



BRAINSTORM QUICK START CARD

Microsoft Office 365

App launcher: Open the app launcher to access apps from anywhere in Office 365.

OneDrive: Store, share, and collaborate on personal, business, and group files. Set permissions to keep sensitive info safe.

Alerts: Get notified of new mail, reminders, and other news you should know.

Settings: Find settings for the program or page you're working on.

You: View your profile and Office 365 account.

Outlook: Click the Outlook, People, Tasks, or Calendar tile to open the familiar Outlook views.

Planner: Chart the path for your Office 365 group by using Planner to assign project tasks and stay current on your progress.

Search: Click **All apps** to search for an app by name or to scroll through your full list of apps.

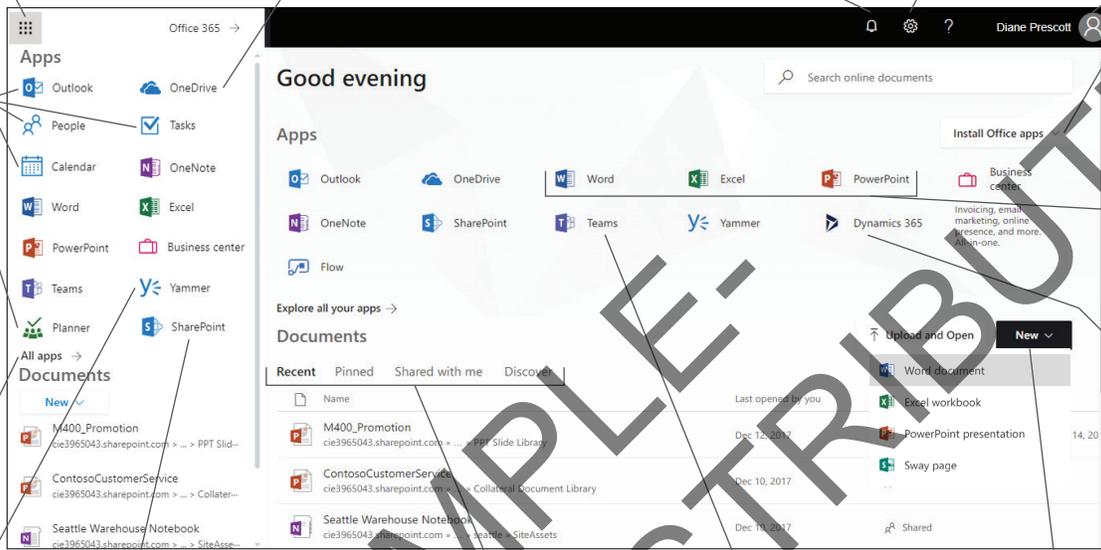
News: Choose Yammer to join discussions with your colleagues and teams.

SharePoint: Open your company's internal site to share information, start workflows, and collaborate like a pro.

Documents: Access a document that you made or find one that was shared with you.

Teams: Set up and manage your project teams. Link all team resources into this collaboration hub.

New: Start a new document, workbook, presentation, or Sway page here so you can get right to work.



Desktop updates: Office 365 ensures you're always up to date with the latest desktop apps.

Office Suite: Your core Office programs are a click away.

Dynamics 365: Manage resources and critical customer relationships in this online platform.

SIGN IN

To sign in to Microsoft® Office 365®:

1. In your browser's address field, enter the URL obtained from your IT administrator.
2. Enter your user ID and password.
3. Click **Sign in**.



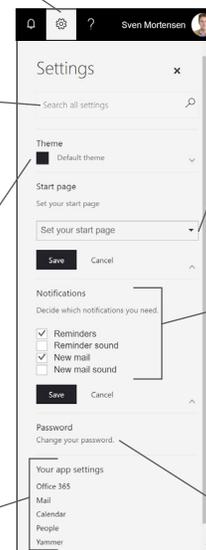
CHANGE OFFICE 365 SETTINGS

Open the Settings menu anywhere in Office 365 to find options unique to the app you're working in. To adjust Office 365 settings, click the **Settings** icon on the Office 365 home page.

Search for an Office 365 setting you want to change.

Change your theme to match your style or your mood. Choose from a variety of colors and designs.

Access settings for Office 365 and other apps.



Choose what page you see when you sign in to Office 365.

Need an alert that you can hear when you're in the zone? Set that up here.

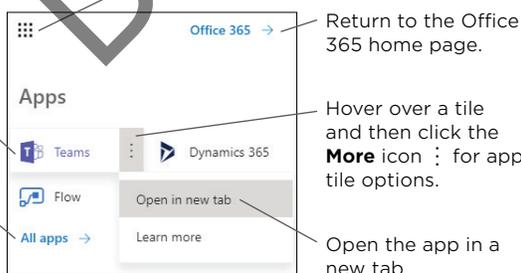
Change your Office 365 password.

OPEN AN APP

The app launcher is your portal for navigating Office 365. Click the waffle icon to find your apps.

Click any tile to open an app.

Find a list of all apps, or search for a specific app.



Return to the Office 365 home page.

Hover over a tile and then click the **More** icon for app tile options.

Open the app in a new tab.

This Quick Start Card is for use by COMPANY employees only. Do not distribute.

FIND YOUR GROUP

Great things happen when great minds work together in Office 365 groups. Every group gets a shared workspace, including a Microsoft OneNote® notebook and an inbox, calendar, document library, and planner.

Set Up a Group

Where you set up your Office 365 group depends on your needs. Set it up from Microsoft Outlook® if your group is organized around email and a calendar. For company-wide communication, choose Yammer®,. For a smaller group, start from Teams. Planning committee? Microsoft Planner.

To create an Office 365 group from Outlook on the web:

1. On the Outlook Folder pane, hover over the **Groups** heading, and click the plus sign +.
2. In the pane that opens on the right, name and describe your group.
3. Choose privacy and language settings.
4. When you finish, click **Create**.

Outlook creates an email address for the group. If you want to tweak it, edit the address in the field above.

Make your group public or private.

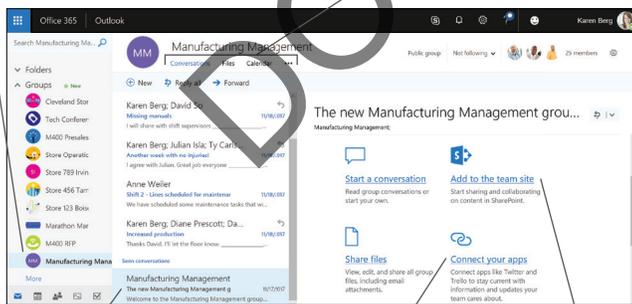
Select the box to send conversations to the members' inboxes. This might be a good idea if your members belong to multiple groups.

5. In the next pane, enter the contact names of the people or distribution lists you want to add to the group. Your administrator can configure Office 365 to allow group guests from outside your organization if desired.

6. When you finish adding members, click **Add**. Outlook displays your new group on the Folder pane and opens your group's new page.

Navigate a Group Inbox

On the Outlook folder pane, click the group name to open its inbox. Access your group conversations, files, calendar, and more.



In the group's inbox, open the welcome message for more options.

Add dynamic resources from other apps.

Add files to your group's SharePoint site.

USE PLANNER

Find your way forward by using Microsoft Planner. From Planner you can author plans, assign tasks, and track progress. All Office 365 groups have a plan in Planner. And if you start a plan from scratch, Planner creates an Office 365 group for it.

Start a Plan

In Planner, you'll arrange each group plan onto its own task board. On the task board you create buckets for each task category.

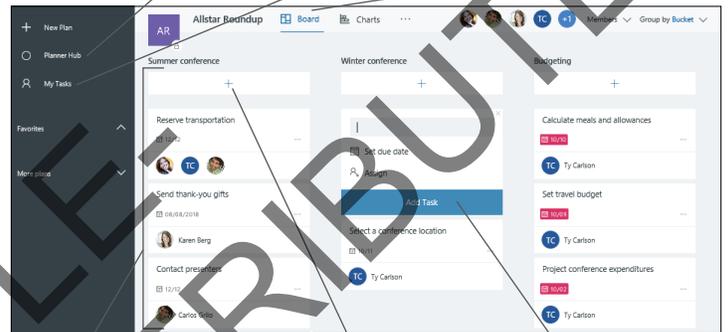
To flesh out a plan in Planner:

1. From the navigation pane on the left, select **Planner hub** and then click your group's name to open its plan.
2. On the new task board, begin adding tasks.

Find all of your group plans on the **Planner hub**.

See all of the tasks assigned to you.

Open the plan's task board.



Buckets organize your tasks by category. To add another, click **Add new bucket** to the right of your buckets.

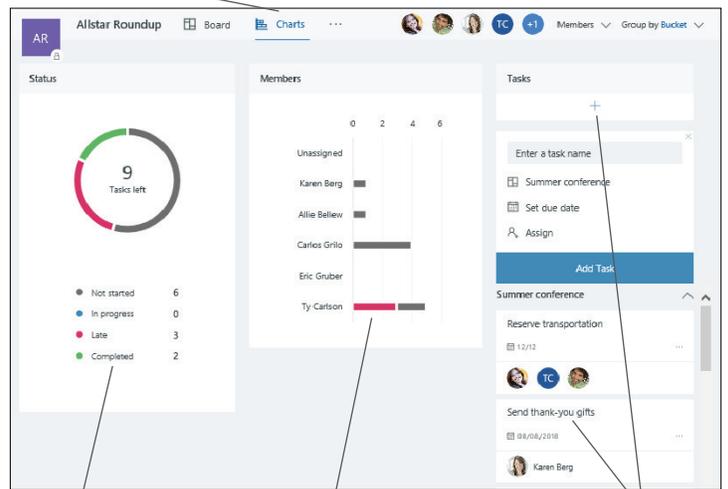
At the top of the bucket, click the plus sign + to add a task.

Add the task name, date, and assignee. Then click **Add Task**.

Note: Set up task buckets by phases, departments, priority, topic, and so on. Drag tasks from one bucket to another as needed.

Check Progress

Want to have something to say when the boss asks you how the plan is coming along? Find key metrics when you open the **Charts** tab.



See the status of the plan, broken down by task.

Find out who's carrying the heaviest task load.

See your team's tasks, and click the plus sign + to add more.

USE FORMS

In Office 365, use the Microsoft Forms app to gather information through polls, surveys, and quizzes. Start your form from the Forms app, Microsoft OneDrive®, or Excel® Online, and watch the results roll in.

Create a Form in Microsoft Forms

To create a form from the Forms app:

1. After you open the Forms app, click **Create a new form**.
2. Click **Untitled form**, and then type a name for your form.
3. If desired, add a description.
4. Click **Add question**, and then choose a question/answer type: multiple choice, short text answer, rating, and so on.

Click the **More** icon ... for additional answer types.

Click the arrows to move the question up or down in your list.

Click to require the user to provide an answer.

Click the **More** icon ... to add restrictions for answer possibilities.

5. On the navigation bar, click **Theme** to choose a color scheme or pattern for your form.
6. Click **Preview** to see how the form will look on a computer or mobile device.
7. When the form is finished, click **Share** to find options for publishing the form. Copy a link to the form, download a QR code, get a code to embed the form on a webpage or sway, or email the form.

Share the form as a template.

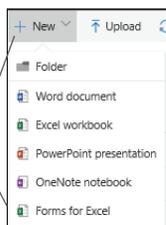
Allow colleagues to view and edit the form.

Define who can respond to the form.

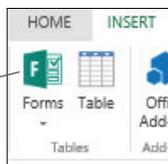
Create Forms in OneDrive and Excel Online

You can access Microsoft Forms tools from OneDrive or Excel Online.

In a OneDrive library, click **New** and select **Forms for Excel**.



In Excel Online, find the Forms command on the Insert tab.



UNDERSTAND ONEDRIVE FOR BUSINESS

OneDrive is your personal business library in the cloud. Store, track, and manage all of your important files. OneDrive is best for small-scale file storage and sharing. For greater file sharing and collaboration capabilities, use Microsoft SharePoint®.

Navigate OneDrive

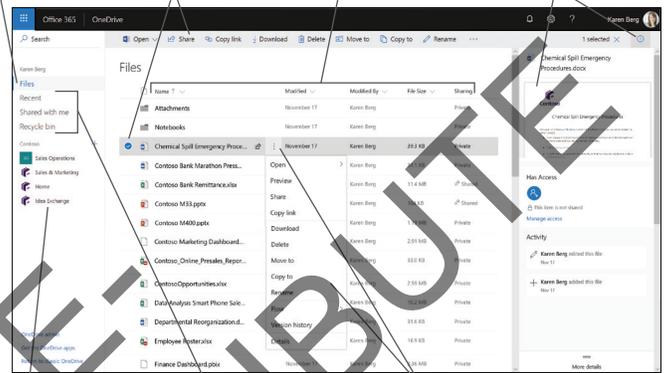
By default, files and folders in your OneDrive library are private, but you can share them as needed. Library users can edit, rate, or follow a file.

See an overview of all your files and folders in OneDrive.

Select a file to reveal the toolbar.

Click a header to sort files and folders by name, date, and more.

With a file selected, click the **Information** icon to display the file's details.



Access your Office 365 group libraries.

Find recently viewed, shared, or deleted files.

Hover over an item and click the dots to view more actions: delete, download, share, and more.

Note: Want faster access to your folders? Sync OneDrive to Windows® File Explorer.

Share a File or Folder

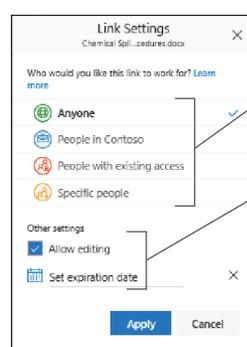
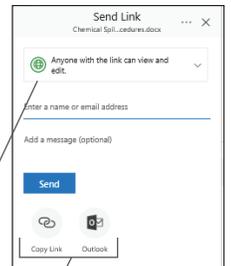
Now that your draft is ready, get some feedback. In OneDrive you can share a file or folder with colleagues inside or outside your company.

To share a file or folder in OneDrive:

1. To the right of the file or folder you want to share, click the **More** icon ...
2. Click **Share**.
3. In the Send Link window that opens, click **Anyone with the link can view and edit** to choose editing permissions.

Note: When sharing a file through Outlook, rather than attaching a static file, you can attach a link to the file in OneDrive. That way you control the recipient's editing permissions, everyone gets access to a single version of the file, and you save space in everyone's mailbox.

Copy and paste the link wherever you want, or open this invitation in Outlook.



To set editing permissions in the Link Settings window:

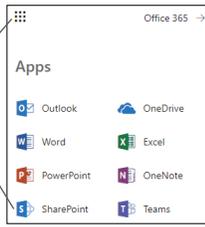
1. Choose your target audience, decide whether to allow your audience to edit the file, and set an expiration on the link if desired. Then click **Apply**.
2. In the Send Link window that opens, enter the contact name or email address of the recipient.
3. Add a message for the recipient if desired.
4. Click **Send**.

USE SHAREPOINT

Tired of checking multiple websites, document versions, and timelines to stay on top of your work? SharePoint puts it all in one place, easily accessible on any device. It's collaboration on a whole new level.

Navigate SharePoint

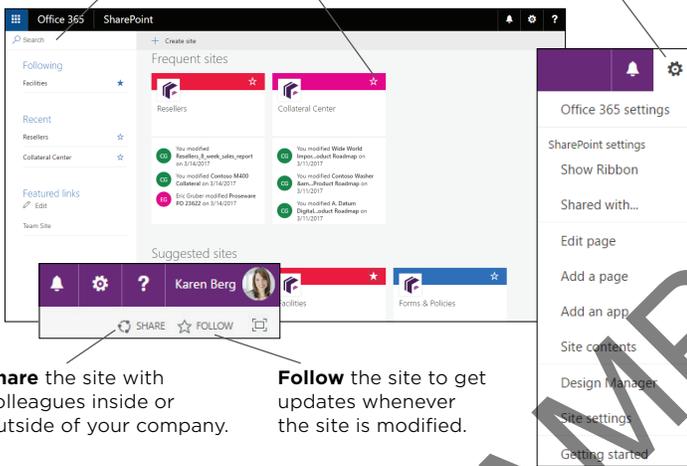
To open your personalized SharePoint home page, click the **app launcher** icon and select **SharePoint**. Here you can access your recent or favorite SharePoint sites and also find updates on the sites that are important to you.



Search SharePoint to find links, news, documents, and other site content.

Sites are represented by cards that list recent changes. Click the star icon to follow the site.

On any site, click the **Settings** icon to modify the site's layout, text, images, apps, and more.



Share the site with colleagues inside or outside of your company.

Follow the site to get updates whenever the site is modified.

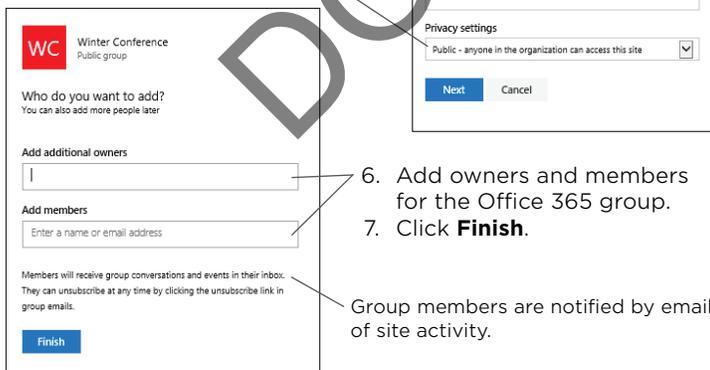
Create a Team Site

Set up a team site to share critical information and give your team the tools they need to be all-stars.

To create a SharePoint team site:

1. Click the **app launcher** and select **SharePoint**.
2. At the top of the SharePoint home page, click **Create site**.
3. On the new pane, choose to create a **Team site**.
4. Name and describe your site, and choose privacy settings.
5. Click **Next**. SharePoint automatically creates an Office 365 group for your new site.

Make the site visible to everyone in the company, or restrict access.



6. Add owners and members for the Office 365 group.

7. Click **Finish**.

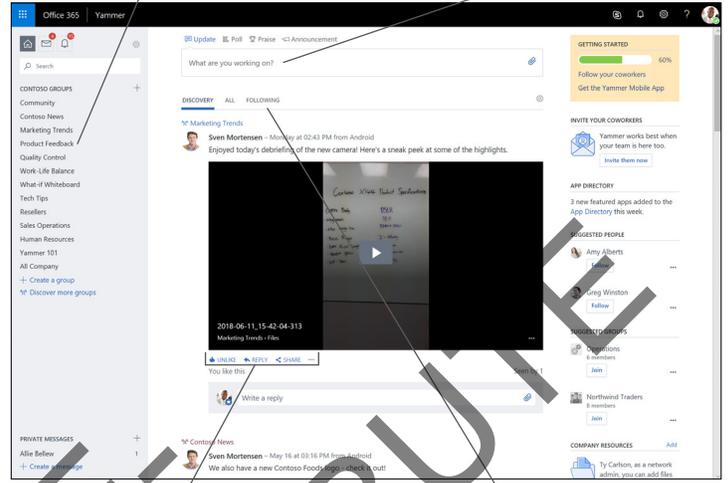
Group members are notified by email of site activity.

WORK OUT LOUD WITH YAMMER

With Microsoft Yammer you can collaborate with team members in an engaging interface that maintains the privacy your organization requires.

View updates based on groups you belong to. Creating a group in Yammer also creates an Office 365 group.

Update team members or ask a question. Include documents, images, or even a poll.



Respond to a post by liking it, replying to it, sharing it with others, and more.

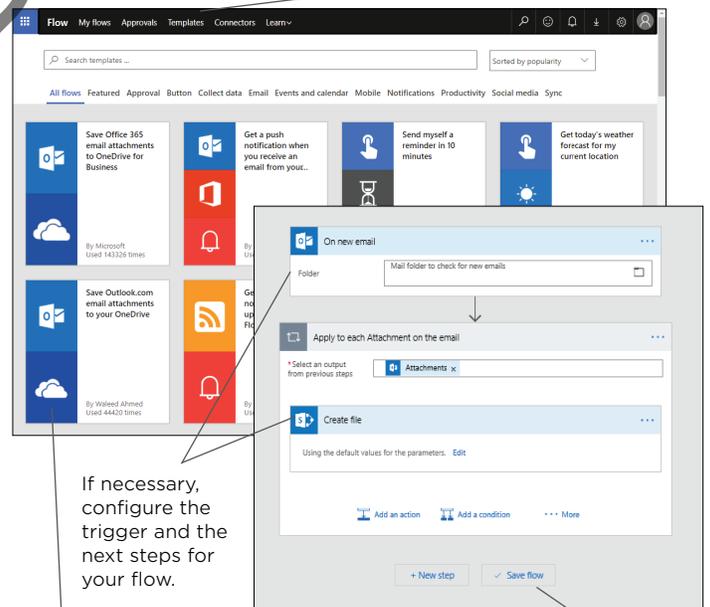
Your newsfeed displays company updates. Click the **Following** tab to see updates from the people, groups, and topics you follow.

GET TO KNOW FLOW

Try out Microsoft Flow to ensure you get a text when your boss emails you or to create a new file in OneDrive when Microsoft Dynamics 365 generates a sales lead. Use Flow to create a workflow from scratch or choose a template to move your processes through more than 100 different apps!

To set up a flow from a template:

1. From the navigation bar, select **Templates**.



If necessary, configure the trigger and the next steps for your flow.

2. Browse or search for a template, and then select one.
3. Follow the prompts to create your flow, and then click **Save flow** or **Create Flow**.

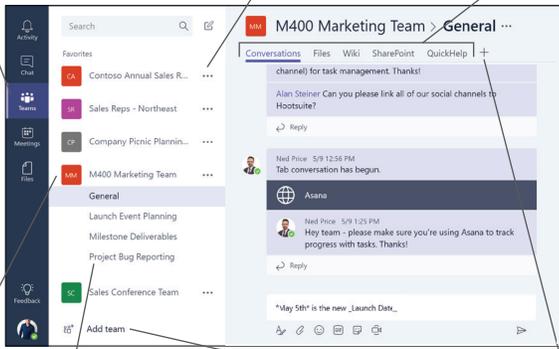
GET ON BOARD WITH TEAMS

Microsoft Teams brings a whole new level of collaboration to Office 365. Teams provides a space for group conversations and lays out the files, websites, applications, and feeds that everyone needs. Teams is the ideal application to use to quickly set up project collaboration.

On the navigation pane, go to recent activity, chats, the teams list, or team meetings.

Find team options, such as adding members or channels.

Channels provide resources that are organized onto tabs.



Select a team.

Channels are your team's topics or projects.

Create a new team. Link it to an existing or new Office 365 group.

Add a new channel tab.

Note: Because Office 365 groups can be created in multiple applications, it's easy to end up with duplicate groups or with group resources spread across multiple apps. Set up organizational standards that ensure order in group creation.

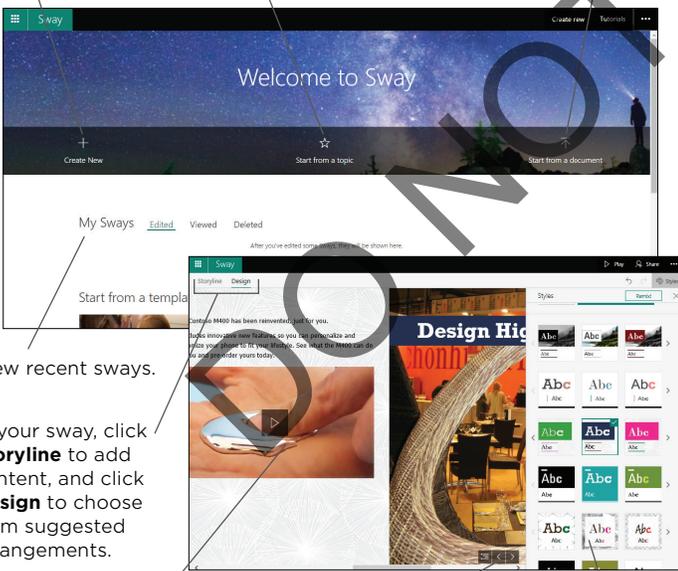
LEARN THE RHYTHM OF SWAY

Get an assist in creating visually appealing presentations, interactive reports, newsletters, and more with Microsoft Sway. You provide the ideas, and Sway makes them shine with assisted authoring and content gathering. Plus, sharing a sway on multiple platforms is a breeze.

Create a new sway from scratch.

Enter a topic, and Sway will create an outline for you to work from.

Add a file as a starting point for your new sway.



View recent sways.

In your sway, click **Storyline** to add content, and click **Design** to choose from suggested arrangements.

Add text, images, videos, Excel charts, Power BI reports, or even other sways.

Swipe through your sway, or go to a different section in the sway.

Go crazy exploring ideas for presenting your content.

DIG INTO DELVE

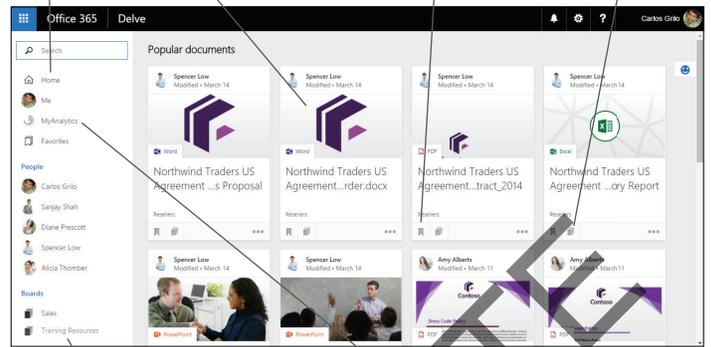
With Microsoft Delve, you can manage your Office 365 profile, organize your essential information, and even figure out what you do all day.

Find your personal and group files.

Click a card to open the file or resource.

Click the bookmark icon to add a file to your favorites.

Click the boards icon to add a file to a board.



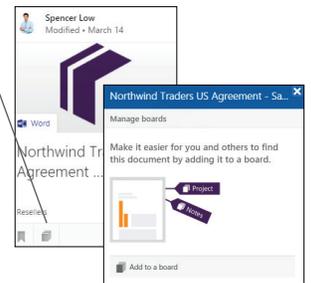
Access your recently viewed boards.

See how much focus time you have and how much time you spend on email or in meetings.

With Delve you can create boards for topics, projects, and goals. Add cards to the board, and share it with your team for quick access to files and resources.

To add a content card to a board:

1. Click the boards icon.
2. Click **Add to a board** and begin typing the name of the board you want to add it to. If you have boards, suggestions will appear as you type.
3. Select a preexisting board, or finish typing and press **Enter** to create a new board.



USE MICROSOFT OFFICE ONLINE

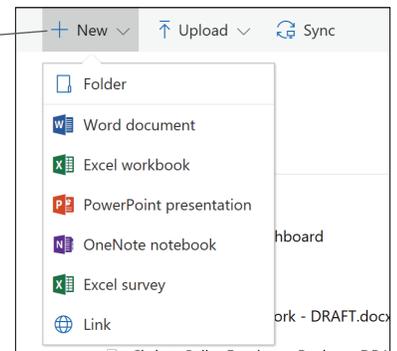
Office Online is the powerhouse of your company's productivity. Through Office 365 you get always-available, always-current access to the apps you need: Microsoft Word, Excel, PowerPoint®, Outlook, and OneNote.

Create Files Online

With Office Online you can create files directly from your web browser—no uploading required. Save your file to SharePoint if it's a project or team file, or save it to OneDrive if you don't plan to share the file widely.

To create a new file in Office 365:

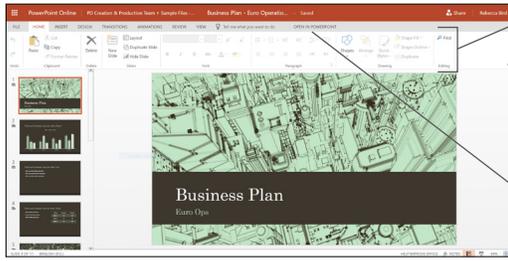
1. From the **app launcher** ☰, open **OneDrive** or **SharePoint**.
2. Open the library where you want to save the file.
3. Click **New** and then select a file type.
4. If prompted, name the file or folder and then click **Create**.
5. When the app opens, create the file.



Note: Your system administrator might not allow file creation for every app in some SharePoint team sites and libraries.

Present with PowerPoint

View, edit, and create presentations on your trip to your next meeting, in PowerPoint Online.

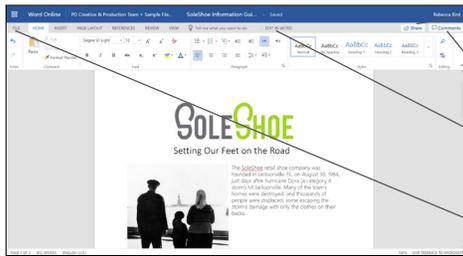


Make simple edits right in your browser.

For more robust tools, edit the presentation in your desktop version of PowerPoint.

Work in Word Online

Keep hacking away at that report in Word Online, even if you're out of the office. You can even see your coauthors' additions in real time.



Share the file with colleagues instantly.

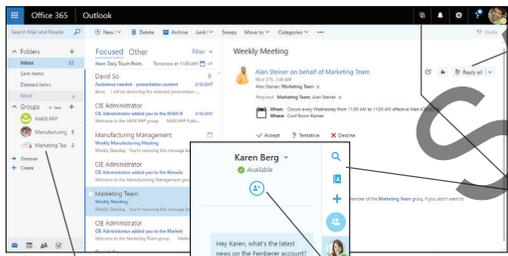
Chat with coauthors in the Word interface.

Edit the presentation in the desktop version of Word.

Go to Backstage view for additional options.

Understand Outlook Online

In Office 365, Outlook is divided into apps called Outlook, Calendar, People, and Tasks. Open any of these to manage your mail, appointments, contacts, and tasks.



In the Mail app, you can respond to messages right from the Reading pane.

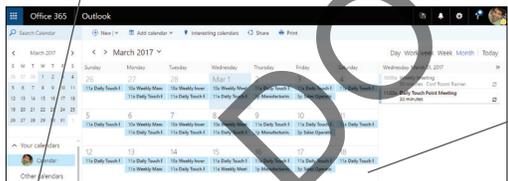
Open Skype to send a quick instant message (IM).

Add contacts to the conversation.

Turn chat notifications on or off.

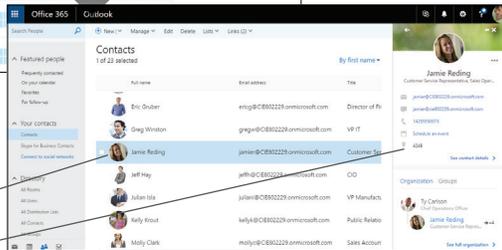
Find your Office 365 group inboxes here.

Find your Office 365 group calendars here.



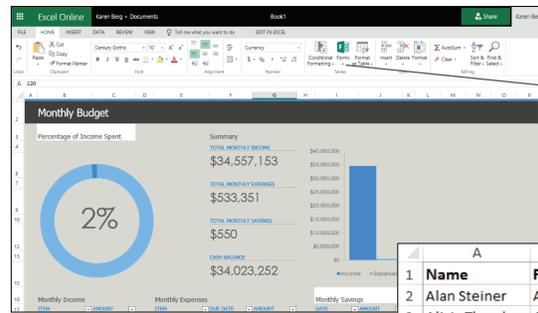
In Calendar, reschedule an appointment by dragging it to a free calendar space.

In People, click a contact name to display details on the contact card.



Explore Excel Online

Excel Online works and looks like your desktop app but gives you the freedom of editing your workbooks from anywhere.



On the Home tab, in the Tables group, click **Forms** to create a poll and analyze the results on a new worksheet.

Excel recognizes patterns and suggests possible data as you type. Click to accept the suggestion.

	A	B	C
1	Name	First Name	Last Name
2	Alan Steiner	Alan	Steiner
3	Alicia Thomber	Alicia	Thomber
4	Amy Alberts	Amy	Alberts
5	Andy Jacobs	Andy	Jacobs
6	Anna Lidman	Anna	Lidman
7	Brad Sutton	Brad	Sutton
8	Carlos Grito	Carlos	Grito

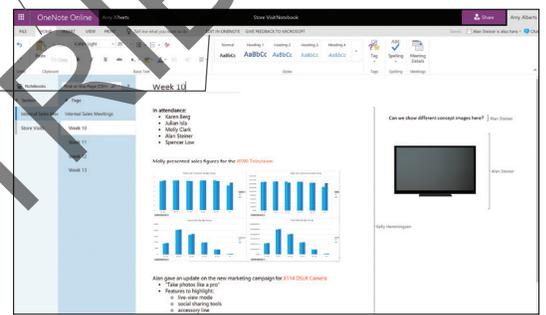
Use OneNote Online

Your Office 365 group OneNote notebook is your communal scratch pad. Get your ideas down, organize them, and search them with ease.

OneNote Online offers a simplified ribbon for basic note taking.

Click **Open In OneNote**

to open the desktop app, where you can use advanced tools to add drawings, arrows, and more.



ADDITIONAL RESOURCES: Further your software skills with these resources from BrainStorm, Inc.

Since Windows 95, BrainStorm has been helping people do more with their software. BrainStorm offers personalized learning and solutions to increase productivity. Do what you do best—faster and smarter than ever before.



BRAINSTORM QUICKHELP™

QuickHelp is a one-of-a-kind solution that offers customized content in an intelligent learning platform. QuickHelp provides users with a unique learning journey that includes:

- Thousands of searchable and shareable videos
- Live, productivity-focused webinar events
- PDF guides to support diverse learning styles
- Assessments to reinforce learning and gauge progress



INSTRUCTOR-LED TRAINING

On-site and virtual training solutions give organizations practical, hands-on experience.



BRAINSTORM

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