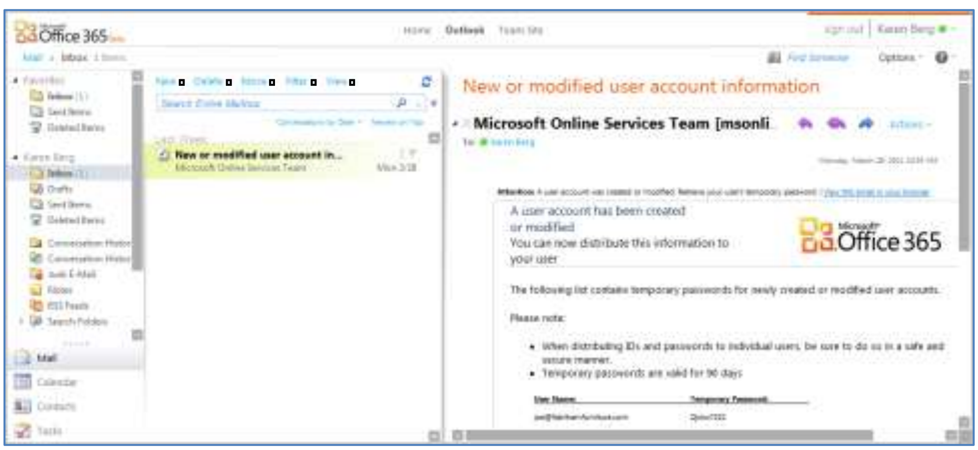
For the best experience with this walkthrough, on different computer (or virtual machine) repeat Tasks 1-3 for the user Chris Gray. This account will be used in optional exercises later in this guide.

Scenario 7: Using Exchange Online

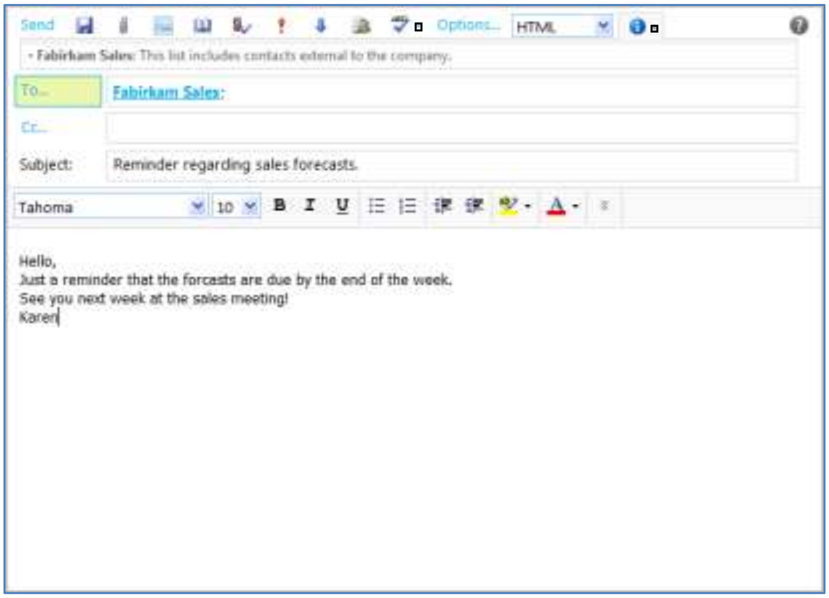
Task 1: Accessing Your Mailbox with Outlook Web Access

Outlook Web Access allows you to work and collaborate effectively wherever you are. When away from your main workstations, all you need is a browser to access your email, calendar, tasks, notes, and to interact with instant messaging.

1. Browse to https://portal.microsoftonline.com, and log on with your administrator credentials.
2. Click **Home** in the main menu.
3. Under **Outlook**, click **Inbox**.

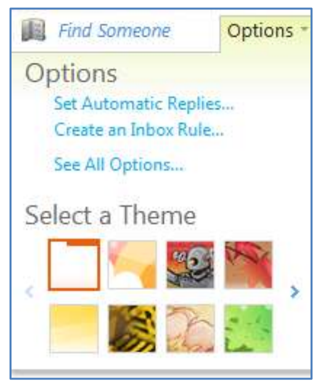


4. Click **New**, and then click **Message**.
5. Click **To**, double-click **Fabrikam Sales** from the list, and then click **OK.**



Notice the MailTip regarding external contacts that appears at the top of the email to remind you that external contacts are part of this distribution group.

6. Add a message to the team, and click **Send**.
7. In the upper right corner of the screen, click **Options**.
8. Note that you can set replies, create rules, change themes, and more from within your web browser. Under **See All Options** you can set signatures and make further customizations. When done, close your browser.



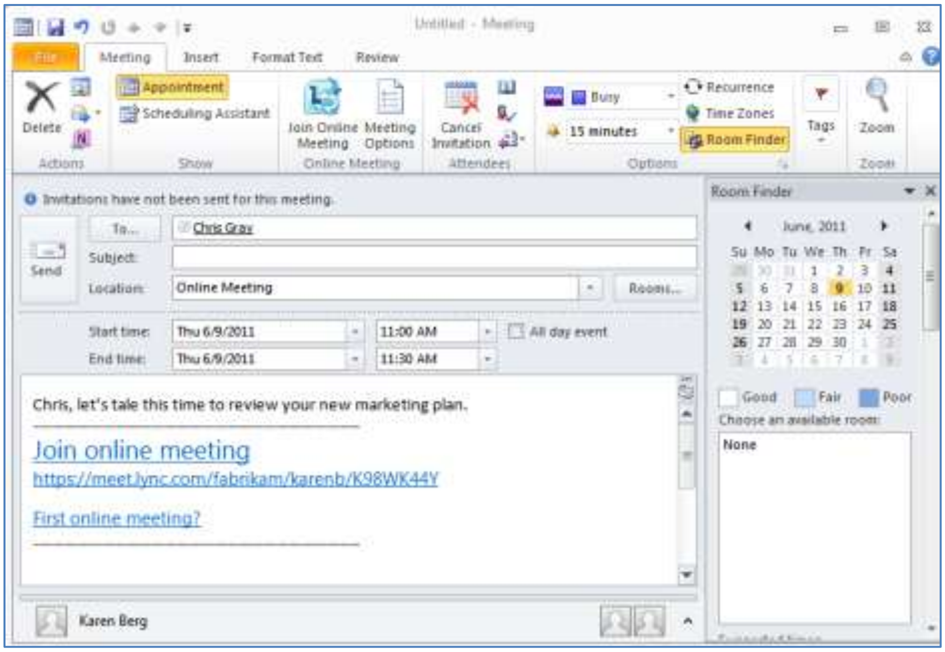
Note

Settings you create in Outlook Web App do not generally apply to your settings in Outlook.

Task 2: Scheduling a Lync Online Meeting with Outlook

Lync Online, Outlook, and Exchange Online work together to make it easy to create a meeting request that includes a link to your online meeting. The following instructions assume that you're using Outlook 2010. The instructions for Outlook 2007 are similar.

1. On your desktop, launch Outlook.
2. Click **Calendar**.
3. Click **New Online Meeting**.



Links to the meeting are automatically populated in the body of the message. When the meeting time arrives, Outlook automatically prompts you with a reminder. Clicking the reminder opens this message, which presents all participants with the meeting link.

4. In the **To** field, enter *Chris Gray.*
5. Click **Send**.
6. Select an email in your inbox, and then click **Meeting**.

Using this **Meeting** button, you can quickly reply to a message with a meeting request, and then populate the meeting request with a Lync Online link by clicking the **Online Meeting** button, as before.

Task 3: Configuring Outlook Email for Your Windows Mobile 7 Device

You can set up your Windows Mobile 6 or Windows Mobile 7 device to synchronize with your company's Microsoft Exchange Online service. In addition, any phone that supports Exchange ActiveSync® should work properly with Exchange Online, including Android and iPhone.

Keeping your mobile device synchronized helps you keep connected with email and scheduling, whether you are at work or out of the office. Before starting, make sure your mobile device service plan supports Exchange Online. Be sure you check to see if there are charges associated with email before configuring your phone. You can find a comparison of Exchange ActiveSync features at http://en.wikipedia.org/wiki/Comparison_of_Exchange_ActiveSync_Clients.

1. If this is the first email account you've set up on the phone, click the **E-mail** tile on the phone's home screen, and skip to step 4. If this is not the first email account you've set up on the phone, swipe left from the home screen.
2. Click **Settings** and then tap **E-mail and Accounts**.
3. Click **Add an Account** and select **Outlook**.
4. Enter your email address and password and tap **Sign In**. Windows Phone 7 will try to configure your email account automatically. If configuration completes successfully, skip to step 7.
5. If your email account can't be configured automatically, click **Advanced Setup**. You'll need to enter the following information:

    a. **E-mail address:** This is your full email access, for example, tony@contoso.com.

    b. **Password:** This is the password for your email account.

    c. **User name:** This is your full email address, for example, tony@contoso.com.

    d. **Domain:** This is the part of your email address after the @ sign, for example, contoso.com.

    e. **Server:** Your server name is m.outlook.com.

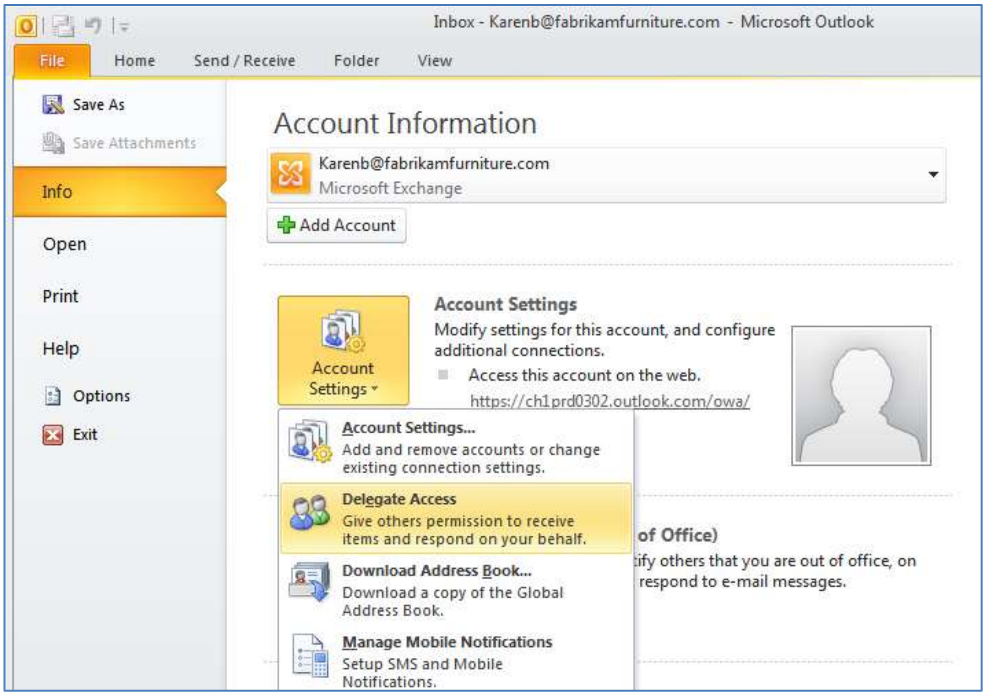
    f. Select the **Server requires encrypted (SSL) connection** box.

6. Click **Sign In**.
7. Click **OK** when Exchange ActiveSync asks you if you want to enforce policies on your phone. Policies let you set a password on your mobile phone and use a remote device wipe to clear all data from your mobile phone in case the phone is lost or stolen.

Task 4: Delegating a Mailbox

Using Outlook with Exchange Online, you can allow another person to manage your calendar, mail, and other settings. This feature is called "delegation" and is commonly needed so that administrative assistants can manage calendars and mail on behalf of others. These instructions assume you are using Outlook 2010. Delegation is also supported in Outlook 2007.

1. Launch Outlook 2010.
2. Click **File**, and then click **Info**.
3. Click **Account Settings**.

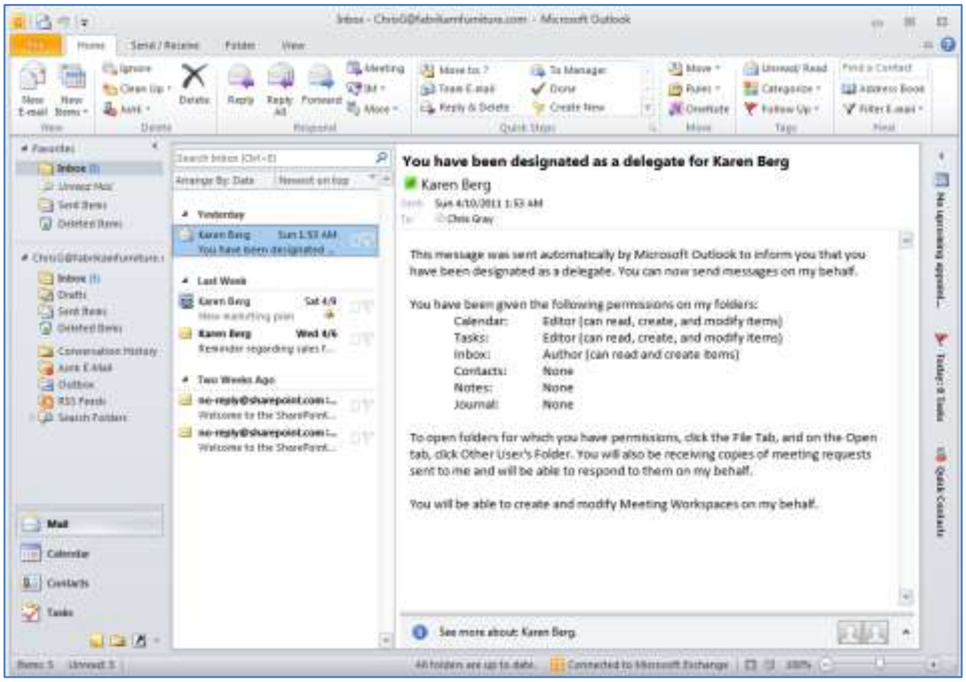


4. Click **Delegate Access**.
5. In the **Delegates** form, click **Add**.
6. In the **Add Users** form, double-click **Chris Gray**, and then click **OK**.
7. In the **Delegate Permissions: Chris Gray** form, for Inbox, select **Author (can read and create items**), and then click **OK**.
8. In the **Delegates** window, click **OK**. Karen has now delegated to Chris the ability to manage her calendar, tasks, and inbox.

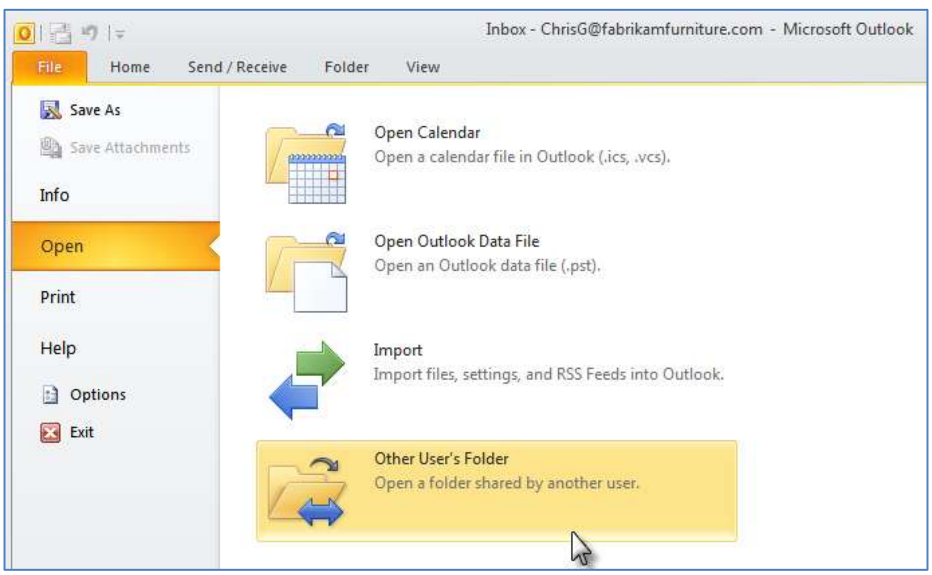
Task 5: (Optional) Accessing a Delegated Mailbox

Chris will receive a message about the delegation but needs to learn how to access the delegated mailbox. Before you begin this task, you must complete Scenario 5, Task 4.

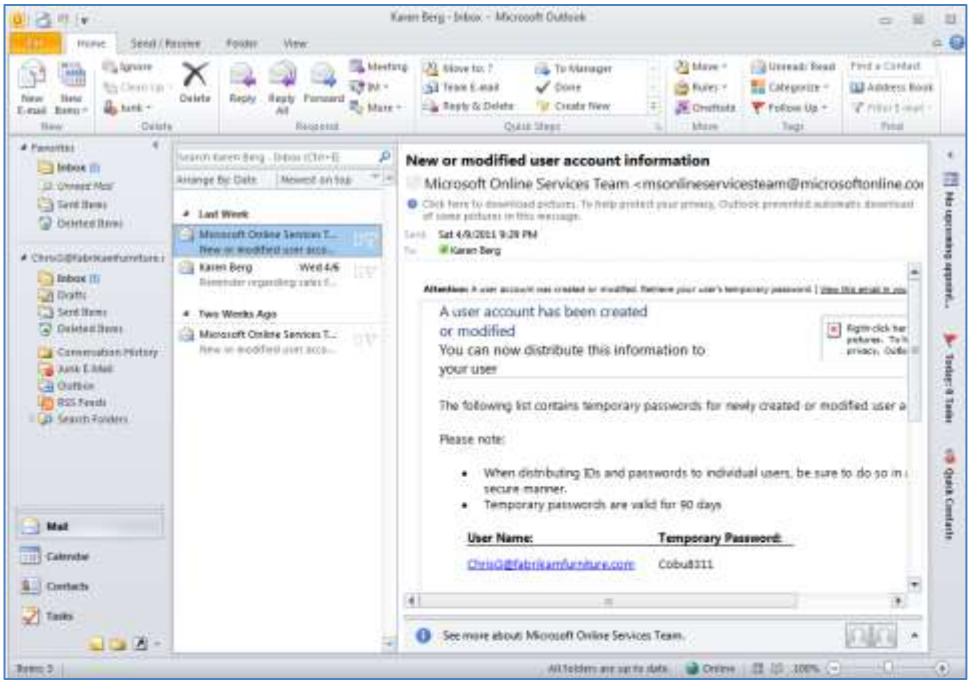
1. On the system configured for Chris Gray, launch Outlook.
2. You will see an email from Karen Berg informing Chris that he has been given access to Karen's mailbox. That email also has instructions about how to access Karen's mail.



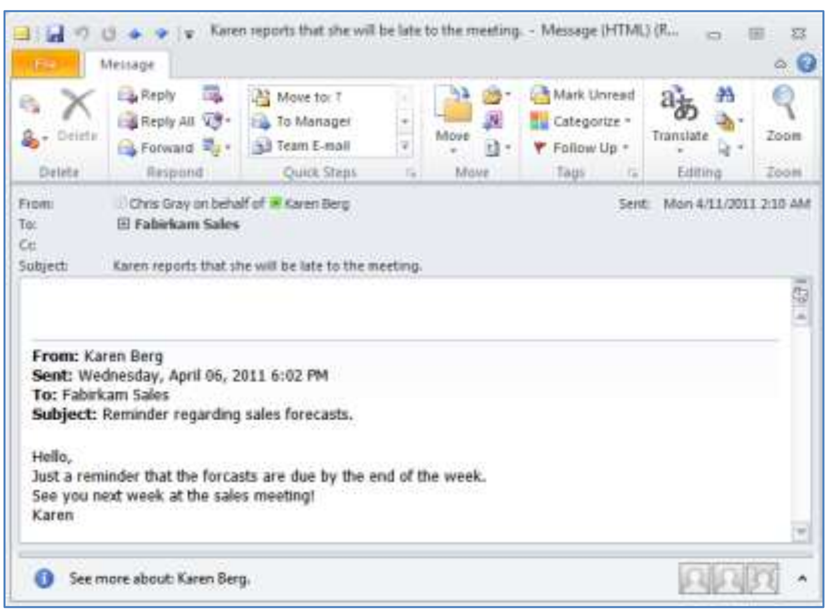
3. Click the **File** tab, then click **Open**.
4. Click **Other User's Folder**.



In the **Open Other User's Folders** form, in the **Name** box, type **Karen Berg**, and then click **OK**. You are **now viewing the contents** of Karen Berg**'s m**ailbox.



5. **Right-cl**ick the message sent earlier to the distribution list. In this example, it is titled **Reminder of sales forecasts**.
6. Click **Reply All**.
7. Clear the **Subject** and replace it with *Karen says she will be 10 minutes late to the meeting*.
8. Click **Send**.
9. Open the new mail. Note that it shows **"Sent on behalf of Karen Berg"**.



10. Close the new message. Be sure it is selected in the inbox, and then press the **DEL** key. You are unable to delete the message as that permission was not delegated.

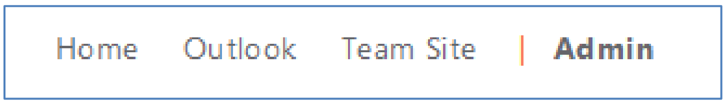
Chris can also access Karen's tasks and calendar similarly. And, he can add the mailbox to his mailbox list, which makes it easier to access the delegated content.

Scenario 8 :Using SharePoint Online

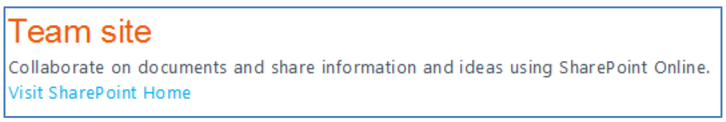
Task 1: Uploading Documents to the Document Library

In this task, you will upload files to the document library you customized in Scenario 6, Task 2.

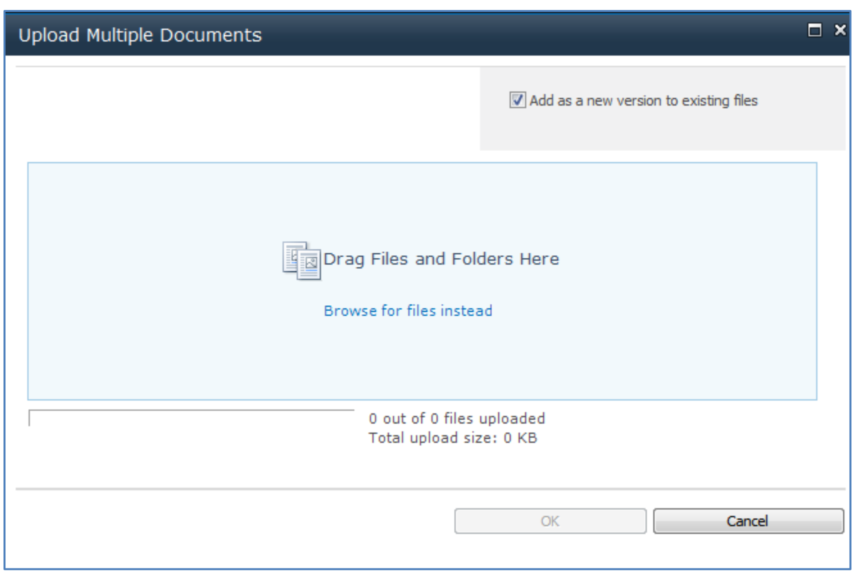
1. If you have not done so already, browse to the Office 365 portal (https://portal.microsoftonline.com), and sign in using global administrator credentials.
2. In the menu at the top of the portal, click **Home**.



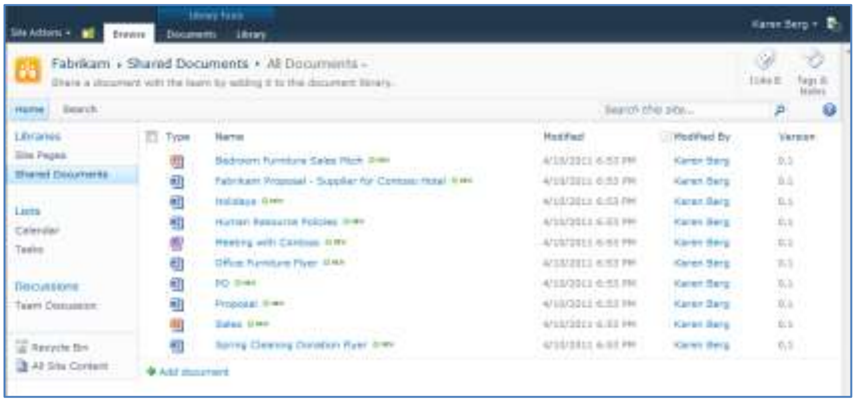
3. Under **Team site**, click **Visit SharePoint Home**.



4. Click **Shared Documents**.
5. Click **Add Documents**.
6. If present, click **Upload Multiple Files** and proceed with step 7; otherwise, click **Browse** and proceed with step 8.
7. Depending on the version of Office you are using, you will see the **Upload Multiple Documents** window (shown), or a page with link **Browse for files**.



8. Upload several documents to the document library. If necessary, click **Done**.



You now have documents on your SharePoint site showing the type of document, the name, when each document was modified, who modified the document and the version number of each document.

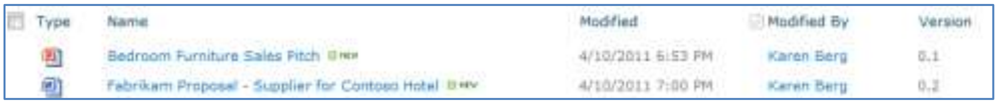
Task 2: Opening and Editing Documents Using Office Web Apps

In this task, you will view and edit a document in your browser using Office Web Apps.

In the **Shared Documents** list, click a Word document. The document automatically opens in Outlook Web Apps.

9. Click **Edit in Browser**. The familiar **Word** toolbar appears. You can now edit the document using capabilities you are already familiar with from Microsoft Word. Note that you can open the document in Microsoft Word with at any time by clicking **Open in Word.**

10. Make a change in the document. Click **File** and then click **Save**.
11. Click **File** and then click **Close**.
12. Notice that the version number for the document you edited has been updated.

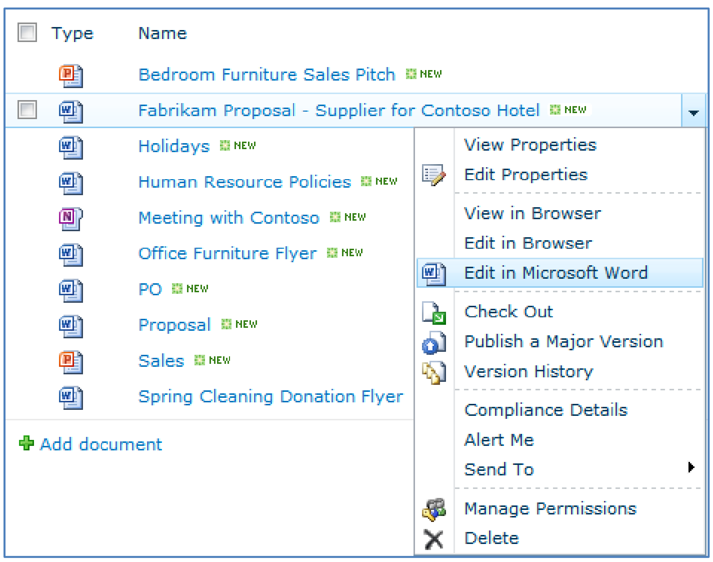


Task 3: Document Versioning, Check-in, Check-out within Microsoft Word

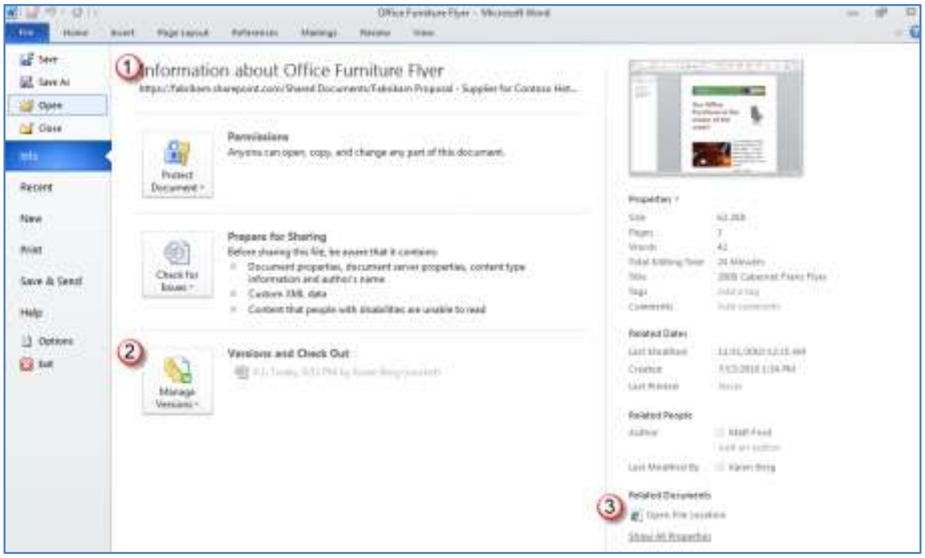
Microsoft Office applications have the ability to open and work with documents hosted on SharePoint Online. You can edit the online documents directly within Office, control versions, check documents in and out, and much more, without leaving your application.

Open a SharePoint Online Document with Microsoft Word

1. In the SharePoint Online document library, click the down arrow next to a document name and select **Edit in Microsoft Word**.



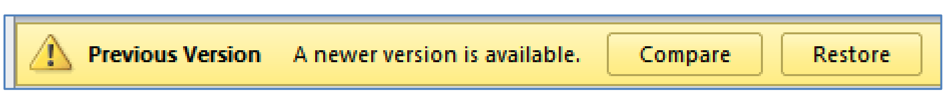
2. If prompted, enter your Office 365 username and password.
3. Make a change to the document, and then click **File**.



4. In the preceding screen shot, in position 1 you'll see the URL for the document. This demonstrates that Word is editing the document directly on SharePoint Online.
5. Click **File**, and then click **Close**.
6. Click **File**. Under **Recent Documents**, note that your document is listed. Word will keep track of your most recent documents on SharePoint Online the same way it would track local documents.
7. Click your file in **Recent Documents** to open the file.
8. Click **File**.

Manage Document Version with Microsoft Word

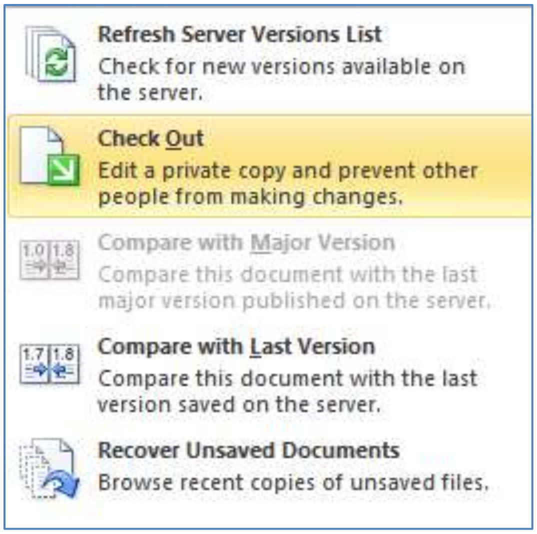
1. In position 2, (shown in the preceding screen shot), under **Versions and Check Out**, note the revision history that SharePoint Online is storing for this document.
2. Click **Manage Versions**.
3. In the column on the left, click **Save**.
4. Note the version information next to **Manage Versions** under **Versions and Check Out**.
5. Click **Save**, and then click **File**.
6. Click **Manage Versions**, and then click **Refresh Server Versions List**.
7. Again, note the version information next to **Manage Versions** under **Versions and Check Out**. You'll see a new line item for the version you just updated.
8. Click a previous version of the document.
9. The document will open with a banner saying that you have opened a previous version. Click **Restore**.



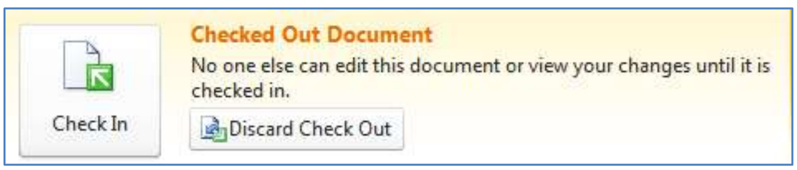
10. Click **File**. Notice that the restored version is now the last entry in the version listing.

Check Documents in and out with Microsoft Word

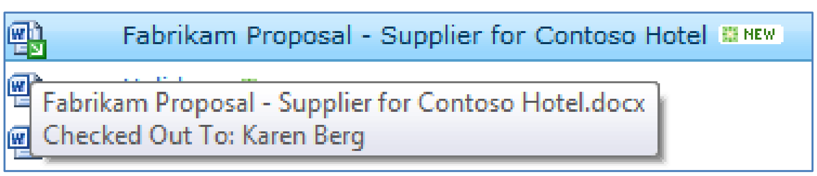
1. Click **Manage Version**, and then click **Check Out**. This action prevents others from editing the document directly on SharePoint Online. In addition, if a user downloads a copy into Word, he or she is presented with message saying the document is read-only.



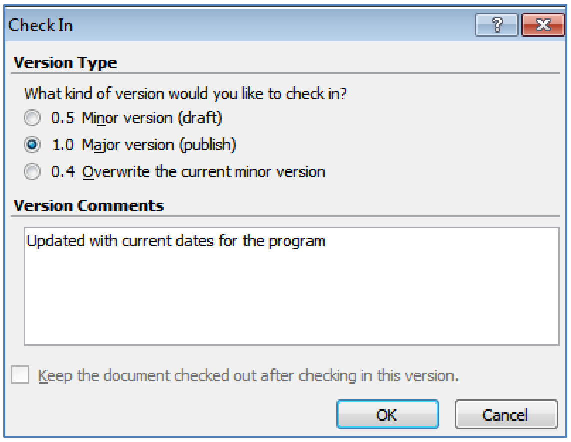
2. Click **File**.
3. Notice that a new section has appeared that allows you to manage check-in and check-out from within Word.



4. The status of the checked-out document is also shown to other SharePoint Online users viewing the document library. In the right column, under **Related Documents**, click **Open File Location** (position 3 in the screen shot at step 3). This opens the document library where the document is stored.
5. Notice that the icon for the checked-out document now has a small green arrow indicating that it is check out. Hover over the icon to show more information about the document.



6. Return to Word and click **Check In**.



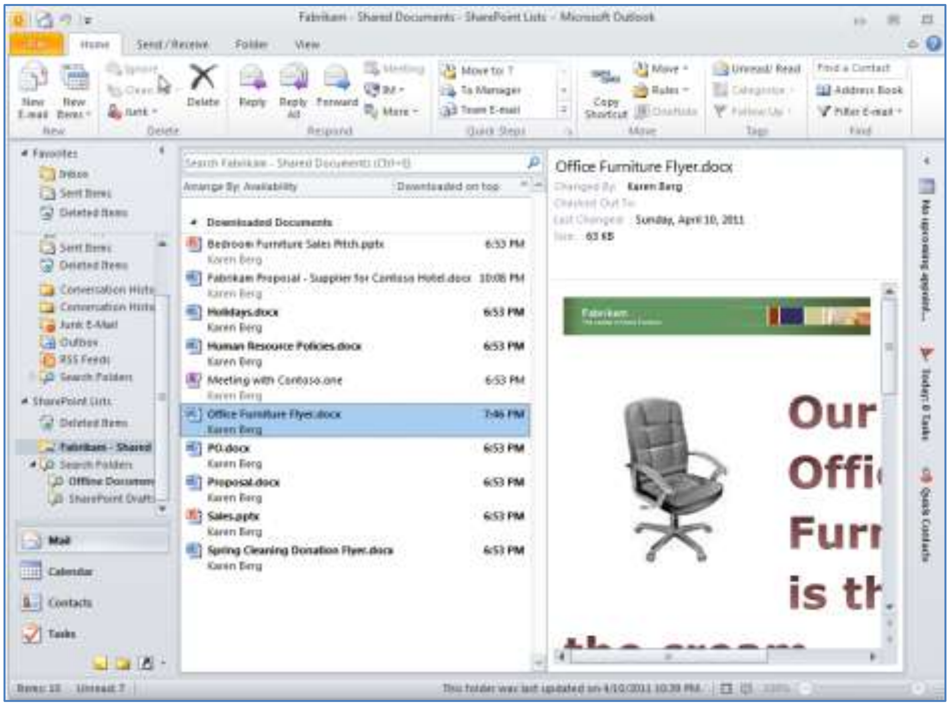
7. Select **1.0 Major version (publish)**.
8. In **Version Comments**, enter a note about your edits, and then click **OK**.
9. The document will be checked in, and Word will automatically notify you that you are now viewing a read-only version of the document.
10. Close Word.

Task 4: Accessing Your Document Library Using Outlook

There are times when you need to access documents stored in SharePoint Online, but you do not have an Internet connection available. If the version of Microsoft Office you are using has SharePoint Workspace, you can easily keep a local copy of your document using SharePoint Workspace. In addition, you can publish your document to Microsoft Outlook 2007 or 2010. You can then open and edit your documents while in Outlook, and they will be saved locally. When you are reconnected to the Internet and logged in, you can publish your edited versions. If you use SharePoint Workspace for offline editing, your updates will be synchronized automatically with the document library when you reconnect.

1. In the document library, under **Library Tools**, click **Library**.
2. Click **Outlook** from the ribbon.

3. Click **Allow** when asked **Do you want to allow this website to open a program on your computer?**
4. Click **Allow** when prompted with **A website to open web content using this program on your computer.**
5. Click **Yes** when prompted **Connect this SharePoint Document Library to Outlook?** The document library will then be downloaded to Outlook and placed in folder named for the document library.



6. (Optional) Double-click a document, and note that you are editing the document in "offline mode." Click **Edit Offline** and make some changes to the document. Close the document and you'll be prompted to update the server version, since you are online. Click **Do Not Update**, and notice that there is an up arrow on the document, indicating that you need to upload your edits. When travelling, you can edit documents in the document library in this manner. If the document on SharePoint Online has been updated since you last retrieved the file, you will be notified of a version conflict, and instructed to save the file to another location.

Scenario 9: Using Lync Online

Task 1: Personalizing Lync 2010

Lync 2010 has a number of features that are designed to be personalized. You can tell people what's happening today in the personal comment section, display your photo, add phone numbers where you can be reached, add and organize contacts, and many other settings. For details on Lync 2010 configuration, see http://office.microsoft.com/en-us/communicator-help/CL101828901.aspx?CTT=97

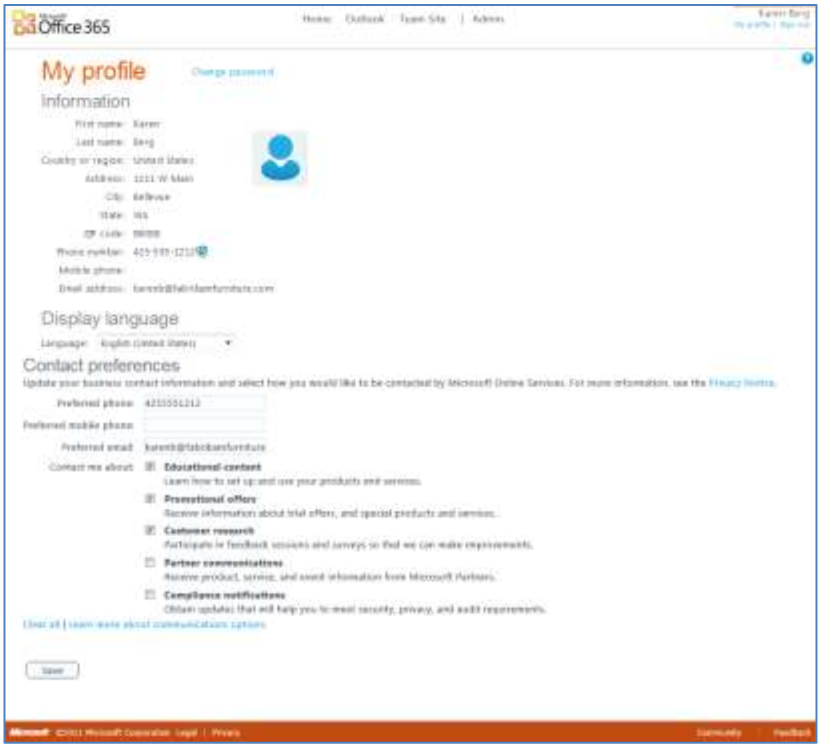
Add Pictures to Lync 2010

When sending email and chatting online, you can see pictures of the people with whom you are communicating. In larger organizations, it can be very useful to help put a face to a name. When using directory synchronization with Office 365, photos will be copied automatically, if present, from Active Directory.

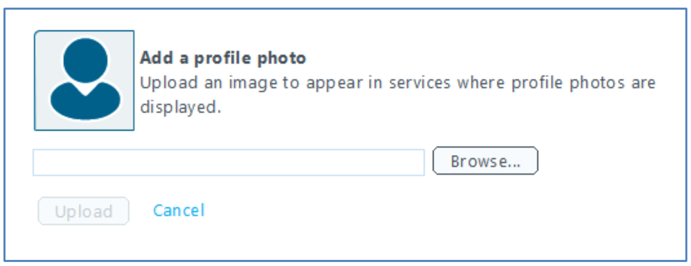
Alternately, you can add a picture to your Office 365 Profile which will be used automatically by Lync 2010.

Note
See **What You Need for the Guided Tour**, earlier in this guide, for details on selecting an appropriate picture.

1. Browse to **https//:portal.microsoftonline.com**, and log on with your administrator credentials.
2. Click **Home**.
3. In the upper right corner, click **My Profile**.



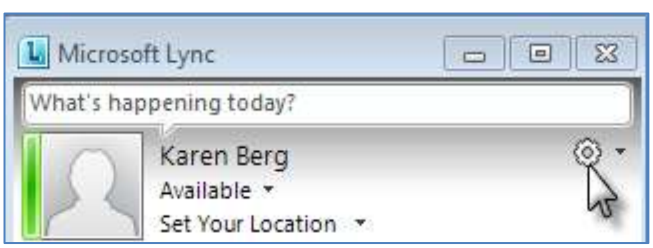
4. Click the blue icon.



5. Browse to a profile picture not larger than 30 KB, and click **Upload**.
6. Click **Save**.

   The profile picture will then be used with Lync 2010. There could be a delay of several hours while the settings propagate across services.

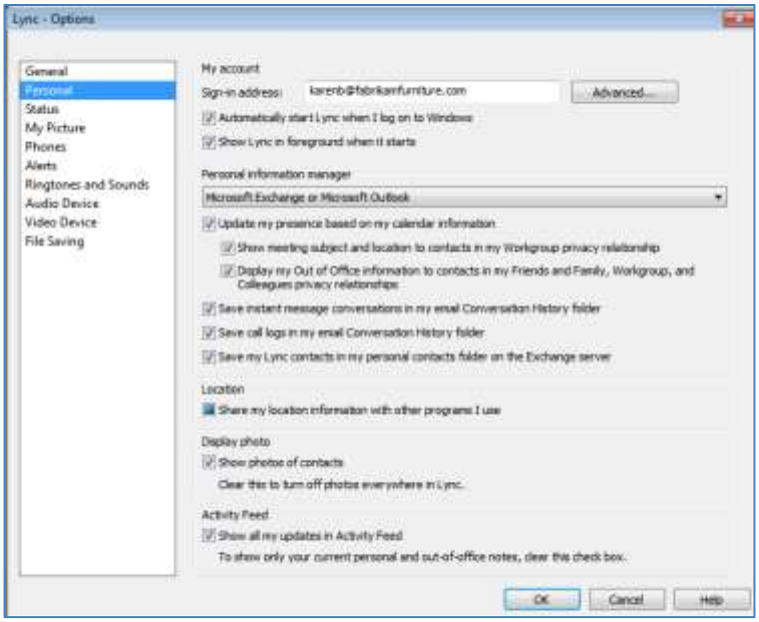
7. In the Lync 2010 client that is logged on as Karen Berg, click the **Options** icon. The **Options** icon is the small cog in the upper right corner of the client.



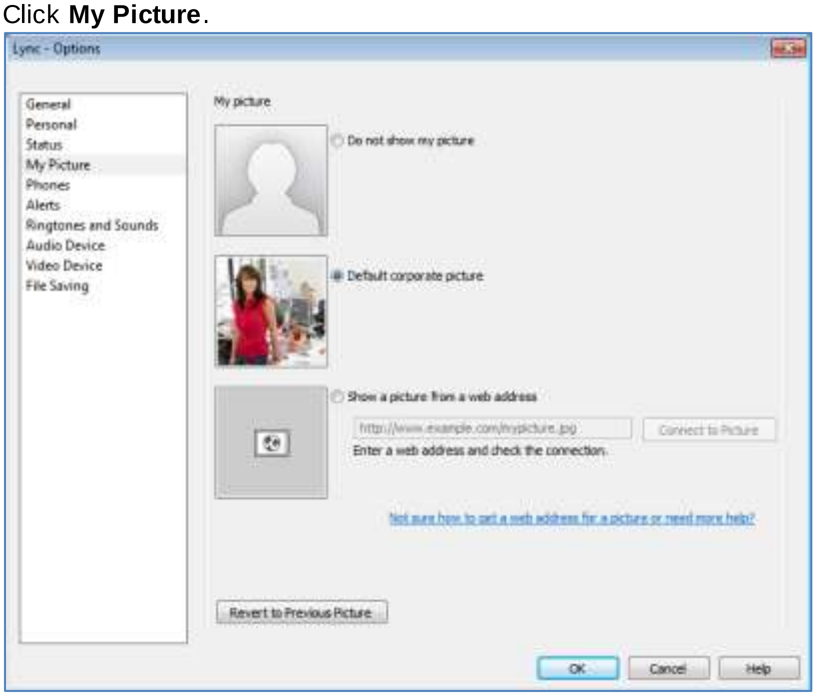
Note

If you click slightly to the right of the cog, on the small triangle, you will see a menu instead of the **Lync-Options** window.

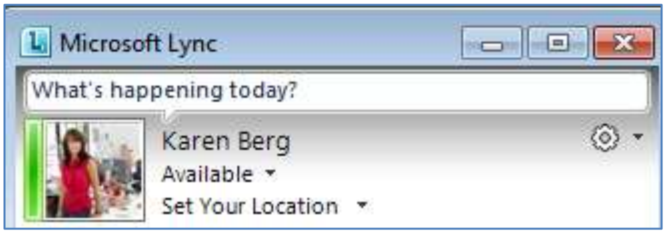
8. In the **Lync – Options** window, if you do not plan to use pictures with Lync 2010, clear the check box labeled **Show Photos of Contacts**, and proceed to the next task.



9. Click **My Picture**.



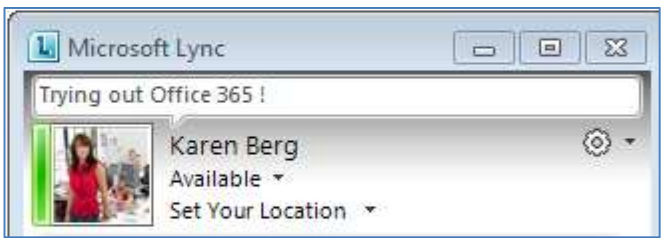
10. Select **Default corporate picture**, and then click **OK**.



11. (Optional) Repeat this task on a second system for Chris Gray.

Add a Personal Comment

1. At the top of the Lync 2010 client, type a comment about what's happening today. Others will see this comment through their Lync 2010 client.



2. (Optional) Repeat this task on a second system for Chris Gray.

Add Location Information

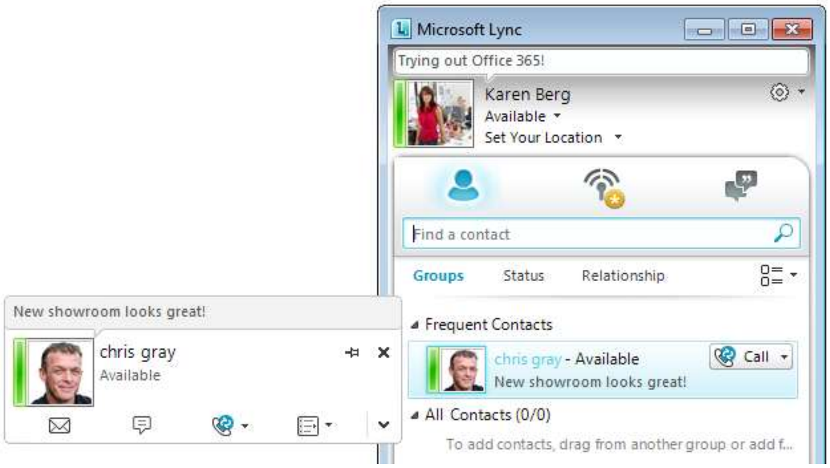
1. Click **Set Your Location**.
2. Type *In the Downtown Office*. Others can now see your location at a glance. This feature can be very useful when people move between multiple locations.

Task 2: Adding Contacts

1. Click the **Find a Contact** search bar, and then type *Chris Gray*
2. Right-click Chris Gray, select **Add to Contacts List,** then click **All Contacts**.
3. Optionally, add any other users you have created as part of the trial.

Task 3: Viewing the Contact Card

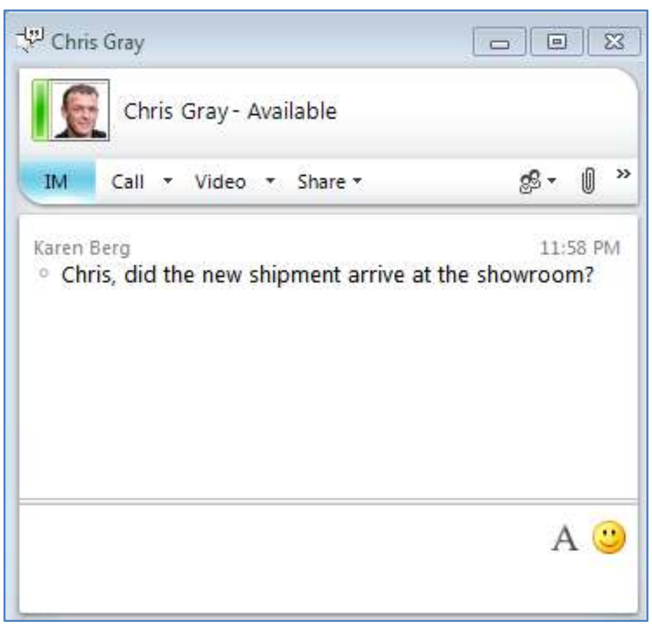
1. Hover over the entry for Chris Gray to view the Contact card. Notice that you can see Chris's comment in the main display.



2. Hover over each icon on the contact card to see that you can email, IM, call, or access additional actions directly from the contact card. Chris' location is also displayed.

Task 4: Instant Messaging

1. Double-click Chris Gray to start an instant message session.



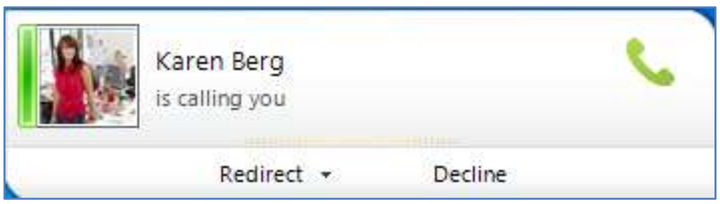
2. (Optional) On the system setup for Chris Gray, respond to the IM.

Task 5: (Optional) Placing a Call with Lync Online

Lync Online allows allow you place voice over IP (VoIP) calls between two Lync Online subscribers on a local network or over the Internet. Your company network needs to permit voice over IP traffic. In addition, VoIP is not available in all locations worldwide. This task requires two systems setup for use with Office 365, and two people to engage in a voice conversation.

Note
Before placing a call, ensure that your audio devices are configured properly. Click **Options** (the cog icon), **Tools, Options,** then select **Audio Device**. Adjust the settings as required, then click **OK**.

1. In Karen Berg's Lync 2010, double-click **Chris Gray**.
2. In the **Lync 2010** menu, click **Call**, and then click **Lync call**.
3. On Chris Gray's system you will hear ringing and see a prompt about an incoming call. Click the **Phone** icon to accept the call.



4. You are now connected to the call and can begin talking.

Note that you can mute your microphone, adjust speaker volume, use the phone keypad, and more with the various menu options and icons.

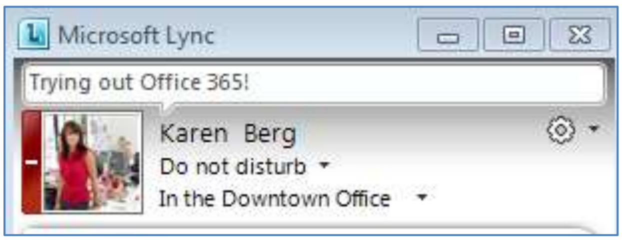
5. End the phone call by clicking the **Handset** icon.
6. Close all open windows.

Task 5: Controlling Presence

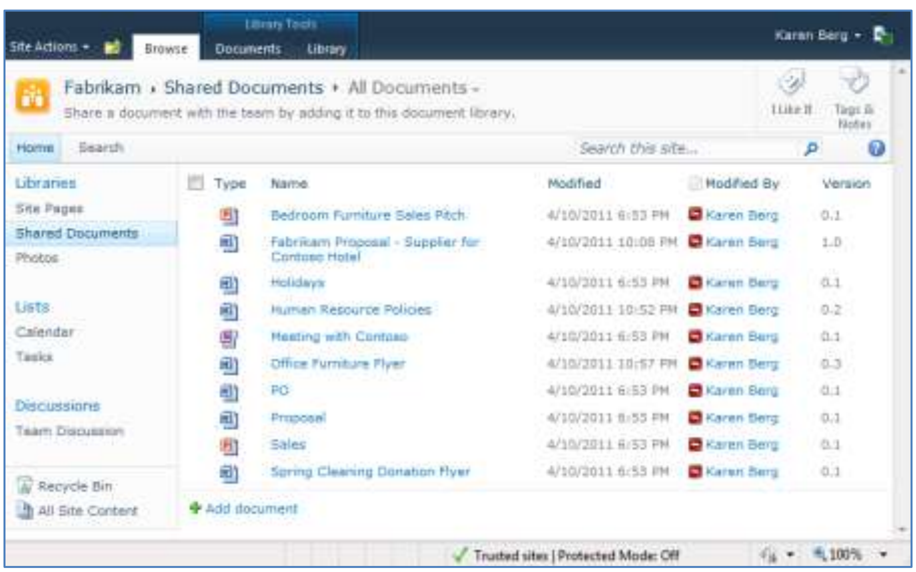
Lync 2010 automatically changes your presence to indicate your availability based on your Outlook calendar. In addition, if you are in a call or in a meeting, Lync will indicate such to other people viewing your status. Your status is also reflected in Outlook, Outlook Web App, SharePoint Online and other presence-aware applications. Finally, you can change your status manually to indicate that you are available when you were planning to be busy, such as in the event of a canceled meeting. Alternately, you can indicate that you do not wish to be disturbed, which blocks all incoming IM requests.

1. Open Lync 2010, and note your status.
2. Hover over the **Lync** icon on the taskbar at the bottom of your operating system window.

3. Click the red square with a white line, indicating “do not disturb.”



4. Karen’s status changes are updated, and others will see that she is not to be disturbed.
5. Open the SharePoint site used in Scenario 8, and click **Shared Documents**. Karen’s status is reflected in the SharePoint site.



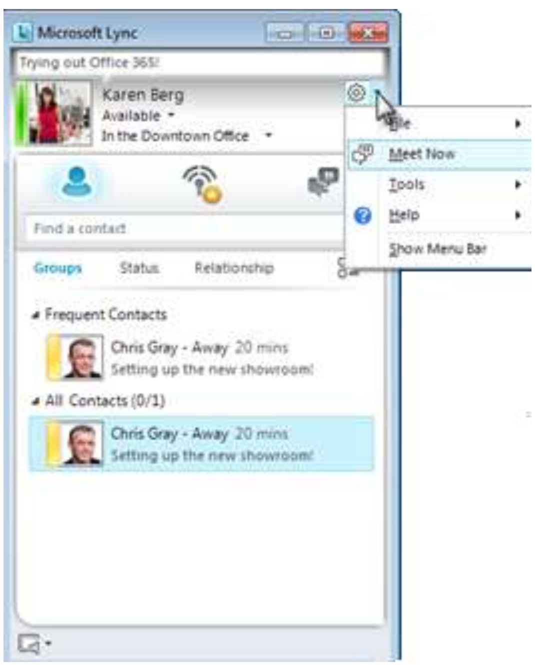
6. Change Karen’s status back to green to indicate she is now available.
7. Observe that the presence is updated in SharePoint Online.
8. Close all browser windows.

9. Launch Internet Explorer, and browse to https://portal.office365.com.
10. Log on as Chris Gray.
11. Under Outlook, click **Inbox**.
12. Open a message from Karen Berg. Note that presence is indicated for Karen in Outlook Web App.
13. Right-click Karen's name, and select **Chat**. Type a message to Karen, and press **Enter**.
14. Note the message that appears. Karen can ignore the request, set her status to "Do not disturb," or accept the invitation to chat.

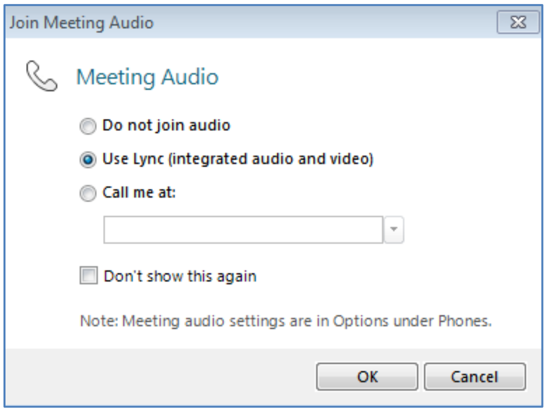
Task 6: Starting an Online Meeting

You can easily start an online meeting using the Meet Now capability in Lync 2010.

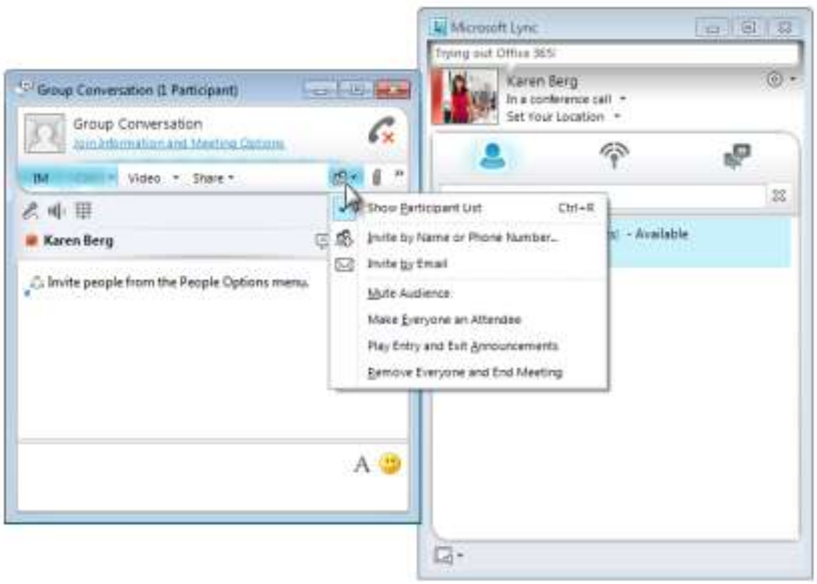
1. In the Lync 2010 client for Karen Berg, click the blue triangle next to the **Options** menu icon.
2. Click **Meet Now**.



3. On the **Join Meeting Audio** screen, click **OK**.

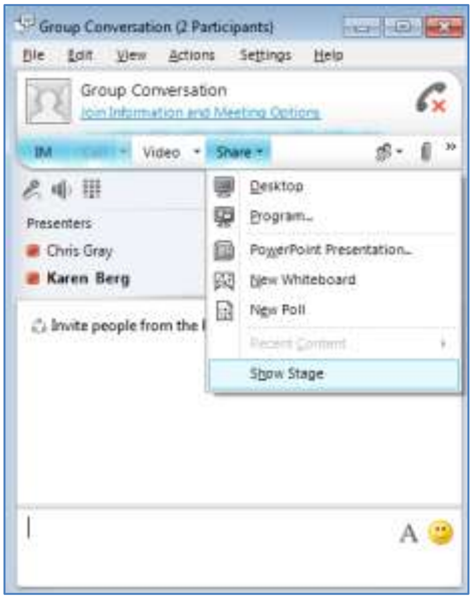


4. Click the **People Options** menu, and select **Invite by Name or Phone Number**.

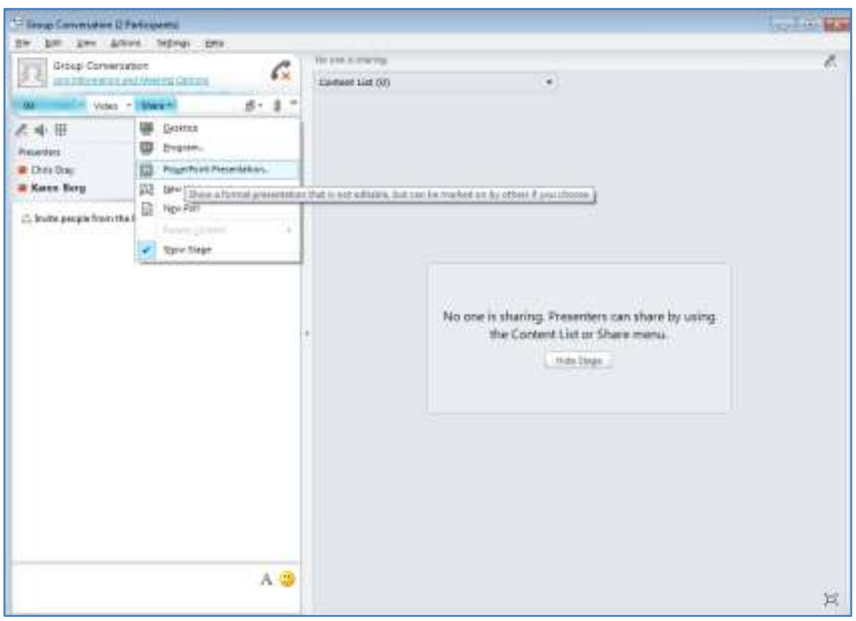


5. In the **Invite by name or phone number** list, double-click Chris Gray.
6. (Optional) On Chris Gray's system, accept the Conference call invitation.

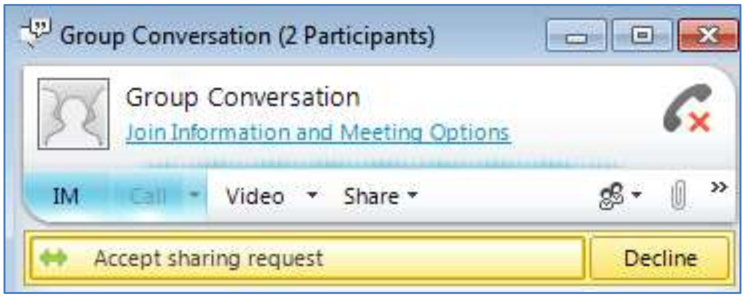
7. Click **Share**, and then click **Show Stage**.



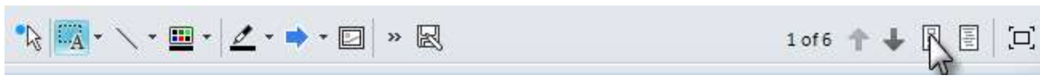
8. In the **Group Conversation** window, click **Share**, and then click **PowerPoint Presentation**.



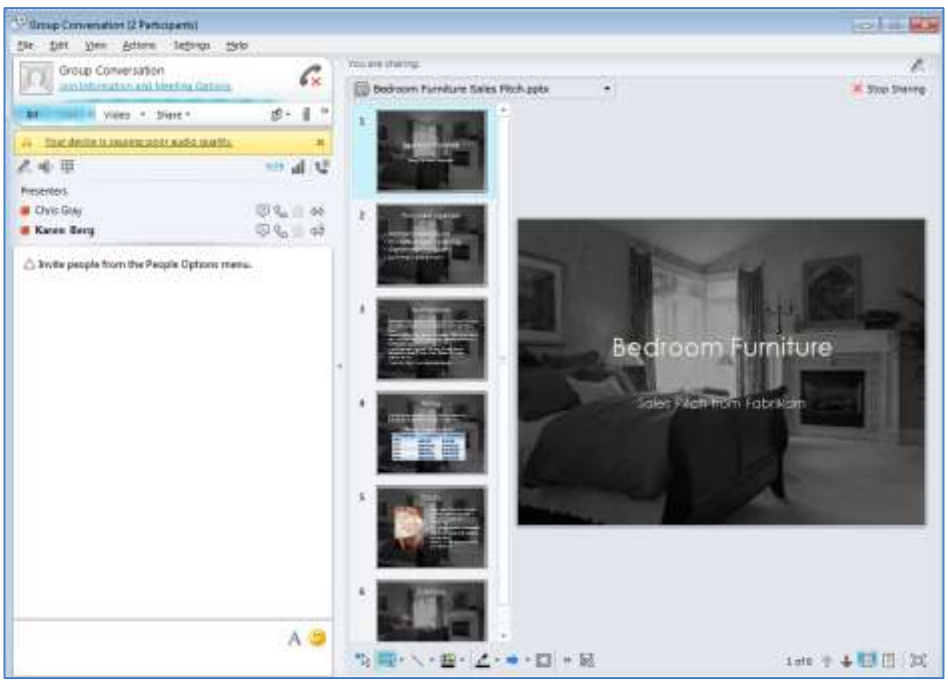
9. Browse to a PowerPoint presentation. Select the deck, and then click **Open**. The deck is prepared for presentation and displayed.
10. (Optional) On Chris Gray's system, click **Accept Sharing Request**.



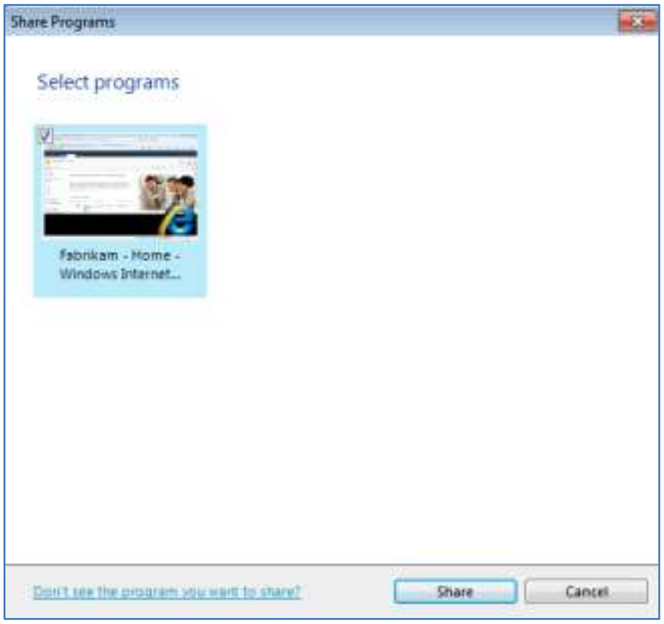
11. On the bottom of the stage, click the **Show Thumbnails** icon.



12. You can click any slide and it will be shown, with animations, to all the people in the meeting. Explore the options available to you as a presenter. The icons at the bottom of the stage provide the ability to send mouse clicks, write, text, draw figures, write in freehand, and move forward and backward in the slide deck.



13. (Optional) View the presentation on Chris Gray's system. You can see that Chris can click ahead in the thumbnail view, if desired. The slide the presenter is showing will have a blue background.
14. Karen now wants to show Chris the new SharePoint Online site. On Karen's system, browse to the SharePoint Online site used in Scenario 8.
15. In Lync 2010, in the **Group Conversation** window, click **Share**, and then click **Program**.
16. In the **Select Programs** window, click the SharePoint site, and then click **Share**.



17. Internet Explorer will now be shown to others in the meeting, which allows you to show others any site you want. You can also share Office documents, custom applications, or your entire desktop. Sharing programs in Lync 2010 using Lync Online is a very powerful tool that allows you to collaborate, demonstrate, and troubleshoot with others in real time ensuring that you are all viewing the events and content. Note that you can give control to others and stop sharing at any time.
18. (Optional) View the shared content from Chris Gray's system.

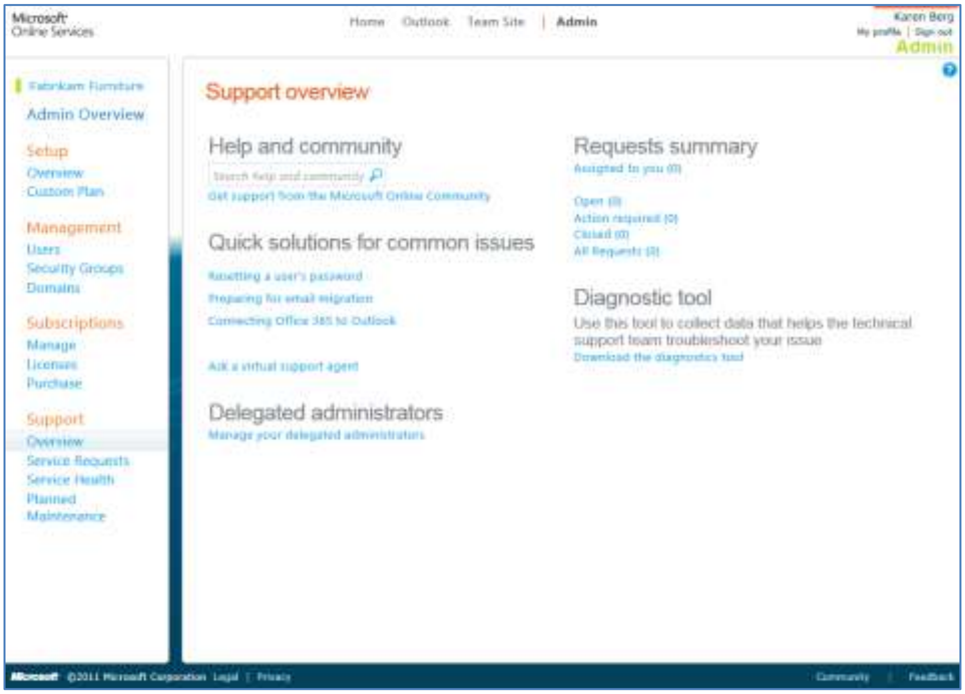
Scenario 10: Getting Support

Service Administrators can search help and community content, see active topics from the Office 365 community pages, view a real-time status report of the services health, download diagnostic tools, manage delegated administration, and file support tickets using the Office 365 administration portal. This scenario will step you through several tasks accessible from the **Support** page.

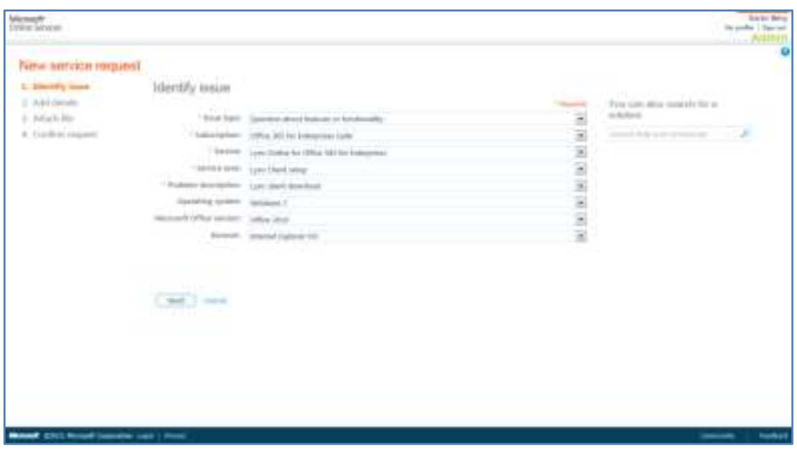
Note
Please do not submit support requests as part of this walkthrough.

Task 1: Opening a Service Request

1. Browse to https://portal.microsoftonline.com, and sign in with your administrator credentials.
2. In the left column, under **Support**, click **Overview**.



3. Note that under **Request Summary**, you can see the status of your support requests.
4. In the left column under **Support**, click **Service Request**.
5. Click **New Request**.
6. Complete the **Identify Issue** fields, and then click **Next**.



7. In the **Add details** form, enter information into the form, and then click **Next**.
8. In the **Attach File** page, click **Cancel**.
9. Click **Yes** when asked **Are you sure you to cancel this request?**

Note
Although this a trial account, support is available. Please do not submit support requests as part of this walkthrough.

In practice, you manage your service requests on the **Service Requests** page, where you can see open and closed requests, and view those that are awaiting a response from you or Microsoft.

Task 2: Viewing Service Health

1. In the left column, under **Support**, click **Service Health**.
2. If necessary, expand the listing under each service by clicking the blue triangle. You can see that different aspects of the service are tracked individually.

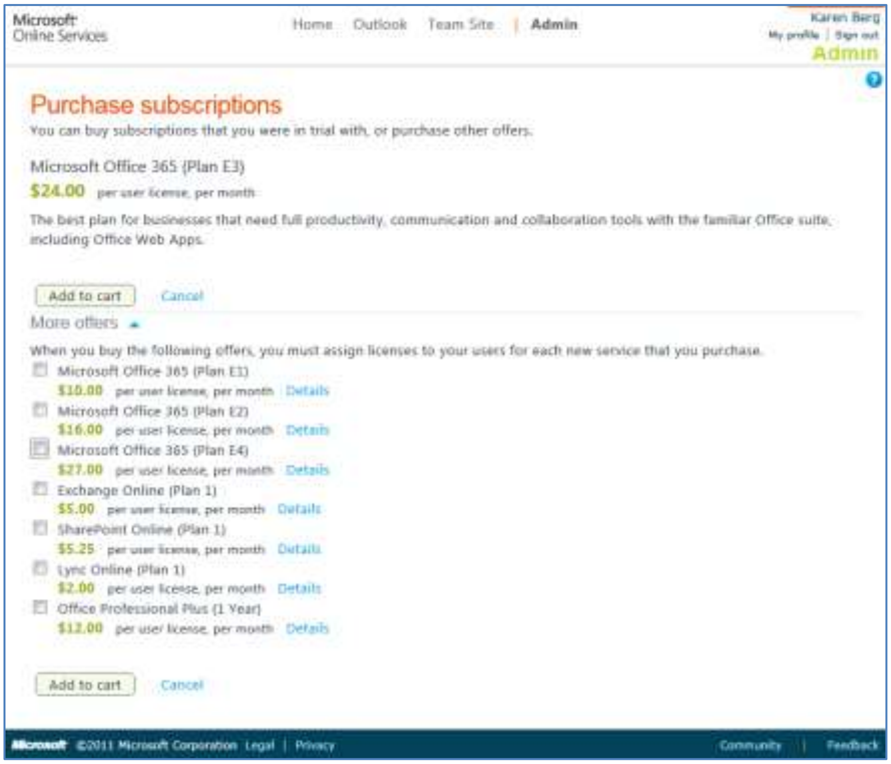
3. Note the meaning for the different icons.
4. If the report you are viewing has any entries with the blue triangle in the corner, click the triangle to show more information about the event.

Scenario 11: Converting a Trial Account to a Paid Subscription

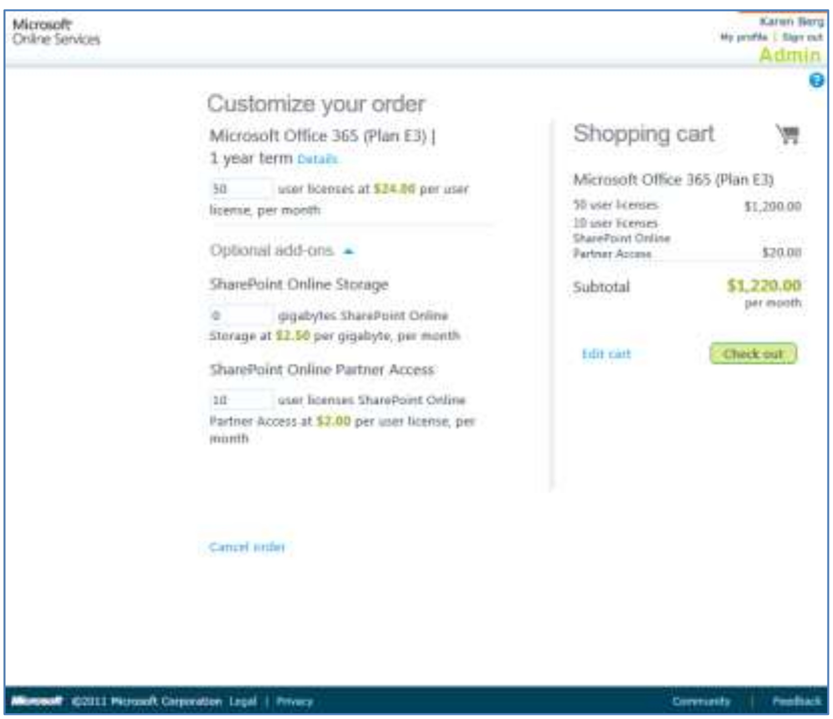
Now that you have experienced the trial, Microsoft invites you to convert your Office 365 trial account to a paid subscription. Your users, mailboxes, SharePoint Online sites, and administrative settings are all retained. Purchasing your subscription grants you unlimited access to all the powerful communication and collaboration tools you experienced during your trial.

1. On the **Admin Overview** page, click **Purchase now**.

2. Select the plan or services you want to purchase, and the number of seats, and then click **Checkout**.
3. On the **Purchase subscriptions** page, click **More Offers** to see the additional offers.

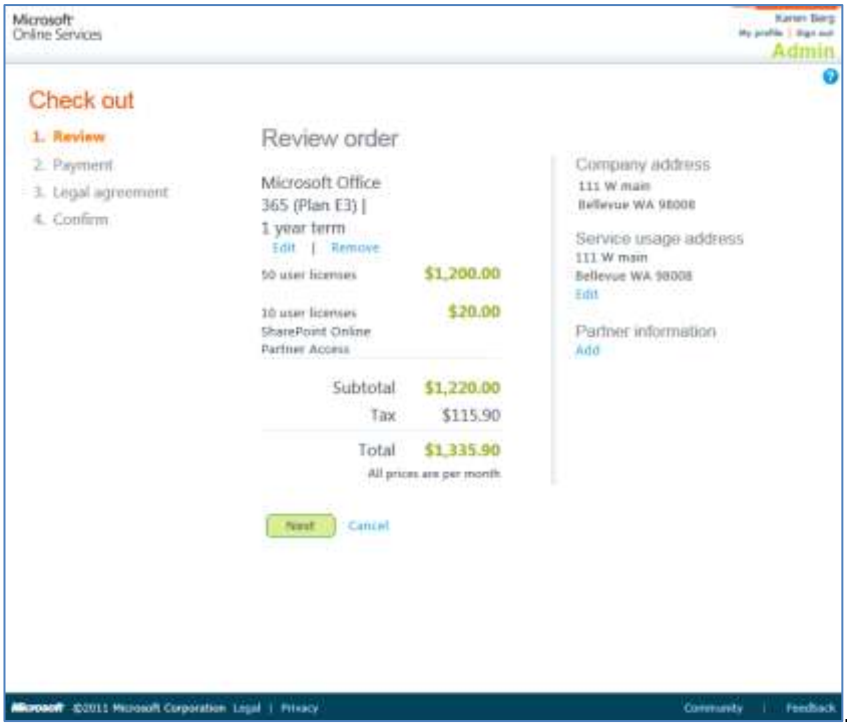


4. Select the plan you want to purchase and click **Add to cart,** or click **Add to cart** under the E3 plan.



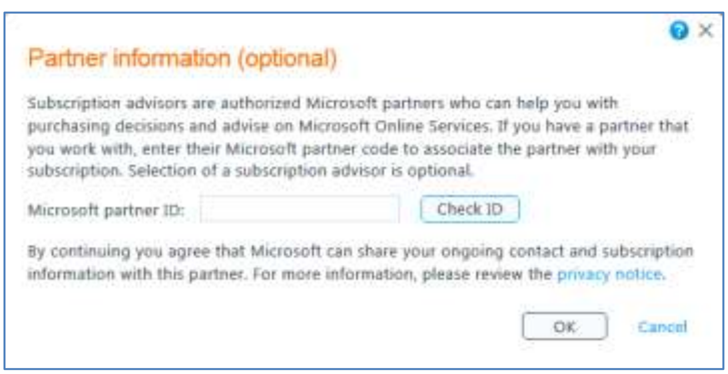
5. Enter the number of licenses and indicate if you require Optional add-ons.

6. Click **Check Out**.



7. If necessary, edit the **Service usage address**.
8. If you have been working with a Microsoft partner, it is important to associate your account with the partner ID. To do this, you will need the Microsoft partner ID. Under **Partner Information**, click **Add.**

Note
By associating your account with a Microsoft partner, that partner may be able to offer you support or additional services. The cost of your services remains the same.



9. Enter the **Microsoft partner ID**. Click **Check ID**, and then click **OK**.
10. Complete the purchase by providing a PO or credit card number.

Where to Go from Here

There are many excellent online resources and references you can use to learn more about Office 365.

Office 365 Community Site

Located at http://community.office365.com, this should be your first stop when you need information. The online Wikis contain updates directly from the product team that are published in advance of online documentation updates. The Forums are monitored by Microsoft support staff and Office 365 experts, such as Office 365 MVPs. There are also links to articles, webcasts, and other useful resources.

Service Descriptions and Data Sheets

The service descriptions for the Office 365 services are the official document detailing which features are available, system requirements, languages supported by a service, SLA, retention policy and other important facts. Microsoft recommends you being familiar with the contents of these documents. Keep in mind that they are regularly updated, so refresh your downloaded set quarterly to ensure that you have the latest information.

The service descriptions are located at http://www.microsoft.com/downloads/en/details.aspx?FamilyID=6c6ecc6c-64f5-490a-bca3-8835c9a4a2ea.

Microsoft Online Team Blog

The Microsoft Online team maintains an active blog at http://blogs.technet.com/msonline. Tags on the blog are useful for finding training and information about specific features and services.