

Microsoft Public Cloud Services Setting up your business in the cloud

Blain Barton



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Microsoft® Public Cloud Services

Setting up your business
in the cloud

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Foreword

Blain Barton has a passion for technology as well as a very deep passion for education. Throughout our years of working together, it has always been apparent that he values the engagement and participation of students as he delivers highly technical topics in a manner that they can enjoy and from which they can glean the technical knowledge he provides to further their education and success. He is both educational and entertaining with his classroom delivery!

I work very closely with local high schools, in addition to the National Center for Women and Information Technology (NCWIT), to provide opportunities for young women to engage in technology activities and further their education in technological topics. Blain has always provided great support for these initiatives and acknowledges the need for more women in technology careers. His support and understanding of these initiatives are greatly valued and have provided some awesome opportunities to our local young women.

Blain has shown great support for education at every level. I have worked with him on many projects, and his determination and excitement for making these platforms available to all individuals is unsurpassed by anyone else I know. He supports many of the initiatives that Hodges University implements to educate a highly diverse population that is inclusive of all who want to learn technology.

In this book, Blain orchestrates the blending of all of the various aspects of Microsoft public cloud services into a comprehensive guide for using these services to their maximum capacity. In doing so, he delivers an informative how-to platform that gives the reader step-by-step instructions to ensure a successful transition to taking full advantage of cloud services and the benefits that they provide. His hard work and dedication to educational platforms is evident from beginning to end. He is truly an educator at heart.

After reading this book, you will possess a greater understanding of the Microsoft Azure platform and the robust business support that it provides, and you will have the knowledge to properly implement the targeted functionality that a business necessitates. Leveraging technology to best suit specific business and financial needs can be difficult, but this book makes it understandable and attainable by providing you with the specific tools and the knowledge you need to properly implement them.

I wish you much success in all of your future endeavors!

—PROFESSOR TRACEY LANHAM

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Introduction

Public cloud services give business owners a fantastic opportunity to use the latest technology without investing in hardware and an IT department. More and more businesses are turning to cloud deployments as an efficient way of doing business. Whether you're a student, an entrepreneur, a startup, a small business owner, or a cloud computing professional, this book is for you if you are thinking about a public cloud deployment for your business.

This book steps you through the process of setting up your business in the cloud. It includes instructions and links to demos that will get you started, in addition to some advanced topics. The instructions take advantage of the trial versions of products from Microsoft so you can get up and running quickly and find the right tools for your business.

This "how-to" book assumes you have no working knowledge of Microsoft public cloud services and administration. That's okay; the book will educate you about all the public cloud services that will help you make your business thrive.

Over the last 22 years with Microsoft, I've personally seen a revolutionary technical transformation from "traditional" on-premises infrastructures consisting of the procurement of physical hardware, the provisioning of physical operating system software from physical media, the testing of hubs, the configuring of switches, and the planning and implementation of network topologies. With today's technology, you have the ability to manage all practical aspects of your business without major investments in hardware and software, and without being an experienced IT administrator or hiring a staff to maintain that infrastructure.

As I reflect back to 1988 when I started in Microsoft Manufacturing and Distribution, the company was leading the list of the "top" software companies. At that time, they were listed in order by revenue: Microsoft #1, Lotus #2, and Ashton-Tate #3. New products from Microsoft then included Basic Professional Development System (PDS), QuickBasic 1.0 for the Mac, and three new CD-ROM titles: Microsoft Small Business Consultant, Microsoft Stat Pack, and the Microsoft Programmers Library. The company established subsidiaries in Spain and Korea, and announced plans for a software center in India. Windows 286/386 was introduced, and the company shipped OS/2 with Presentation Manager. Mike Maples joined Microsoft to head the applications division. The Microsoft company meeting was held at the new Washington State Convention Center. The meeting's theme was "Making It All Make Sense," and the gift to attendees was a portable stereo/tape player. Boy, how times have changed.

In a relatively short time, we've moved from assembling "package software" to providing the devices and services available in the world today. The days of putting a CD-ROM or DVD into your computer tray and "locking and loading" the physical software from media are really coming to an end. Now you can pay only for services that you use, as you use them, and often it is just a matter of downloading the software to get started or subscribing to the services. For example, within the Microsoft public cloud, software services such as Microsoft Office 365, Microsoft Azure, and Microsoft Intune are provisioned right from within a Microsoft datacenter. (In the tech world, *provisioning* means providing everything you need related to a service.) When running these services, you don't have to worry about hardware failures and electrical costs.

Over my career, I've personally seen this new technical transformation from physical packaged software to software and services that are accessed from an online portal. What motivates me is making sure we build great experiences that expand your digital lifestyles and work for your businesses, whether you are an individual user, an owner of a small business startup, a student, or one of the IT pros and developers in this world of cloud computing. I was inspired to write this book by a group of students, so I assume my homework assignment is completed.

Prerequisites for setting up your subscriptions

To complete the exercises in this book, you need an Internet browser and a connection to the Internet. You will be downloading free trial versions of various products.

IMPORTANT When you access a free trial version and set up your subscription, the clock starts ticking. You will have access to the product for a limited time. It is important that you do not set up your trial subscription until you need it for the chapter you are reading. If you set up your subscription ahead of time, the subscription might expire before you use it in the exercises in the book.

- **Office 365** To get your trial version of Office 365, go to <http://aka.ms/office365plan>. Scroll down the column under Office 365 Business, and click Free Trial.
- **Microsoft Azure** To get your free 30-day trial of Azure, go to <http://aka.ms/try-azure>.
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About the companion content

In addition to the links to demos, articles, and free courses referenced in the book, companion content for this book can be downloaded from the following page:

<http://aka.ms/pcs/files>

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What the cloud can do for your business

- What is the cloud? 1
- What kinds of Microsoft public cloud services are available? 2
- What can Microsoft public cloud services do for your business? 3
- Putting it all together 4

What is the cloud?

The cloud: no doubt you've heard that term. But if you're like a lot of people, you might not know what it means—or how it could help your business.

Simply put, *the cloud* refers to software and services that run on the Internet. This is in contrast to the software and services that run locally, on your computer. The cloud is also used to store data. When you store data or use a cloud service, you can access the data from anywhere, using any device that connects to the Internet—not just from your computer's hard drive or your company's network server.

Although people talk about the cloud like it's a single entity, it is in fact made up of massive datacenters all over the world. These centers store the programs and services that people access online, in addition to any data that users upload to the cloud.

There's more than one cloud, and many different types, too. These types include the following:

- **Private cloud** A cloud that is used solely by a single organization. In a private cloud, the datacenters that support the cloud are on the premises of the organization. The only people who can access the software and services in the cloud, or store data there, are people authorized by the organization to do so. Building and maintaining a private cloud can be a costly endeavor, and might be suitable only for very large organizations. Often, businesses use private datacenters because they need to support older physical computers that have been powering their organizations for years.

- **Public cloud** Technically, in terms of architecture, there is little difference between a private cloud and a public cloud. But a public cloud is accessible by anyone who wants to use it. Anyone can access software and services on a public cloud, or store data there. Usually, software and services on a public cloud are offered on a “pay-as-you-go” basis, although some are free.
- **Hybrid cloud** A hybrid cloud is what you might expect—a combination of a private cloud and a public cloud. An organization might take the hybrid cloud approach if, for example, it wanted to store sensitive data on a private cloud, but be able to access that data by using a program on a public cloud.
- **Community cloud** In this model, a group of organizations with similar needs, interests, or concerns might share a private cloud in order to share resources.

The focus of this book is Microsoft public cloud services.

What kinds of Microsoft public cloud services are available?

Microsoft offers more than 200 public cloud services. These services are divided into three main categories:

- **Software as a service (SaaS)** SaaS describes a way of licensing and delivering software by using a subscription model. Subscriptions can be paid on a monthly or yearly basis, or through special licensing programs. With SaaS, the software is located in the cloud, and users access it through the Internet. It is not installed on the user’s computer. Examples of SaaS are Microsoft Office 365, Xbox Live, and Microsoft Intune.
- **Infrastructure as a service (IaaS)** With IaaS, users can rent compute, storage, and networking resources by using datacenter hardware to deploy virtual machines. (A *virtual machine* is a virtual computer within a physical computer, implemented in software. It emulates a complete hardware system, from processor to network card.) Users pay for these resources as they would a utility, like power or water, with the cost reflecting the actual amount of resources consumed. Examples of IaaS are virtual machines within Microsoft Azure.
- **Platform as a service (PaaS)** With PaaS, users can develop, run, and manage web apps in a ready-made, cloud-based environment. Examples of using PaaS include building an app, an SQL database, or a website.

What can Microsoft public cloud services do for your business?

Microsoft public cloud services can help your business in lots of ways. Most notably, they can save you money. For one thing, by using Microsoft public cloud services, you can avoid purchasing expensive servers. With cloud services, you can run your business by using devices like smartphones, laptops, tablets, and printers. You can also scale back your IT staffing. After all, less hardware to support means a smaller in-house staff to support it. But there are other, less obvious savings. For example, if your business uses cloud services, your staff might be able to work from home on a permanent basis. That will help you save on your lease, utility bills, garbage services, and office supplies.

Using Microsoft public cloud services can also help you grow your business. You can use the money you save to invest in other areas of your business, like people and marketing. As your business grows, you can scale up your use of these services.

Perhaps most importantly, with Microsoft public cloud services, you can focus on your business, not on the technology needed to run it. These services are always on and always connected. You pay only for what you consume, by using a transparent infrastructure that runs 24 hours a day, 7 days a week, and 365 days a year to meet the needs of your business. Unlike your staff, Microsoft public cloud services never take a vacation. Moreover, these services are constantly evolving, bringing more uptime, elasticity, scale, on-demand networking, computing, and storage.

Throughout the rest of this book, you'll explore using several Microsoft public cloud-based tools to run your business. These include the following:

- **Microsoft Azure** Azure is the Microsoft cloud platform, offering a collection of compute, storage, data, networking, and app services. It is both an IaaS and a PaaS and is used to build, deploy, and manage apps and websites.
- **Azure Site Recovery** With Azure Site Recovery, employees can back up or replicate and recover important data.
- **Azure RemoteApp** With RemoteApp, employees can access desktop programs on their local computers from any Internet-connected laptop, tablet, or smartphone.
- **Office 365** Office 365 makes all the Office programs that office workers know so well (Microsoft Word, Excel, PowerPoint, Outlook, OneNote, Access, and Publisher) available online on a subscription basis.

- **Microsoft Intune** With Microsoft Intune, employees can gain protected access to corporate programs, data, and resources from virtually anywhere, using almost any device.
- **Microsoft Skype for Business** With this cloud service, employees can easily place audio and video calls and exchange instant messages.
- **Microsoft Dynamics CRM Online** Drive sales and marketing with this online customer relationship management (CRM) solution.
- **Yammer Services** With this private social network tool, employees can quickly self-organize, collaborate, and make decisions.
- **Office 365 Video** Use this video-streaming service to bring world-class video streaming to your organization.
- **Server Manager** With this tool, you can view and manage your server's productivity both in the cloud and on-premises.
- **OneDrive for Business** With OneDrive for Business, you can securely store all your files and share them with coworkers. Files can be synchronized across all your devices, so that you can access them anywhere, anytime, whether you're online or not.
- **Windows App Studio** Want to create an app? Then App Studio is for you. With App Studio, you can quickly build, test, and share Windows and Windows Phone apps.

Preparing your plan

How do you know which Microsoft public cloud services are for you? To answer that, you'll need a strong business plan. This book does not cover building a business plan, but I encourage you to seek out information about building one. (There are some great sample business plans in Office 365.) Building a business plan will help you identify the needs of your business. When you know these, you can determine what services you will need.

Putting it all together

Each Microsoft public cloud-based service is a formidable tool in its own right. But it's when you put them all together, creating an ecosystem of services and devices, that they really shine. Just imagine a scenario in which features like Office 365, Microsoft Intune, and Azure work with services like Windows Server, Microsoft Dynamics CRM Online, Yammer, and Skype for Business, all connected to your various devices. No matter where you travel, these services and your data travel with you. Even better, you leave all the hardware and maintenance to Microsoft, freeing you to focus on running your business (see Figure 1-1).

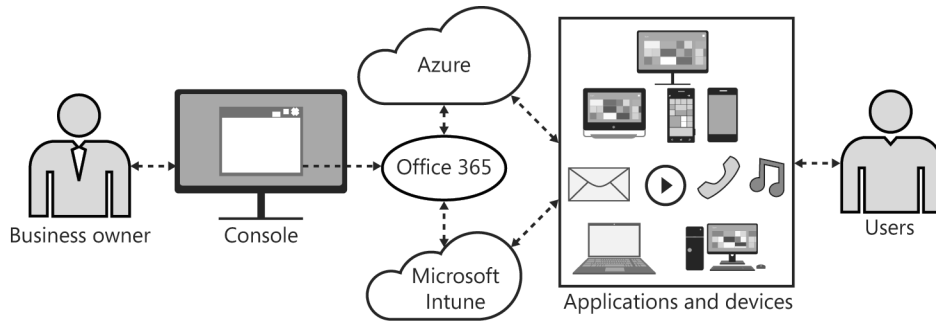


FIGURE 1-1 Microsoft public cloud services leave you free to focus on running your business.

Summary

- *The cloud* refers to software and services that run on the Internet. The cloud is also used to store data and build business intelligence.
- When you store data or use a service in the cloud, you can access it from anywhere, with any device that connects to the Internet, including Windows, iOS, and Android devices.
- The cloud is made up of massive datacenters all over the world. There is more than one cloud, and many different types. These include private clouds, public clouds, hybrid clouds, and community clouds.
- Microsoft offers more than 200 public cloud services. These are divided into three main categories: software as a service (SaaS), infrastructure as a service (IaaS), and platform as a service (PaaS).
- Using Microsoft public cloud services for your business can help you save money, grow your business, and focus on your business rather than on the hardware support needed to run it.
- Although each public cloud-based service is a formidable tool in its own right, it's when you put them all together, creating an ecosystem of services and devices, that they really shine.

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Get started with Office 365

- Introduction to Office 365 7
- Under the hood of Office 365 9
- Find the right subscription 10
- Sign in for the first time 12
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- Add, edit, and delete user accounts 22
- Work with files 27
- Use Office Mobile on all your devices 30

Introduction to Office 365

Microsoft Office has long offered a range of applications to boost productivity. These include the following:

- **Word** Microsoft Word is a word-processor program. It's ideal for generating documents of all kinds.
- **Excel** Microsoft Excel is a program for handling spreadsheets. You can use spreadsheets to store and analyze data in tabular form, which makes them ideal for handling accounting and bookkeeping tasks.
- **PowerPoint** If your business requires you to create slideshows or presentations, you'll appreciate the many robust and built-in features of Microsoft PowerPoint.
- **Outlook** Microsoft Outlook serves as a full-featured email client, calendar, task manager, and address book.
- **OneNote** With Microsoft OneNote, you can gather notes—even ones that are handwritten—drawings, screen clips, and audio files into one easy-to-access place. It's great for brainstorming or just keeping track of ideas.

- **Access** Microsoft Access is a database management system. If you need to track data for your business, you can use Access to do it.
- **Publisher** With the Microsoft Publisher desktop-publishing application, users can quickly and easily design marketing materials like brochures, business cards, newsletters, calendars, and more.

Office 365 is like Office, except it expands its domain from the personal computer to the cloud. Office 365, one of the public cloud-based services offered by Microsoft, is a software as a service (SaaS) suite that includes not only the personal computer versions of Office, but also mobile versions and the server services needed to connect them. With Office 365, you can use the familiar applications you've probably run on your PC for years—Word, Excel, and PowerPoint, and in some cases, depending on which subscription option you choose, Outlook, OneNote, Access, and Publisher—to save, edit, and modify documents in the cloud. In addition, you can store the files you create in Microsoft OneDrive for Business, which is included with the bundle. (You'll learn more about OneDrive for Business in Chapter 3, "Store your files in the cloud with OneDrive for Business.")

MICROSOFT VIRTUAL ACADEMY Get more information about Office 365 fundamentals at aka.ms/go-mva/o365fund.

Some subscription models of Office 365 also include the following:

- **Yammer** Yammer collaboration software is like a private social network. You can use Yammer to get connected to the right people, share information across teams, and organize around projects so you can go further, faster. With Yammer, collaboration just happens—even on the go. Yammer helps your company work like a network so you can listen, adapt, and grow in new ways.
- **Office 365 Video** Office 365 Video is a website portal where people in your organization can post and view videos. Essentially, it's a streaming video service for your organization. Videos can be organized by channel. For example, you might have one channel for a specific group or department and another for a particular subject.

Of course, individual users can optimize their productivity by using the top-notch applications that Office 365 offers. But the power of Office 365 really lies in its support for collaboration and the sharing of information. With Office 365, teams can work together, tracking tasks, project timelines, documents, and emails all from one centralized place. If you're ready to learn more about Office 365—what it's good for and how to set it up—read on!

IMPORTANT A detailed overview of the ins and outs of the various Office 365 applications—for example, Word and Excel—is beyond the scope of this book. Instead, this chapter will focus on getting you set up to use Office 365.

Skype for Business

Another program, Skype for Business, has recently been updated to work seamlessly with Office 365. With Skype for Business, previously known as Microsoft Lync, users can make calls online—including international calls—by using almost any device. Instant messaging is also supported. For more information, go to www.skype.com/en/business.

Under the hood of Office 365

There are three main functions inside Office 365 that support the collaboration and sharing of information, providing a singular experience:

- **Exchange Online** Microsoft Exchange Online facilitates email management and administration. With Exchange, you can synchronize email, calendars, and contacts across all your devices.
- **SharePoint** Every business has a repository of files used to conduct day-to-day business. Microsoft SharePoint provides a place to store and manage all those files, and to manage access to them. SharePoint also helps with keeping track of multiple versions of a file and setting up notifications when a new version is ready. SharePoint can even help with building workflows for business processes.
- **Skype for Business** Skype for Business, previously known as Lync, integrates with Exchange and SharePoint to facilitate real-time communications like instant messages, video and audio meetings, and screen sharing, across all devices. This makes collaboration a breeze. You can also use Skype for Business to determine each user's status—for example, "Available" or "In a Meeting," with color coding to help convey information at a glance—thanks to a feature called presence. For example, if you have a meeting scheduled on your calendar, Skype for Business automatically sets your presence to "In a Meeting" and sets your color to red to indicate that you are busy.

All this happens behind the curtain. There's no need for you to manage these operations. Instead, you can focus on running your business!

IMPORTANT If you are using or are going to use Office 365, set up your tenant for Office 365 first, then Microsoft Intune, followed by Microsoft Azure Directory integration. You'll find more information about tenants in Chapter 9, "Give users access to third-party applications."

Find the right subscription

Office 365 is an SaaS suite. As such, it is subscription-based (also known as license-based). Microsoft offers various subscription plans to fit your needs. All Office 365 plans are billed monthly for the total number of users.

To determine which subscription option is right for your business, you must first identify your business needs. Then it's a matter of determining which Office 365 features will help you meet those needs. With your subscription, you pay for only those features you need and that will deliver the most for your business right now. You can always upgrade (or downgrade) your subscription if needed.

All Office 365 subscriptions offer the following:

- **A 99.9-percent financially backed uptime guarantee** That is, the servers on which the Office 365 services are hosted are guaranteed to be up and running 99.9 percent of the time.
- **Phone and web support** Get help with critical issues 24 hours a day, seven days a week, not just during regular business hours.
- **A community forum** Use this to look up information and work with other users to find quick answers.

There are two primary subscription groups:

- **Office 365 Business** The options in this group are meant for organizations that have fewer than 300 users.
- **Office 365 Enterprise** Office 365 Enterprise does not have a user limit.

TIP Don't be afraid if you're on the edge of 300 users. You can easily upgrade your subscription from Office 365 Business to Enterprise.

Office 365 Business subscription options for small and medium organizations

The Office 365 Business subscription group offers the following options:

- Office 365 Business Essentials
- Office 365 Business
- Office 365 Business Premium

NOTE Because the pricing of each of these subscription options is subject to change, no pricing information is included here. For up-to-date information on pricing and features, go to products.office.com/en-us/business/compare-more-office-365-for-business-plans. When you are ready to choose a plan, go to aka.ms/office365plan.

Table 2-1 presents all the Office 365 Business subscription options and their corresponding features.

TABLE 2-1 Office 365 Business subscription options

Feature	Office 365 Business Essentials	Office 365 Business	Office 365 Business Premium
Full, installed Office applications (Word, Excel, PowerPoint, Outlook, Publisher, and OneNote) on up to five PCs or Macs per user		X	X
Office Mobile apps on up to five Windows Phone, Android, or iOS (Apple) tablets and phones per user		X	X
Online versions of Office, including Word, Excel, and PowerPoint	X	X	X
File storage and sharing on OneDrive for Business with 1 terabyte (TB) of storage per user	X	X	X
Business class email, calendar, and contacts with a 50-gigabyte (GB) inbox	X	X	X
Unlimited online meetings, instant messaging (IM), and video conferencing	X		X
An intranet site for your teams, with customizable security settings	X		X
A corporate social network (Yammer) to help employees collaborate across departments	X		X
Personalized search and discovery	X		X

Office Online web apps

As shown here, some Office 365 subscription options include desktop versions of the suite's various applications—such as Word and Excel. In addition to these versions, there are also Office Online versions of these applications. These online versions are Internet based. That is, you access and use them through your Internet browser—for example, Internet Explorer, Safari, Firefox, or Chrome. These applications have less functionality than the desktop versions but are great if you need to use them on devices that don't have the desktop versions installed.

Using the 30-day trial

Not ready to make a decision about which subscription option is right for you? Don't worry. Microsoft offers a free 30-day trial for some subscription options. To use it, go to aka.ms/office365plan, click the appropriate Free Trial link near the bottom of the page, and follow the directions in this book's introduction to set everything up.

MICROSOFT VIRTUAL ACADEMY Get more information about how to get the most out of your Office 365 trial at aka.ms/go-mva/office365trial.

Sign in for the first time

As soon as you've decided which subscription model you want to use and have set everything up, your next step is to configure the service and get started with some management tasks. First, however, you'll need to sign in. When you access Office 365 for the first time, a Welcome page appears. Follow these steps to complete the first-time sign-in process:

1. Enter the requested basic information about who you are and where you're located (see Figure 2-1). Click Next to continue.

FIGURE 2-1 The first step in creating your new ID is to provide some basic information.

2. Create your user ID and password (see Figure 2-2), which you'll use to access the service. Enter a user name (such as **admin**) and the domain name. Then create your password. Enter your password a second time for confirmation, and click Next.

FIGURE 2-2 Create your user name and password.

IMPORTANT Make sure you establish a strong password policy for all users. Strong passwords use a mix of uppercase and lowercase letters, numbers, and special characters such as the asterisk or dollar sign. Learn more about creating strong passwords at aka.ms/secure-password.

Notice the box to the right of the User ID box. It contains a blank space followed by the text `.onmicrosoft.com`. This text is part of a domain name that Microsoft automatically creates when you sign in to Office 365 for the first time. You provide the rest of the domain name by typing it into the blank space in the box. For example, suppose your company is called Trawbridge. In that case, you might enter **trawbridge** in the blank space. The domain name would then be `trawbridge.onmicrosoft.com`.

NOTE A domain name is a string of text that appears in a URL or email address. For example, for the URL `www.microsoft.com`, the domain name is `microsoft.com`. Similarly, `trawbridge.com` is the domain name in the email address `gchan@trawbridge.com`.

NOTE Don't worry—if you already have a domain name for your company, you can associate it with Office 365. For example, if you already own the domain name `trawbridge.com`, you'll have the chance to set that as your domain name, omitting the `onmicrosoft`, in a moment.

3. On the next page (see Figure 2-3), select either Send Text Message or Call Me. Depending on what you choose, you will receive either a text message or a phone call to confirm that you are who you say you are and to create a valid account. Enter your phone number. Then, depending on which option you chose, click Text Me (as shown here) or Call Me.



FIGURE 2-3 Complete the security verification to finish creating an ID.

After you enter the required information, you will receive a verification message via a text message on your phone. When you do, click Create My Account on the verification page.

Explore the Office 365 Admin Center

You use the Office 365 Admin Center to set up your organization in the cloud. The Office 365 Admin Center opens to a Dashboard page. On the left is a navigation pane, which you use to access different areas of the Admin Center. Click the app launcher in the upper-left corner of the title bar to activate the app tiles, as shown in Figure 2-4. These tiles give you access to the settings for Exchange, Skype for Business, SharePoint, and any other apps you have installed. If you are the administrator, an Admin tile also appears.

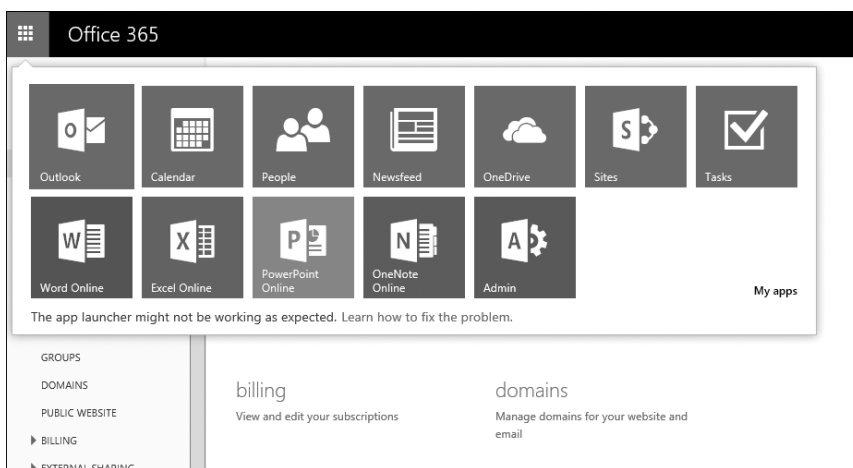


FIGURE 2-4 The Admin Center provides quick access to various apps, so that you can set up new user accounts and manage your subscription.

Configure a custom domain

IMPORTANT If you do not have a custom domain name at this time, use the default domain name created for you. You can always go back and change it after you have purchased a custom domain from a provider.

If your organization already has a custom domain name, configure it as follows:

1. In the Office 365 Admin Center, click the Domains link in the navigation pane on the left side of the page, as shown in Figure 2-5.

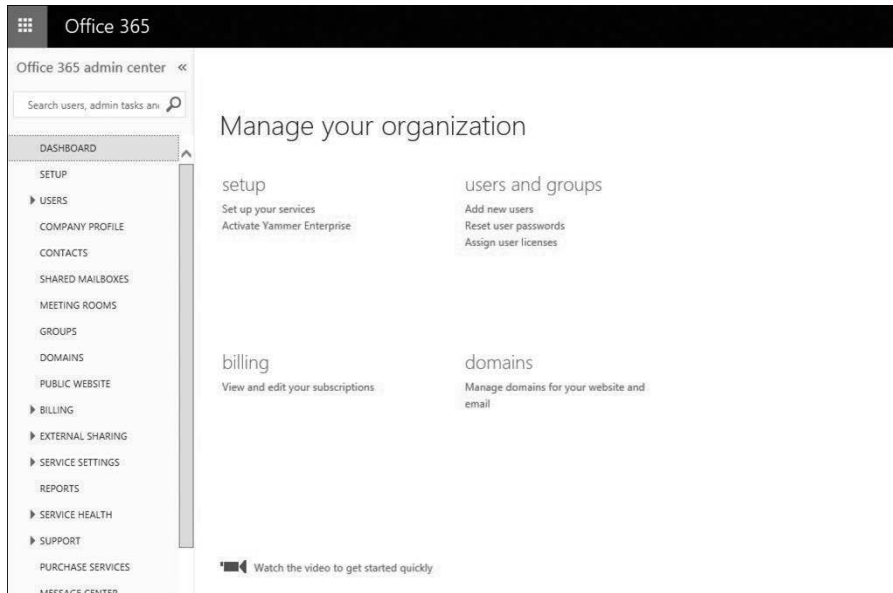


FIGURE 2-5 Click Domains to configure your new domain settings.

2. On the Manage Domains page, shown in Figure 2-6, click Add Domain. This starts a wizard that walks you through adding your domain to Office 365.

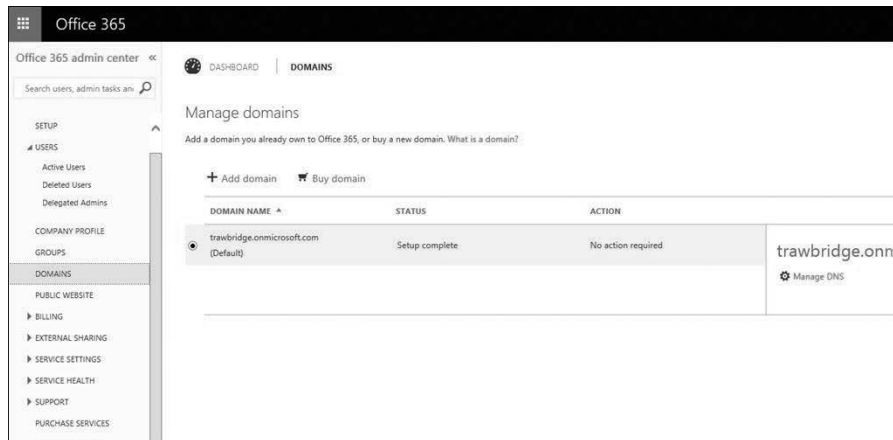


FIGURE 2-6 Click Add Domain to add a domain you already own.

3. The Add A New Domain In Office 365 Wizard opens, showing a brief description of the three-step process of adding a domain (see Figure 2-7). Click Let's Get Started.

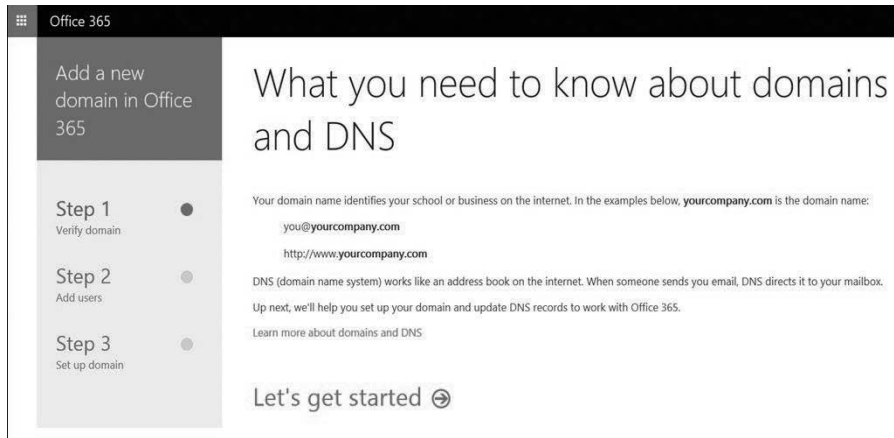


FIGURE 2-7 Add a domain to Office 365.

4. Enter the name of the domain that you own—in this example, **trawbridge.com**, as shown in Figure 2-8—and click Next.

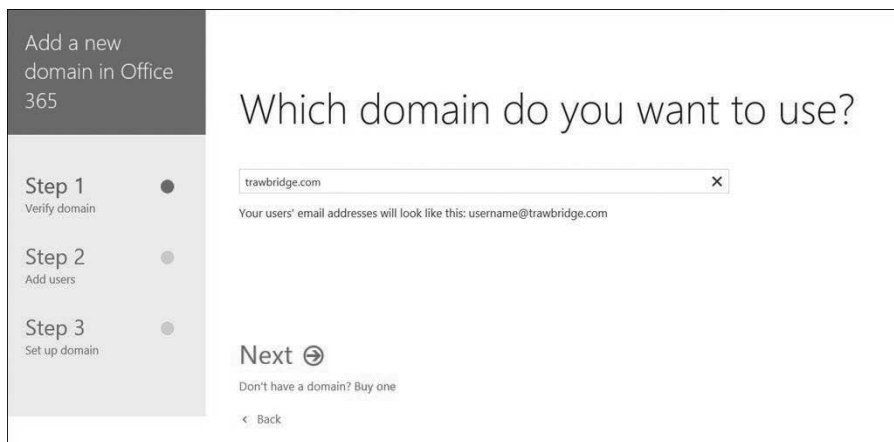


FIGURE 2-8 Enter the custom domain name.

5. In the next step of the wizard, you will confirm ownership of the domain. How you do this depends on what Domain Name System (DNS) hosting provider, or registrar, you use. To find out what steps you must take, click the drop-down list and click your hosting provider.
6. After you complete the steps required by your hosting provider, you'll be prompted to sign in to your account with that provider, as shown in Figure 2-9.

NOTE The remaining steps vary based on your setup and provider.

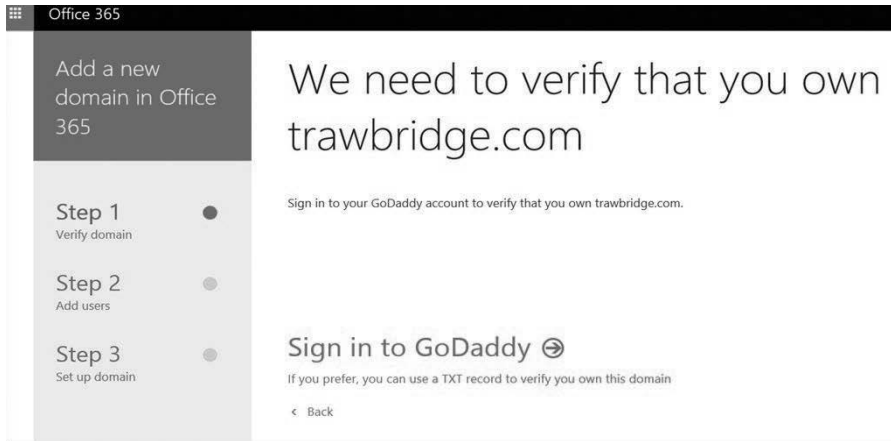


FIGURE 2-9 Confirm that you own the domain.

7. Enter the user name and password for your hosting account, as shown in Figure 2-10, and click Secure Login. The wizard checks to make sure that you own the domain name you have entered. (Note that this check can take up to 72 hours.)

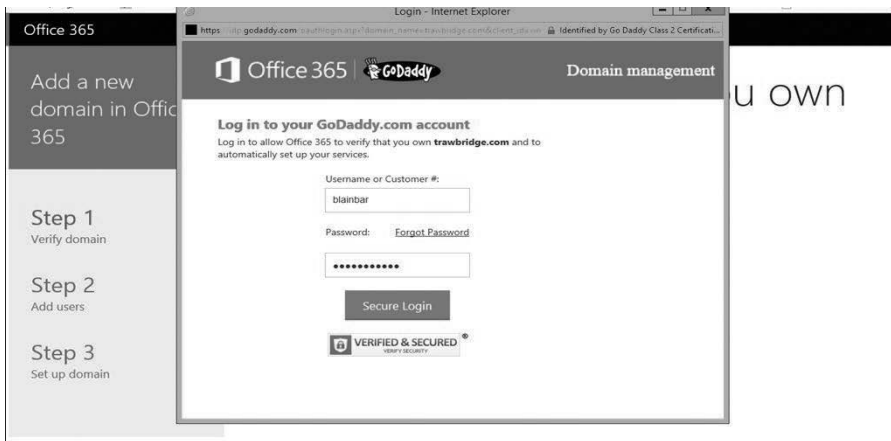


FIGURE 2-10 When prompted, enter the user name and password for your account with the hosting provider.

IMPORTANT You will sign in after the end of the subscription process, and the subscription process will sign you out. You then must sign in as the new account, which in my case is *admin@trawbridge.com*, with the same password that I had for the previous *domain.onmicrosoft.com*.

- When prompted, confirm that you want to make a change to the domain by clicking **Accept** on the page shown in Figure 2-11.

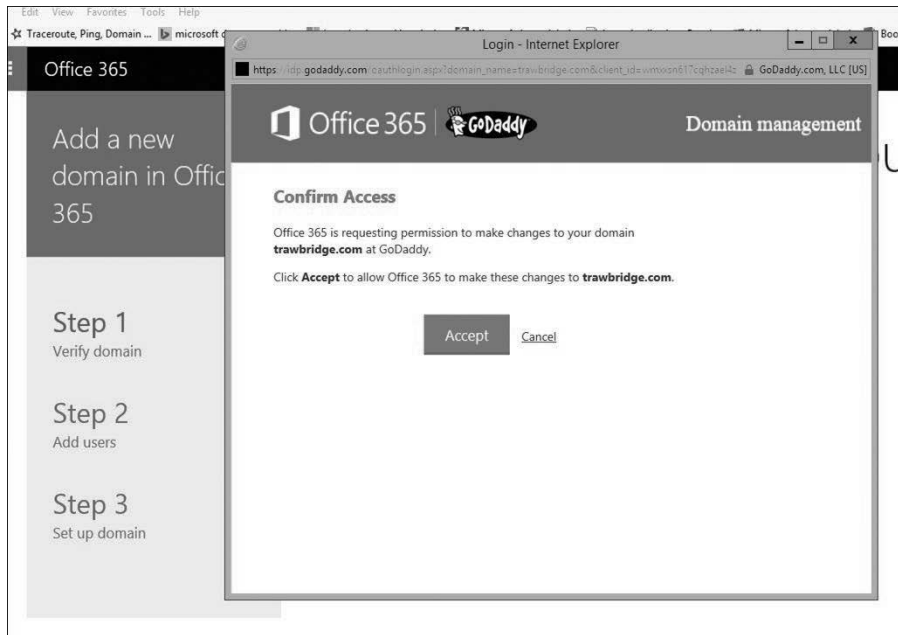


FIGURE 2-11 Confirming access.

- When the domain is confirmed, the wizard indicates that step 1, the verification process, is complete (see Figure 2-12). Click **Next**.

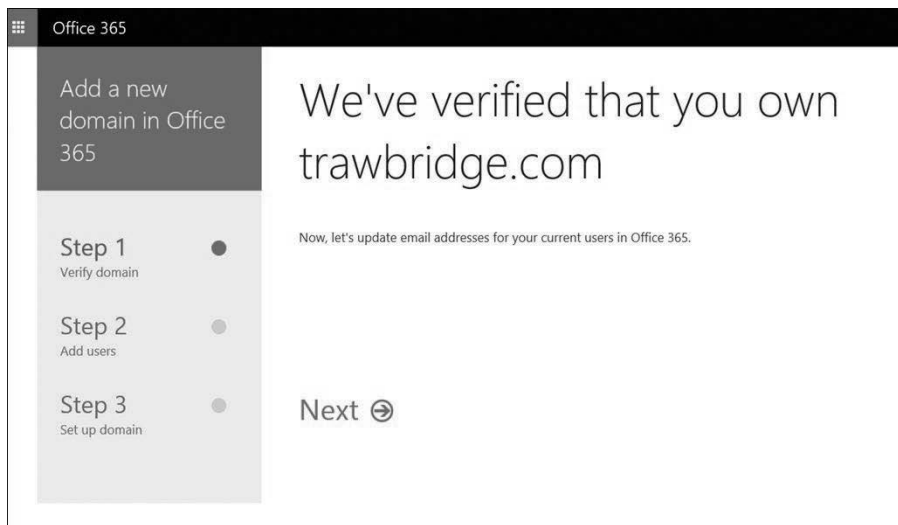


FIGURE 2-12 Your domain has been verified.

- 10.** The Let's Update Your Current Office 365 Users page appears (see Figure 2-13). For now, click Skip This Step. (You will learn how to add users in the next section.)

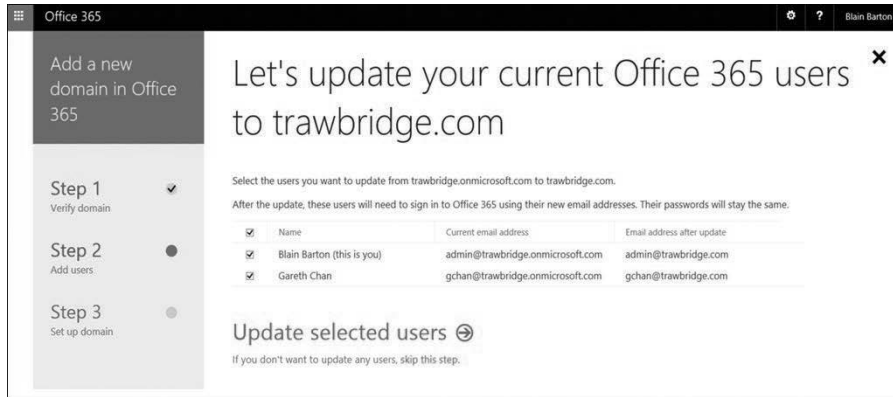


FIGURE 2-13 Skip step 2 for now.

- 11.** The Get Ready To Update DNS Records To Work With Office 365 page appears (see Figure 2-14). Click Next.

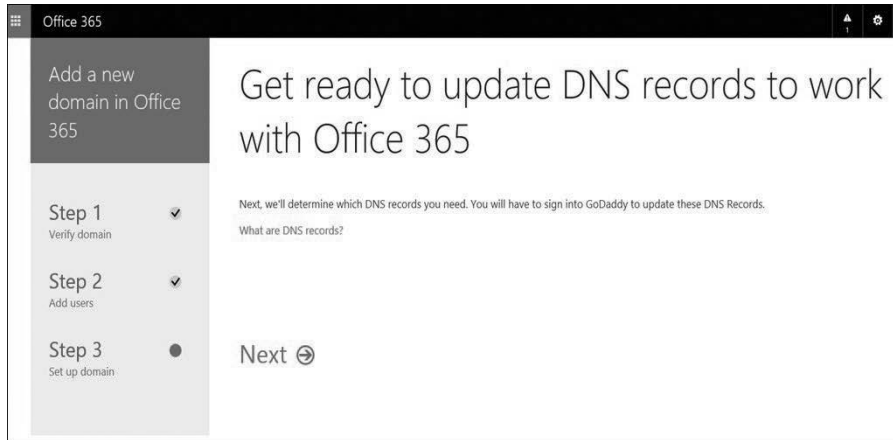


FIGURE 2-14 Begin step 3, updating DNS records to work with Office 365.

- 12.** The wizard asks you which services you want to use with your domain (see Figure 2-15). Select the Outlook For Email, Calendar, And Contacts check box. Also select the Lync For Instant Messaging And Online Meetings check box. Then click Next.

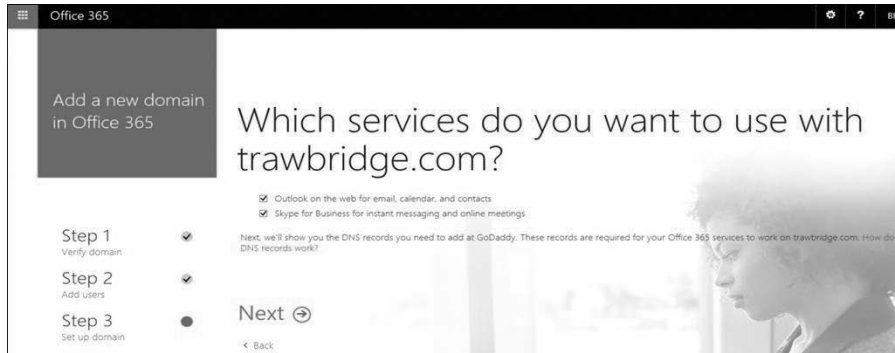


FIGURE 2-15 Select the Outlook and Lync check boxes and click the Next button to continue.

NOTE You can find out more about Exchange Online by referring to the Exchange Guides at aka.ms/exchange_guides.

13. If your domain is registered with GoDaddy, you can add your DNS records automatically. Click Add Records, as shown in Figure 2-16, and Office 365 will do the rest. If your domain is registered with another provider, click Add These Records Yourself and follow the prompts.

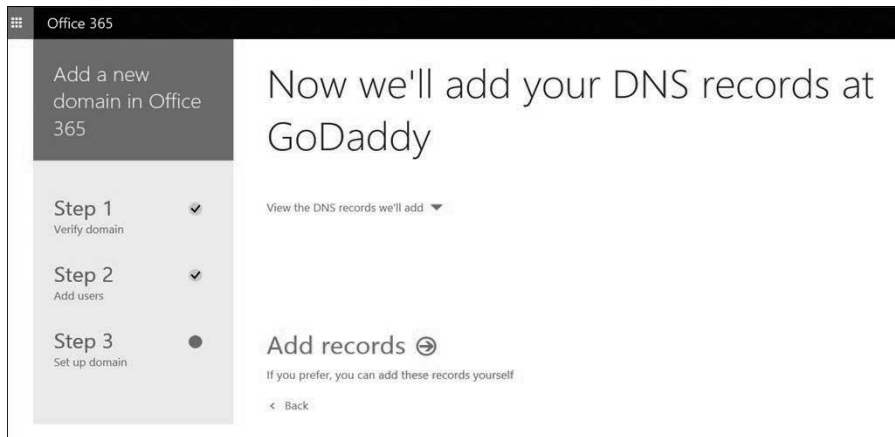


FIGURE 2-16 If GoDaddy is your domain provider, click Add Records to set up the DNS records automatically.

14. After Office 365 validates that the records are configured correctly, you are redirected to the Manage Domains section of the Office 365 Admin Center, shown in Figure 2-17. Notice that the domain you added appears.

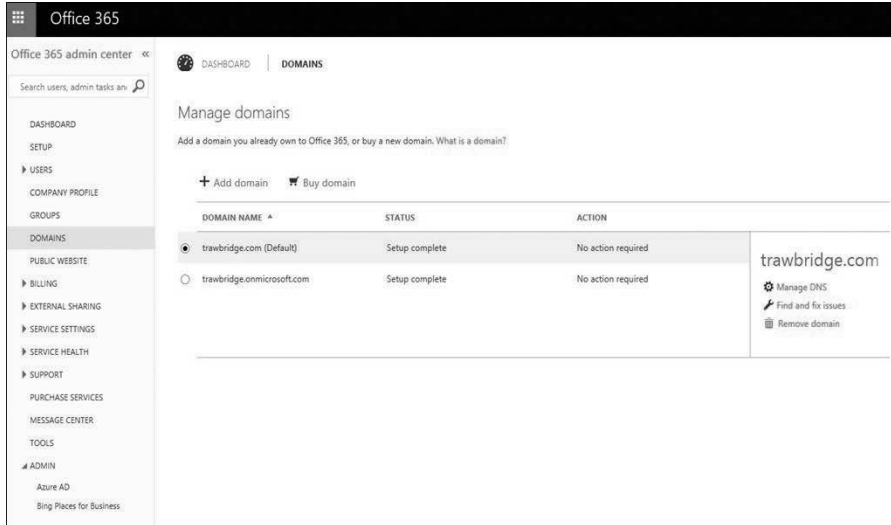


FIGURE 2-17 The domain you added appears on the Manage Domains page in the Admin Center.

15. Sign out from your Office 365 account. Then sign back in with the new account (in this case, **admin@trawbridge.com**) with the same password that you had for the previous domain.onmicrosoft.com (see Figure 2-18).

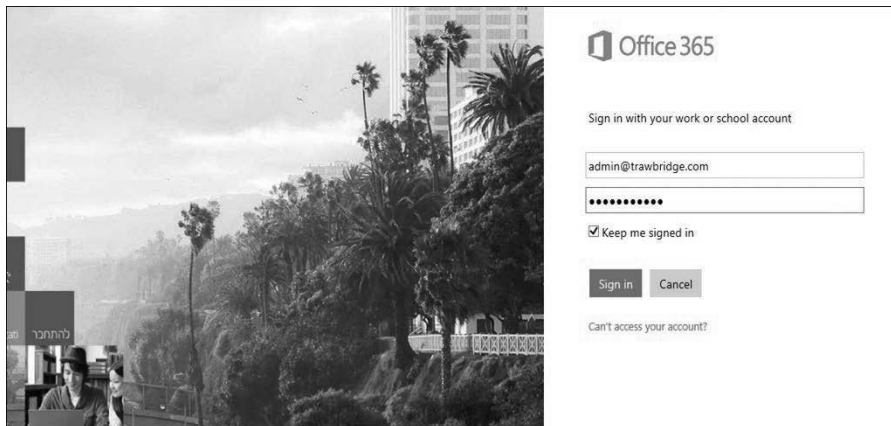


FIGURE 2-18 Sign out and sign back in using the new account.

16. The profile is updated with the new domain information and will be available when you sign in (see Figure 2-19).

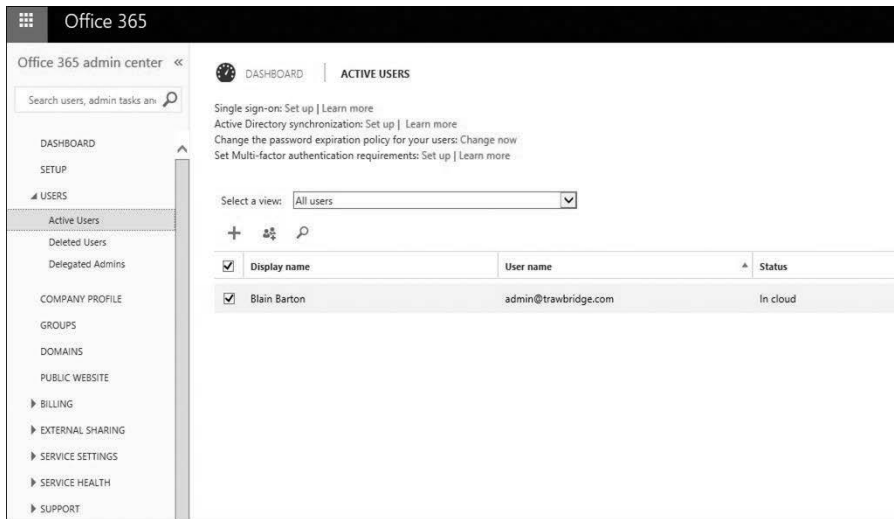


FIGURE 2-19 The Active Users page in the Admin Center shows that the profile is updated with the new domain information.

Add, edit, and delete user accounts

Unless you run a one-person operation, you'll likely need to add other users to your Office 365 subscription. When you do, they can use all the programs and features that Office 365 provides.

To add a user to Office 365, sign in to your Office 365 account and open the Admin Center. Then follow these steps:

1. Click Users and then Active Users in the pane on the left.
2. Click the Add User button (the plus sign). The Create New User Account page opens (see Figure 2-20).

Create new user account

First name Last name

Maxim Goldin

* Display name

Maxim Goldin

* User name

mgoldin @ trawbridge.com

Auto-generated password | Type password

New password will be displayed in the next page

Make this user change their password with Outlook Web App on next login.

* Email password to the following recipients

admin@trawbridge.com

Select licenses for this user:
There are currently no licenses to assign. Buy more licenses

Create Cancel

FIGURE 2-20 Create a new user.

3. Enter the following information. When you're finished, click Create.
 - **First name** This is the user's first name.
 - **Last name** This is the user's last name.
 - **Display name** When you enter the user's first and last names, they are automatically concatenated for the display name. If you want to change the display name to a nickname or some other type of shorthand, go ahead and do it now.
 - **User name** This is the name your new user will use to sign in to his or her account when accessing Office 365. Be sure to click your new custom domain in the drop-down list on the right.
 - **Password** If you leave the default Auto-Generated Password, a random password will be chosen and emailed to the user. Alternatively, you can set a password for the user. To do so, click Type Password and enter the password you want to use.

NOTE The initial password is temporary. The user will need to change it within 90 days.

- **Make this user change their password with Outlook Web App on next login** Select this check box if you want the user to change the password the next time he or she signs in.
- **Email password to the following recipients** After you choose a password option, enter the user's email address so that the password can be sent to that user. Also enter your own email address so that you, the administrator, also get the password, for safekeeping.

NOTE This email address should be one to which the user currently has access. Don't send it to his or her new Office 365 email address.

4. A confirmation message similar to the one shown in Figure 2-21 informs you that the user account has been created. Click Close.

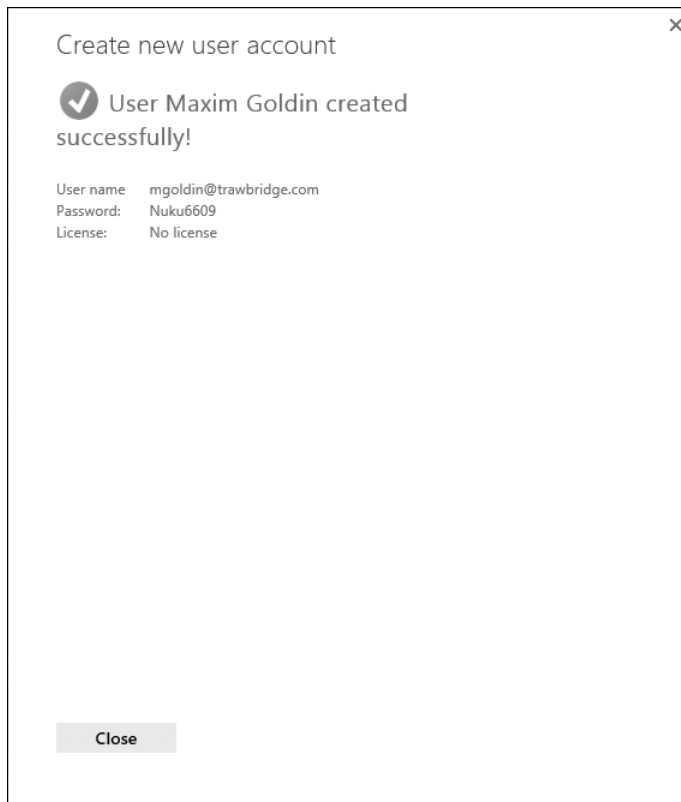


FIGURE 2-21 You'll receive a notification that the account has been successfully created.

If you prefer, you can add multiple users at the same time.

TIP Before you begin this process, make sure you have enough licenses for everyone you want to add. To find out how many subscriptions you have available, click the **Billing** option in the left pane of the Admin Center and click **Subscriptions**. If you need to purchase more licenses, click the **Change License Quantity** link and follow the prompts.

To add multiple users, follow these steps:

1. In Excel, create a spreadsheet with the following column headings:
 - User Name
 - First Name
 - Last Name
 - Display Name
 - Job Title
 - Department
 - Office Number
 - Office Phone
 - Mobile Phone
 - Fax
 - Address
 - City
 - State or Province
 - Postal Code
 - Country or Region
2. Populate the spreadsheet with the information for each person you want to add. The User Name and Display Name fields are required for each user. To leave other fields blank, enter a space followed by a comma. When you're finished, save the spreadsheet.
3. In the Office 365 Admin Center, click **Users** and then **Active Users** in the pane on the left. Then click the **Add Users** button (the button with two people and a plus sign).
4. The Bulk Add Users Wizard starts. On the **Select A CSV File** page, click the **Browse** button and locate and select the spreadsheet you created in steps 1 and 2. Then click **Next**.
5. The wizard verifies that the entries in the spreadsheet are formatted correctly. If there are no errors, click **Next**. (If there are errors, view the verification log, and then correct the errors in your spreadsheet.)
6. On the **Settings** page, click **Allowed**. Then click the **Select A Location** drop-down list and click the country or region where these users are located. Finally, click **Next**.

TIP If you want to enter users from multiple countries/regions, you must create a spreadsheet for each country/region and run the Bulk Add Users Wizard for each spreadsheet.

7. On the Assign Licenses page, click the licenses you want to apply for the individuals listed in your spreadsheet. Then click Next.
8. On the Send Results In Email page, enter the email address of anyone who should receive a list of these new users, along with their temporary passwords, via email. Then click Create. The list is emailed to the address you specified.
9. The Results page lists the users whose accounts were created and their temporary passwords. Click Close to close the wizard.
10. Notify each user that his or her account has been created and supply each user with his or her temporary password.

NOTE If you want to notify users via email that their accounts have been created, be sure to use email addresses to which the users currently have access. Don't send them to their new Office 365 email addresses.

Sometimes a user's information changes. For example, a user might get married and change his or her name. Fortunately, editing a user account to reflect this and other changes is simple. To edit a user account, sign in to your Office 365 account and open the Admin Center. Then follow these steps:

1. In the Office 365 Admin Center, click Users and then Active Users in the pane on the left.
2. On the page that appears, click the user whose account you want to edit. Then click Edit.
3. The Details page appears. If the information on this page is OK as is, click Save. If you need to change any information on this page, do so before you click Save.
4. Click Settings. Follow the same procedure as with the Details page.
5. On the Licenses page, retain, replace, or add licenses as needed. Then click Save.

If a user leaves your organization, you should delete his or her account. Not only will this prevent the departed employee from accessing the account, it will free up the associated license for a new user. To delete a user account, sign in to your Office 365 account and open the Admin Center. Then follow these steps:

1. In the Office 365 Admin Center, click Users and then Active Users in the pane on the left.
2. On the page that appears (see Figure 2-22), click the user whose account you want to delete. Then click Delete.

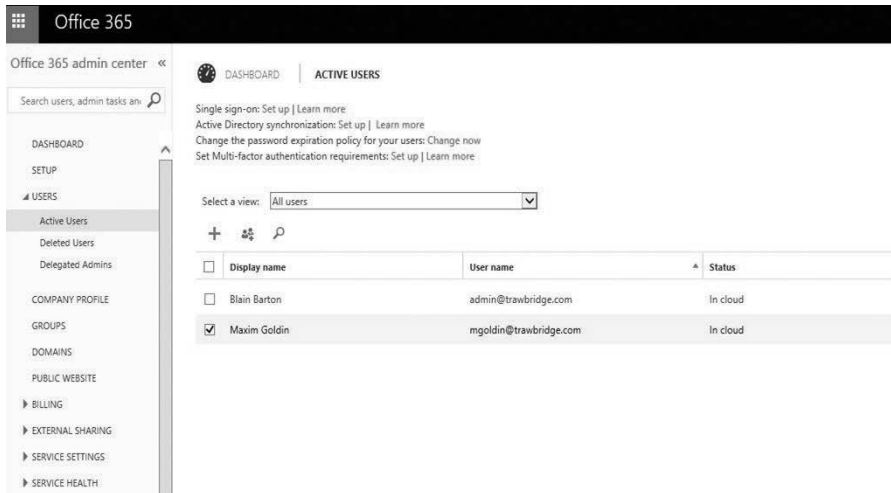


FIGURE 2-22 Select the check box next to the user account you want to delete.

3. In the confirmation message that appears, click Yes.

Work with files

Your Office 365 subscription includes SharePoint. SharePoint offers the following built-in tools:

- **Team sites** With SharePoint, a team site is created automatically. You can create additional team sites as needed. These SharePoint team sites are used for collaboration within teams, such as for managing shared content, tracking tasks, posting announcements, and managing workflow.
- **Document libraries** You can use SharePoint document libraries to store, organize, sync, and share documents. Because all your documents are in one place, everybody can access the latest versions whenever they need them. You can also use document libraries to sync your documents to your local computer for offline access. You can create document libraries for each project you're working on or for specific types of documents, such as reports, presentations, or proposals.

- **Custom lists** With the Custom List app, you can build and share custom lists.
- **Task lists** You can use the built-in Tasks app to build and share task lists. That way, you can delegate to team members as needed.
- **Site Mailbox** The Site Mailbox app helps you keep emails and documents close together by connecting your site to an Exchange mailbox. You can then view your email on SharePoint and view site documents in Outlook.

In addition to these built-in apps, there are several other apps that you can add to your SharePoint team sites. Some are free, whereas others must be purchased. Adding apps really expands the functionality of SharePoint and, by extension, Office 365. For example, you can add a forms library (used to create and store forms), a picture library (great if you deal with a lot of images in your work), and even a wiki page library (handy if, for example, you want to build a wiki that outlines the various processes you use in your business). These and other apps, many of which are designed for a specific type of business or business process, are available from the SharePoint Store (see Figure 2-23). To access this page, click the Sites tile in Office 365, as shown in Figure 2-24. Then, in the Site Contents > Your Apps page, click SharePoint Store in the pane on the left (see Figure 2-25).

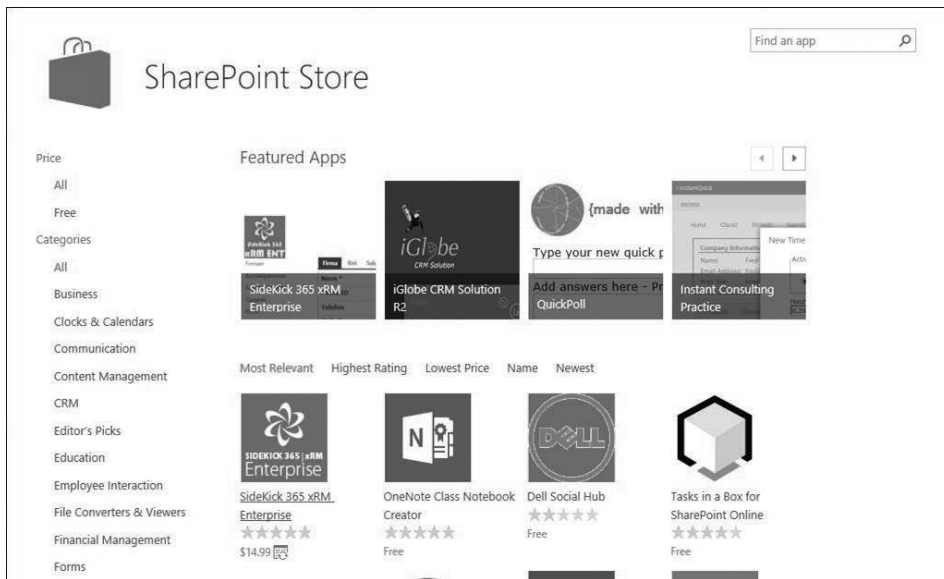


FIGURE 2-23 You can buy many types of SharePoint apps in the SharePoint Store.

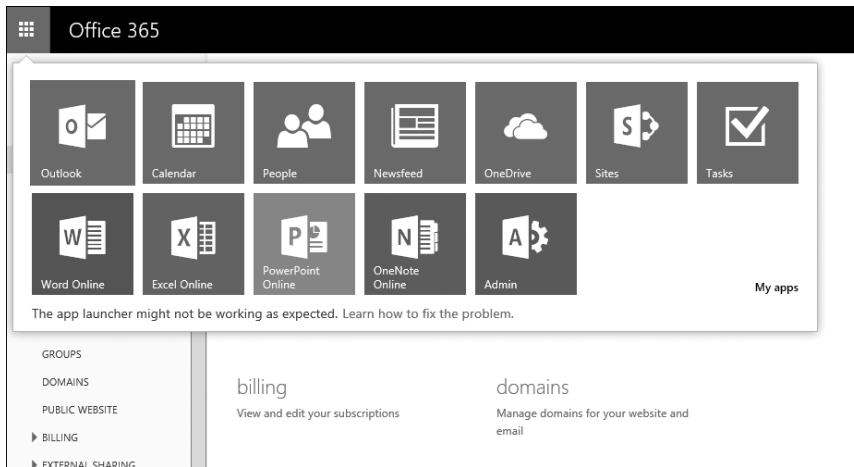


FIGURE 2-24 Choose Sites from the main Office 365 tiles.

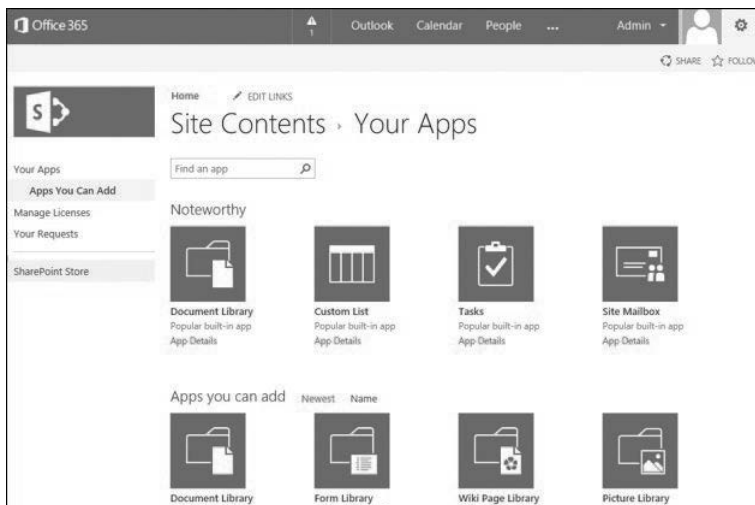


FIGURE 2-25 Open the SharePoint Store from this screen.

To explore your SharePoint tools and settings, sign in to your Office 365 account and open the Admin Center. Then follow these steps:

1. Click the Admin menu and choose SharePoint. Your main SharePoint page opens. Here the SharePoint team sites of which you are a member are displayed.
2. Click a team site to view the content created and shared by that team.
3. Click Documents in the navigation pane on the left to display a list of documents available on that team site—that is, the contents of the team site’s document library.

4. Click a document to open it. Alternatively, you can click the ellipsis (...) to the right of the document to open a preview of the document, as shown in Figure 2-26. You can click Edit to open and edit the document without checking it out and locking it so others cannot edit it while you are in the file. Also, you can click the ellipsis on the lower right to view a list of menu choices, and click Check Out to lock the file and check it out to you for edit. Figure 2-26 shows a SharePoint team site with the Office Online version of Excel and its menu displayed.

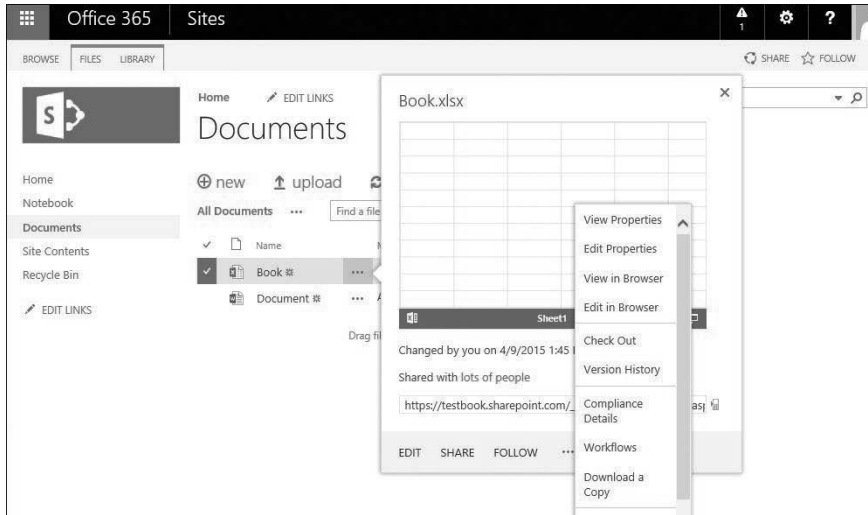


FIGURE 2-26 A SharePoint team site represents a centralized location for your organization's documents.

To make it easier for team members to find your files in a list or library, you can create a view. When you create a view, you can organize content, displaying it by type, date, author, or a custom value specific to your business. The view is added to the View menu for your list or library. For help adding views, see aka.ms/addingviews.

SharePoint supports document versioning. With versioning, you can have each update to a document saved and recorded as a new version. Alternatively, each update will overwrite the previous version of the file.

TIP Checking out a file is the safest way to edit a document. It ensures that there aren't two people editing the document at the same time.

Use Office Mobile on all your devices

Your business can benefit by having Office available on all your mobile devices—including your Windows Phone, Android, or iOS (Apple) smartphone or tablet. As you discovered earlier in this chapter, in the section “Find the right subscription,” many subscription options allow for as many as five devices per user, including mobile devices.

NOTE Find out more about purchase options or try Office for free on your device at aka.ms/o365ondevices.

You can use the following Office applications while you're on the go:

- Word
- Excel
- PowerPoint
- OneNote
- Outlook
- Yammer

Figure 2-27 shows a device with Office installed. In addition, you can set up your mobile device to use OneDrive for Business and Skype for Business (Lync).



FIGURE 2-27 You can install Microsoft Office for iPad on your iPad.

How you set up your device depends on what type of device you have—Windows Phone, Android, or iOS. The following lists provide more information:

- **Windows Phone**

- For help setting up Office Mobile on your Windows Phone, go to aka.ms/win-phone-setup-office.
- For help setting up email on your Windows Phone, go to aka.ms/android-phone-setup-email.

- **Android**

- For help setting up Office Mobile on your Android device, go to aka.ms/win-phone-setup-email.
- For help setting up email on your Android device, go to aka.ms/android-setup-email.

- **iOS**

- For help setting up Office Mobile on your iPhone, go to aka.ms/iphone-setup-office.
- For help setting up Office Mobile on your iPad, go to aka.ms/ipad-setup-office.
- For help setting up email on your iPhone or iPad, go to aka.ms/iphone-ipad-setup-email.

Summary

- Office has long offered a range of applications to boost productivity. Office 365 is like Office, but it expands its domain from the personal computer to the cloud.
- Office 365 is a software as a service (SaaS) suite that includes not only the personal computer versions of Office, but also mobile versions and the server services needed to connect them.
- With Office 365, you can use the familiar applications you've probably run on your PC for years—Word, Excel, and PowerPoint, and in some cases, depending on which subscription option you choose, Outlook, OneNote, Access, and Publisher—to save, edit, and modify documents in the cloud. Some subscription models also offer Yammer and Office 365 Video.
- Exchange facilitates email management and administration and can be used to synchronize mail, calendars, and contacts across all your devices.
- Every business has a repository of files used to conduct day-to-day business. SharePoint provides a place to store and manage all those files, and to manage access to them. SharePoint also helps with keeping track of multiple versions of a file and setting up notifications when a new version is ready. SharePoint can even help with building workflows for business processes.

- Skype for Business integrates with Exchange and SharePoint to facilitate real-time communications like international calling options, instant messages, video and audio meetings, and screen sharing, across all devices. This makes collaboration a breeze. With Skype for Business, you can also view each user's status—for example, "Available" or "In a Meeting," with color coding to help convey information at a glance—thanks to a feature called *presence*. For example, if you have a meeting scheduled on your calendar, Your presence is automatically set to "In a Meeting" and your color is set to red to indicate that you are busy.
- Some Office 365 subscription offerings include the full Office desktop software version in addition to hosted versions of Exchange, SharePoint, Skype for Business, and OneDrive for Business, all of which can be accessed via Microsoft public cloud services. Office web apps offer more limited features but are free.
- The first time you access Office 365, you will create a user account.
- The Office 365 Admin Center lists links for your services and includes an Admin drop-down menu along the top of the page. This menu gives you access to Office 365 settings, in addition to settings for Exchange, Skype for Business, and SharePoint. On the left is a navigation pane, which you use to access different areas of the Admin Center.
- If your organization has a custom domain, such as trawbridge.com, you can configure Office 365 to use it.
- Unless you run a one-person operation, you'll likely need to add other users to your Office 365 subscription. When you do, they can use all the programs and features that Office 365 provides. Doing so is easy.
- Your Office 365 subscription includes SharePoint. SharePoint offers several built-in tools, including team sites, document libraries, custom lists, task lists, and a site mailbox. In addition to these built-in apps, there are several other apps that you can add to your SharePoint team sites.
- Your business can benefit by having Office available on all your mobile devices—including your Windows Phone, Android, or iOS (Apple) smartphone or tablet. Many subscription options allow for as many as five devices per user, including mobile devices. Although not all Office 365 applications are available for Office Mobile, you can use Word, Excel, PowerPoint, OneNote, Outlook, and Yammer while on the go. In addition, you can set up your mobile device to use OneDrive for Business and Skype for Business.

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