Microsoft® **Office**
Specialist

MOS Study Guide

for Microsoft®
Office 365

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John Pierce

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1 Navigating Office 365

The skills tested in this section of the Microsoft Office exam for Office 365 relate to how you navigate features and applications. You'll learn about navigating on the home page, in Outlook Web App, and on your team site in SharePoint Online. Specifically, the following objectives are associated with this set of skills:

1.1 Navigate Office 365 features

1.2 Navigate Office 365 applications

In this chapter, you'll gain an understanding of how Office 365 integrates its features, the navigational tools it provides on the home page, and the options you have for finding help and support. You'll also be introduced to working with the navigation pane in Outlook Web App and how to use the Quick Launch and breadcrumbs to navigate on your SharePoint team site.

Office 365 features and navigation are described at a high level in this chapter. In the following three chapters, you'll find detailed descriptions of how you work with specific Office 365 applications.

1.1 Navigate Office 365 Features

You gain access to the applications and features that Office 365 provides on a portal page that you open in your web browser. After you sign in to the portal, you work with the type of user interface controls (mostly links) that you find on most any other website. This section describes the features you work with in Office 365 and how you navigate to them from the portal's home page. You'll learn, for example, about resources and community sites you can rely on to help you set up your Outlook contacts and e-mail account. This section also describes the basic functionality of Outlook Web App and the SharePoint team site. In addition, you'll see how to view and update your profile and learn about the help and support features for Office 365.

Understanding Office 365 Authentication

Like many applications, Office 365 requires you to sign in using an ID and password. If you sign up for Office 365 (for yourself or for your organization), these authentication credentials are issued to you as part of that process. If you did not sign up yourself but are part of a small business or an organization that has deployed Office 365, you likely received your ID and a temporary password from the person responsible for administering Office 365. When you sign in the first time using the temporary password, you are required to reset that password.

> **Tip** Use a strong password for your Office 365 account. A strong password includes a mix of uppercase and lowercase letters, numbers, and special characters (such as a dollar sign or an underscore). You can learn more about creating strong passwords at *http://www.microsoft.com/security/online-privacy/passwords-create.aspx*.

> **See Also** For information about changing your password at other times, see "Updating Your Profile" later in this chapter.

Instead of having a Windows Live ID that you use to sign in to Hotmail or other Windows Live services, you need a Microsoft Online Services ID to work with Office 365. In a basic deployment of Office 365, you can recognize this ID because it includes the text *onmicrosoft* as part of the domain name you generally use for your e-mail address—for example, sam@contoso.onmicrosoft.com. (If you are using Office 365 on a custom domain instead of the domain set up by Microsoft, your user ID might not include this text.)

Working on the Office 365 Home Page

You can open the Office 365 portal in a couple of ways. Both approaches require you to sign in with your Microsoft Online Services ID and password.

Using *portal.microsoftonline.com*

To go directly to the sign-in page that takes you to the Office 365 portal, open your web browser and then type **https://portal.microsoftonline.com** in the address bar. (Of course, you might want to add this site to your list of favorites or create a shortcut to the site because you are likely to visit the site often.) Enter your user ID and password, and then click Sign In. Select Remember Me if you want to access the portal without

having to enter your user ID. (You still need to enter your password.) The option Keep Me Signed In lets you close your browser but remain signed in to Office 365 until you manually sign out.

> **Important** Microsoft recommends that you select the Keep Me Signed In option only when you are working on a private computer. It's not advisable to select this option if you are working with Office 365 on a public computer or on a computer you share with others.

You sign in with your Microsoft Online Services ID and password. Microsoft provides this ID when you sign up for Office 365, or you might receive it from an administrator.
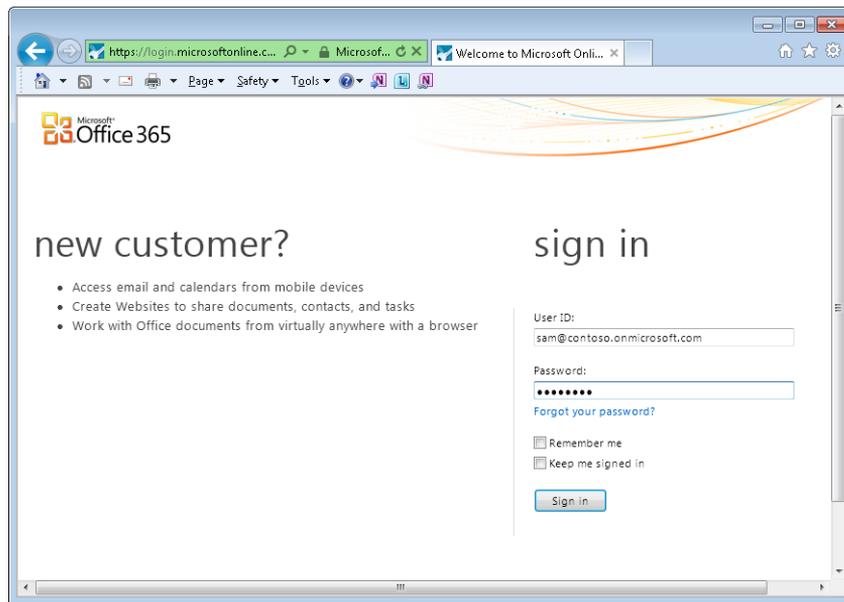
As you can see in the following screen shot, the home page of the Office 365 portal organizes links and information in two panes and a top navigation bar. Links to applications and websites appear on the left and at the top, and links to resources and community sites are included in a list at the right.

> **Important** Users who are Office 365 administrators see the Admin page when they sign in (and the Admin link appears in the top navigation bar). The Admin page includes additional links, such as those for managing Office 365 applications; accessing support sites; and managing users, subscriptions, and licenses.

The Office 365 home page for a standard user of the enterprise plan. Use the links at the top to open Outlook or your team site. Use the search box or the links under Community to find help and support.
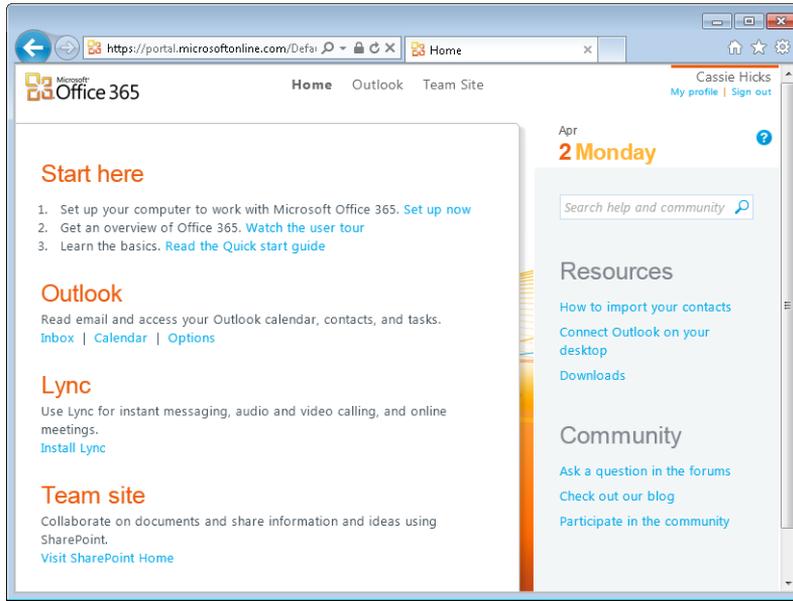
Several of the resource links lead to information about setting up Outlook Web App. For example, you can read how to import your contacts into the address book in Outlook Web App and how to connect the Web App to the desktop version of Microsoft Outlook. (Compatible versions are Outlook 2007 with service pack 2, Outlook 2010, and Outlook 2011 for the Mac. Note that Outlook 2007 and Outlook 2010 require updates that are installed when the desktop setup is completed.)

> **See Also** You'll learn the details of how to import contacts in Chapter 2, "Communicating by Using Office 365 Outlook Web App." You'll learn more about setting up Outlook to work with Office 365 in "Configuring Office 365 to Work with the Office Desktop Applications" later in this chapter.

One Office 365 application you might not be familiar with is Microsoft Lync. Lync is a real-time communications application that provides capabilities for instant messaging, online meetings (using Voice over IP, or VoIP), and displaying presence information that tells you when a colleague is available or busy.

> **See Also** You'll learn the details of working with Lync in Chapter 3, "Collaborating by Using Lync Online."

Lync isn't installed by default. To install it, click Install Lync to open the Downloads page. (You can reach the same destination by clicking Downloads in the list of resources.) Specify whether you want to install the 32-bit or 64-bit version of Lync, and then click Install.

> **Important** The version you choose depends on which version of the Windows operating system you are using. Click the Which Version link to learn more about determining which version of Lync to use.

After the installation of Lync is complete, you should see the Lync window, where you sign in to the program using your Microsoft Online Services ID and password. You might need to install the Microsoft Online Services Sign-in Assistant if it is not already installed on your computer. If that's the case, you'll see a message in the Lync window when you try to sign in telling you that you need to install additional software. Click the message to download the installation file you need.
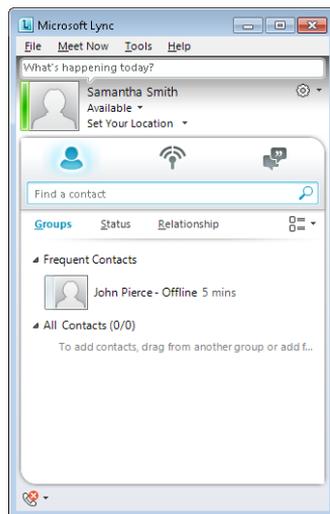
Microsoft Lync is a real-time communications application that you can use for instant messaging, online meetings, conference calls, and other needs.

On the portal's home page, the links under Community take you to online forums and blogs that are one of the support options for Office 365. You can also use the search box above the Resources list to find information about a topic. You'll learn more about Office 365 help and support later in this section.

➤ **To display the Office 365 portal**

  1. Open your browser, and then type **https://portal.microsoftonline.com** in the address bar.

  2. Enter your user ID and password, and then click **Sign in**.

➤ **To install Lync**

1. Sign in to the Office 365 portal.

2. On the home page, click **Install Lync**.

3. On the **Downloads** page, specify whether you want to install the 32-bit version of Lync or the 64-bit version.

4. Click **Install**.

Using Office365.com

An alternative route to the portal is to open the Office 365 product website, *office365.com*, and sign in there. (The Sign In link appears in the top-right corner of the page. This link takes you to the sign-in page shown earlier in this chapter.)

On this site, you can find information about Office 365, including current subscription plans. The Office 365 site also provides background information (such as customer stories and overviews of Office 365 features), links to sites where you purchase a subscription or download the free trial, and links to support sites.

Click Sign In in the top-right corner of the Office 365 product website to sign in and open the portal for work.

➤ **To sign in to the portal from www.Office365.com**

1. Open your browser, and then type **www.Office365.com** in the address bar.

2. At the top right of the Office 365 site, click **Sign In**.

3. On the Office 365 sign-in page, enter your user ID and password, and then click **Sign In**.

Configuring Office 365 to Work with the Office Desktop Applications

On the Downloads page you use to install Lync, you'll also find options to install Microsoft Office Professional Plus (an option that is provided only in the enterprise version of Office 365) and for configuring Office 365 so that it works with the Office desktop applications.

If you are not already running the Professional Plus edition of Office 2010 and want to install it, select 32-Bit or 64-Bit under Version, and then click Install. Use the links provided to get more information about installing and upgrading to this edition and to determine which version you should install.

As the information on the Downloads page indicates, by configuring the Office desktop applications to work with Office 365, you can send e-mail from Outlook 2007 or Outlook 2010 and save files to your SharePoint team site when you are working in an application such as Microsoft Word or Microsoft Excel.

In this area, click the Set Up button to start the process. Click Run in the security dialog box, and you'll then see Office 365 download the setup file it needs to configure the desktop applications. Sign in to Office 365 when you are prompted. At this point, the setup program checks your current configuration and then opens a page, shown in the following screen shot, that describes the steps the program will take and which applications it can configure.

Configuring Outlook 2007 or Outlook 2010 to work with Office 365 requires manual steps. Other configuration requirements are performed automatically.
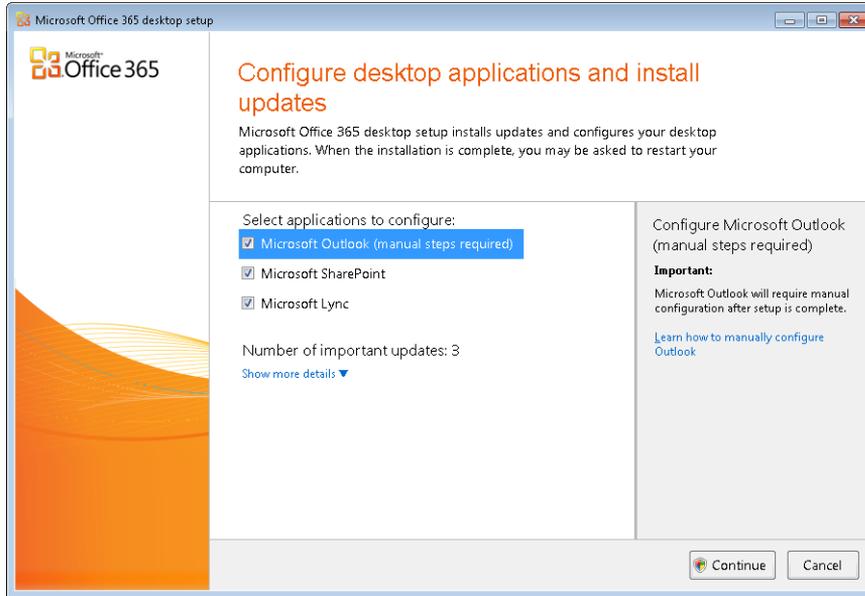
Be sure to take note of the information that tells you that configuring Outlook requires some manual steps. (The steps for connecting your account to Outlook 2010 are summarized later in this section.) If you want to review the steps involved before you proceed, click the link provided. Also note that the setup program might need to install updates to your computer. Use the Show More Details link to see a list of the updates.

If you don't want to configure a particular application, clear the check box. Click Continue after you specify the options you want to use, and then click I Accept if you agree with the licensing terms. The setup program then downloads the updates and configures the applications.

After the updates are installed, you are prompted to restart your computer to complete several of the configuration steps. When your computer restarts, the Office 365 desktop setup program should run again and complete the configuration steps it performs automatically. These steps include adding a shortcut for Office 365 to the Start menu and setting up SharePoint to work with the desktop applications.

To finish configuring Outlook, review the steps and other information described in the Help topic that is displayed when you click the link Learn How To Manually Configure Outlook. For Outlook 2010, you take the following steps:

1. Open Outlook 2010.
2. Click the **File** tab. On the **Info** page, click **Add Account**.

3. In the **Add New Account Wizard**, on the **Auto Account Setup** page, type your name and your Office 365 e-mail address, and then enter and confirm your password in the text boxes provided.

4. Click **Next**.

    With the information you provided in step 3, Outlook should automatically find the other settings it needs and complete the setup of your account.

5. Restart Outlook to have the new settings take effect.

➤ **To set up and configure Office desktop applications to work with Office 365**

1. On the Office 365 portal home page, click **Downloads** in the **Resources** list.

2. On the **Downloads** page, under **Set up and configure your Office desktop apps**, click **Set Up**.

3. Sign in to Office 365 when prompted.

4. In the Office 365 desktop setup program, select the Office applications you want to configure, and then click **Continue**.

5. Restart your computer when you are prompted.

6. Follow the steps required to set up your Office 365 account in Outlook 2007 or Outlook 2010. See the steps provided earlier in this section for Outlook 2010. You can also click **Connect Outlook** on your desktop in the **Resources** list on the Office 365 home page to find more information.

Getting Started with Outlook Web App

Outlook Web App (sometimes abbreviated OWA) is the online version of the desktop e-mail, scheduling, and contact-management application. Outlook Web App includes four views—Mail, Calendar, Contacts, and Tasks. This configuration is essentially the same as what's available in the desktop version.

> **See Also** If you want to read a comparison of the features available in Outlook Web App and the desktop version of Outlook, go to *http://help.outlook.com/en-US/beta/ Cc511379.aspx.*

At the top of the portal's home page, click Outlook to open your inbox. Under the Outlook heading in the portal's main pane, click Inbox, Calendar, or Options to start working in a particular view of Outlook Web App. The Inbox and Calendar links take you to the views in Outlook that you use for e-mail and for scheduling, respectively. The Options link takes you to a page on which you can change or set options to manage your e-mail accounts and calendar. For example, from the Options page you can connect

different e-mail accounts, organize aspects of e-mail such as rules and automatic replies, join and manage e-mail groups, and control many aspects of how you want Outlook to behave.

> **See Also** You'll learn the details of working with these options in Chapter 2.

As mentioned earlier, several of the links in the Resources list on the home page direct you to procedures and information that help you set up Outlook Web App—importing contacts and connecting to your desktop version of Outlook.

The Account view of the Outlook Options page also includes a list of shortcuts. Click these links to display pages on which you start and complete the operations described.

Open the Outlook Web App Options page to view account information and configure settings. Use the shortcuts to help set up and manage your e-mail account.
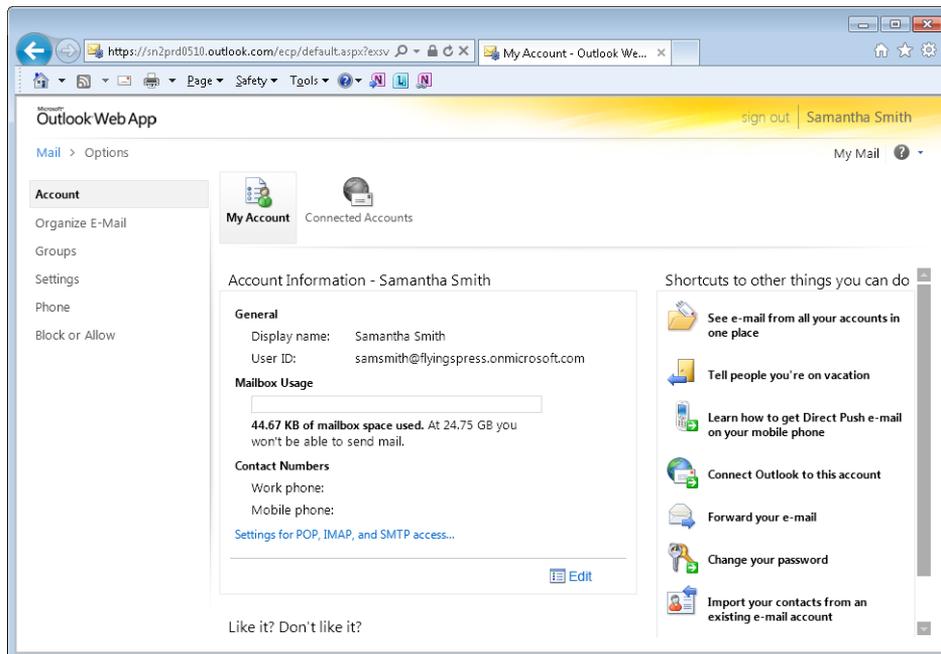
When you run Outlook Web App the first time (by clicking the Inbox link, for example, or by clicking Outlook at the top of the home page), you see a dialog box that prompts you to specify the language and time zone you want to use. After you choose settings and click OK in this dialog box, Outlook Web App opens.

> **To get started with Outlook Web App**

   1. Sign in to the Office 365 portal.

2. On the home page, click **Outlook** at the top of the page.

3. Specify a language and time zone, and then click **OK**.

Viewing Your Team Site

The Office 365 team site is built on the Microsoft SharePoint platform. Organizations, teams, and groups use SharePoint sites as tools for collaborative needs such as managing shared content, tracking tasks, posting announcements, and managing business workflows.

> **Important** In the enterprise version of Office 365, users who are not set up as Office 365 administrators do not have access to the team site until an administrator adds them as a user of the site.

On the Office 365 portal home page, clicking Team Site in the top navigation bar opens the team site in the window in which the portal is displayed. You can click the Back button in your browser to return to the portal home page. Click Visit SharePoint Home in the Team Site section of the main pane to open the team site in a new window.

Use links on the home page to open the SharePoint Online team site. This screen shot shows the basic framework you will build from.
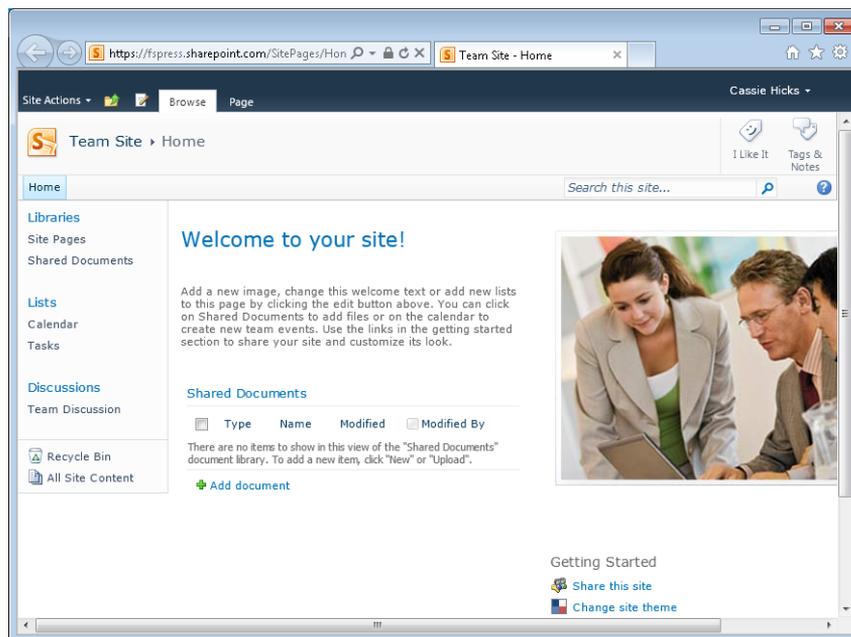
Two of the main elements of a SharePoint site are libraries and lists, both of which you use as repositories for information. If you have sufficient permissions for the team site, you can, for example, create a document library for each project your team manages or define a library in which you store specific types of documents—proposals, budgets, presentations, reports, and so on. You can also create other types of libraries, including picture libraries for storing image files and wiki page libraries, which are designed for sharing information within a group.

You start in this dialog box when you add libraries, lists, and pages to your team site. Filter the view by selecting categories at the left.
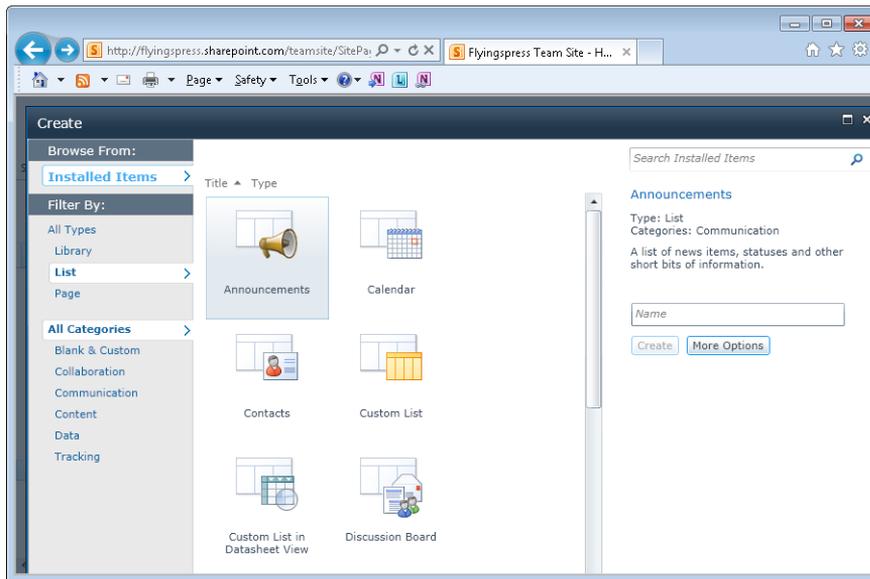
Lists are designed for specific uses—tracking tasks, for example, or listing announcements or contacts. Your team site can also include subsites. (Again, only users with sufficient permissions can create subsites.) A business might use the main team site as its intranet home page, and then each department could develop its own subsite, which it uses to store and display content relevant to its work and role within the business at large.

With the Office 365 enterprise or small business edition, you can implement the three-state workflow. (The enterprise version of Office 365 includes other types of workflows as well.) This workflow lets you track an item through three phases, or states. For example, you could track a request for proposal (RFP) through states named Submitted, Pending, and Approved.

> **See Also** For more information about site permissions, working with SharePoint features such as lists and libraries, and using Office Web Apps with SharePoint, see Chapter 4, "Managing Sites in SharePoint Online."

The Small Business Edition Team Site and Website

In the small business edition of Office 365, the team site is configured differently from how it appears in the enterprise edition. The Office 365 home page for the small business edition, for example, contains a link to a default document library (Shared Documents). It also contains icons that run the Office Web Apps for Word, Excel, PowerPoint, and OneNote. The documents you create by using these icons are stored in the default Documents library.

The team site's home page is also configured differently. It contains links you can use to edit the home page, add new pages, and share the site with others. It also provides a list for posting announcements.

The basic team site for the small business version of Office 365.
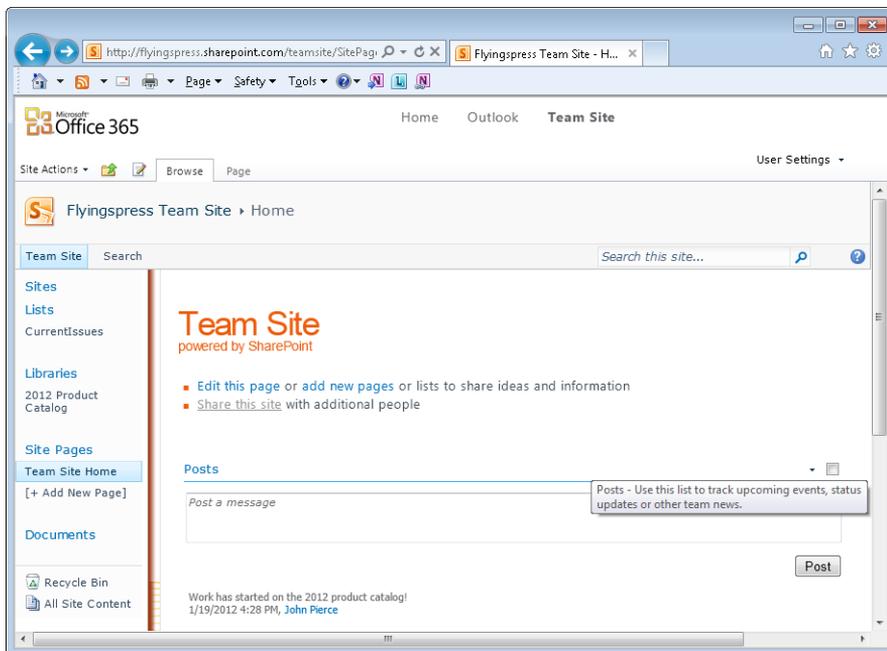
In addition, the portal home page for the small business edition includes a link to a public website that is built using SharePoint features. This site contains five standard pages—Home, About Us, Contact Us, Site Map, and Member Log In. To edit this page, you must be an Office 365 administrator.

If you are an administrator, click Admin on the portal's home page, and then click Edit Website. You'll see a SharePoint document library that stores the five default pages. You can change the look and feel of the website, add pages and images, and modify other properties of the site by using the tools on the ribbon that appears when you edit a page. You can apply much of what you learn about SharePoint sites in Chapter 4 to design your public site.

Updating Your Profile

An Office 365 profile includes information such as your name, country or region, and e-mail address. The fields in the Information area—First Name, Address, and Phone Number, for example—only display data. You cannot edit this information yourself on this page. An Office 365 administrator enters some of this information when your account is set up and can update this information when necessary.

The My Profile page includes a setting for the display language you want to use and, for Office 365 administrators (in the enterprise plan), contact preferences—that is, the contact information you want Microsoft Online Services to use to contact you. You can enter phone and e-mail address information and also select options for the type of information you want to be contacted about. For example, you can choose to receive (or not receive) educational content about how to set up and use products and services.

As part of your profile, you can choose to receive information about Office 365.
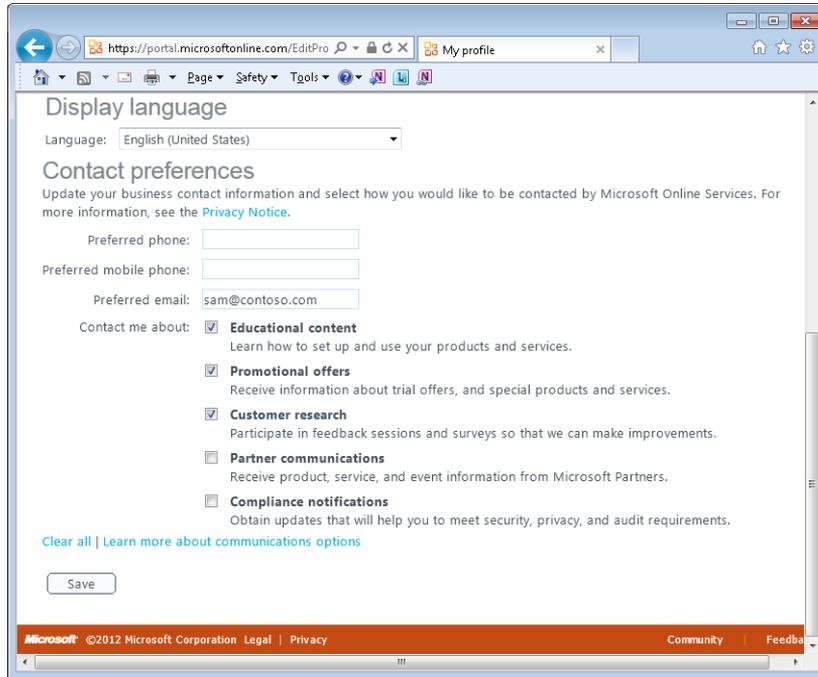
If you want to include a photograph of yourself in your profile, click Change Photo, click Browse to select an image file on your computer or network (or type the file name along with the path to the file), and then click Upload. The photo you add cannot be more than 100 kilobytes (KB) in size.

Another operation you perform on the My Profile page is changing your password. Click the link near the top of the page. At this point, you might need to sign in again for security reasons. You then follow the standard steps for defining a new password— enter your old password and then enter and confirm your new password. The Change Password page indicates how strong your password is—that is, whether your password uses a healthy mix of uppercase and lowercase letters, numerals, and symbols.

To view your profile and make any changes to your password, photo, or contact preferences, click My Profile in the top-right corner of the portal's home page. Make any changes, and then click Save.

➤ **To change your password**

1. On the portal page, click **My profile**.
2. On the **My profile** page, click **Change password**.
3. Sign in to Office 365 when prompted.
4. Type your current password. Type your new password, and then enter your new password again to confirm it.
5. Check the **Password Strength** indicator to be sure you are using a strong password.
6. Click **Submit**.

➤ **To add or change a profile photo**

1. On the portal page, click **My profile**.
2. On the **My profile** page, click **Change photo**.
3. Click **Browse**.
4. In the **Choose File to Upload** dialog box, select the image file you want to use, and then click **Open**.
5. On the **My profile** page, click **Upload**.

Getting Help and Support

When you have a question about how to work with Office 365, you can take several routes toward the answer. First, you can use the search box on the portal home page to locate information about a topic. The search results open in a new window and include topics from the Office 365 Help system as well as information from community forums. On the search results page, use the links below the search box (All Content, Help Articles, Forums, Blogs, and Wikis) to filter the results. You can use the Sort By links to view the results by categories such as relevance and rating.

After Office 365 displays search results, you can filter and sort them by selecting a category such as Forums and an option such as Most Recent.
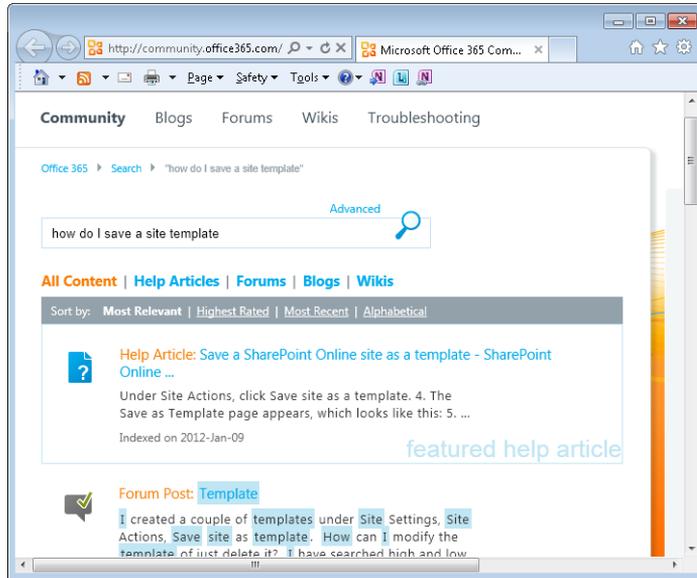
The Help button on the portal's home page opens the Office 365 Help page, which contains links to Help topics about specific applications and to information that gets you started with Office 365. (Unless you are responsible for administering an implementation of Office 365, you probably won't need to refer to the topics under Help For Admins.) The Help page also includes a search box you can use to locate information about a specific topic.

The Help page displays general categories you can browse through. Use the search box to find more detailed information.
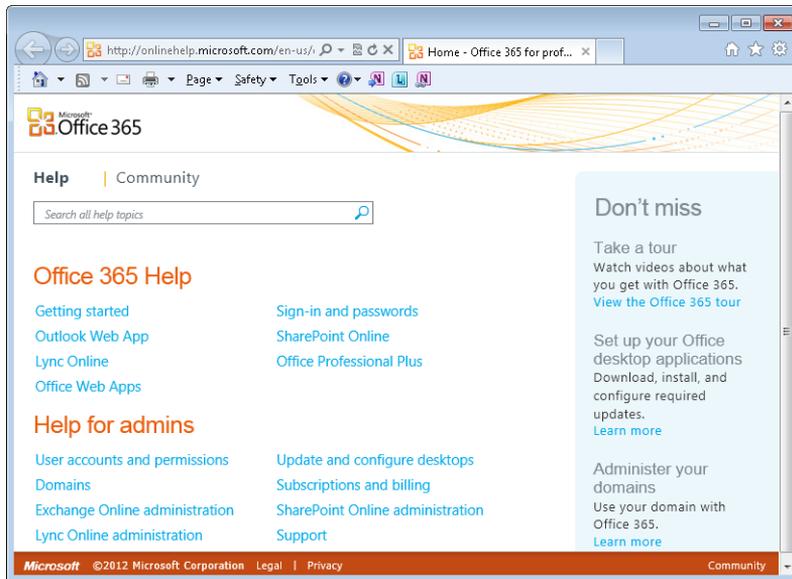
The following sections describe more about the Office 365 community forums and the other options for finding help and support.

Viewing Context-Sensitive Help

The Help content you want to see often depends on the task you are performing or the application you are working in. In Office 365, the Help content is tailored in this way. For example, when you switch to the Calendar view in Outlook (by clicking Calendar on the portal's home page, for example) and then click the Help button in Outlook, the topics that appear pertain to tasks such as sending a meeting request, using flags and reminders, and using the Scheduling Assistant to view your colleagues' free and busy times.
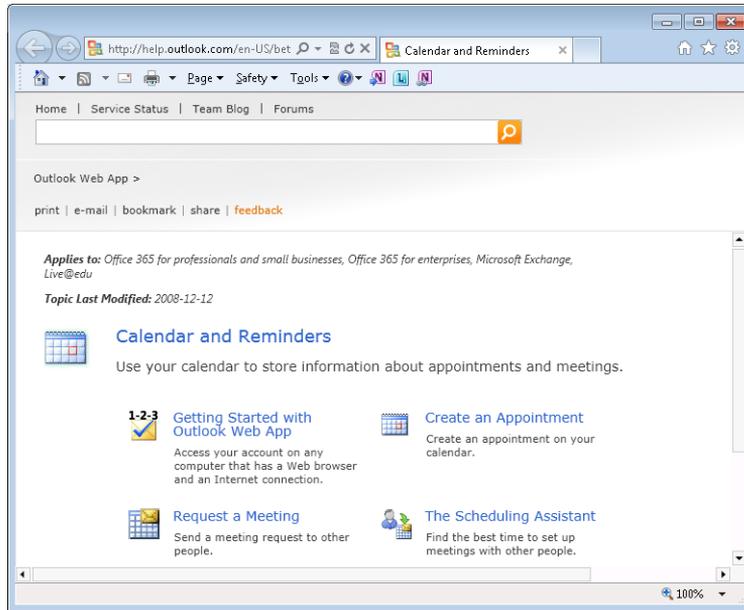
The Help topics displayed depend on the context you are working in.

Tip Use the links near the top of the page to print a Help topic; send a link to the topic in e-mail; bookmark the page; share it on sites such as Facebook, Twitter, or Windows Live; or offer feedback.

Using Office 365 Tutorials

Under the Start Here section on the portal's home page, you'll find links to animated overviews of Office 365 features and functionality and to a quick-start guide that reviews the essentials for working in Office 365. The guide explains features and provides the steps for basic procedures such as creating a contact in Outlook Web App and sending an instant message in Lync. (You'll learn how to perform these and many other detailed procedures in Chapters 2 through 4 as well.)

To find details for many tasks or to get an overview of Office 365, go to the portal's home page, click the Help button, and then click Getting Started under Office 365 Help. The Getting Started page is organized by category, with specific topics listed under headings such as Outlook and Lync.

When you are working in Outlook Web App, the Help page for each of the Outlook Web App views (Mail, Calendar, Contacts, and Tasks) has a link to an article named "Getting Started with Outlook Web App." Similarly, if you open the Help page for your SharePoint

Online, you can click the Getting Started link to see a list of topics that describe basic tasks and introduce the SharePoint ribbon, for example.

> **Tip** Among the Getting Started topics for your team site, you'll also find links to a series of articles that guide you through planning and managing a site collection. If you are responsible for implementing Office 365 or working with a group to plan your team site, these articles will prove helpful.

If you want an introduction to Lync, click Welcome To Lync on the Help menu in the Lync window to view an animated overview that also includes steps you can follow to make sure your phone and webcam work with Lync.

Reviewing Information in Community Forums

Using your Microsoft Online Services ID, you can create an account to participate in the Office 365 community, and thereby gain access to blogs and forums where you can learn more about specific topics and pose questions when you need help and advice from other Office 365 users and experts.

To set up a community account, click Participate In The Community, the last link under Community on the portal's home page. You simply need to enter the display name you want to use and click Join Now. The community site provides links to the latest postings on the blog (see the next section), recent forum discussions, technical Wikis, and other news of interest about who is using Office 365 and how they are using it.

Click Ask A Question In The Forums on the portal's home page to pose a question of your own or to search for information about a topic you are troubleshooting or exploring. (You can also click Forums near the top of the Community page or the blog.) Posts to the forums are organized in categories, with each forum category subdivided into topics. Under the topics, each discussion in a specific forum is listed. Click a column heading (Topic, Date, or Replies) to sort the discussions.

Forums are organized by service, and each main forum is divided into categories such as you see here for Lync.
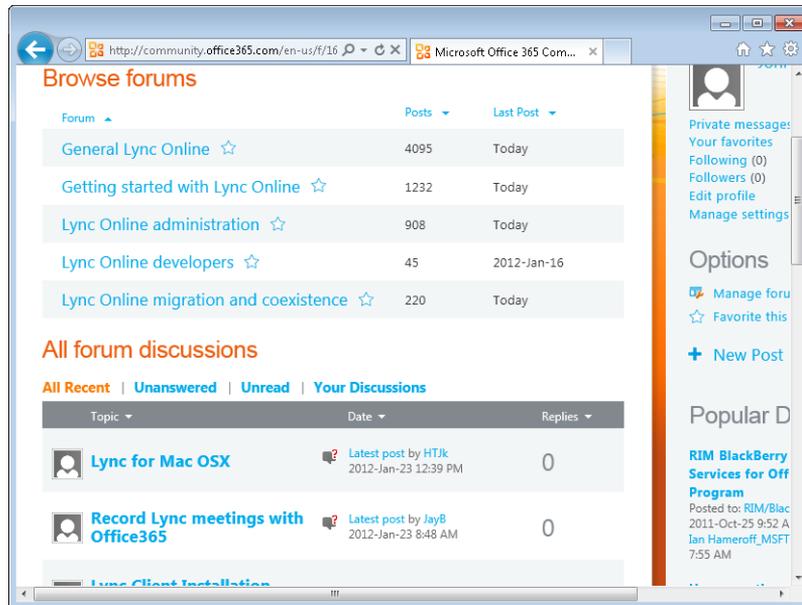
> **Tip** If you want to follow discussions on specific Office 365 forums, open the Forums page (click Ask A Question In The Forums on the portal home page) and then use links under Options (Manage Forum Subscriptions and Subscribe Via RSS) to set up the subscriptions you want.

Consulting Team Blogs

Click Check Out Our Blog in the group of community links on the home page to display the Office 365 Technical Blog. Like other support pages, the blog page provides a search box and sorting options.

Although some posts are more pertinent to the work of software developers and administrators than everyday users of Office 365, you can still find plenty of helpful information by scrolling through the list of blogs, sorting the list, or searching for information on a topic. Click Post A Question to the right of the search box to submit a question to readers of the Office 365 community forums.

Finding Technical Support

The Microsoft Support site provides a page dedicated to Office 365. The URL for the site is *support.microsoft.com/ph/15834.* This page contains a collection of links that are germane to standard users of Office 365 as well as to administrators. Select a category along the left side of the page to display links to articles about Office 365 applications, resolutions to common problems, and troubleshooting advice.

Go to the Office 365 support page on microsoft.com to view solutions to common issues, background information, and other resources.
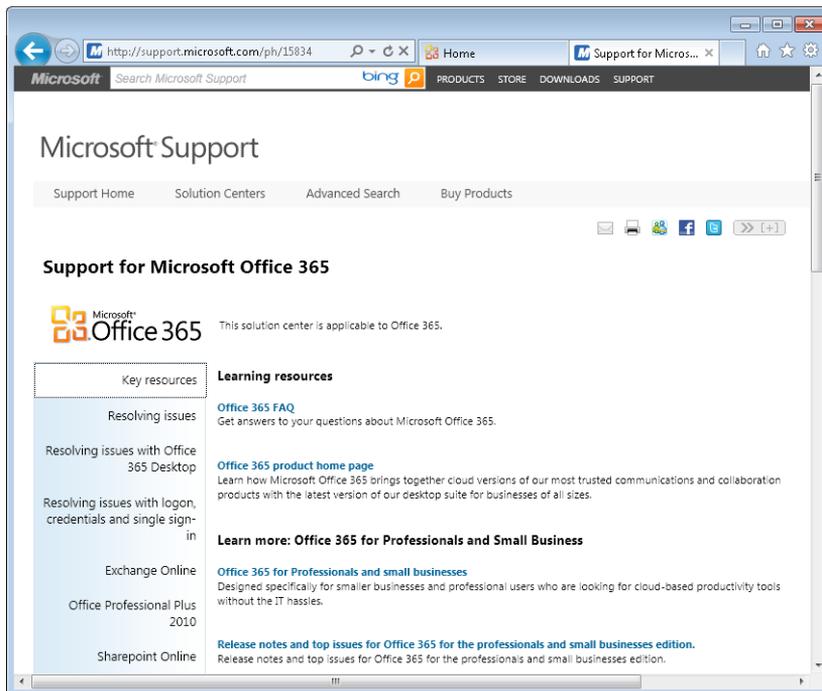
> **Tip** You'll also find a link to support pages on *office365.com.* You can find information about deploying Office 365 and system requirements, links to the Office 365 blog and the Office 365 community site, and other information.

Using How-To Procedures and Solutions

As mentioned earlier, much of the Office 365 Help content is designed for specific contexts. The topics you discover by searching or by browsing the Help system often provide step-by-step procedures for performing specific tasks. For example, the following screen shot shows the Help topic for how to request a meeting. In addition to the

how-to procedure shown for this task, you can use the links under Related Help Topics and Related Forum Or Blog Discussions.

Step-by-step procedures are provided for many common tasks.
Use the links on the right to find related information.
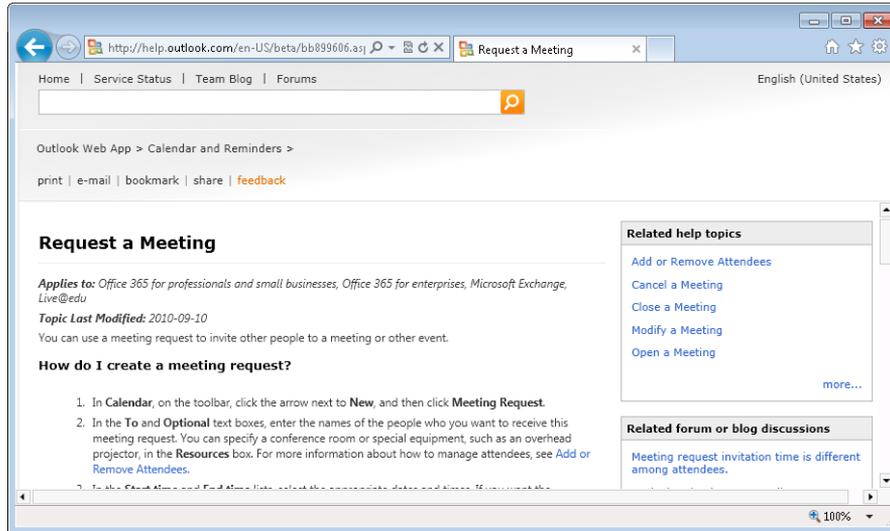
One other tool you can use to try and solve an issue is the Office 365 troubleshooting tool. To access this tool, start by clicking one of the community links on the portal's home page or go directly to *http://community.office365.com*. Then click the Troubleshooting heading near the top of the page.
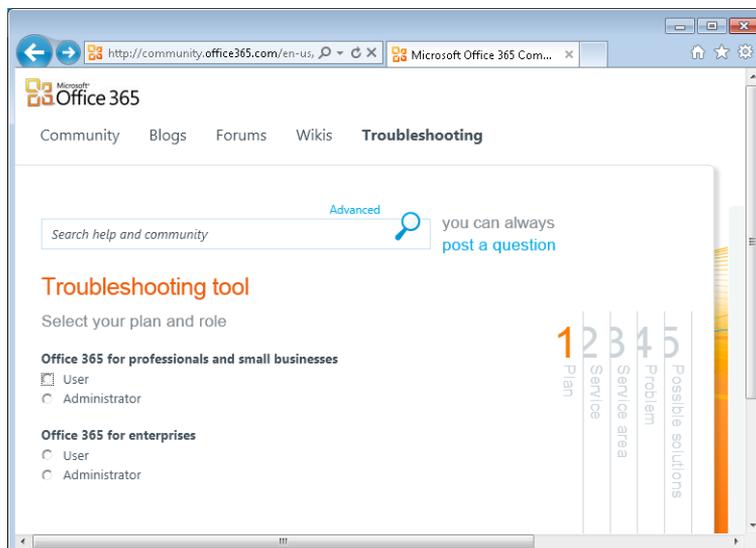
The selections you make in the troubleshooting tool lead to a list of possible solutions to the problem you identify.

You work with the troubleshooting tool much like you work through one of the Office desktop wizards. Here, first select the plan and role that fits your situation, and then follow along by making selections that pertain to the issue you want to solve. For example, in step 2, select the service you are having trouble with, which might be SharePoint Online or Exchange Online (which you would choose if the problem is connected to Outlook Web App). With each selection you make, the troubleshooting tool progresses through its steps and displays a set of options that help you identify the particular problem you have. When you reach step 5, Possible Solutions, you'll see a list of topics that might include your particular issue. If you see a description that matches or closely resembles your issue, click the link to find more information. Otherwise, click Start Over to work through the troubleshooting tool again.

Practice Tasks

Practice the skills you learned in this section by performing the following tasks on your installation of Office 365:

- Sign in to Office 365.
- Use the links on the home page to open Outlook and your team site.
- Install Lync (if it is not already installed and you have permissions to install applications on your computer).
- View your profile, and add a picture if you want to.
- Sign up for the Office 365 community.
- Explore the Office 365 Help system, the blogs, and forum discussions.

1.2 Navigate Office 365 Applications

Two of the applications you'll use in Office 365 are Outlook Web App and SharePoint, which provides the foundation for your team site. In this section, you'll learn the basics of how to find your way around these applications. We'll look at Outlook first and then cover the SharePoint team site.

Using the Outlook Navigation Pane

The navigation pane appears along the left side of the Outlook Web App window. At the bottom of the navigation pane are links to your inbox, the calendar, the tasks list, and your list of contacts. To switch views, you need only to click the link for the view you want to work with. The navigation pane then shows items for that specific feature. For

example, when you are looking at the Mail view, you'll see a list of favorite folders along with standards such as Inbox, Drafts, and Sent Items. At the top of the navigation pane for tasks and contacts, you'll see a set of options that let you filter the items that Outlook displays.

Use the navigation pane in Outlook Web App to organize and access items. Right-click an item in the navigation pane to display a menu with commands similar to what you see here for Calendar view.
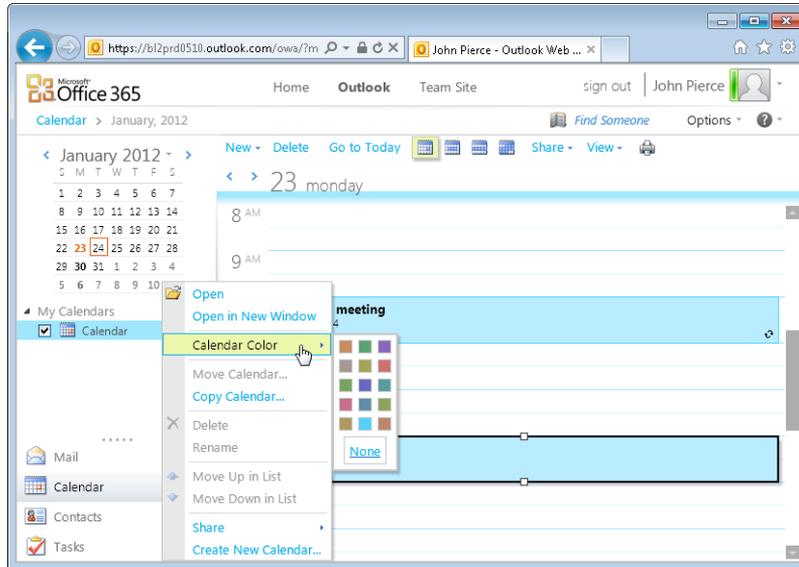
The following sections explain navigational features in each of the Outlook Web App views.

> **See Also** See Chapter 2 for details about working with e-mail, calendars, tasks, and contacts.

Navigating in Mail View

For e-mail, the navigation pane includes a set of default folders you will be familiar with if you use the desktop version of Outlook. Above the list of default folders is a set of favorites. The initial group of favorites are Inbox, Unread Mail, and Sent Items.

> **Tip** Click the arrow beside Favorites or the name of your account to collapse and expand the list of folders shown in the navigation pane.

To manage the Favorites list, you can use the Add To Favorites and Remove From Favorites commands. The relevant command appears on a menu that appears when

you right-click a folder in the navigation pane. This menu also lets you work with e-mail folders and modify the view of the navigation pane in other ways. Use the menu to perform the following operations:

- Open a folder
- Open a folder in a new window
- Move or copy a folder
- Delete a folder
- Rename a folder
- Create a folder
- Mark items as read
- Empty the folder

You'll see a list of similar commands when you work in the Calendar, Contacts, or Tasks views.

➤ **To add a folder to the Favorites list**

➜ In the navigation pane, right-click the folder you want to add, and then choose **Add to Favorites**.

➤ **To remove a folder from the Favorites list**

➜ In the Favorites list, right-click the folder you want to delete from the list, and then choose **Remove from Favorites**.

➤ **To create a new folder in the navigation pane**

1. In the navigation pane, right-click your account name (or right-click a folder for which you want to create a subfolder).
2. From the menu, choose **Create New Folder**.
3. In the box that appears on the navigation pane, type a name for the folder.

Navigating in Calendar View

When you view the calendar, the navigation pane shows a thumbnail view of a monthly calendar at the top. You see the current month by default and can use the arrows at the right and left of the month's name to move ahead or back in time. You can also click the name of the month to pop up a menu that lets you choose an upcoming month or year or a month or year in the recent past.
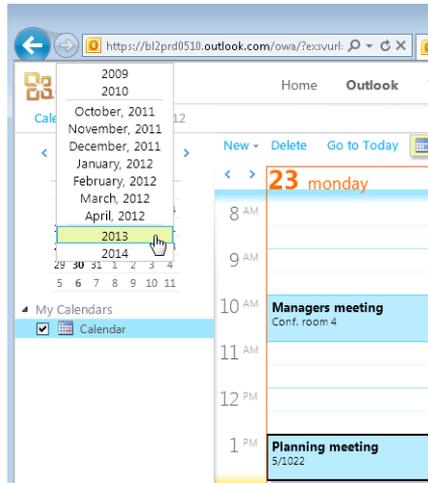
Use the calendar control in the navigation pane to display an upcoming date or one in the recent past.

Under My Calendars, Outlook displays the default calendar and any other calendars you set up. Right-click My Calendars to display a menu that lets you rename, remove, or define a new calendar group. If you define at least one other calendar group (you can define more), the Move Up In List and Move Down In List commands become active on this menu. You can use these commands to change the order in which calendar groups are displayed in the navigation pane.

Right-clicking a specific calendar displays a menu with a number of other commands, including Open and Open In New Window and Move Up In List and Move Down In List. On this menu, the Move Up and Move Down commands apply to specific calendars, letting you reorder the calendars within a group. The Calendar Color command lets you assign the background color for a calendar.

> **See Also** You'll see how to work with other commands on this menu, including Share and Create New Calendar, in Chapter 2.

Navigating in Contacts View

In Contacts view, the navigation pane includes a set of filtering options in addition to a list of contact groups and folders. The filtering options are All, People, and Groups. These options let you see a specific list of contacts so that you can more easily locate and work with contacts you need.

By default, the contact folder list has a single group (My Contacts) that includes a folder named Contacts. Right-click My Contacts to display a menu with commands for renaming, removing, and creating groups; changing the order of contact groups in the list; and creating a new contacts folder.

> **Tip** If you create a contacts group of your own, these commands are also available when you right-click that group.

Right-click a contacts folder, and you gain access to commands like those you see for e-mail and calendars (and for tasks).

➤ **To filter the contacts list in the navigation pane**

1. Click **Contacts** at the bottom of the Outlook Web App window.

2. In the navigation pane's **Show** area, select the filtering option you want to apply: **All**, **People**, or **Groups**.

3. Double-click a contact item to display its details.

Navigating in Tasks View

As with contacts, the navigation pane in the Tasks view includes a set of filtering options above the list of task groups and task folders. The default configuration includes one task group, named My Tasks, and two task folders—Flagged Items And Tasks and Tasks. The Show options let you view all tasks (active and complete) or filter the view to see only active tasks, overdue tasks, or completed tasks.

As you can in other Outlook Web App views, you can right-click a task group or task folder to open a menu with commands that let you create groups and folders and change the order in which folders appear in the navigation pane.

➤ **To filter the task list in the navigation pane**

1. Click **Tasks** at the bottom of the Outlook Web App window.

2. In the navigation pane's **Show** area, select the filtering option you want to apply: **All**, **Active**, **Overdue**, or **Complete**.

3. Double-click a task item to display its details.

Navigating on Your Team Site

In Chapter 4, you'll learn the details of how to extend and add features to your team site. This section describes two basic navigational aids you'll use on the team site—the Quick Launch, which is displayed along the left side of the team site window, and the breadcrumb navigation, which you access by clicking the folder icon that appears next to Site Actions at the top of the window.

Use links in the Quick Launch at the left to open lists and libraries. Use the breadcrumbs, shown at the top, to navigate up to the home page or another location.
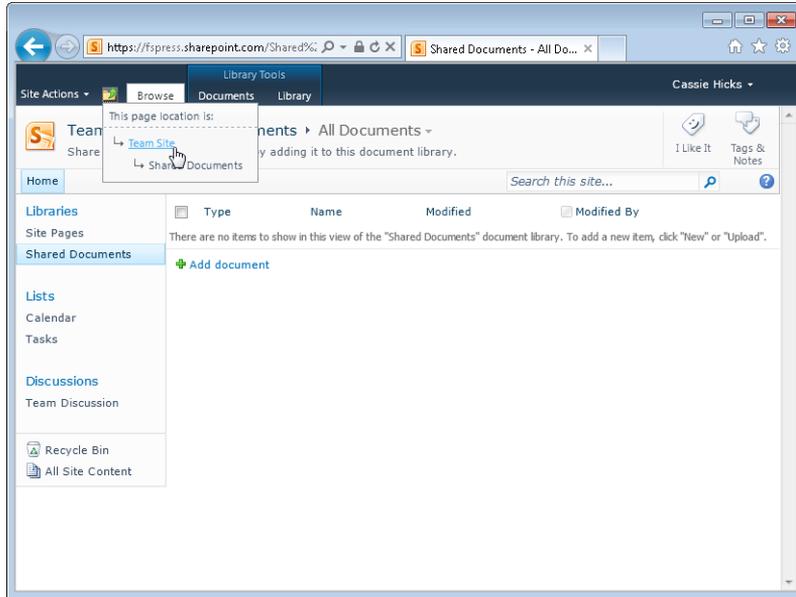
Using the Quick Launch

The links included on the Quick Launch let you display subsites, pages, lists, and libraries on your site with a single click. By default, links to the team site's pages, the Shared Documents library, the Calendar and Task lists, and the default Team Discussion appear on the Quick Launch. The Quick Launch also includes the links Recycle Bin and All Site Content.

You can retrieve pages or other items you delete from the Recycle Bin for up to 30 days. The All Site Content link takes you to a page that shows each element of your team site (lists and libraries, for example). You can open an item by clicking its link. If you have permission, you can click the Create link at the top of the page to initiate the steps you follow to add an element to your site.

When you click Site Pages on the Quick Launch, SharePoint displays a page from which you can edit the pages already on your site or add a page. In the list of current pages, move the pointer to the left end of a row, and SharePoint displays a check box. Select this check box to display commands on the ribbon. You use these commands to (among other operations) upload a document, edit properties, and configure settings for a list or library.

Clicking the Shared Documents link under Libraries leads you to a page you can use to upload a document to this library or create or edit a document already stored there.

When you build your team site by adding other lists and libraries, links to these items can be added to the Quick Launch to facilitate navigation.

Navigating Up with the Breadcrumbs

As you add elements to your default team site (such as lists, libraries, pages, and subsites), you can use the breadcrumbs tool to retrace your steps to a page higher in the site's hierarchy.

The breadcrumbs icon sits just to the right of the Site Actions menu. (The ScreenTip that you see when you point to this icon is Navigate Up.) When you click it, you'll see a simple depiction of the relationship of the page you are viewing to the site at large. To move up the site hierarchy—for example, to return to the team site home page—click the entry for the page you want to view.

➤ **To navigate using breadcrumbs**

1. Click the breadcrumbs icon.
2. Click the page you want to view.

Practice Tasks

Practice the skills you learned in this section by performing the following tasks on your installation of Office 365:

- Open your Outlook Web App inbox.
- Using the navigation pane, add folders for current projects, frequent e-mail correspondents, or other categories you use to organize your e-mail.
- Open the team site, and then open the Shared Documents library from the Quick Launch.
- Use the breadcrumbs to return to the team site's home page.

Objective Review

Before finishing this chapter, be sure you have mastered the following skills:

1.1 Navigate Office 365 features

1.2 Navigate Office 365 applications