# Office 365

# Essentials - quick start guide

Note: This guide was created using **Firefox 42**. Your screens and options may look different if you use an alternative version/browser.

## Basic Navigation

Once you launch Office 365 from MyPortal, you will be taken to the main screen. From there you can select which application you'd like to use. You can switch to a different application by clicking the Services Icon in the upper left corner of your browser window.

## OneDrive – Storing, Sharing & Editing

OneDrive is an expansive cloud-based storage space for your files (including non-Microsoft Office files such as images and videos). OneDrive also allows you to share files for viewing or editing with others within our district.

1. Launch Office 365 from within MyPortal.
2. Click the OneDrive icon. The first time you use OneDrive, you will be prompted through the set-up process. After that, you'll see the OneDrive Home Screen. Your default view is that of the documents you've uploaded.
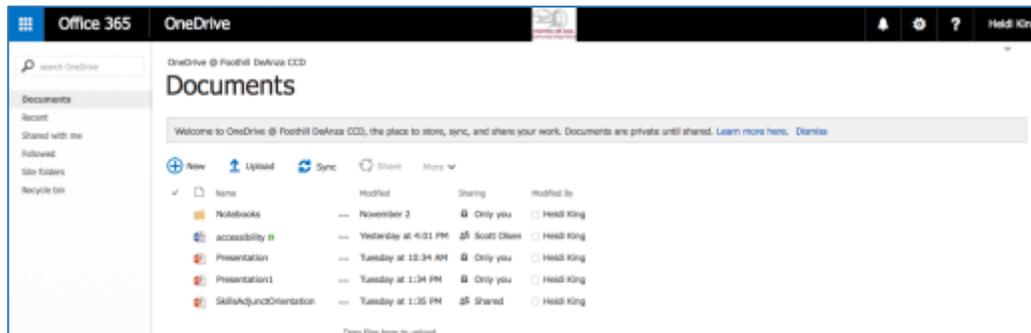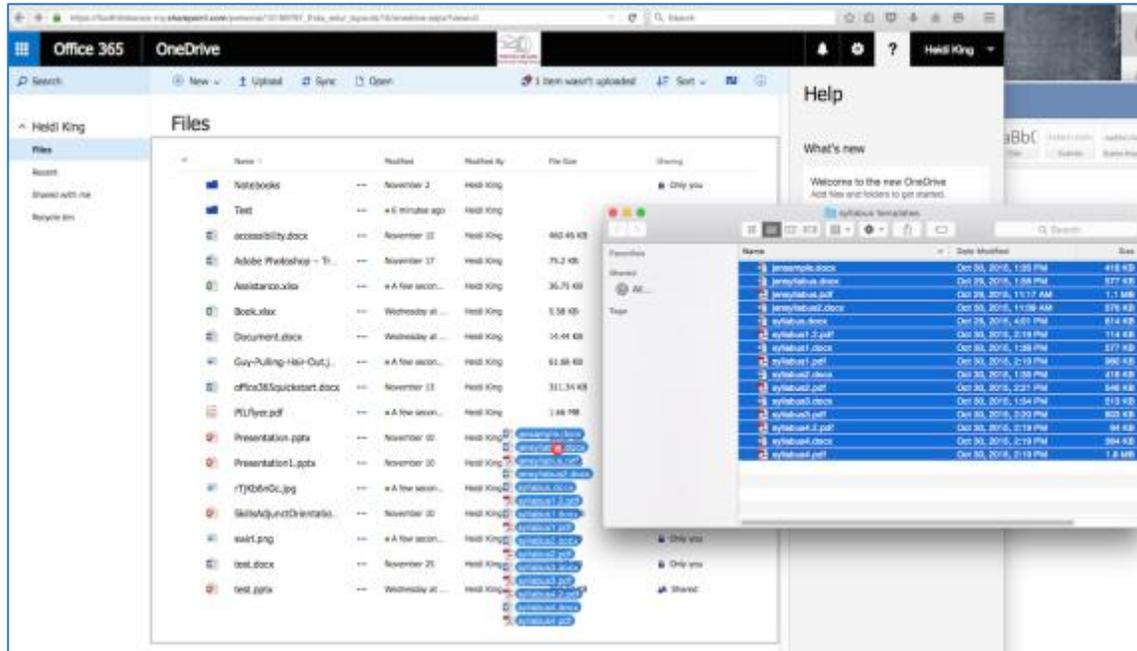


### Uploading Files from Your Hard Drive

1. Open your OneDrive in Office 365
2. Drag Files to the Documents window OR Click the Upload button and select the files you wish to upload.

If you use Office 2016, you will be able to log into Office 365 from within your desktop application. Once you do that, you will have the option of saving any documents you create on your desktop Office applications (Word, Excel, PowerPoint) to your hard drive or directly to your OneDrive.

> For security reasons, do not sign into Office 365 from within your desktop application (Office 2016) on a <u>shared computer</u>.

Note: You can upload folders to OneDrive. You can, also, drag/upload multiple files on your hard drive at once. Limitations: 100 files at a time, no single file over 10GB.



*Select multiple files from within a folder on your hard drive and drag them to the OneDrive window.*

## Creating Folders in OneDrive

In order to create a new folder, you'll need to make sure no files in your OneDrive are selected, otherwise you won't see the menu that allows you to create folders.



1. Click New
2. Select Folder
3. Name your folder

Once your folder is created, you can drag and drop file(s) from your hard drive into the folder in OneDrive.
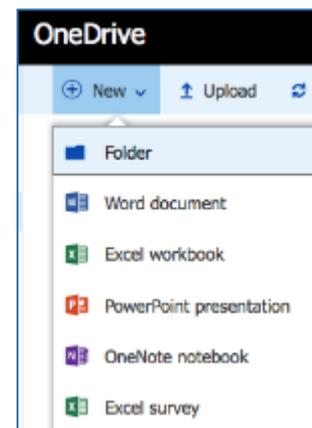
## Sharing Files with Others

By default, all files you upload to OneDrive are locked and only visible to you. You can share these documents with others.

1. Locate the document you want to share and click on  🔒 Only you  in the Sharing column.
2. A pane will open to the right and you can select your sharing options.

**Invite People**

You can invite people via their email addresses to view or edit your documents. Type in the first or last name of the person you want to share the document with a pop-up window will appear for you to select the correct staff member.

From the pull-down menu, select whether you want the person to Edit or View the document ("can edit" or "can view."
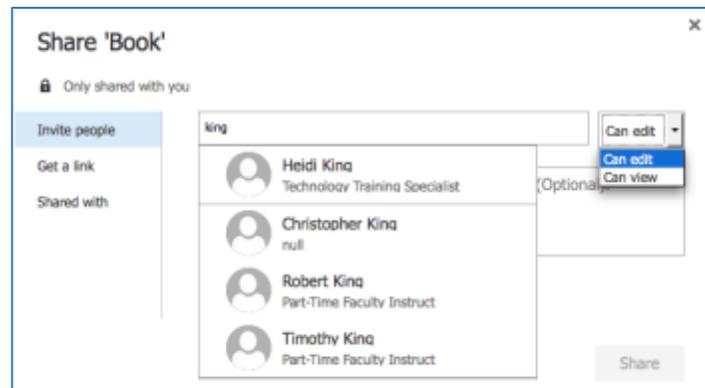


By default, you can write a message to the person(s) you're sharing the document with and he/she will be notified via email. You can deselect this option, but it's recommended that you allow people to be notified via email.

Click share when you're finished.

> Office 365 is not a platform for collaboration with students. This is designed to allow you to collaborate/co-edit with employees and vendors. If you want to collaborate with students, please use your campus Course Management System.

**Get a Link**

A link allows you to share a document without sending an email invite. It also allows people who may not have Microsoft Office to view documents, presentations and spreadsheets with free online viewers. For instance, if you get a link for a PowerPoint presentation and share it with students, even students who do not have PowerPoint will be able to view the presentation online.

They do not need a OneDrive account to view the documentation either, provided you make the right selections when getting your link.
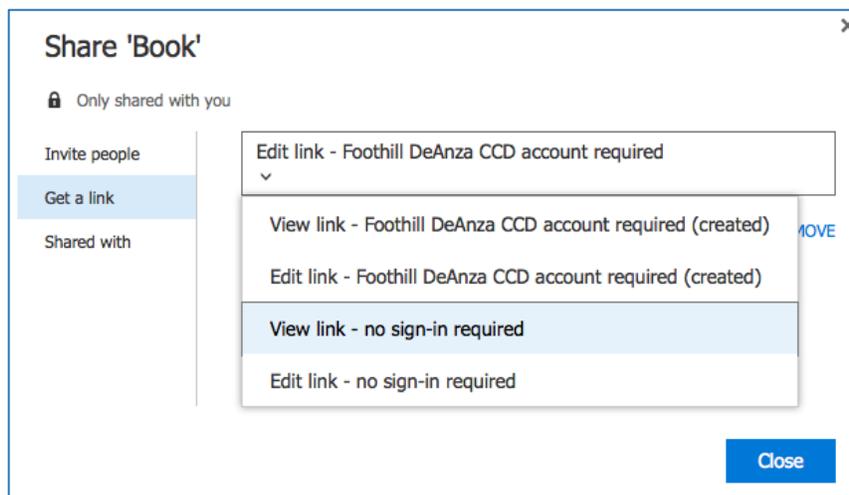
*To share your document/presentation/spreadsheet with people who do not have Microsoft Office or OneDrive, Click "Get a link" and then select "View link – no sign-in required" from the pull-down menu.*

Once you make your link selection, a window will appear with a unique web address. You can copy and paste this address into an email, or use it to create links on your website.

## Viewing Shared Files

When others share documents with you, they are stored in a separate area of your OneDrive. Click on the "Shared with me" link in the left side of your window to see the files other have shared with you.



## Viewing Files

If you click on the name of any file in OneDrive, you will be taken to an online viewer. This is much like a PDF in that all formatting will be retained. This is an important distinction because there are certain things that will not work for you to edit in the Online version, particularly in Word.

For instance, if you click on the name of a document that you know contains equations created in the equation editor in Word, you will be able to see those equations. However, if you select to edit the document online, you will not see your equations, because the online version of Word does not have an equation editor.

These types of documents will need to be edited in your desktop version of Office.

It is always best to view a document someone has shared with you before deciding whether or not you want to open it online or in your desktop version. Documents with multiple pictures, text boxes, charts, drawing objects or equations should be edited in the desktop version.

## Editing Files

If you're already viewing an Office file, you can choose to edit the file from the viewer screen. Click on Edit Document at the top of your screen, and select "Edit in Word" or "Edit in Word Online."
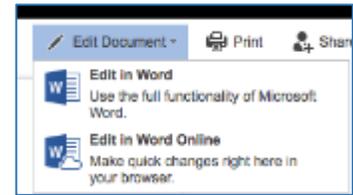


Also, you can open any file from your OneDrive window in the online version of office or on your desktop version. Click on the three dots to the right of the file name. Select the document you want to open.
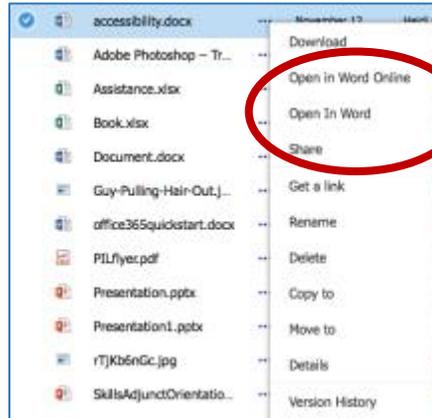


## Editing Shared Files

Office 365 allows you to simultaneously edit files with multiple people *provided you are exclusively using the online versions of Word, Excel or PowerPoint.* Currently, the sync feature, which would allow multiple users to edit a document on the desktop version, does not currently work for our set up.

If you want to take advantage of this feature, it is best to work on content first. For instance, allow multiple users to add their information or change information in a Word document or PowerPoint. Once the content is complete, you can open the document in the desktop version of Word to make stylistic finishing touches, such as styles, text boxes, drawing objects, charts or graphs.

## Signing Out

You should get in the habit of logging out of Office 365 when you are finished. Click your name in the upper right corner of your window and select, "Sign Out."

> ***If you are using a shared computer,*** you will need to Sign Out of both Office 365 and MyPortal ***and quit your browser.*** This is the only way to guarantee that the next person using the computer will not have access to your Office 365 account/OneDrive.
>
> ***Windows users should note*** that on a Mac, closing the browser window does not quit the application. You need to go to the Firefox pull-down menu at the top of the screen and select "Quit" or press Command+Q on your keyboard to quit.

*The following will give information about what you can do with the online version of Office, and what you can't.*

## Microsoft Word Features

Aside from the notable differences listed below, the different versions of Word have similar capabilities.  Please note that Microsoft is making updates frequently, and some of these utilities below may become available online/in the app over time.

|  | Desktop Version | Online Version | Word Application (for tablets) |
|---|---|---|---|
| Styles | X | X | |
| Drawing Objects | X | | X |
| Text Boxes | X | | X |
| Insert Pictures | X | X | X |
| Equation Editor | X | | |
| Charts/SmartArt | X | | |
| Macros | X | | |
| Insert Comments | X | X | X |
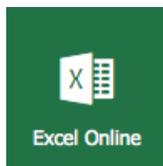
## Microsoft Excel Features

All versions of Microsoft Excel currently have similar features for the average user. However, you still may have problems with robust formulas you created on the desktop version if you try to open them online or in the app.

## Microsoft PowerPoint Features

You'll find new templates in the online and app version of PowerPoint. Most features are the same between PowerPoint online and the desktop version. However, there are fewer transitions and animations available in the online version. In addition, you can not create action buttons in the online version. You can view/use action buttons in the PowerPoint viewer, though. So if you have these in your presentations and you want to share a link with students, they will be able to have full functionality with your PowerPoint presentations.

## Sync

Please note that the Sync option/button on your Office 365 screen is not currently operational. Office 365 is an evolving online tool and different functions will become available over time. Check back frequently for updated documentation available via ETS or at
http://www.deanza.edu/learningresources/technology