



# Office 365: An IT Department for Small Businesses

*Tamar E. Granor  
Tomorrow's Solutions, LLC  
Voice: 215-635-1958  
Email: [tamar@tomorrowssolutionsllc.com](mailto:tamar@tomorrowssolutionsllc.com)*

*Small development shops (and other small businesses) generally don't have the skills in-house to operate a mail server or host their own website. Time spent on these and other IT tasks comes out of billable hours. Microsoft's Office 365 offers an inexpensive way of outsourcing these tasks. For a small monthly fee, a company gets an Exchange server, web hosting, cloud storage, and the latest version of Office.*

*In this session, we'll look at what Office 365 has to offer, including a look at the SharePoint-based team and public sites you can create.*

I've been a one-woman shop for 25 years. Any time I spend running my office instead of helping clients is time I'm not earning any money. While some office activities, like adding content to my website, may ultimately bring in more business, others are simply lost time.

For that reason, I've never run my own mail server or my own web server. I don't see myself selling IT support services, so time to learn how to do those things isn't a good investment.

Over the last year or so, though, it became clear that having my own mail server would make some things much easier. I've been synching a phone with Outlook on the desktop for years, but going forward, needing to do so limits my options considerably.

So when my son, who was on Microsoft's SharePoint team at the time, started telling me about Office 365, I listened. He explained that it would include an Exchange server, web hosting, tools for building a website, cloud storage through SkyDrive Pro, and online access to the Office applications. While I didn't particularly need the last two items, I knew I wanted an Exchange server (without having to administer it myself), and I was paying far too much for web hosting, so I was open to changing that.

Once he demonstrated creating a website with SharePoint Online, I was sold. At his suggestion, I waited for the latest version, including SharePoint 2013, to be released, and then jumped on board. Once I did, the real value proposition of the Office 365's web hosting of a SharePoint-based website became clearer. The ability to set up a data-based site without having to write any code, and to add data to the site with an easy drag-and-drop meant I could easily share the hundreds of articles I've written over the years.

While I haven't put them to work yet, team sites to share documents with those I choose to share them with have real promise for me, too. I can see putting all the documents for a project on a team site, so everyone I'm working with can read and modify them with the built-in Office applications.

I'll discuss the different components of Office 365 at different depths, related primarily to how much time I've spent with them. As noted earlier, my interest was primarily in the Exchange server and web hosting, so this paper focuses on those two aspects. The Office Web Apps are barely touched, and some other components get only a glance here. In truth, covering all aspects of Office 365 in any depth would require a book, not a white paper.

## **Genealogy**

Office 365 is the successor to two different Microsoft Online offerings: Business Productivity Online Suite (BPOS) and Office Web Apps. BPOS included Exchange Online, SharePoint Online, Live Meeting and Office Communications Online, while Office Web Apps was a competitor to Google Docs.

Office 365, merging the back-office services with the Office applications, was released in 2011, based on Office 2010. The release of Office 2013 led to a major update of Office 365; that's the version I'll discuss in this paper.

## Lots of flavors

There are a number of offerings under the Office 365 name. You can see the whole set at [office365.com](http://office365.com). I'll focus here on the business options. Those are divided into various groups; the list changes over time. At this writing, there are six offerings: Small Business, Small Business Premium, Midsize Business, and three Enterprise-level options, including a basic hosted email plan; currently priced at \$4 per user per month, it offers only email and support.

Beyond hosted email, the main differences relate to the maximum number of users and whether you get desktop versions of the Office applications. All versions offer an Exchange Server, a public website, private team sites, 25 GB per user of storage on SkyDrive Pro, and use of the Office Web Apps. The price varies based on the maximum number of users supported. The low-end Small Business offering is \$5 per user per month, limited to 25 users. The low-end Enterprise version is \$8 per user per month, but the number of users is unlimited.

More expensive options in each group also include desktop and mobile versions of Office for each user. The Enterprise versions also include more support and several other advanced features.

As of this writing, you can see a comparison of versions at <http://tinyurl.com/kzy4ypr>. Note also that some of them offer a one-month free trial.

For my one-person office (which already has an MSDN subscription that provides Office), I chose the \$5/month Office 365 Small Business plan.

## Getting started

Before you sign up for Office 365, you'll want to have a registered domain. This will be the domain for the email addresses you create and the public website. (See "Publishing a public site," later in this document for more on the latter.)

To sign up, choose the plan you want and click the appropriate "Buy" button. You see the page shown in **Figure 1**. When you scroll farther down, you set up the first (or, for a single user organization, only) email address, including password. **Figure 2** shows an account for a non-profit organization I'm involved with.

Office 365

sign in to add this subscription to your current account

## just a few details

You're about a minute from your new account.

### set up your account

\* Country or region:  
 ▼  
Can't be changed after you sign up. [Why not?](#)

\* First name:

\* Last name:

Phone:

\* Email:  
  
We'll use this to send you important account information.

\* Organization name:  
  
Type your company name, like *Contoso, Ltd.*

### Office 365 Small Business (Month to Month)

#### plan highlights

- 1 User License
- For small businesses (fewer than 25 users) and professionals that need anywhere access to email and documents with Office Web Apps.

[Chat now](#)

**Figure 1.** Use this page to sign up for Office 365.


### create your new user ID

\* User ID:  
 @  .onmicrosoft.com  
You'll use this to sign in to Office 365. [Can I remove the .onmicrosoft.com part?](#)

\* Password:

\* Confirm password:

[New | Audio](#)



\* Verification:  
  
Type the characters you see above.

By clicking **continue** you agree to our [terms and conditions](#).

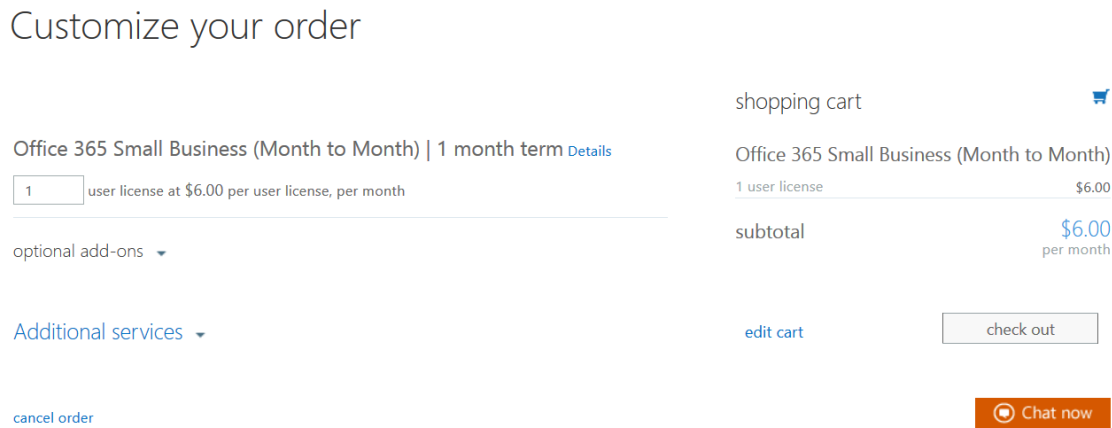
[continue](#)

your user ID  
Tamar@HFLPhilly.onmicrosoft.com

Microsoft ©2013 Microsoft Corporation Legal | Privacy Community | Feedback

**Figure 2.** The sign-up page also includes setting up the first email account for your organization.

When you click “continue,” you see the Customize your order page, shown in **Figure 3**. If you need more than one user, you can indicate that here. Also, note that because this is a demonstration account that I don’t intend to keep long, I chose the month to month option. For my business, I paid for a year in advance and got a discount.



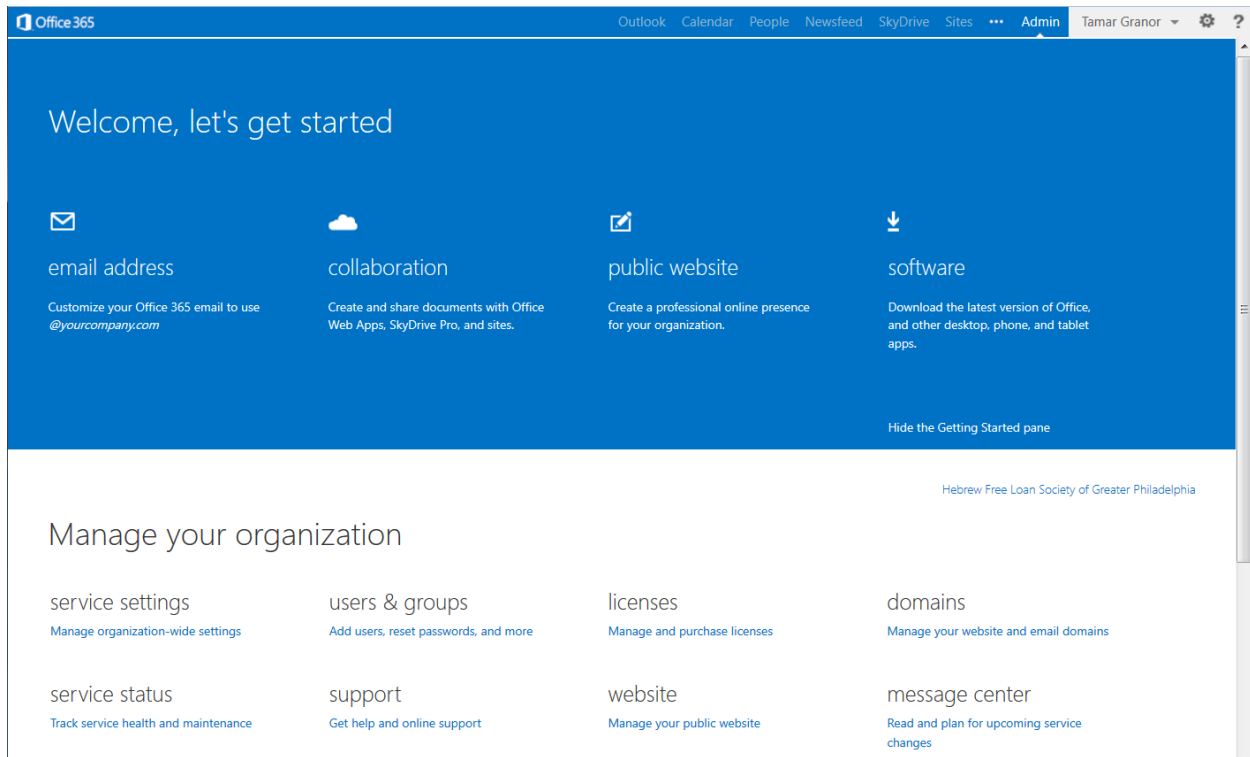
**Figure 3.** On this page, you can specify the number of users you want. The “optional add-ons” and “Additional services” links let you add more SkyDrive Pro storage and add additional Office 365 plans.

Click “checkout” to go through a series of pages that handle payment.

## Setting up

Once you’re all set, you can see the main administration panel (**Figure 4**). This is also where you land when you sign into Office 365 in the browser.

Initially, this page includes a Getting Started pane to walk you through the various Office 365 set-up tasks. Once you’ve completed your set-up process, you can click “Hide the Getting Started pane” to remove that section.



**Figure 4.** The Admin panel of Office 365 gives you a place to administer your account and initially includes the Getting Started pane.

The first thing to do is set up your email address to use your custom domain. By default, the email address you create with Office 365 is in the form [username@something.onmicrosoft.com](mailto:username@something.onmicrosoft.com). You probably want it to be [username@something.com](mailto:username@something.com).

The first item in the Getting Started pane lets you make this change.

When you click it, you see the page in **Figure 5**; click “Start now” to proceed. The next page of this wizard (shown in **Figure 6**) is key; you use it to specify the domain you’re associating with Office 365. Once you finish setting up, you can’t change it, so make sure to specify the domain you really want, if you have more than one.

## Change your Office 365 email address to use *@yourcompany.com*

### Why change it?

When you signed up, your initial Office 365 email address was **tamar@hflphilly.onmicrosoft.com**.

But if you already own an email address that your customers are familiar with, like **tamar@yourcompany.com**, you can use that address instead. [Do I have to do this before I can use Office 365?](#)

Get an overview of the process:

[Video: Customize your email address in Office 365](#)

### Would you like to change your Office 365 email address now?

It will take about **45 minutes** to make the change, and we'll show you exactly what to do. [Why will it take so long?](#)

Start now

Maybe later

**Figure 5.** Clicking the email address item in the Getting Started pane shows this page.

## Change your Office 365 email address to use *@yourcompany.com*

If you own a domain already, you can change your Office 365 email address so it's something like: *yourname@yourcompany.com*.

What domain do you want to use with Office 365? [What's a domain?](#)

Example: fourthcoffee.com

**Note:** You must already own the domain before you add it to Office 365. [What if I don't own one?](#)

back

next

cancel

**Figure 6.** On this page, you specify the domain you're associating with your Office 365 account. This choice can't be changed, once set-up is complete.

When you click “next,” you're queried about the domain you specified (**Figure 7**). If you already have a website, you can choose whether to leave it where it is or replace it. Even if you choose to replace it, you can set things up so that your current site works until you finish creating the new site and deploy it.

# Change your Office 365 email address to use @hflphilly.org

Tell us about hflphilly.org

Do people in your company already have **hflphilly.org** email addresses?

- Yes
- No

Do you already have a **hflphilly.org** website? [Why is this important?](#)

- Yes, and I want to keep it where it's hosted today
- Yes, but I want to design a new website in Office 365 to replace it
- No

**Note:** Unfortunately, we can't automatically move your website from your current website host to Office 365.

[cancel](#)

**Figure 7.** To do things correctly, you need to tell Office 365 about your existing domain.

When you click “next,” you see a summary page (**Figure 8**) of the steps to start using your new Exchange server. Click “Start step 1,” and you’ve walked through the steps necessary for Office 365 to confirm that you’re allowed to make this change. The steps depend on where the site is registered, and involve creating a DNS record. After you’ve made the DNS change and verified it, you’re ready for step 2 in **Figure 8**, changing the email address you already created (the onmicrosoft.com one) to your custom domain. You’ll see that “Update existing Office 365 addresses” is now a link; click it.

The page shown in **Figure 9** lists all the users in your account (presumably one, at this point) and lets you specify which should change to your custom domain. Click “Update” on the next page, click “Finish” and you’re prompted to sign out of Office 365 and sign back in with the new email address.

Once you log back in, you can add any other users you need. Even if you have no other users, you need to continue through the wizard steps. So click the “email address” tile in the Getting Started pane and click “Add users to Office 365” to reach the page shown in **Figure 10**. If you’ve paid for additional users, add them; otherwise, just click “No, I’ll do it later”. Either way, click “next.”



# Set up hflphilly.org to work with Office 365

Based on your choices, here are your next steps. [Review or change answers](#)

- 1 [Confirm that you own hflphilly.org](#)  
Before you can use **hflphilly.org** with Office 365, help us verify that you own it.
- 2 [Update existing Office 365 email addresses](#)  
Update email addresses from **@HFLPhilly.onmicrosoft.com** to **@hflphilly.org** for yourself and any users you've already added to Office 365.
- 3 [Add users to Office 365](#)  
Add users that you want to have **@hflphilly.org** email addresses.
- 4 [Complete the process](#)  
After this step, you can start sending and receiving email in Office 365 with your **@hflphilly.org** email address.

[back](#) [Start step 1](#) [Save and close](#)

**Figure 8.** This page shows you the steps needed to move your domain's email to Office 365.

1 2 3 4

## Update existing Office 365 email addresses

Now that you've confirmed that you own the domain, let's update your email address from **@HFLPhilly.onmicrosoft.com** to **@hflphilly.org**.

Select the users you want to update.

<input checked="" type="checkbox"/>	Name	Current email address	New email address
<input checked="" type="checkbox"/>	Tamar Granor (this is you)	Tamar@HFLPhilly.onmicrosoft.com	Tamar@hflphilly.org

[back](#) [Update](#) [cancel](#)

**Figure 9.** On this page, you can specify which users' email addresses should use your custom domain. Here, there's only one user.

1 2 3 4

## Add users to Office 365

Do you want to add users now?

- Yes, I want to add users  
 No, I'll do it later

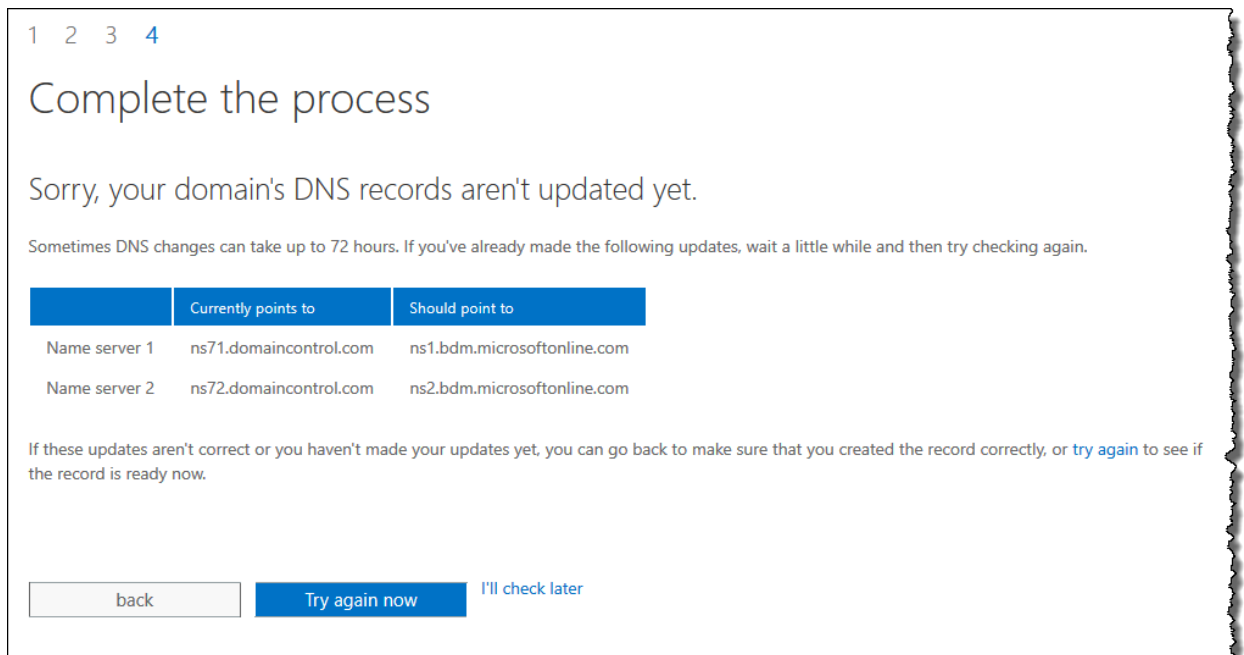
**Note:** You have to add everyone who already gets email at **hflphilly.org**. [Why is this important?](#)

**Figure 10.** Use this page to add additional users, or just choose No to proceed.

Again, you're returned to the email set-up page. Click "Complete the process." Again, you'll need to do some work with your domain registrar; this time, it's specifying the correct name servers. Follow the directions provided.

When you're done, you can click "Done, go check" to see whether your changes have taken effect. If not, you'll see a page that tells you so and gives you a chance to test again. Once the test is successful, you see a page (**Figure 11**) that confirms it. Click "Finish" to return to the email set-up wizard page, where you can click "All done!" to return to the Office 365 Admin page.

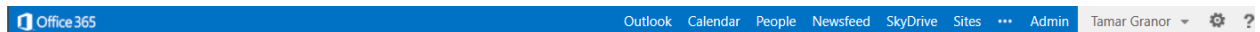
Note that in this paper, some examples are drawn from the account created in this section, but a number are based on my tomorrowssolutionsllc.com account.



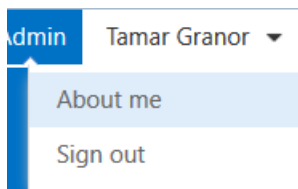
**Figure 11.** After you change your name server settings at your domain registrar, you can check whether the change has propagated. If not, you'll see this page.

## The Admin panel

The top of the Office 365 main administration page includes a menu for the main components of Office 365; this whole bar across the top (shown in **Figure 12**) is called the *suite bar*. In the figure, a little carat indicates that we're currently looking at the Admin page. Next to the menu is the name of the logged-in user; this is a dropdown that changes as you move to other parts of the service. On the Admin page, it's pretty sparse (**Figure 13**).



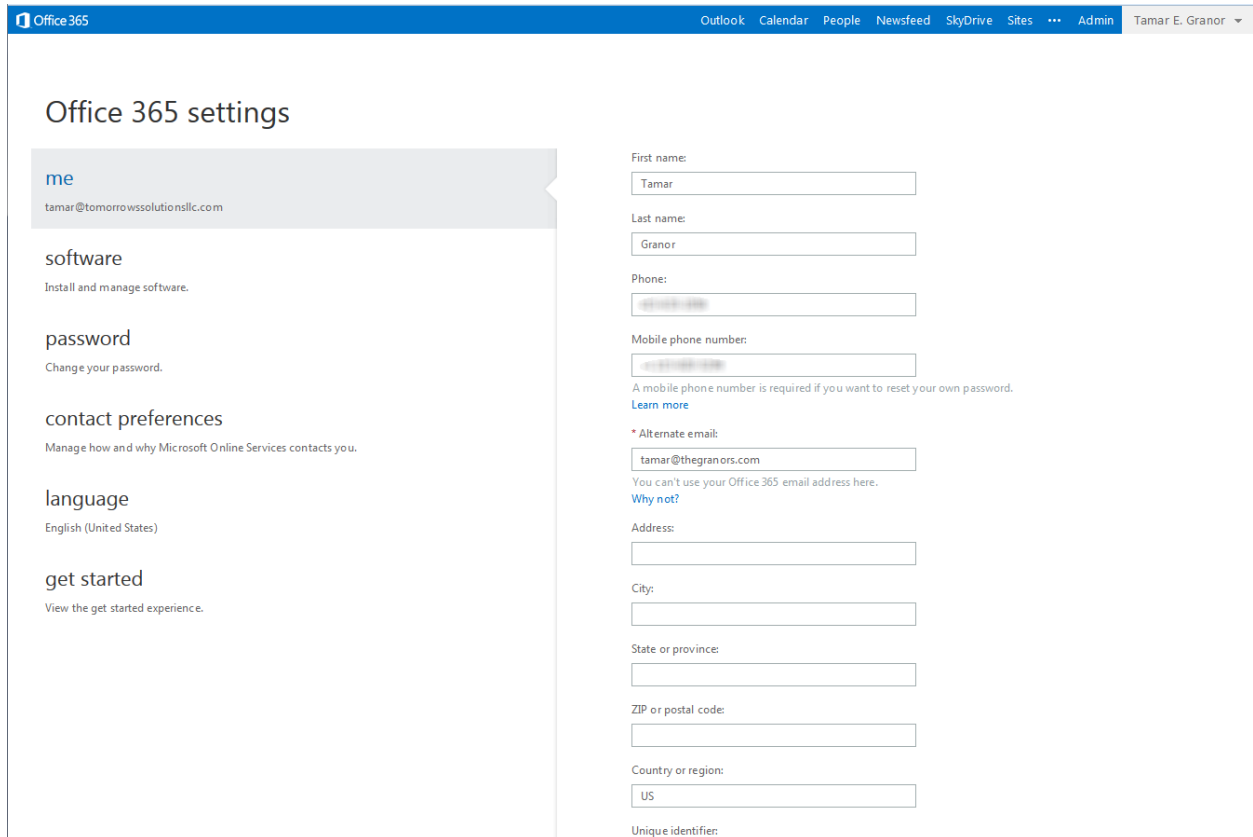
**Figure 12.** The suite bar is the main menu for Office 365.



**Figure 13.** The user's name in the menu bar is a dropdown. The contents change depending where you are in Office 365.

The next icon indicates Settings. This one, too, changes depending where you are in Office 365. In the Admin panel, the only option is Office 365 Settings. Choosing that option opens a page showing your set-up, as in **Figure 14**.

Not surprisingly, the final icon, the question mark, opens a Help window.



**Figure 14.** The Office 365 settings page includes basic information about a user, as well as password management and more.

## ***Managing the company***

If you're the administrator for the Office 365 installation, the "Manage your organization" section at the bottom of the Admin page lets you control users, licenses, organization information, and so forth. The exact content varies depending on which type of Office 365 account you signed up for. That section also provides access to support information.

Because I haven't set up Office 365 for an organization of more than one person, I'm not sure what non-administrators see here.

## **Controlling your organization's settings**

Clicking "Manage organization-wide settings" in the "service settings" section shows a page (**Figure 15**) that lets you control what other users can do.

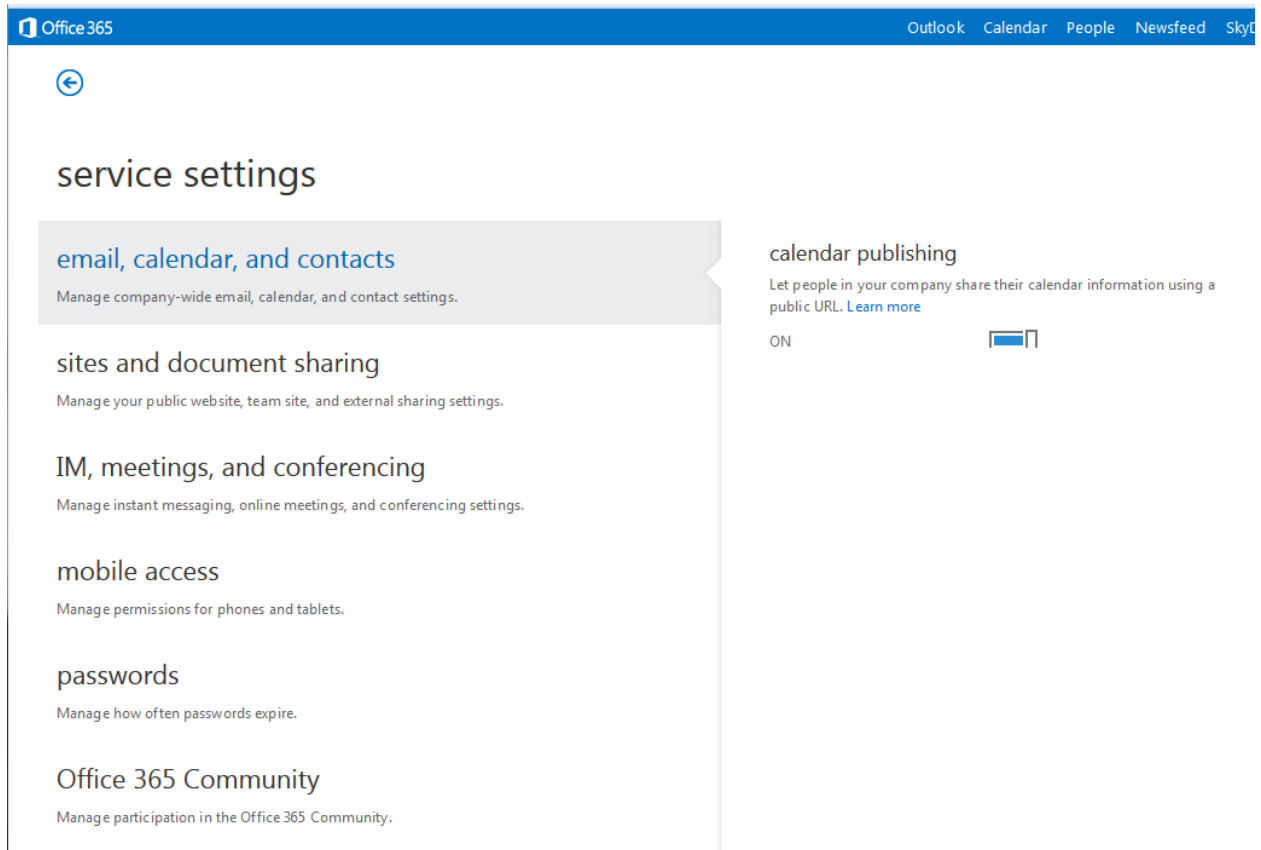


Figure 15. The service settings page controls what users can do with Office 365. It also provides control over the organization’s public website.

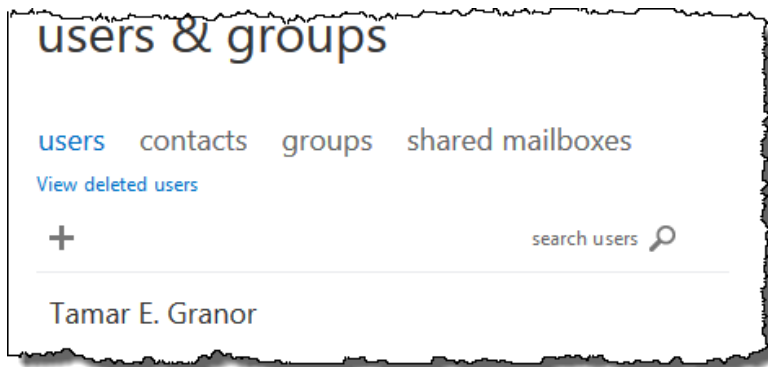
## Managing users and licenses

As its text suggests, the “Manage and purchase licenses” link in the Admin panel lets you see how many licenses of what types you have and buy more, as in **Figure 16**.

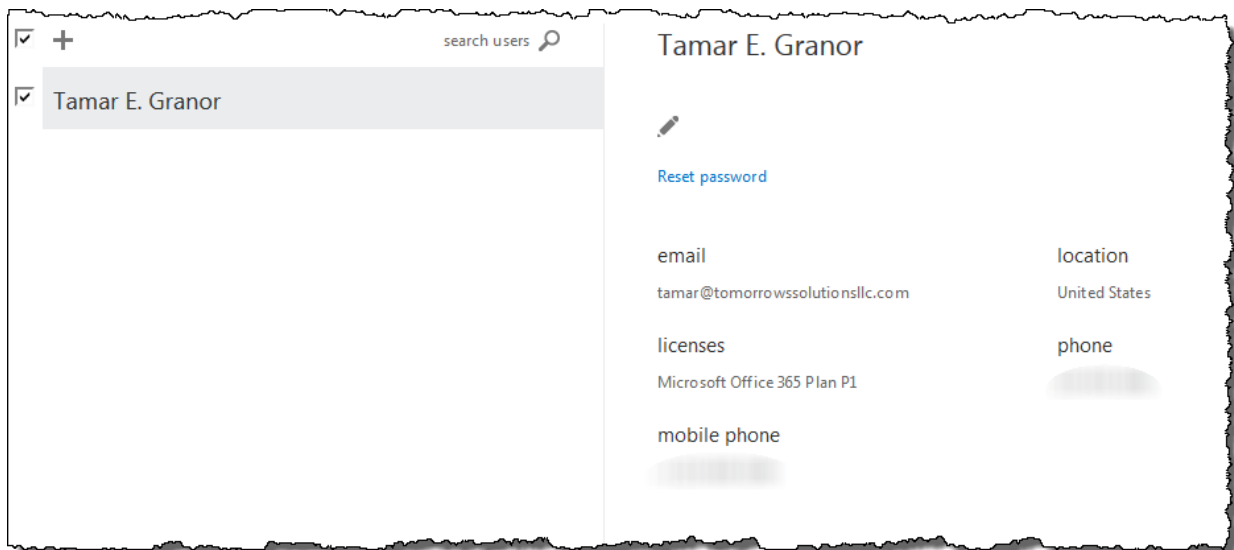


**Figure 16.** The Licenses page lists your subscriptions. Click purchase services to buy more licenses.

Licenses get matched with users. The “Add users, reset passwords, and more” link brings you to the Users & Groups page (**Figure 17**), where you can manage the list of users for your organization. When you hover over a user, a checkbox appears to let you select that user; when you do so, details about that user, such as phone numbers appear in the right pane, as in **Figure 18**.



**Figure 17.** Use the users & groups page to manage the list of users in your organization.



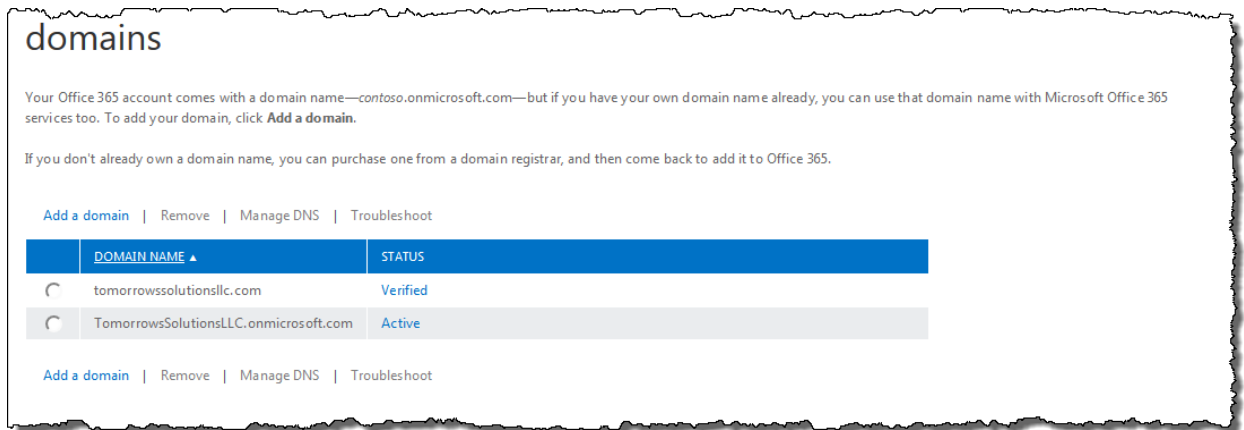
**Figure 18.** Check the box next to a user to see detailed information about that user.

Click the plus sign to add a new user; you can only complete this operation if you have an available license for the user.

The links at the top of this page let you manage a shared contact list for your organization, set up groups (distribution lists) of users, and designate some mailboxes as shared.

## Managing domains

The “Manage your website and email domains” link brings you to a list of domains associated with the organization, as in **Figure 19**. The list includes the onmicrosoft.com domain that’s created when you set up your account, as well as the custom domain you set up. If your organization has multiple domains, you can add others here, though that may not be your best option. If your reason for having multiple domains is simply to have multiple URLs pointing to a single website, it may be less expensive and easier to set up alternative domains to forward to the domain you set up in Office 365.



**Figure 19.** The list of domains includes the default onmicrosoft.com domain that’s automatically created, plus your custom domain, if you set it up.

When you add a domain to Office 365, you move management of DNS (domain name service) records from your registrar to Office 365. The DNS records you need should get created automatically, but the “Manage DNS” link lets you see what’s there and make any necessary changes.

### Tracking Office 365 status

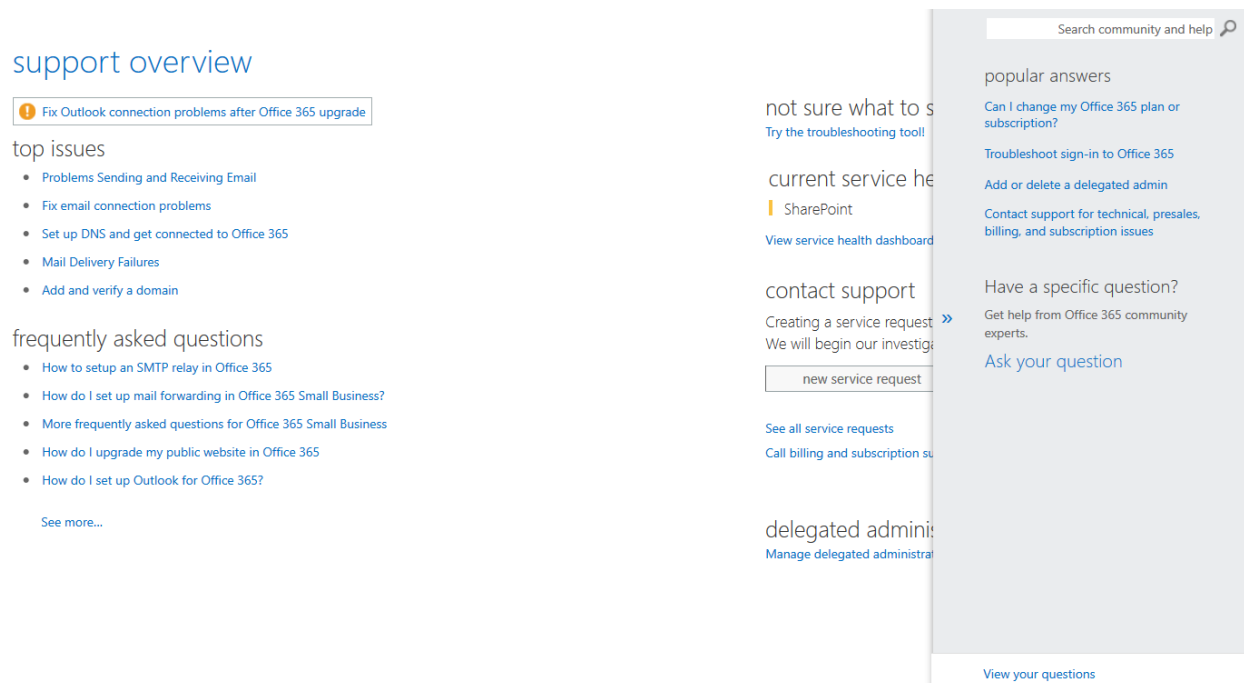
Clicking “Track service health and maintenance” navigates to the Service Health page (Figure 20), which provides information on the status of each Office 365 service. For any issues that have occurred, you can click the icon to see details. The “Planned Maintenance” link shows scheduled maintenance for each service.

SERVICE	TODAY	MAY 30	MAY 29	MAY 28	MAY 27	MAY 26	MAY 25
Exchange Online							
E-Mail and calendar access	✓	✓	✓	✓	✓	✓	✓
E-Mail timely delivery	✓	i	i	i	✓	✓	✓
FOPE Administration (Admin Center)	✓	✓	✓	✓	✓	✓	✓
FOPE Encryption	✓	✓	✓	✓	✓	✓	✓
FOPE Quarantine	✓	✓	✓	✓	✓	✓	✓
Management and Provisioning	✓	✓	✓	✓	✓	✓	✓
Sign-in	✓	✓	✓	✓	✓	✓	✓
Voice mail	✓	i	i	✓	✓	✓	✓
Identity Service	✓	✓	✓	✓	✓	✓	✓
Lync Online							
All Features	✓	✓	✓	✓	✓	✓	✓
Audio and Video	✓	✓	✓	✓	✓	✓	✓
Dial-In Conferencing	✓	✓	✓	✓	✓	i	✓
Federation	✓	✓	✓	✓	✓	✓	✓
Instant Messaging	✓	✓	✓	✓	✓	✓	✓
Management and Provisioning	✓	✓	✓	✓	✓	✓	✓
Mobility	✓	✓	✓	✓	✓	✓	✓
Online Meetings	✓	✓	✓	✓	✓	✓	✓

**Figure 20.** The Service health page shows status history for each Office 365 service.

## Getting support

The “Get help and online support” link in the Admin panel navigates to the Support Overview page, shown in **Figure 21**. The page offers three different approaches to support.



**Figure 21.** The Support Overview page offers several different ways to get help with Office 365.

The left column lists frequently asked questions. A currently hot issue is highlighted at the top of the column. The “See more...” link at the bottom of that column links to the Office 365 support site, opening it with a Wiki page displayed.

The center column provides more general help, including links to create a service request and contact information for both technical and subscription support.

The right column isn’t actually a column at all; it’s a pop-out pane. It provides the ability to search the support site, as well as to post questions in the Office 365 forums. Those forums are monitored by Microsoft personnel, who reply to questions. (Although I haven’t always solved my problems by asking there, I have always gotten responses.) The link at the bottom, “View your questions,” brings up a list of all your posts, so you can easily find them.

## Using the Exchange server

Most users will spend only a little time in the Admin panel and most of their time using the actual components of Office 365. For many, home in Office 365 will be the various pieces of Outlook there.

The desktop version of Outlook includes email, contacts, calendar, and tasks. Office 365 includes all of those, but spreads them across three elements on the suite bar.



Click “Outlook” in the suite bar to handle email and tasks. Click “Calendar” to work with the calendar. Click “People” to work with your contact list.

As with any other Exchange server, you can choose to synchronize with Outlook or another email client and you can set up a mobile phone to synch with the server as well. Thus, depending on your needs, once things are set up as you want, you might only rarely work on the Outlook pages. (Be aware that items you put in Outlook’s Notes are not synched between the Exchange Server and mobile versions of Outlook. In my view, this makes the Notes component essentially useless.)

What works for me is to have Outlook on my primary and secondary machines, but to use the Outlook Web App in Office 365 when I’m at another computer. Since Exchange keeps them all in synch, including sent messages, I know I’m always looking at the full data set.

### ***Migrating data***

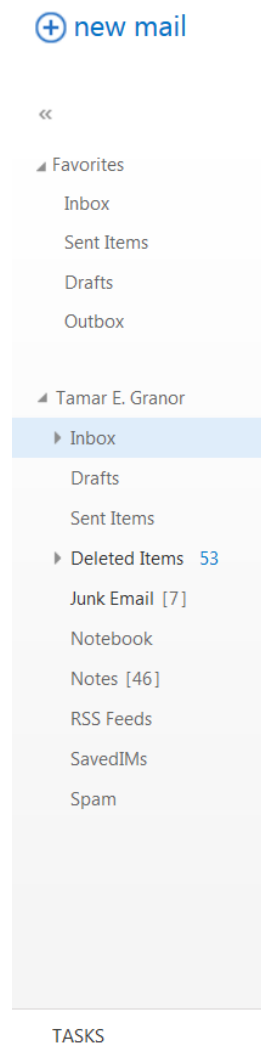
If your users are already using Outlook, connecting to one or more mail servers directly, they’ll probably want to move at least some of their data into Office 365. I wanted all of my stored email, calendar items, contacts and tasks.

For those using Outlook on the desktop, the best approach seems to be to create a new Outlook data file, associate it with the Exchange Server account and then drag and drop existing contacts, calendar items, tasks, and email folders from the old data file into the new one.

In addition, there are tools for importing your existing mail, contacts, calendar and tasks. This Microsoft support page provides instructions: <http://office.microsoft.com/en-us/office365-suite-help/migrate-email-and-contacts-into-a-new-office-365-account-HA103169067.aspx>. The instructions also include a way to receive mail from other email accounts on the Exchange Server.

### ***Working with email***

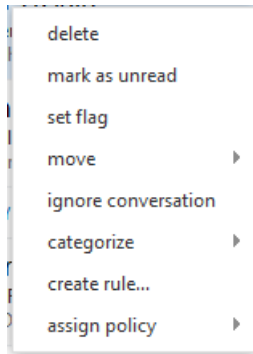
The “Outlook” link on the Office 365 suite bar opens the Outlook Web App to a page that looks something like the email view of Outlook. The page has three panes. The left pane (shown in **Figure 22**), which can be collapsed, shows favorite folders at the top (the list can be customized by dragging into and out of it) and the complete folder tree at the bottom. There’s also a button at the bottom to view Tasks. (See “Working with tasks,” later in this section.)



**Figure 22.** The left pane in Mail view shows Favorite folders and then a complete hierarchy of folders. A button at the bottom lets you switch to Tasks view.

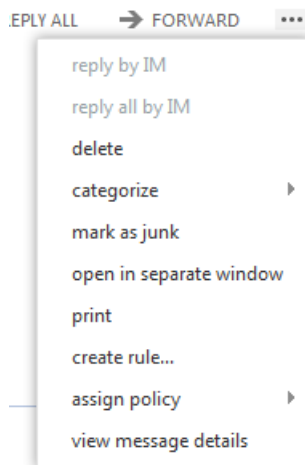
The middle pane contains the list of messages currently in the inbox. Links let you filter it to only unread messages, messages to you, or flagged messages. In addition, a dropdown lets you change the sort order. A search box above the list lets you filter based on content.

There's a context (right-click) menu for messages, shown in **Figure 23**. Note that, unlike in Outlook, there's no way to mark a message as junk or block the sender from there.



**Figure 23.** This context menu appears when you right-click on a message in the message list.

The right pane, which is, by default, much wider than the others, contains the message currently highlighted in the message list. Links at the upper right let you reply, reply all, or forward. An ellipsis (“...”) link opens a menu of additional options, shown in **Figure 24**.



**Figure 24.** This dropdown menu lets you manage email messages.

Be aware that, as far as I can tell, marking a message as junk does not add the sender to the blocked senders list or prompt you to do so.

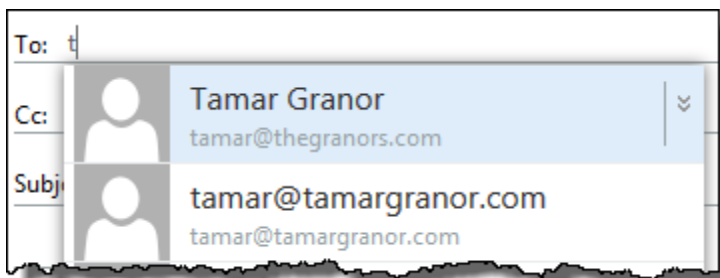
A link just below this list of links lets you mark the message as unread.

To send a new message, click the New Mail link in the upper left corner of the page. This changes the right pane to a new message (**Figure 25**). The From dropdown lets you decide which email account to send from (if you have multiple accounts configured).

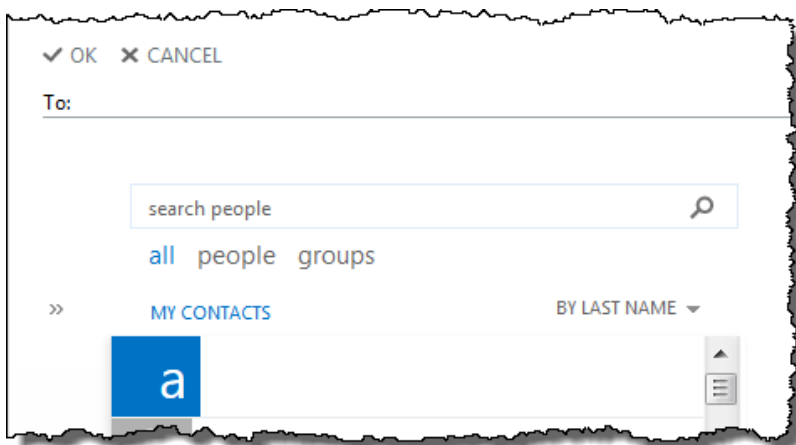
When you start typing in the To: line, matching items from your contacts appear, as in **Figure 26**. You can just choose the one you want. Alternatively, you can click the “+” at the end of the To: line to open a page showing your contacts, as in **Figure 27**. You can then navigate through that page, or search in it, to select the email recipient(s). The right pane of that page, not shown in the figure, displays details for the currently selected contact.



**Figure 25.** You write new emails in the right pane.

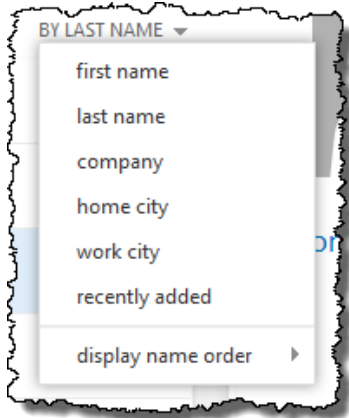


**Figure 26.** As you type into the email To line, matching contacts are listed.



**Figure 27.** You can also choose email recipients from your contact list.

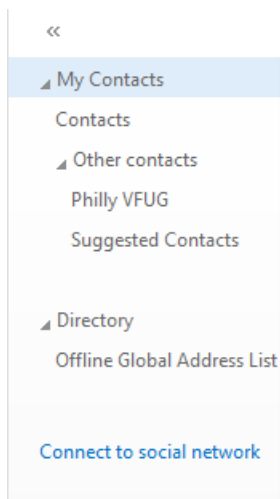
On the contact list page, you can click links to filter to only people or only groups (that is, distribution lists). You can use the dropdown on the right (**Figure 28**) to sort the list.



**Figure 28.** The list of contacts can be sorted various ways to help you find the ones you want.

Click the chevron at the left side of the page to show all your available contact folders, as in **Figure 29**. You can then click the name of a folder to display the contacts in that folder.

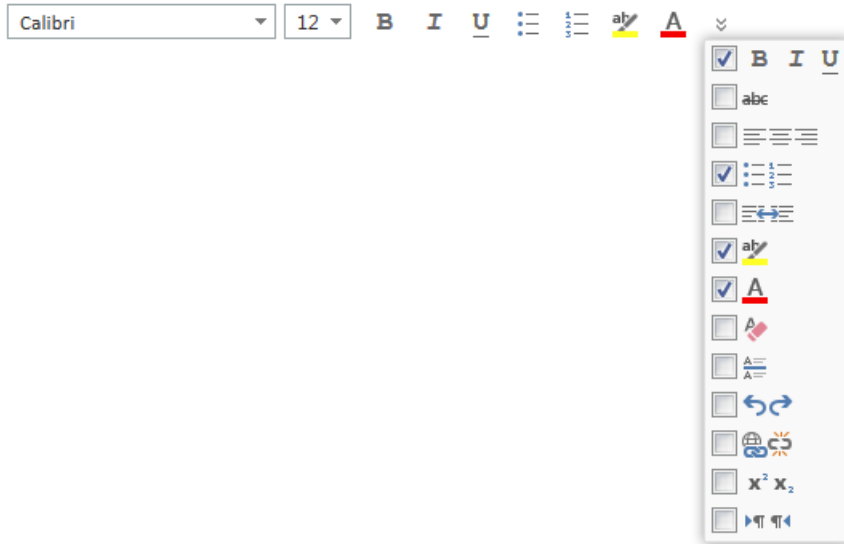
Once you've selected the recipients for the message, click OK to return to the message page. The Cc line lets you specify people to be copied on the message in the same ways you can choose the recipients.



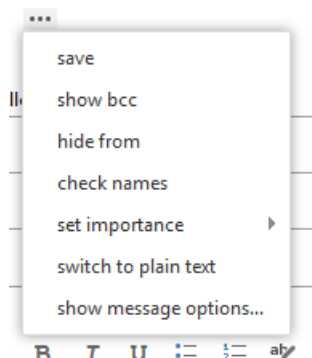
**Figure 29.** The pane showing other contact folders is hidden by default. When you click the chevron, it's displayed.

As **Figure 25** indicates, something that looks like a toolbar provides formatting capabilities for the message body. The chevron at the end of the “toolbar” lets you determine what options appear, as shown in **Figure 30**.

The links above the message (shown in **Figure 25**) let you manage the message. Beyond sending or cancelling the message, click Insert to add attachments. The ellipsis dropdown (**Figure 31**) lets you add a Bcc line, set the message's importance and more.



**Figure 30.** This toolbar lets you format your message. The dropdown determines which formatting options appear on the toolbar.

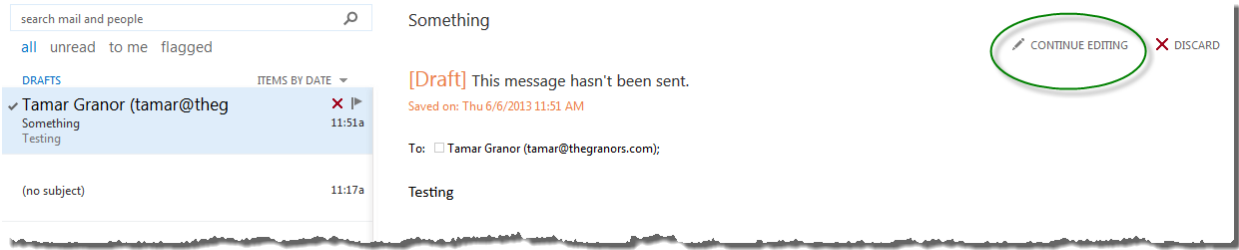


**Figure 31.** This dropdown menu provides additional control over email messages.

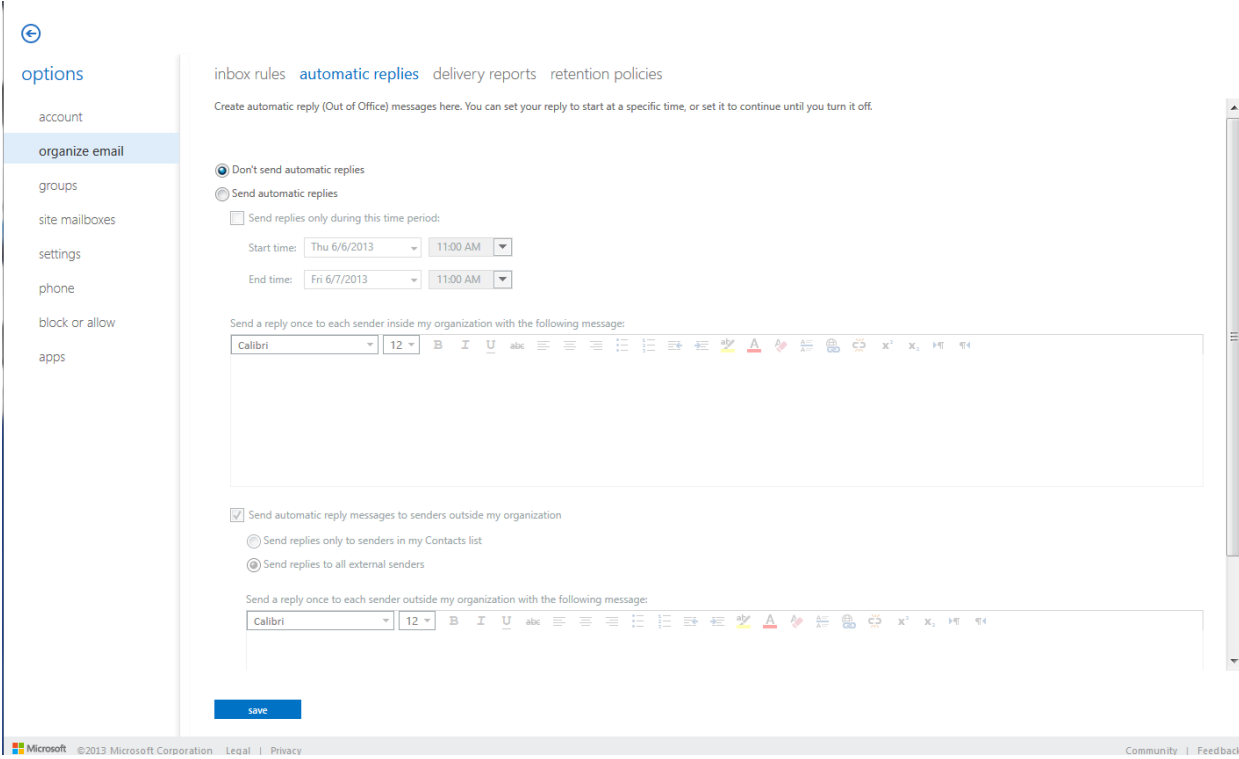
If you prefer to write messages in a separate window, you can click the icon in the upper right corner of the message page. (It looks like one window overlapping another.)

One very elegant feature of the interface is that, if you click on a link that navigates away from this page while writing a message, the message in progress is automatically saved in Drafts. When you return to the Outlook page, you can click on Drafts and then on the message. Then, click the Continue Editing link (**Figure 32**) to get back to where you were.

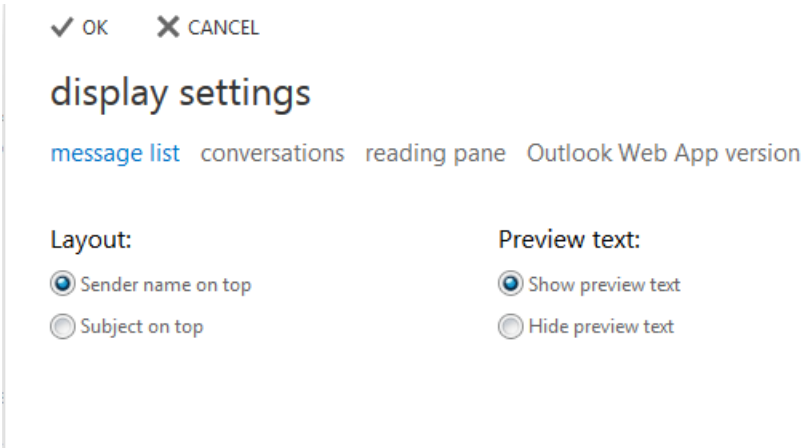
When you're looking at email, there are a couple of email-specific items on the Settings menu in the Office 365 suite bar. "Set automatic replies" navigates to a page (**Figure 33**) for setting up Out of Office messages. "Display settings" determines the layout of the Outlook page. The Display Settings pane (**Figure 34**) opens from the right edge of the browser. The links under "display settings" show different settings you can manage. **Figure 34** shows the choices for the message list, while **Figure 35** shows options for threading conversations, and **Figure 36** shows choices for the reading pane.



**Figure 32.** When you navigate away from a message in progress, it's automatically saved in Drafts. Find it and click Continue Editing to go on.



**Figure 33.** You can set up “Out of Office” messages to reply to emails received during a specified time period.



**Figure 34.** You can determine how the Outlook Web App is laid out.

message list [conversations](#) reading pane Outlook Web App version

**Layout:**

- Newest message on top
- Oldest message on top

**Deleted items in conversations:**

- Show deleted items
- Hide deleted items

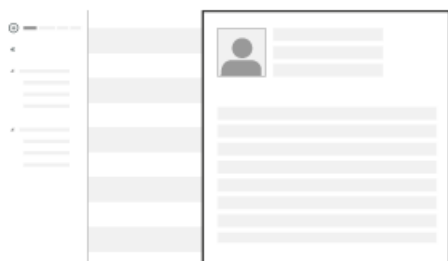


**Figure 35.** The Conversations link lets you determine how messages in the same discussion are displayed.

message list [conversations](#) [reading pane](#) Outlook Web App version

**Layout:**

- Show reading pane on the right
- Show reading pane at bottom
- Hide reading pane



Apply to all folders

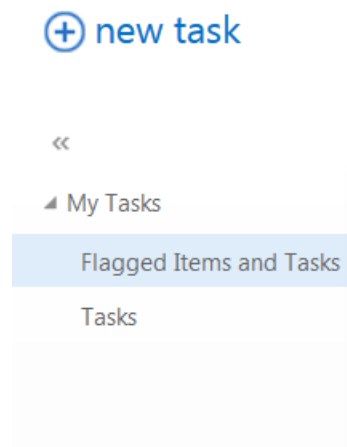
**Figure 36.** You can determine the main layout of the Outlook pane by clicking the Reading Pane link.

### ***Working with tasks***

Click the “Tasks” button at the bottom of the left pane in Mail view to switch to Tasks view. This view is quite similar to the Mail view, with three vertical panes. The left pane shows

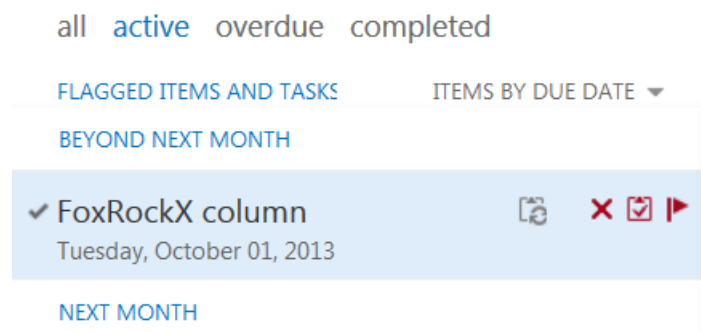


folders and can be collapsed. As **Figure 37** indicates, the task list can show flagged email items as well as tasks.



**Figure 37.** The left pane in Tasks mode shows folders. The selection there also determines whether flagged email items show up in the Tasks list.

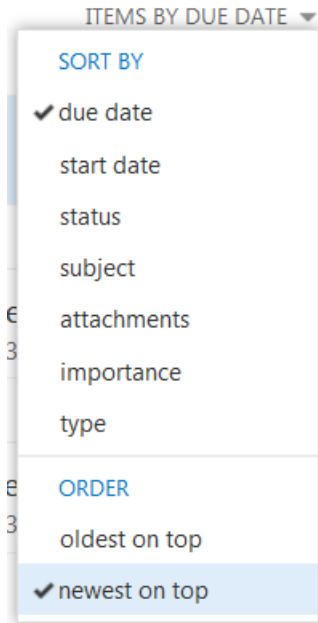
The middle pane shows tasks and allows you to filter and sort as you wish. The links at the top let you choose whether to show all tasks, active tasks, overdue tasks or completed tasks. In **Figure 38**, all active tasks are shown in reverse chronological order.



**Figure 38.** You can choose which tasks to display and sort as you want.

The dropdown above the list, shown in **Figure 39**, lets you choose the sort order. By default, tasks are sorted by due date with the oldest on top.

The right pane shows the details for the currently selected task, as in **Figure 40**. While you can modify the reminder and the Mark Private checkbox here, use the “Edit” link to switch to a full edit mode, shown in **Figure 41**. The same form appears when you choose to add a new task (though, of course, in that case, the fields are initially blank). As with emails, there’s a way to move the task editor to a separate window.



**Figure 39.** You can sort the list of tasks on any of these fields, and choose ascending or descending order.

FoxRockX column

 EDIT  COMPLETE 

Due: [Tuesday, October 01, 2013](#)

Status: Not started  
% complete: 0  
Start date: None  
Priority: Normal  
Date complete: None  
Companies: None  
Owner: Tamar E. Granor  
Total work: 0 Hours  
Actual work: 0 Hours  
Mileage: None  
Billing: None

Reminder  
Tue 9/24/2013 9:00 AM  
 Mark Private

Repetition: Repeat the task Day 1 of every other month effective Tue 10/1/2013.

**Figure 40.** The right pane in Task view shows the details of a single task and lets you edit them.

**Figure 41.** Clicking the “Edit” button in the right pane switches the pane to let you edit the details for a task.

To add a new task, click the New Task button at the top left and fill out the form.

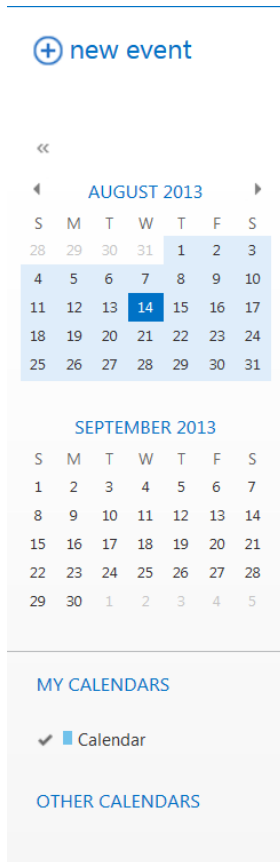
Oddly, there’s no button or link in Task view to return to email. Instead, you have to click the Outlook link in the suite bar.

### ***Managing your calendar***

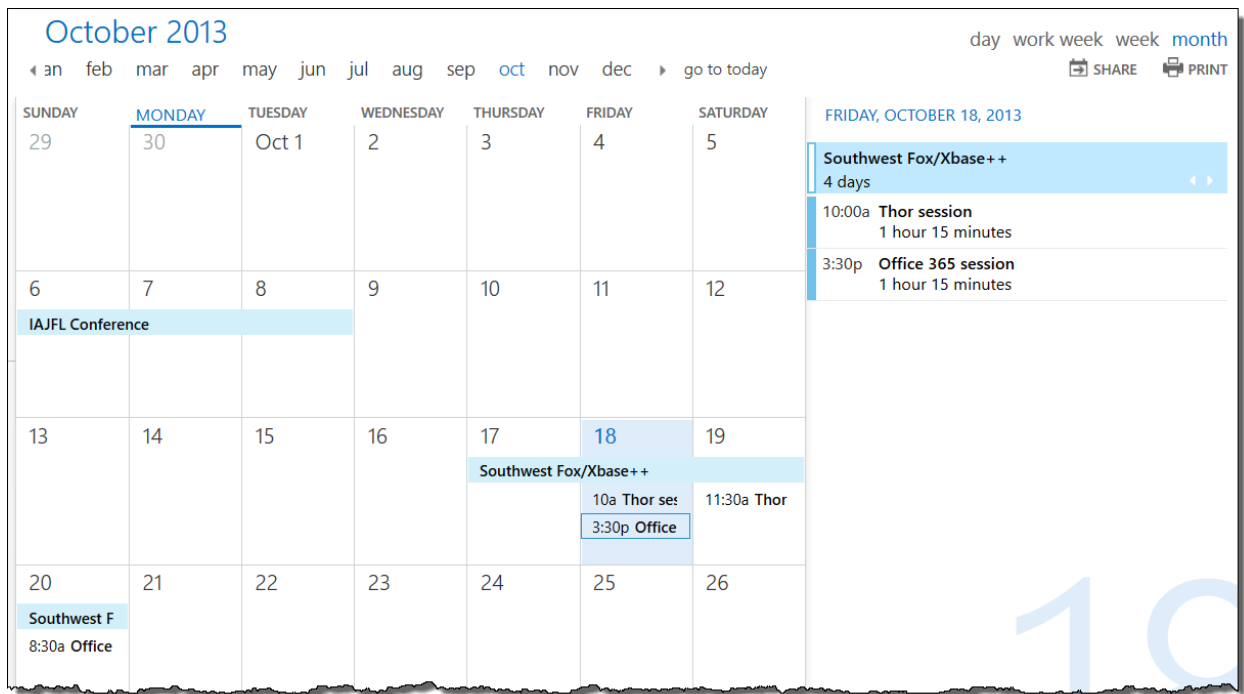
To open your calendar, click “Calendar” in the suite bar. The Calendar has only two panes, though the right pane sometimes has two sections. The collapsible left pane (**Figure 42**) shows one or more months at a time. (The number of months you see is controlled by the position of the separator bar between that section and the list below.) Click on a date and the right pane switches to that date. If your organization has multiple users, the left pane also lets you indicate which calendars other than your own should be displayed.

The right pane offers multiple ways of looking at the calendar itself. By default, it shows you an entire month, plus the agenda for a single day, as in **Figure 43**. The month abbreviations let you quickly navigate; just click to go to that month. Click the “go to today” link to return to the current date.

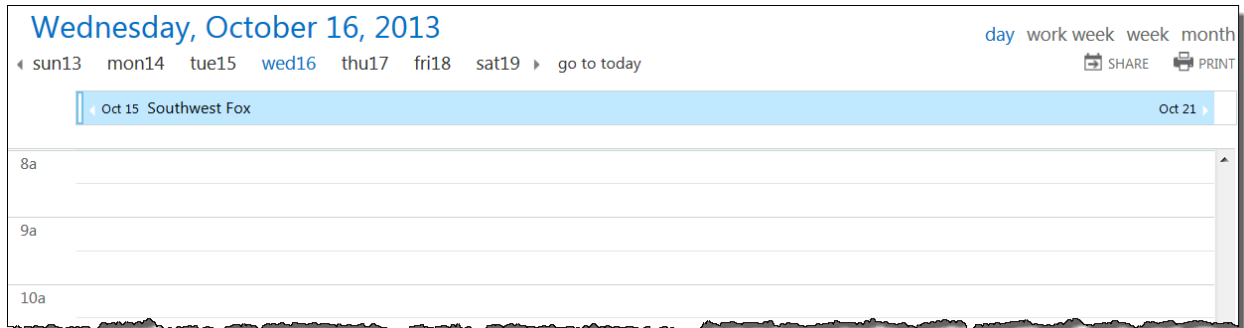
The links at the upper right let you change the view. **Figure 44** shows the result of choosing “day.” In this case, you see a detailed agenda for a single day, with a week’s worth of days available for navigation. You can see Monday through Friday (or whatever range you’ve set as the work week) by choosing “work week” or the entire week by choosing “week,” as in **Figure 45**. Both of these views let you navigate a week at a time.



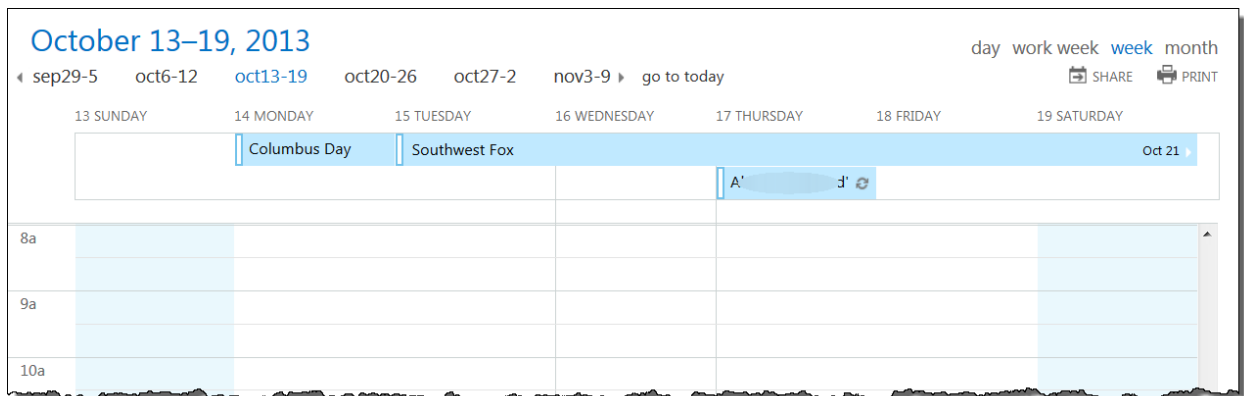
**Figure 42.** The left pane in Calendar mode shows two months and lets you decide what calendars contribute data.



**Figure 43.** By default, the calendar shows a whole month with details for one selected date at the side.



**Figure 44.** Choosing “day” shows the agenda for a single day in datebook format.



**Figure 45.** Choosing “week” shows you agendas for an entire week, and lets you navigate by weeks.

To add an item to the calendar, click the “new event” link at the top left. A form for adding an appointment, shown in **Figure 46**, appears. The Attendees line here works like the “To:” line of an email, letting you add people from your address book. The Repeat dropdown lets you make this a recurring appointment. For organizations with multiple users, the Scheduling Assistant helps to find a time and place that works for all attendees.

The Calendar offers a number of ways to view and edit existing appointments. First, if you click on an appointment in the Calendar grid, a window pops up showing the details, as in **Figure 47**. The same window pops up when you click on the item in the daily agenda that’s shown with the monthly calendar.

Click the “overlapping windows” icon in the upper right for a larger view of the same appointment, shown in **Figure 48**. Alternatively, click the Edit link to open an editing window for the appointment, like the one in **Figure 46**, but with the appointment data filled in. If the appointment is recurring (like the VFP FUG in the example), when you click Edit, you get to choose whether to edit this occurrence or the series; that menu is shown in **Figure 49**.

SAVE DISCARD SCHEDULING ASSISTANT

Event:

Location:

Attendees:

Start:   Duration:

Show as:  Reminder:

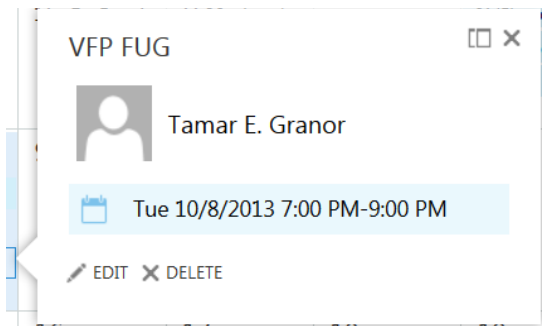
Calendar:

Repeat:

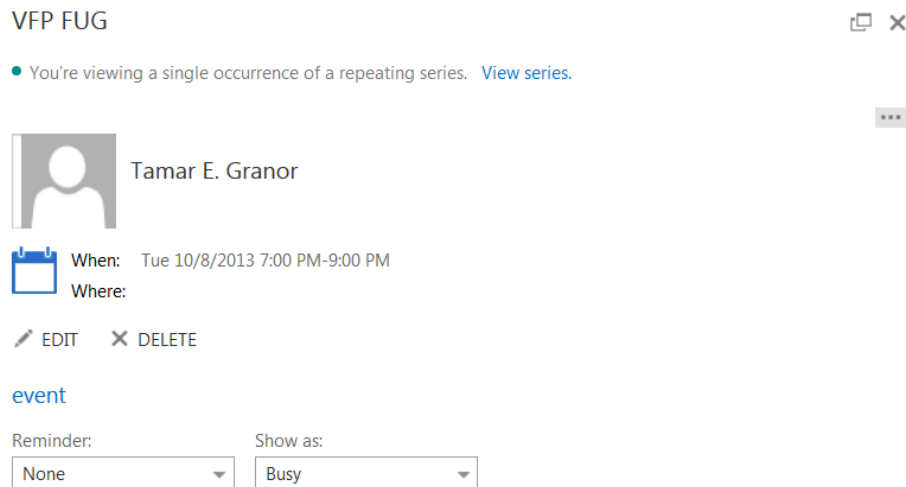
Mark as private  Online meeting

Calibri 12 B I U

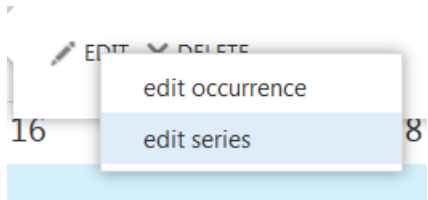
**Figure 46.** Use this form to add appointments to your calendar.



**Figure 47.** Clicking on an appointment in the Calendar shows the full appointment in a pop-up window.



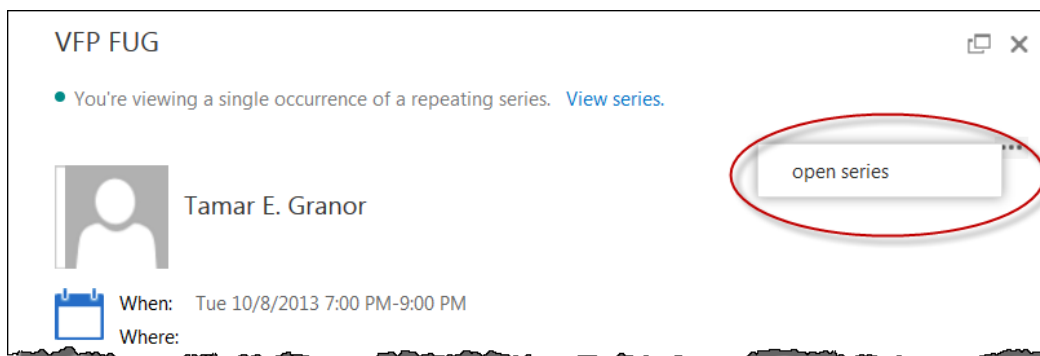
**Figure 48.** This view of an appointment is available from a couple of different places.



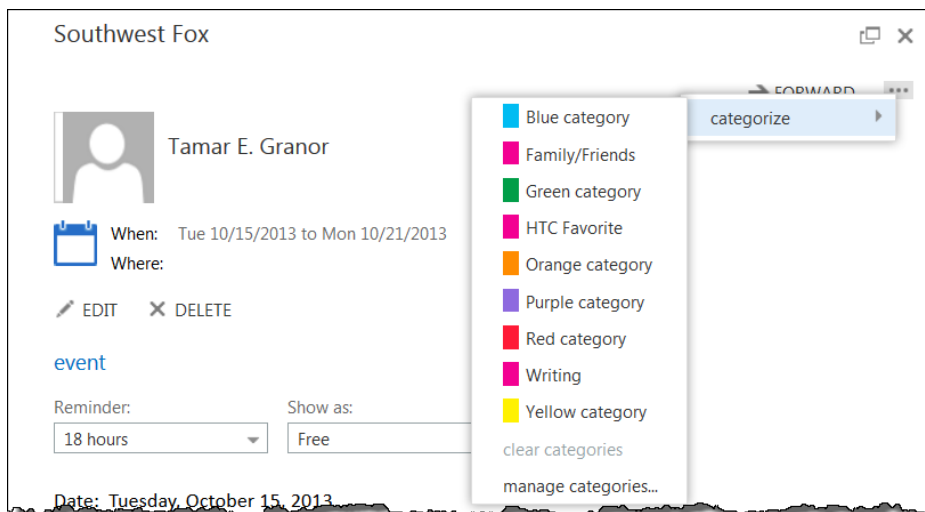
**Figure 49.** For recurring appointments, you choose whether to edit this instance or the series as a whole.

Double-click on an appointment to open the larger view shown in **Figure 48**. From there you can click Edit to open the editing window; as with the pop-up version of the appointment, if it's recurring, you see the menu in **Figure 49**.

The detailed appointment view has an ellipsis on the right-hand side. Click it to open a menu. If you're viewing a single occurrence of a recurring appointment, the only item available is "Open Series," highlighted in **Figure 50**. For stand-alone appointments or recurring series, that menu contains "Categorize," which lets you color-code the appointment. In addition, next to the ellipsis, there's a button to let you forward the appointment to other people; **Figure 51** shows the menu expanded.



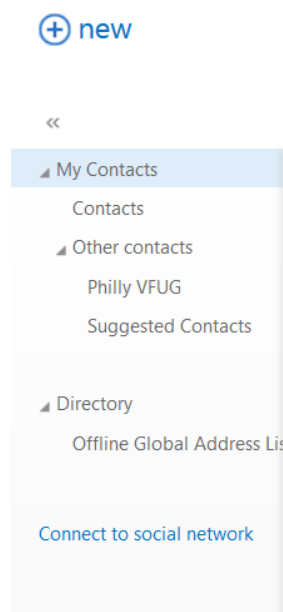
**Figure 50.** When you're viewing a single occurrence of a recurring appointment, you can switch to viewing the series instead.



**Figure 51.** You can categorize and forward appointments from the detailed view.

## Managing Contacts

The final Outlook component available in the Office 365 suite bar is contacts, listed as “People.” As with several other components, there are three panes here. The left pane, which is collapsible, shows what contact lists are available; see **Figure 52**. You can click on any of the lists to filter what appears elsewhere. The “Directory” link is relevant only for organizations with more than one account. It provides access to the “company directory.”



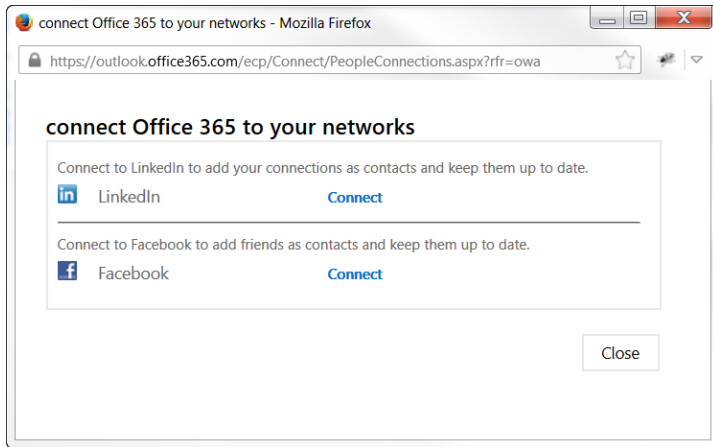
**Figure 52.** The left pane in People shows the available contact lists.

The “Connect to social network” link lets you see all your LinkedIn connections and Facebook friends with your contacts. When you click it, the form shown in **Figure 53** opens. (Because I’m sure I want to make that connection, I haven’t gone any farther with this process, but it’s documented at <http://office.microsoft.com/en-us/support/connected-accounts-HA102836325.aspx>.)

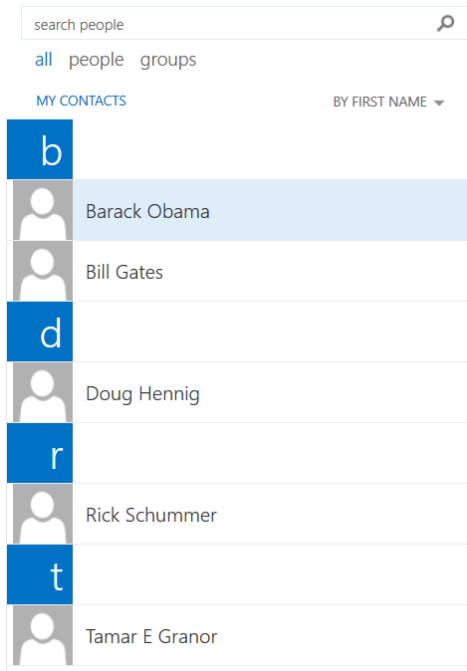
The center pane in People (**Figure 54**) shows the contact list. The dropdown on the right, shown in **Figure 55**, lets you specify the sort order. The links at the top let you show all contacts, just individuals or just groups; groups are what used to be called “distribution lists,” lists of contacts under a single name.

The right pane shows details for whatever contact is selected in the center pane, as in **Figure 56**. The icons under the name allow you to send an email and schedule a meeting, respectively. Clicking an email address also lets you send an email. Click “notes” to see any notes stored in the contact.

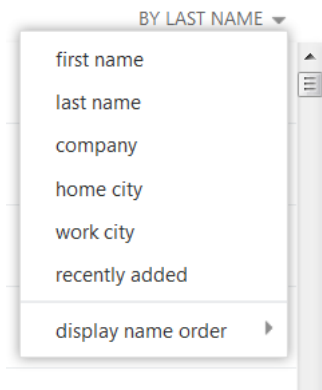




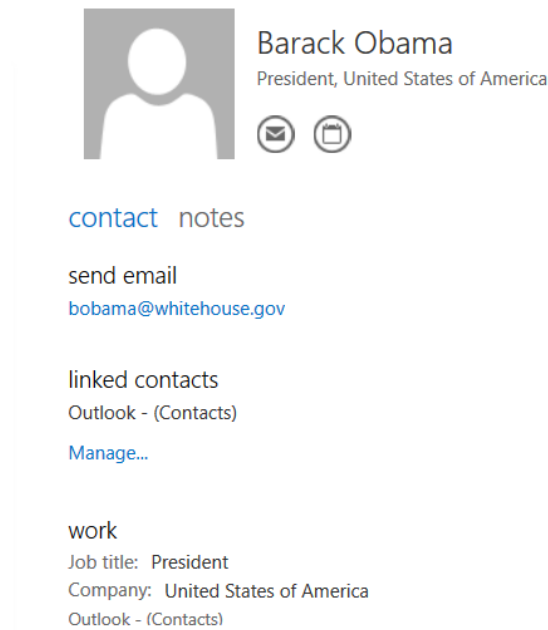
**Figure 53.** This form lets you connect LinkedIn connections and Facebook friends to your contact list.



**Figure 54.** The center pane of People shows the specified contacts in the order you indicate.

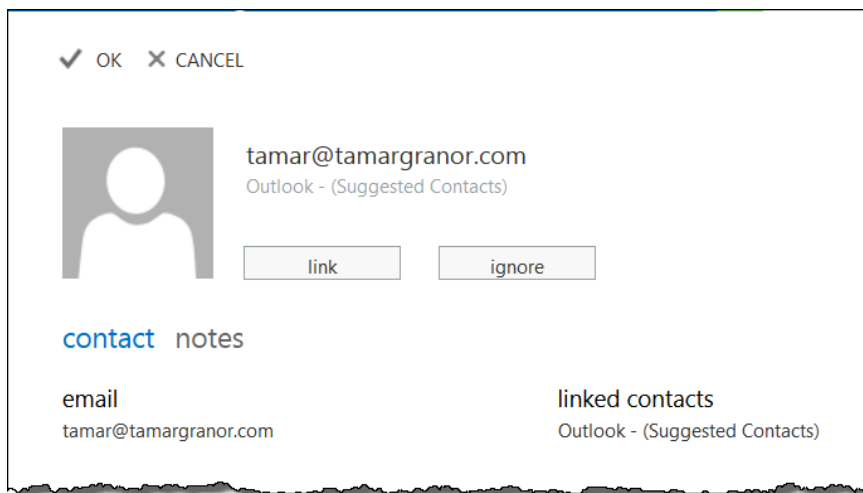


**Figure 55.** You can sort contacts in a number of ways.



**Figure 56.** The right pane of People shows an individual contact.

The “Manage” link lets you connect a contact to other contacts or to email addresses you’ve used recently, so they show up on a single Contact card. For example, when I click the Manage link of my own record, one of the suggestions is [tamar@tamargranor.com](mailto:tamar@tamargranor.com), shown as a “suggested contact” in Outlook. When I click that address, the form in **Figure 57** appears. If I choose to link this contact, when I refresh my contact card (by clicking away and click back in the list of contacts), the additional email address is shown, as in **Figure 58**.



**Figure 57.** Contacts lets you create connections between multiple contacts.



**Figure 58.** After linking another email address to a contact record, it appears on the Contact card.

As in the other Outlook components, click the pencil icon to edit a contact; the editing form is shown in **Figure 59**. The plus signs in the form are not for expanding and contracting a section of information, as you might think, but for adding information. For example, to add another email address, you click the plus sign next to “email,” and textboxes appear to enter another email address, as in **Figure 60**. Clicking the plus sign for “other” pops up a menu (**Figure 61**) to let you decide what type of information to add. When you’re done editing, click “SAVE” at the top of the form to keep your changes.

The ellipsis button next to the pencil button for a contact opens a dropdown; the only item there is delete, which removes the contact.

Contacts from your organization’s directory look a little different; **Figure 62** shows my record in my company directory. The green bar on the left hand side indicates that I’m available for instant messaging right now. (The dropdown menu from your name lets you set your availability.)

SAVE     DISCARD

First name:

Middle name:

Last name:

**+ email**

Email:

Display as:

Email:

Display as:

Recently emailed

Email:

Display as:

**+ work**

**+ address other**

Street:

City:

State/Province:

ZIP/Postal code:

Country/Region:

**+ phone**

**+ other**

**Figure 59.** Use this form to edit contact information.

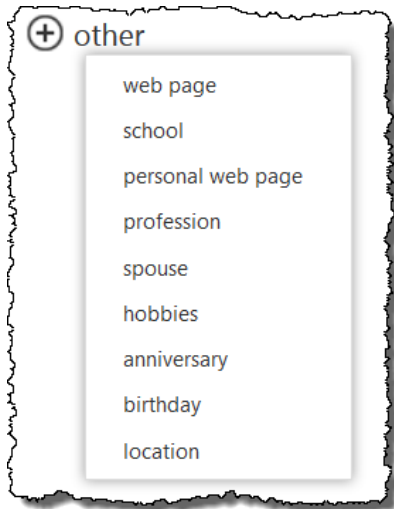
Email:

Display as:

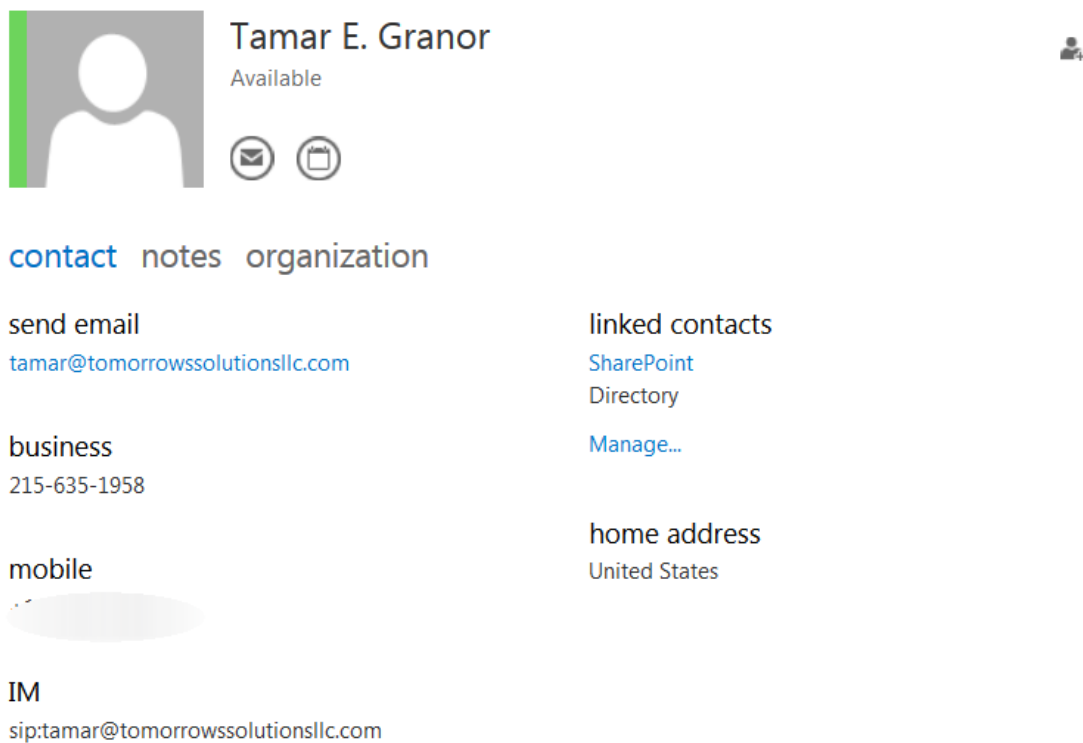
Email 2:

Display as:

**Figure 60.** You can add more information to a contact record by clicking the appropriate plus sign.



**Figure 61.** You can add various types of information to a contact record, using the “other” section.

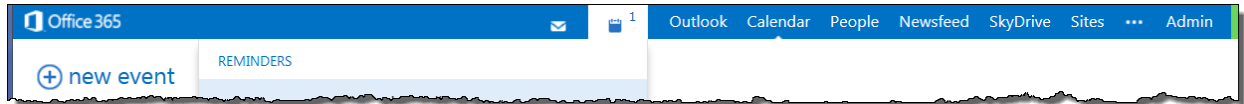


**Figure 62.** Contacts from your organizational directory include IM information and a link to the person’s profile.

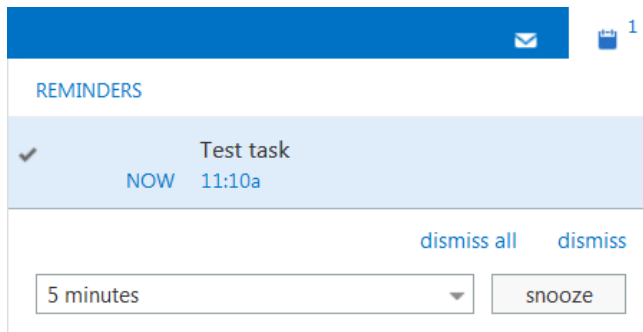
## **Notifications**

The Outlook Web App provides notifications for new emails, calendar events and tasks on the suite bar. **Figure 63** shows an email notification and a task notification. For tasks and

events, a reminder pops up, as shown in **Figure 64**; double-click the reminder to open a separate window with the task or appointment information.



**Figure 63.** Notifications for new emails and for events appear on the menu bar.



**Figure 64.** Task and event reminders pop up over the current display.

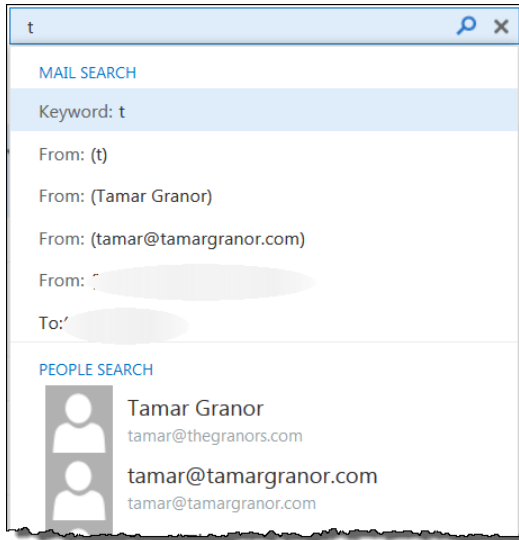
Clicking the email icon shows a preview of the new message(s).

## ***Searching in Outlook***

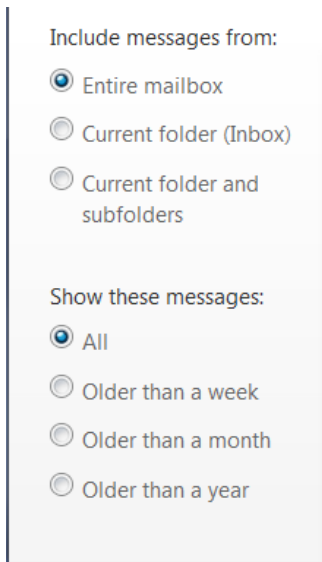
When in Mail or People view, a search textbox appears above the center pane. It operates a little differently in each view. In Mail view, when you start typing, a dropdown appears to let you choose what to search for and see potential matches; see **Figure 65**. In addition, a pair of option groups (**Figure 66**) appears in the left pane to let you narrow the scope of the search. When you hit Enter, click the magnifying glass, or choose one of the items listed in the dropdown, your email is searched and the center pane shows the matching records. Click the 'X' in the search box to clear the results and return to your previous location.

As **Figure 65** shows, the search box in Email view can also search for contacts. In addition to showing existing contacts that match what you've typed, the final item in the dropdown is "Search Contacts and Directory." When you click that item, you're switched to People mode, and the center pane shows contacts who match what you typed.

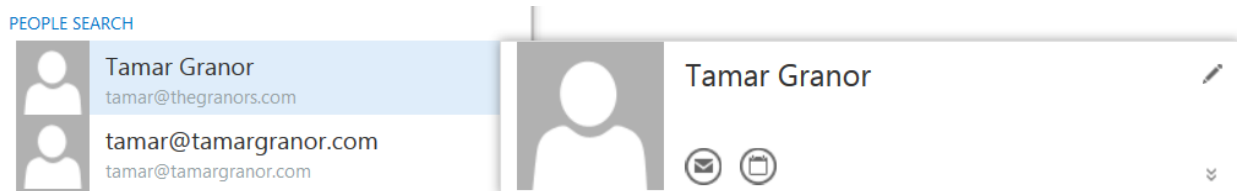
The matches shown in the People Search section of the dropdown behave a little differently. When you click one of those, a pop-up appears (**Figure 67**). You can send email, schedule a meeting or open the contact for editing right from the pop-up. Click the chevron to open a more detailed view of the contact's information. (Interestingly, I don't see a way to switch to Contacts with this contact selected.)



**Figure 65.** When you use the search box in email mode, this dropdown lets you quickly indicate what you want.



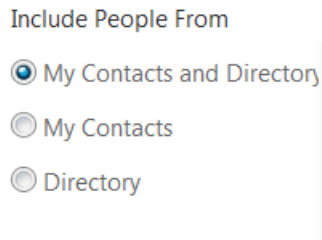
**Figure 66.** These option groups let you decide which folders and messages to search.



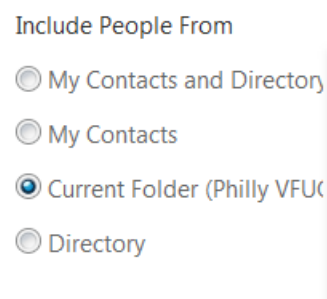
**Figure 67.** Clicking a name in the People Search section of the search dropdown opens a pop-up window for that person.

In Contacts, the search box searches only your contacts and there's no dropdown. Type your search string into the search box and hit Enter or click the magnifying glass, and the center pane shows matching records. An option group appears in the left pane (**Figure 68**)

for you to choose which contact lists to include. If you were looking at a sub-folder from your contacts when you began the search, it also appears as an option, as in **Figure 69**.



**Figure 68.** This option group lets you indicate whether to search only your contacts, only your organization's directory, or both.



**Figure 69.** The currently select contacts folder appears in the search options.

As far as I can tell, there's no way to search the calendar in Office 365.

## Create sites with Office 365

One of my principal reasons for switching to Office 365 was its ability to host my company website. While there's lots of inexpensive hosting available, bundling hosting with an Exchange Server made it essentially free.

The underlying technology for websites in Office 365 is SharePoint. A full discussion of SharePoint is beyond both the scope of this session and my knowledge. That's actually the point, too; I was able to build an attractive, dynamic website without having to learn too much. (Full disclosure: as noted earlier in this paper, my son was on the SharePoint team, and he did serve as tech support in my early adventures.)

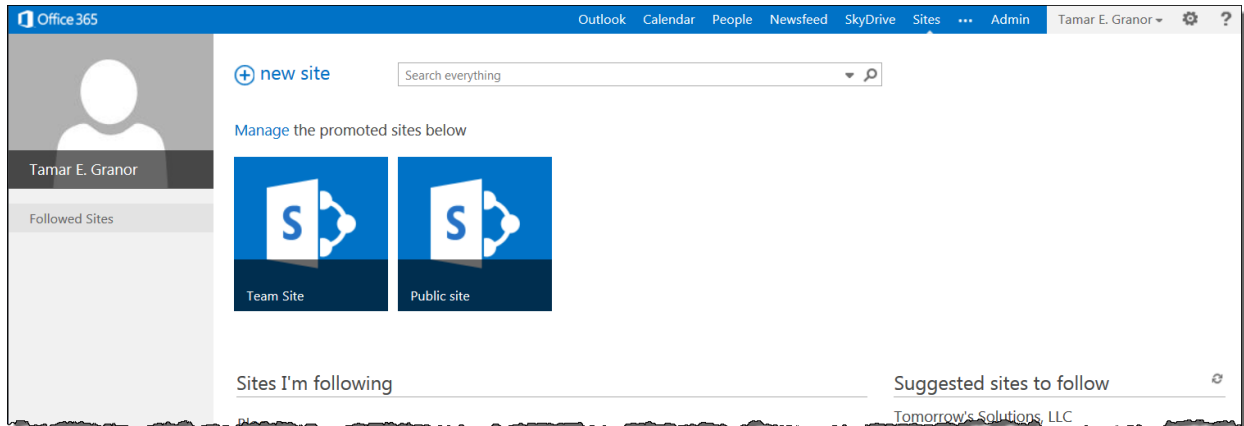
Office 365 supports two kinds of sites, a single public site and as many private sites (called *team sites*) as you want to build. A team site might represent a project or a team or pretty much anything. Imagine, for example, a team site containing all the design documents for a project, along with a wiki for the team to discuss the project.

A SharePoint site is built from pages (as with any website); in addition to typical page contents (formatted text and so forth), those pages can contain what SharePoint calls "web parts" and "app parts." Both web parts and app parts are essentially UI widgets that let you put content on pages along with functionality.



## Getting started with Sites

Not surprisingly, sites are accessed through the “Sites” item on the Office 365 suite bar. When you choose it, you see something like **Figure 70**. You can have only one public site (which you can associate with the domain you used to create your Office 365 account), but you can create many team sites.



**Figure 70.** You start out with a team site and a public site.

While there are some differences between private and public sites, much of the work to set them up is the same. SharePoint is best known for its strength in integrated document and content management, so sites are structured around documents and collections of documents. SharePoint provides various ways to organize documents and to share them with other members of your organization and the public.

### Creating a public site

The public site starts out with a set of sample pages that are likely to be useful to many businesses: Home, About Us, Contact Us, Directions and Blog; see **Figure 71**. You can get rid of any of them and add any that you'd prefer.

There's a ribbon below the suite bar. It contains Browse, Page and Site tabs for editing the site, as well as links (on the right-hand side) for actions. The ribbon doesn't appear in the published site visitors see. Neither do the other trappings of Office 365. **Figure 72** shows the home page of the public website I created with SharePoint for my business.

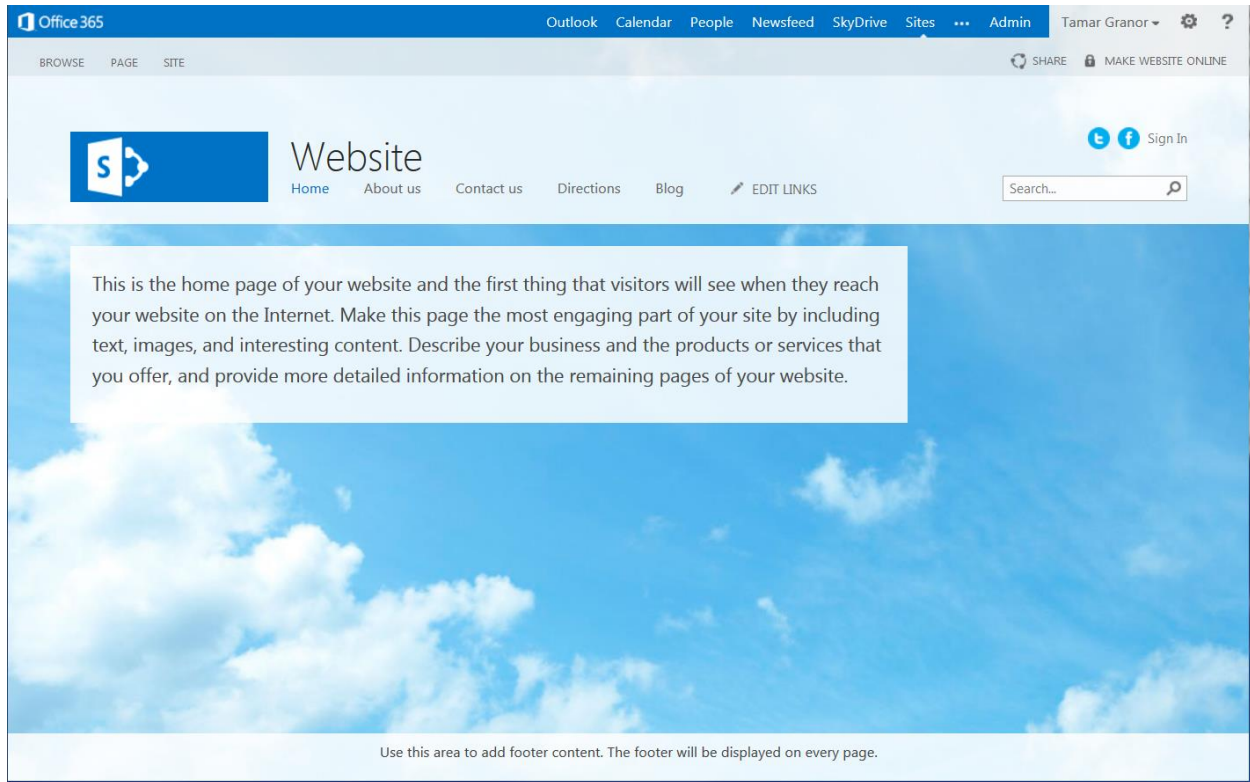


Figure 71. The public site starts out with some standard pages.

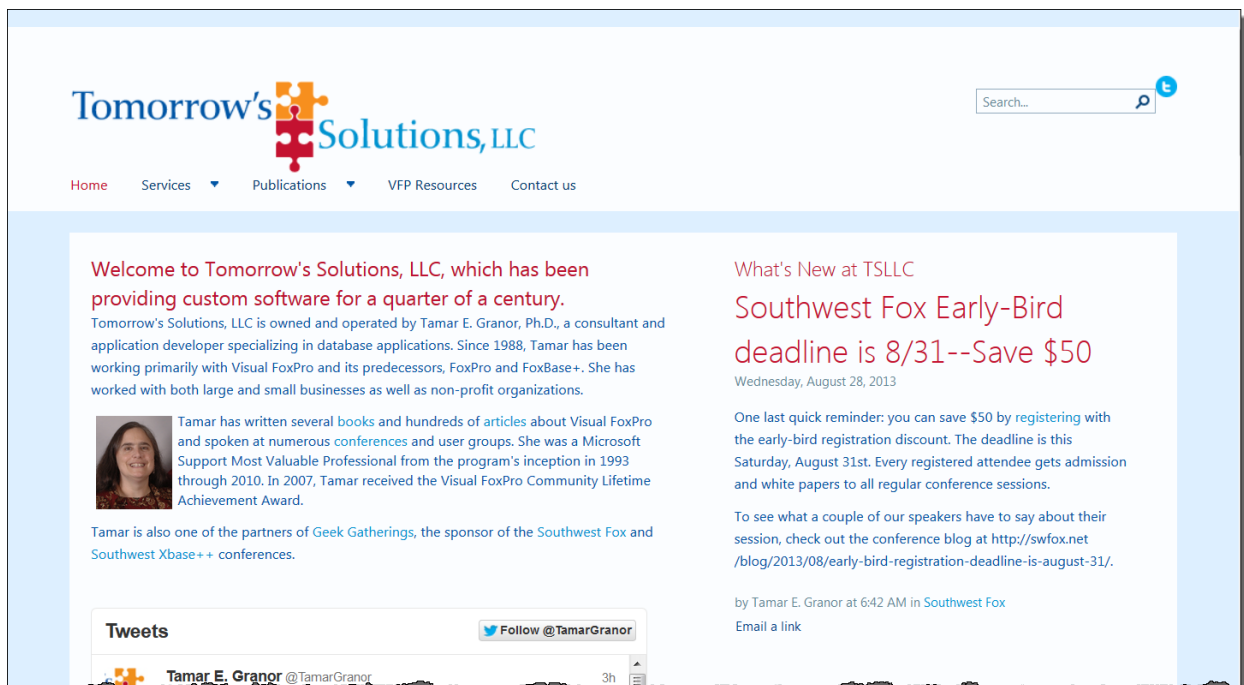


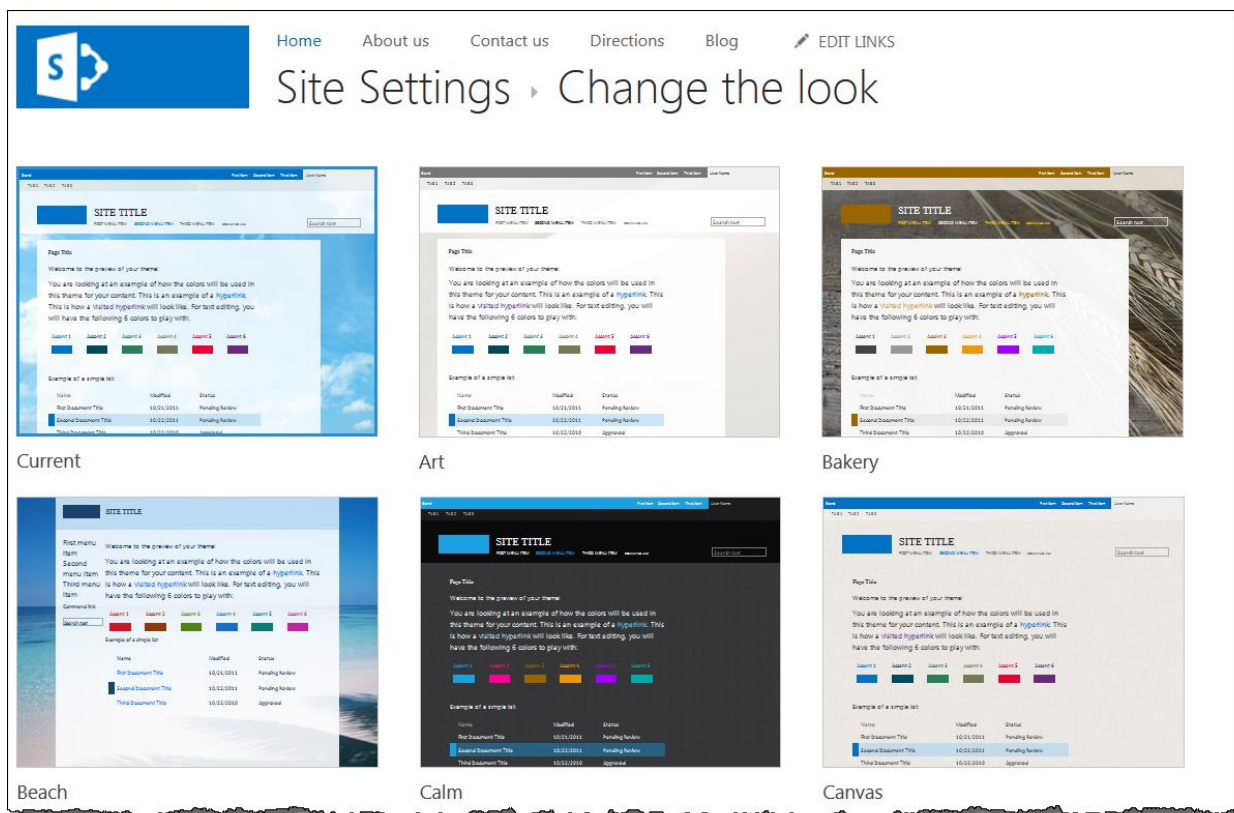
Figure 72. When you publish a public site to the web, visitors can't tell it was created in Office 365.

## Choosing a style

The first step in turning the generic public site into something that represents your company is choosing an underlying style for the site. This determines both layout and color scheme. Presumably, you want your company's logo and color scheme; you may also want to choose fonts that reflect your company style. (You can adjust all of this fairly precisely; see "Customizing your site's design," later in this document.)

Choose "Site" on the ribbon and click "Change the Look"; the Change the look page of Site Settings appears. **Figure 73** shows part of the page. A theme is really just a starting place. The background image, the position of the navigation menu, and the actual colors and fonts can be changed.

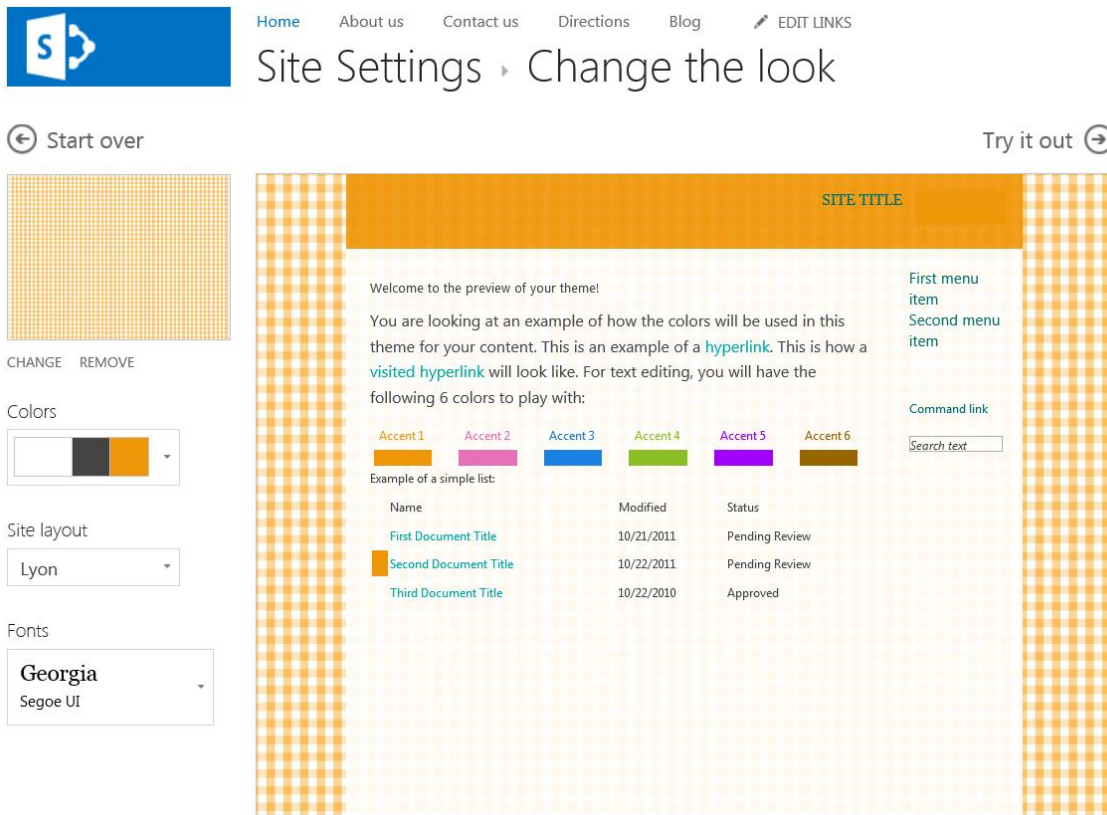
Since the theme named "Orange" (in the second page of themes) seems a good match for Southwest Fox's colors, I'll use it for this demo site, which will contain my Southwest Fox white papers.



**Figure 73.** This page lets you pick a basic color scheme.

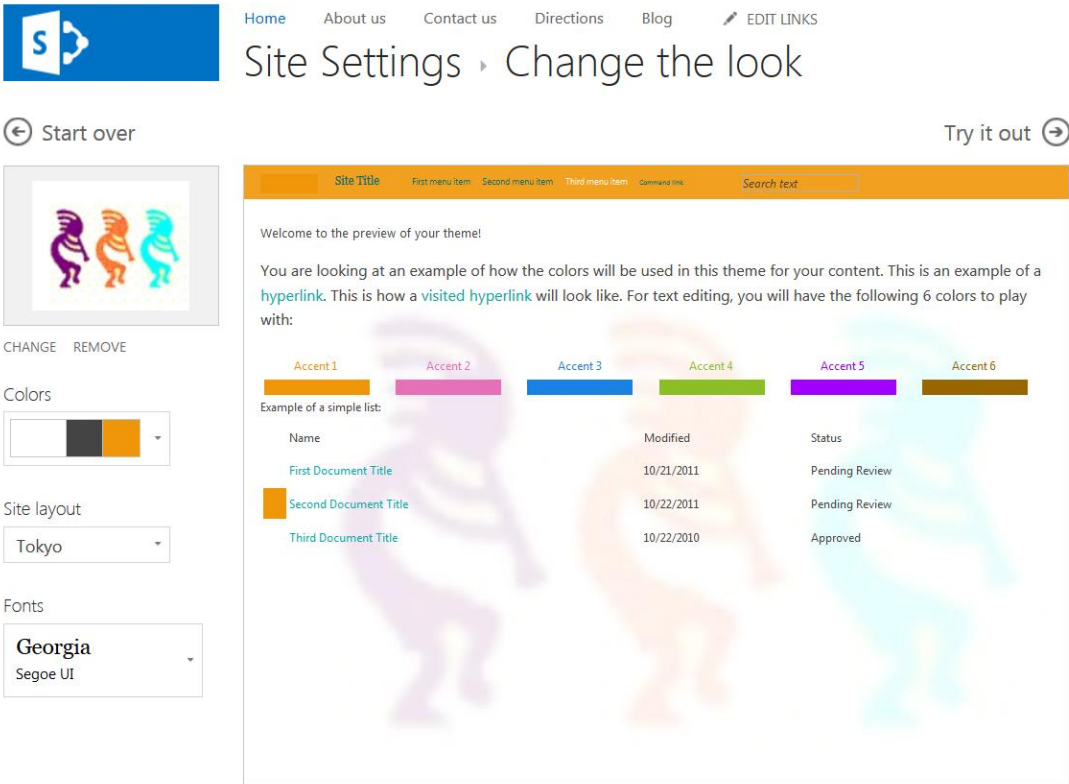
Click the theme you want and the page shown in **Figure 74** appears. Here, you can choose an entirely different set of colors or fonts, and the layout of the site (top menu vs. side menu and so forth).

You can also specify a background image for the site by dragging and dropping an image into the specified box (or clicking “Change” and navigating to the desired image file). In **Figure 75**, I’ve added the Southwest Fox kokopelli logo as a background image.

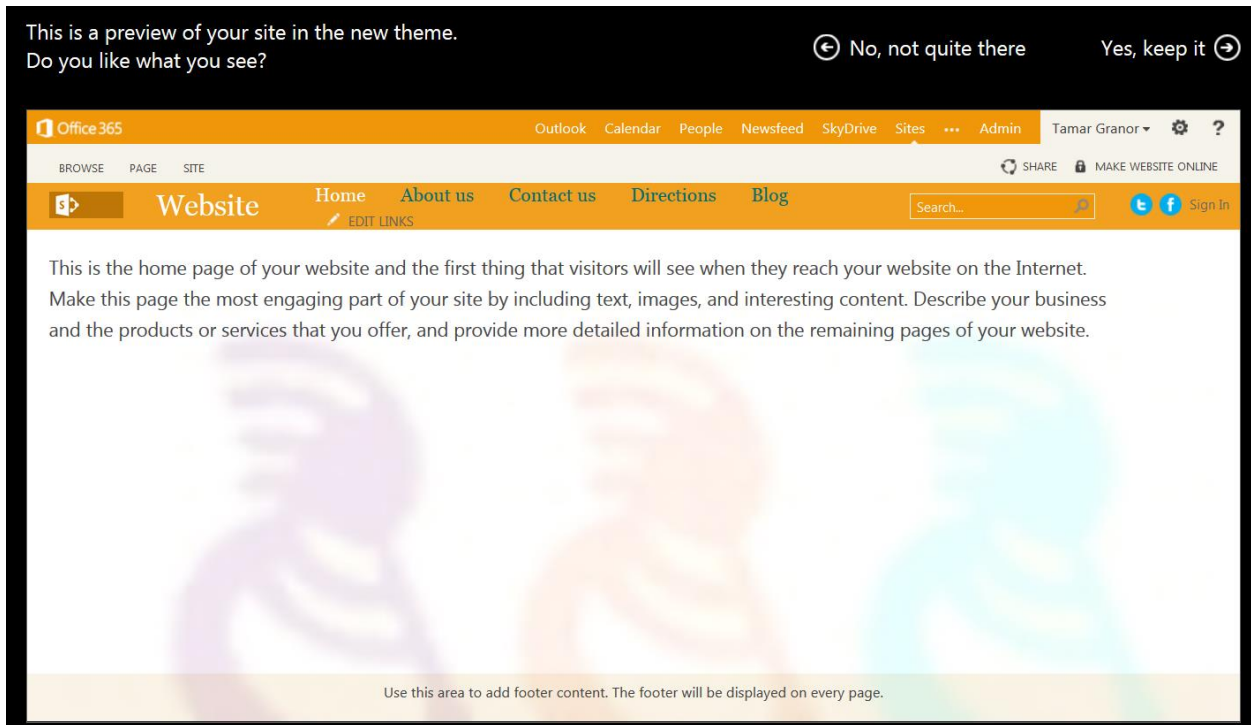


**Figure 74.** This page lets you tweak your theme. You can change colors, fonts and layout.

Once you’ve finished tweaking the settings, click Try it out to see what your site will look like. You see a preview of the site with the selected colors, fonts, layout and background image, as in **Figure 76**. When you click “Yes, keep it,” you return to the home page for the site, with your new appearance settings in effect.



**Figure 75.** You can specify an image to use as the background for your site.

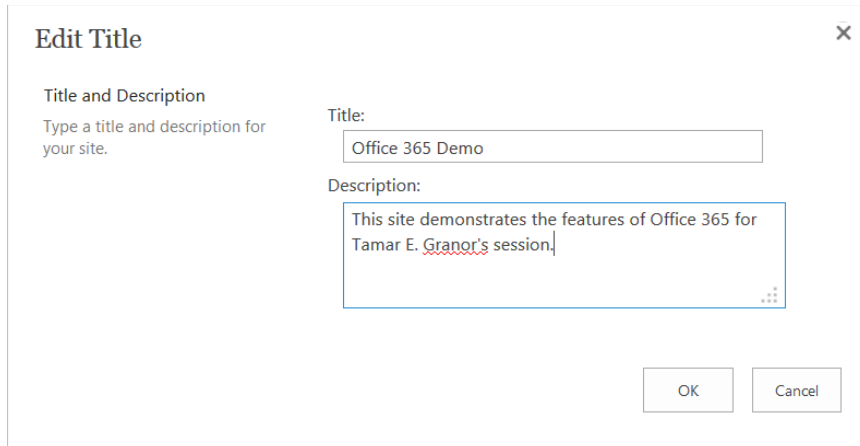


**Figure 76.** When you're finished adjusting appearance options, you see a preview of your site.



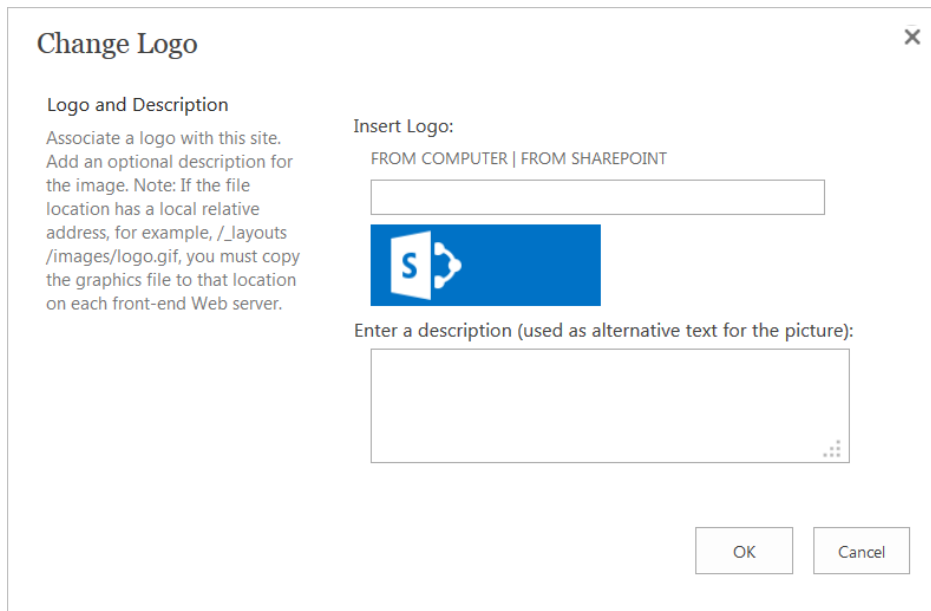
## Personalizing your site

In addition to setting colors and fonts, you can associate the site with the company (or whatever it applies to) to by specifying the title, description and logo to appear. From the “Site” tab on the ribbon, choose “Edit Title” and a dialog (**Figure 77**) appears to specify your site’s title and description.

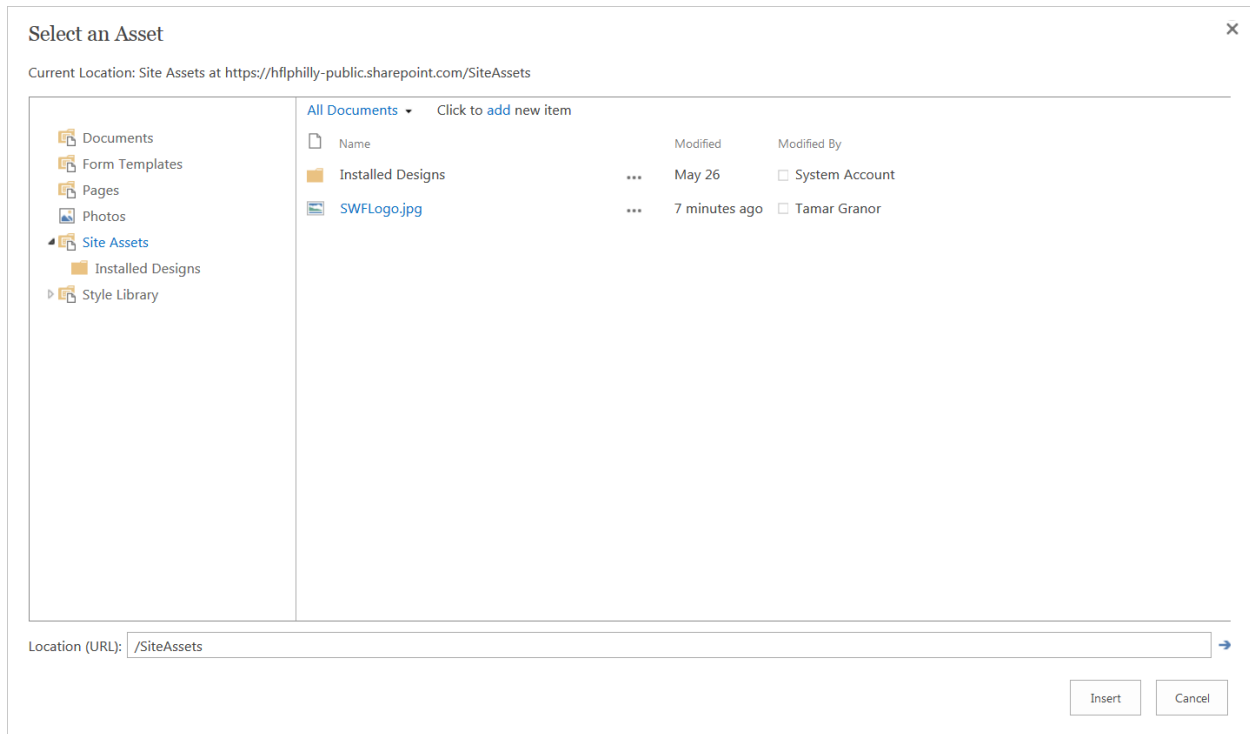


**Figure 77.** This form lets you specify your site’s title and description.

To add your logo, choose “Change Logo” from the ribbon’s “Site” tab. In the dialog that appears (**Figure 78**), you can either upload an image from your computer or use one that’s already stored in SharePoint. Since I want the same kokopelli logo that I’m using for the background, I chose From SharePoint and the dialog in **Figure 79** appears. I chose the single file shown there.

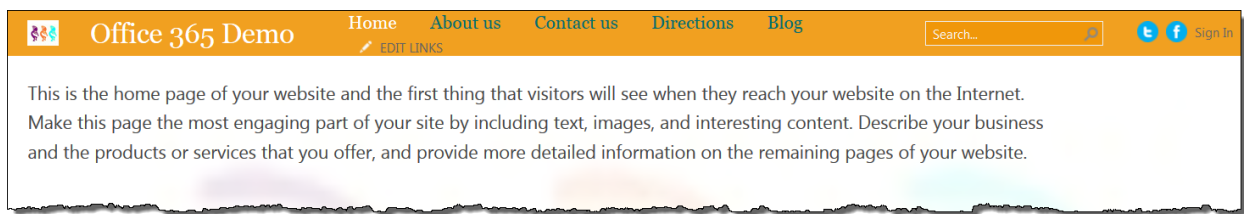


**Figure 78.** This dialog lets you specify your company logo to appear on the site.



**Figure 79.** This dialog lets you pick a file already stored in SharePoint.

After making these changes, the site table was changed and the SharePoint logo was replaced by the logo I specified, as in **Figure 80**.

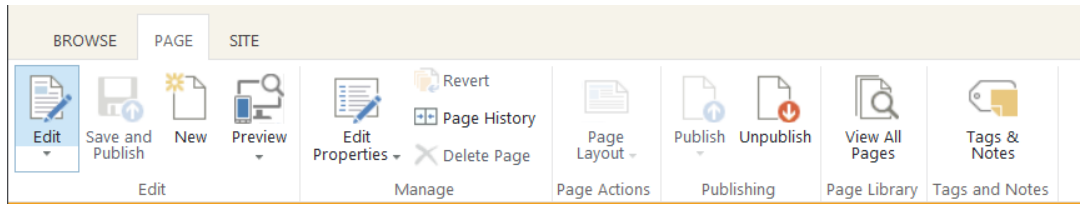


**Figure 80.** Once you specify a custom title logo, they appear on every page.

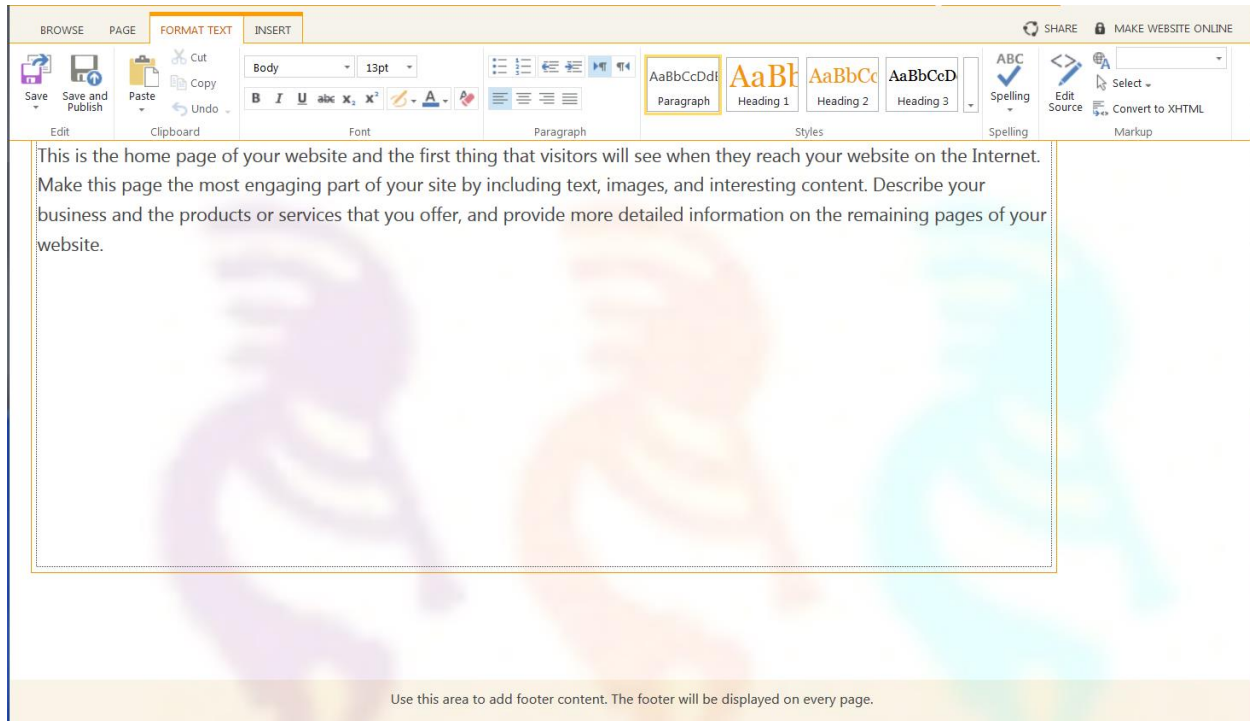
## ***Adding content***

Although SharePoint is a tool for document management and sharing, SharePoint sites can contain a variety of content. The simplest is formatted text, as on any website.

To start adding your content to the home page for the site, click Page and then choose Edit, as in **Figure 81**. The display changes to show you the structure of the page and to let you make changes. **Figure 82** shows the home page for the site in edit mode.

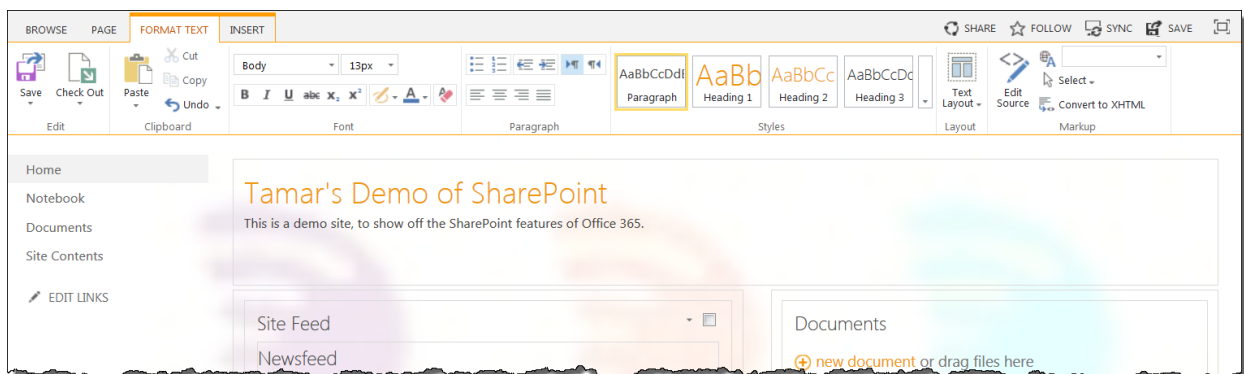


**Figure 81.** This ribbon menu is available when editing a site.



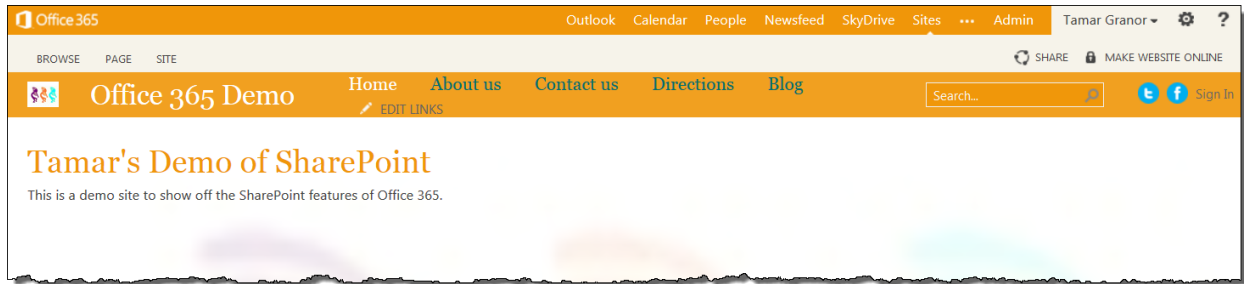
**Figure 82.** In edit mode, you can see the structure of a page, as well as change its content.

I entered some text and used the Format Text tab of the ribbon to make one line a heading, as in **Figure 83**. Since I was done editing the page for now, I clicked Save on the ribbon to save my changes. **Figure 84** shows the page as it now appears.



**Figure 83.** You can enter text and set styles and formatting, similar to the way you do so in Word.





**Figure 84.** After making a few changes, the home page of the public site looks like this.

To modify any of the other built-in pages, just click the link for that page, and then edit it in the same way. However, formatted text is only the beginning of what you can do with a SharePoint site. What makes a SharePoint site powerful is web parts and app parts.

## Web Parts and App Parts

A *Web part* is a “customizable Web page element that can be added to SharePoint pages,” according to [http://www.rharbridge.com/?page\\_id=60](http://www.rharbridge.com/?page_id=60). In other words, they’re widgets you can put on pages you create with SharePoint.

An *app part*, according to Microsoft (<http://msdn.microsoft.com/en-us/library/gg191706%28v=office.15%29.aspx>), is “a component of an app for SharePoint that can be embedded on a site page to expose the functionality of the app.” The same glossary defines an *app for SharePoint*, as “a cloud-enabled app that integrates rich, scenario-focused content and services into a SharePoint environment.” In other words, also a widget, but this one not built into SharePoint, but added.

From the perspective of building a site, web parts and app parts are pretty much the same, except that web parts are available off the bat and app parts have to be added. There are a number of apps provided with Office 365, plus a SharePoint Store that includes apps you can add to your sites. Some are free, some are not. Be aware that some apps can only be used on team sites, not on your public website. (I suspect the inverse may also be true, but haven’t spent enough time with team sites to confirm that.)

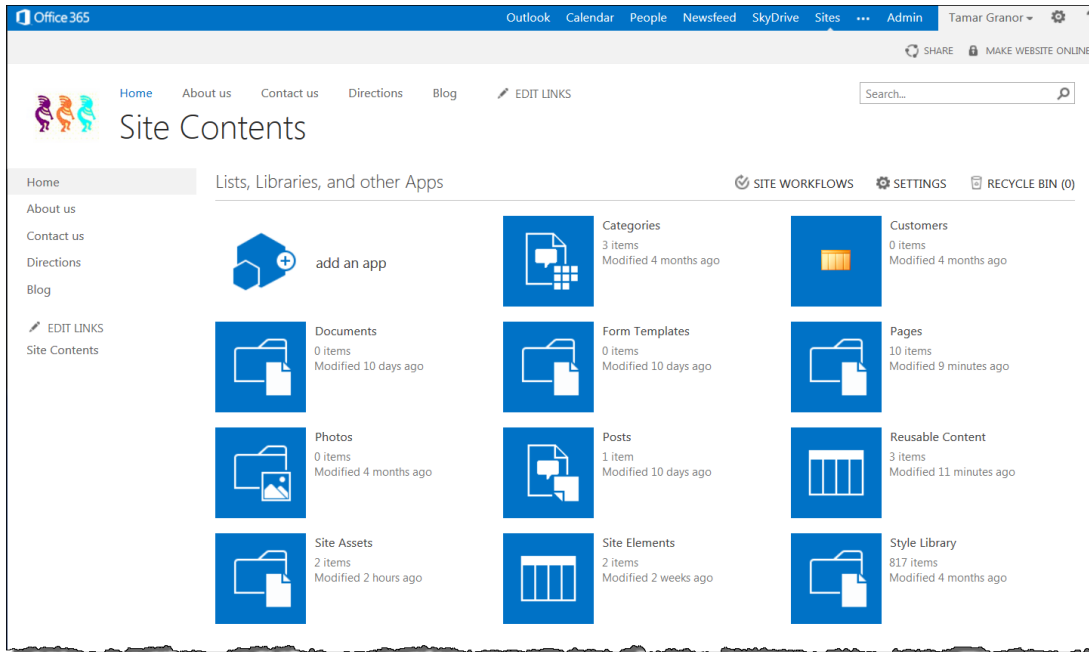
Typically, web parts and app parts let you collect some information and then provide one or more ways (called *views*) of displaying it. You can drop a web part or an app part onto a page of a SharePoint site and choose which of its views the page uses.

In my experience, two of the apps that come with SharePoint are essential to site-building: Document Library and Custom List. As the name suggests, a Document Library contains documents; Microsoft describes it this way:

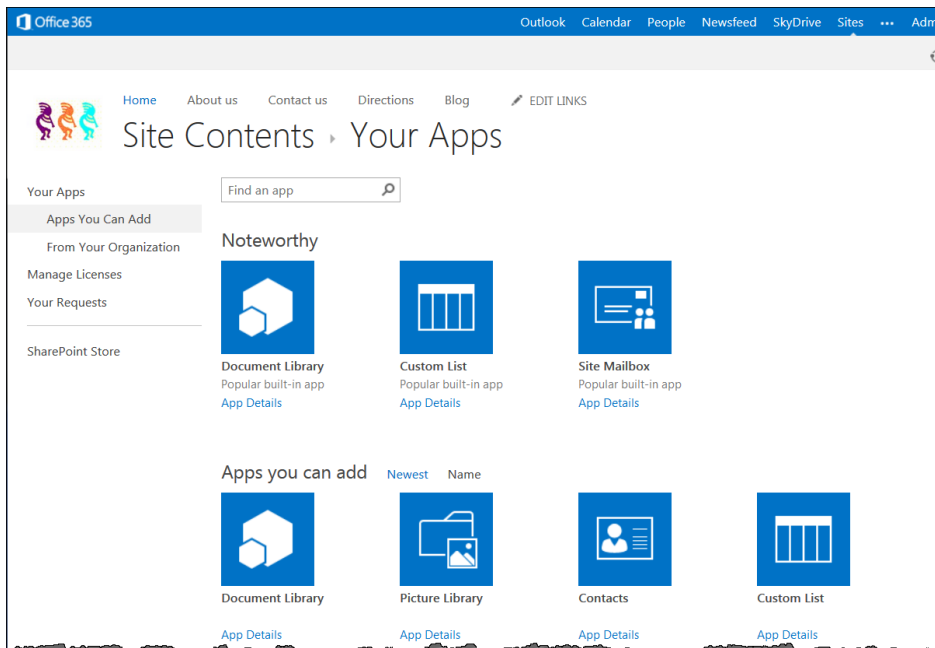
Use a document library to store, organize, sync, and share documents with people. You can use co-authoring, versioning, and check out to work on documents together. With your documents in one place, everybody can get the latest versions whenever they need them. You can also sync your documents to your local computer for offline access.

“Documents” here means any kind of file, not just Word files. You can add spreadsheets, PDFs, presentations, and more.

Let’s create a Document Library and add it to the home page of our public site. To add an app to your site, choose Site Contents from the Settings menu. You’ll see something like **Figure 85**. When you click “add an app,” the Your Apps page (**Figure 86**) appears.

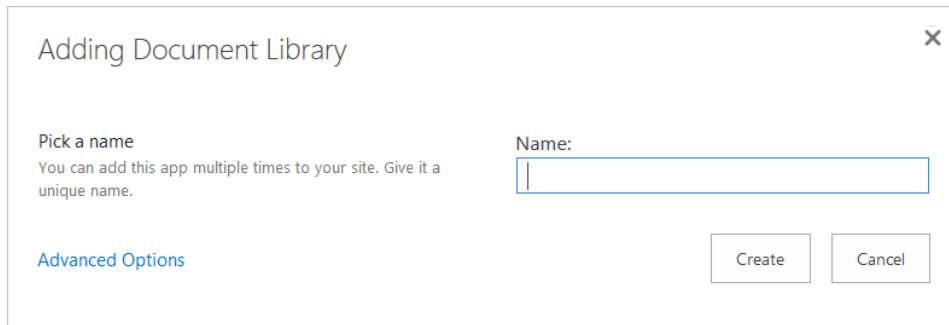


**Figure 85.** The Site Contents page lets you see all the components of your site and add new ones.



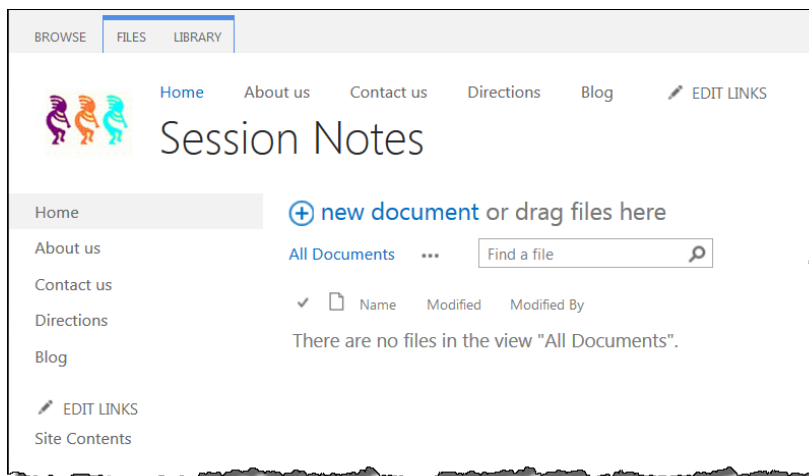
**Figure 86.** This page shows the apps available to add to your site.

Click the app you want to add. What happens next depends on the app you choose, but in many cases, the first step is naming the new app instance, as in **Figure 87**. I called this one Session Notes, because I plan to put all my Southwest Fox white papers into it.



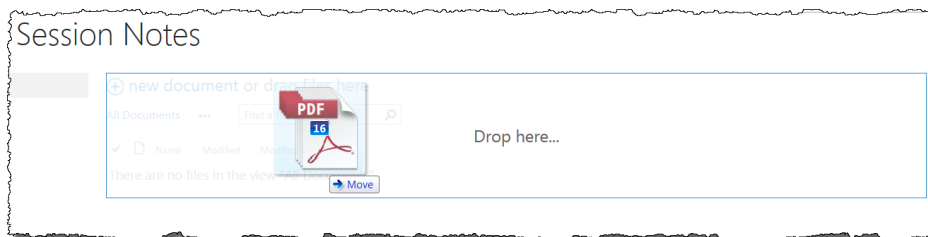
**Figure 87.** The first step in adding many apps to a site is naming the instance of the app. As this dialog indicates, some apps can be added multiple times and need a unique name for each instance.

After clicking Create, the new app appears on the Site Contents page. You can click it to begin working with it; **Figure 88** shows the result.



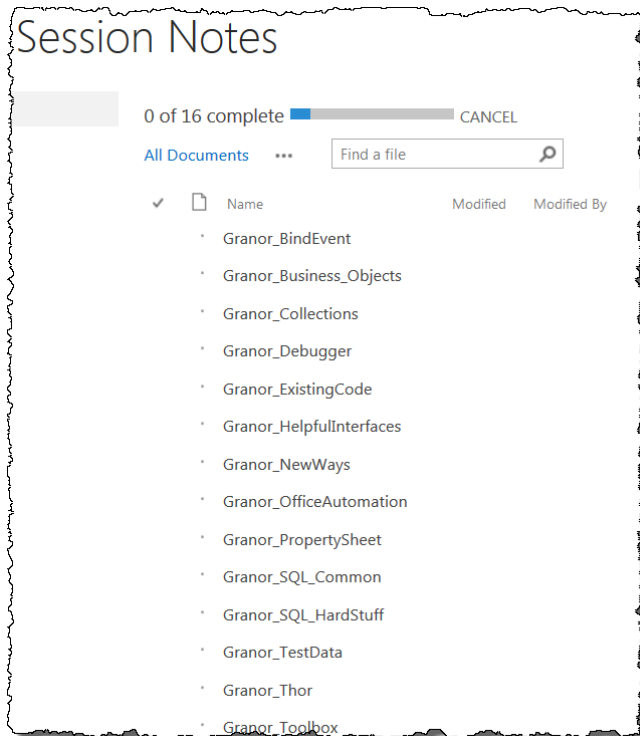
**Figure 88.** When you click a Document Library to begin working with it, you see it in this format.

As the figure suggests, the easiest way to add documents to a Document Library is to just drag and drop. I have a folder that contains PDFs of my white papers from past Southwest Fox conferences. To add them to this site, I just open Explorer, select them and drag them into the Document Library where indicated, as shown in **Figure 89**.



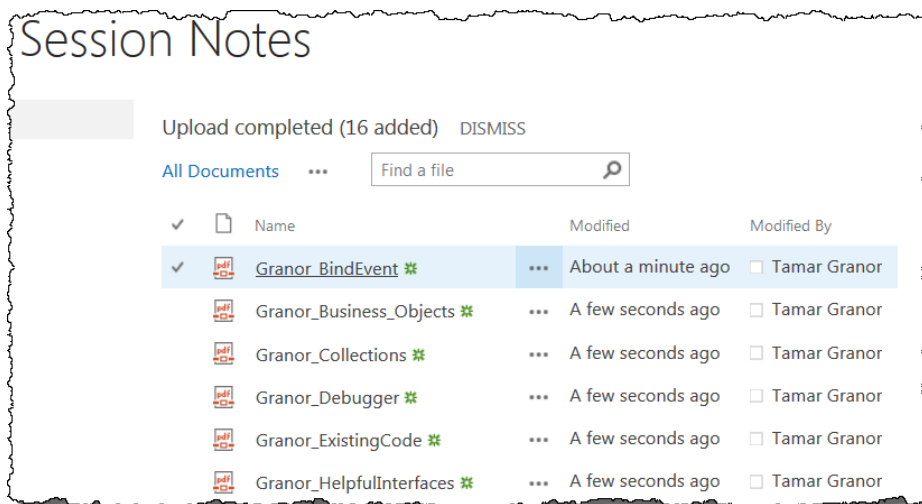
**Figure 89.** When you drag files over a Document Library, it becomes a drop target.

Once you drop the documents, SharePoint starts uploading them to the site, as in **Figure 90**.

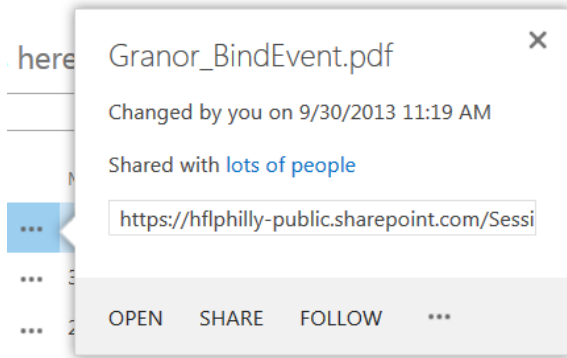


**Figure 90.** When you drop documents, SharePoint uploads them.

After the documents finish uploading, they appear as links, as in **Figure 91**. Click a link to open the document. The ellipsis next to the document name opens a pop-up (**Figure 92**), called a *document callout*, with information and actions for the document. The textbox provides a link to the document that you can copy and paste.

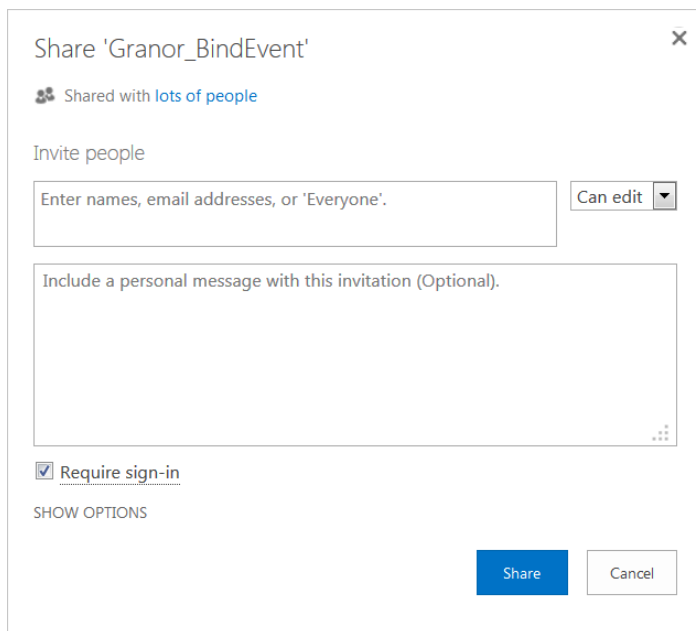


**Figure 91.** Documents you drop into a list appear as links. Click one to open the document.



**Figure 92.** Click the ellipsis next to a document to see this information, with its associated menu.

The bottom row of the document callout is a menu. “Open” opens the document, just as clicking its link does. “Share” lets you give people, both inside and outside your organization, access to the document, using the dialog in **Figure 93**. You can specify whether they can edit the document or only view it, as well as whether they have to sign into Office 365 to see it.



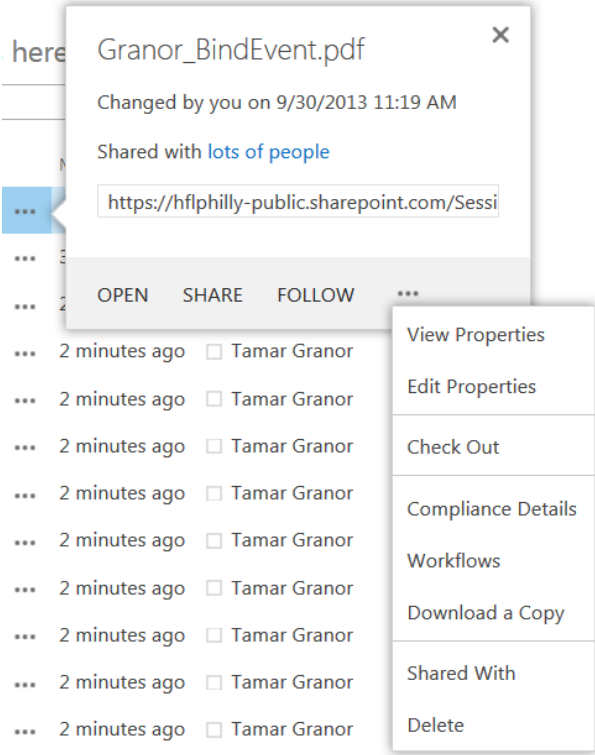
**Figure 93.** Use this dialog to give others access to a document.

In fact, SharePoint’s sharing model is far more robust than **Figure 93** would indicate. This dialog is a wrapper around a complex model for giving permissions. (To work with the full model, choose “Site settings” from the Settings menu on the suite bar, and choose “Site Permissions.”) It’s also worth noting that what you see for an individual document depends on your permissions for it; if you don’t have permission to share it, an attempt to do so kicks off an approval workflow, asking the person who does have permission to share the document. (For a Document Library on a public site, you don’t need to worry about sharing the document; when the site is published, visitors will have access to the documents.

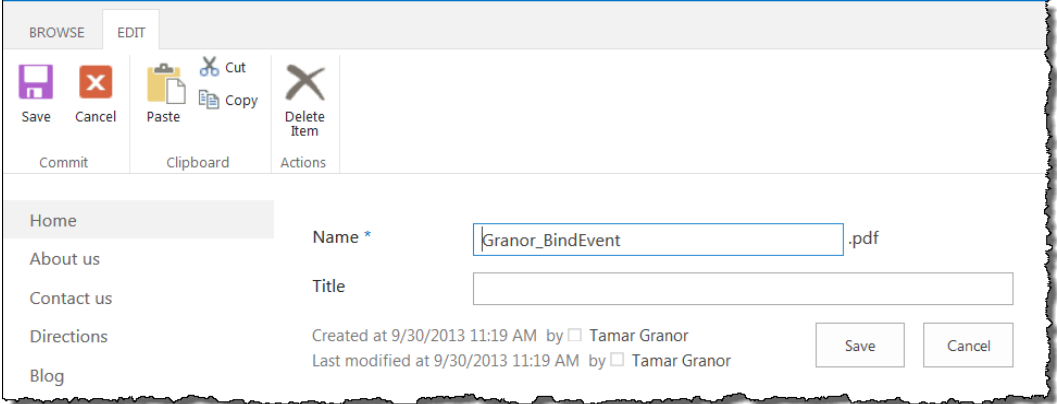
However, when you use a Document Library on a team site, SharePoint’s sophisticated sharing model offers lots of flexibility.)

The “Follow” menu item lets you indicate interest in a particular document. Once you follow a document, any changes to the document appear in your Office 365 newsfeed.

The ellipsis in the menu row opens another menu, shown in **Figure 94**. What shows up when you choose “View Properties” or “Edit Properties” depends on the document. For a simple PDF like the example, you see only the file name and a title for the document, as in **Figure 95**. Editing the file name actually changes the name of the stored file.



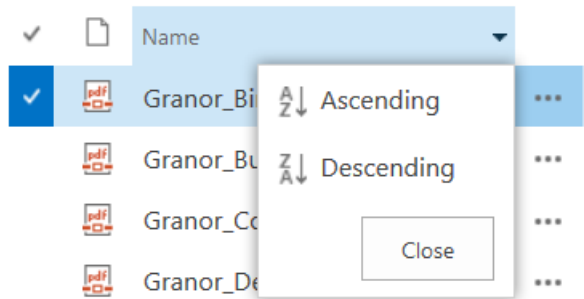
**Figure 94.** The ellipsis opens a pop-up, offering more options for working with the document.



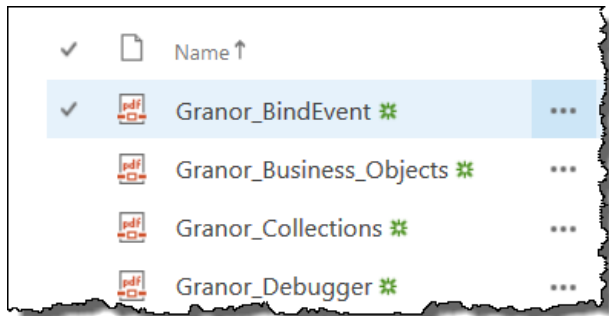
**Figure 95.** You can modify different properties for different types of documents.

As the “Check Out” item on the menu indicates, SharePoint has version control built in.

One thing that may not be apparent at all when looking at the Documents section is that the column heading “Name” actually opens a menu (**Figure 96**). After you choose a sort order, the header shows it (**Figure 97**).



**Figure 96.** The Name column header provides a menu for sorting the documents.

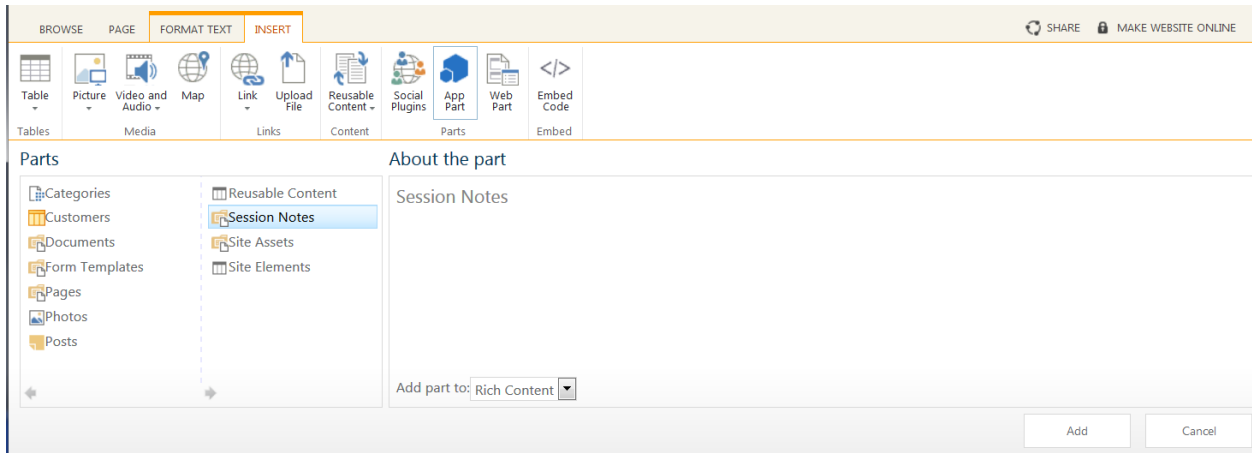


**Figure 97.** Once you’ve sorted a list, the header indicates the sort order.

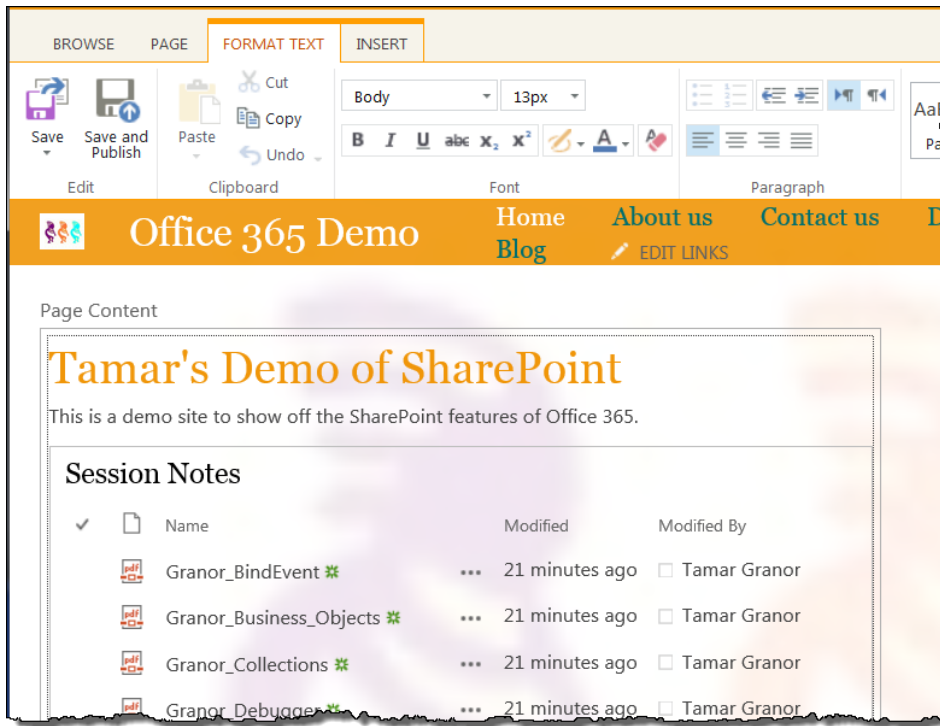
## Putting a Document Library on a page

So far, the Session Notes document library exists in the Site Contents, but isn’t visible on the site. To make it visible, we need to drop the corresponding App Part onto a page. To do so, put the relevant page into Edit mode and position the cursor where you want the Document Library to appear. Then, click the Insert tab on the ribbon, and then click App Part or Web Part to see what’s available. **Figure 98** shows the web part for the Session Notes app selected (though looking at it through the App Part item); once you click “Add,” the web part is added to the page, as in **Figure 99**.

For basic project documents, a list like this may be sufficient. However, you can do much more with a list of documents. When the page is in edit mode, a tiny icon (circled in **Figure 100**) opens a menu (shown in **Figure 101**). We’ll look at the most interesting item in this menu, “Edit Web Part,” after exploring how to create views. (See the section “Views,” later in this paper.)



**Figure 98.** Each app on your site offers a web part you can drop onto a page.

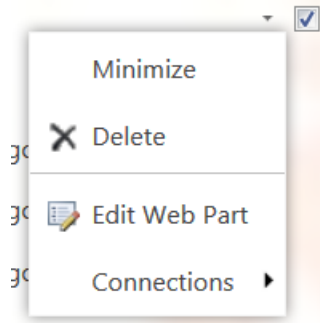


**Figure 99.** The app part is dropped onto the page, using its default view.



**Figure 100.** The tiny icon called out here opens a menu.



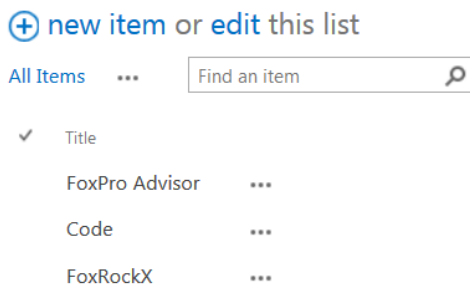


**Figure 101.** This menu lets you manipulate the document list.

## Creating and using Custom Lists

The other frequently used app type is Custom Lists. A Custom List is a list of items. You can use it on its own, or turn it into a look-up list for another app. For example, on my public website, I have a Document Library of articles I've written. I created a Custom List of publications in which those articles appeared, and then added that information to the Document Library. This Custom List of publications, shown in **Figure 102**, is pretty basic.

### Publications



**Figure 102.** The Custom List app lets you create any kind of list you want. In its most basic form, it just contains a single field.

To add a Custom List to a site, you follow the same set of steps described in the preceding section, “Putting a Document Library on a page.” Here, we’ll create a Custom List of conference tracks to assign to the documents in the Session Notes Document Library.

Once you open the page (**Figure 103**) showing the Custom List’s contents, you can either click New Item or click the Edit link to start adding items. Edit makes more sense when you have a number of items to add; that puts the list into a mode (**Figure 104**) that makes it easy to add items. You can type an item in and when you hit Enter, it’s saved and a new row appears for the next item; see **Figure 105**. When you’ve added all the items you want, click Stop; you return to a view of the complete Custom List (though it may be paged, if there are enough items), as in **Figure 106**.

Instead of entering items individually, you can also drag and drop data from Excel or other table-type programs, as long as the column list is similar.

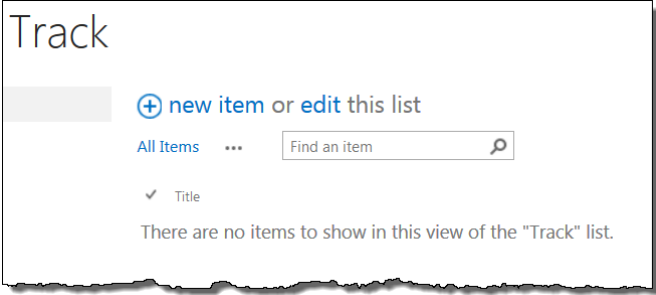


Figure 103. You can simply add new items to the Custom List.

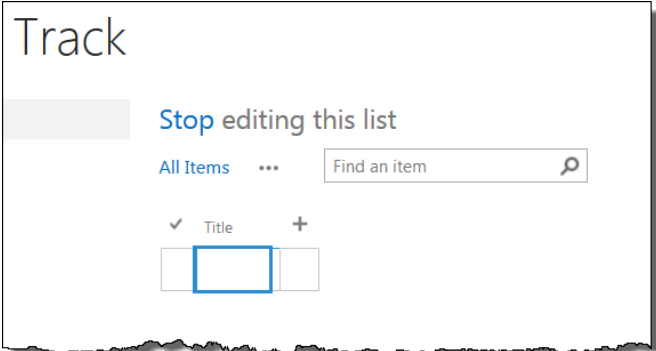


Figure 104. You can put the Custom List into edit mode, where you can add items quickly.

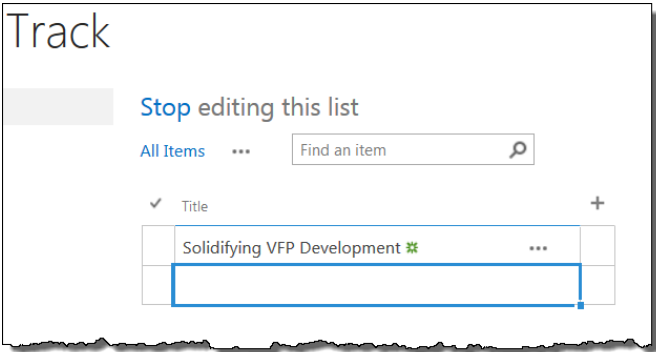
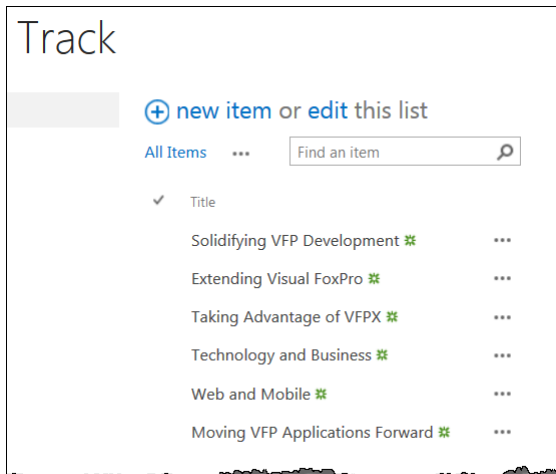


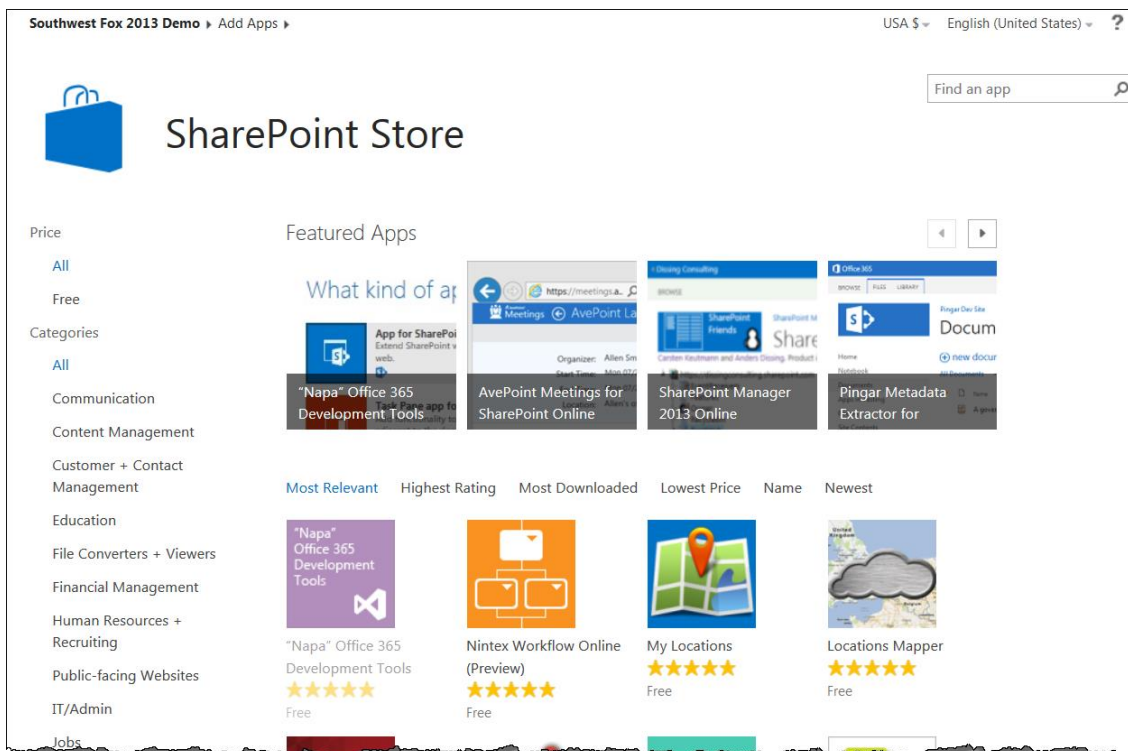
Figure 105. In Edit mode, pressing Enter saves the item and prepares for the next.



**Figure 106.** Once you stop adding items to the list, you see the contents.

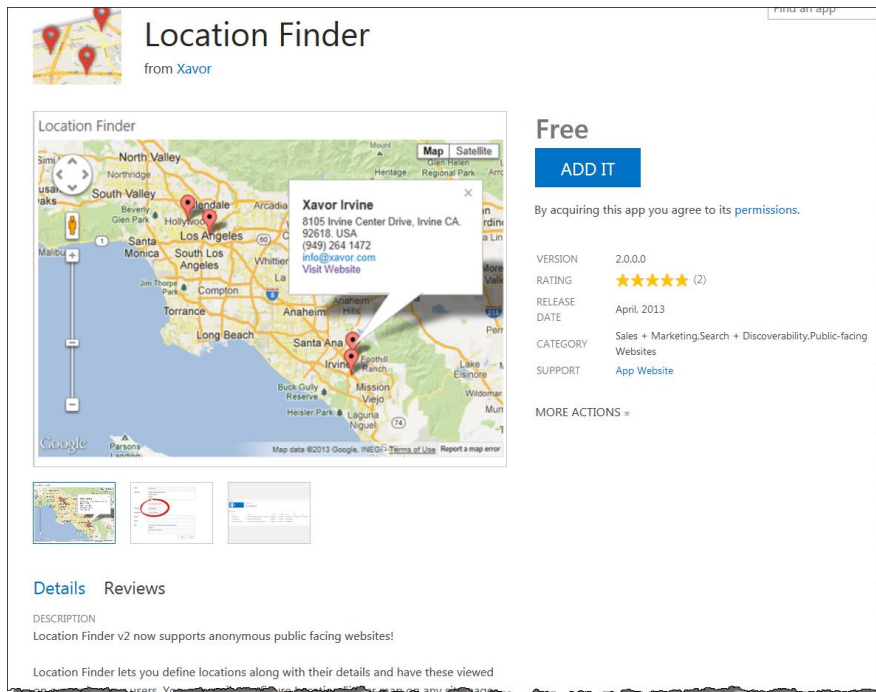
In the next section, we'll look at how to further customize these apps.

Beyond these two, there are quite a few apps built into SharePoint. But if you can't find an app that does what you want on the Your Apps page (shown in **Figure 86**), you can look in the SharePoint Store. From the Your Apps page, click "SharePoint Store"; the page shown in **Figure 107** appears. There are dozens of apps available, and the number is growing. You can filter the list using the links on the left, or search using the search box near the top. Prices range from free to hundreds of dollars, with most apps on the low end.



**Figure 107.** The SharePoint store offers dozens of apps you can add to your site.

Click on an app to learn more about it. **Figure 108** shows information about an app called Location Finder. If you want to install an app, click the “Add It” button.

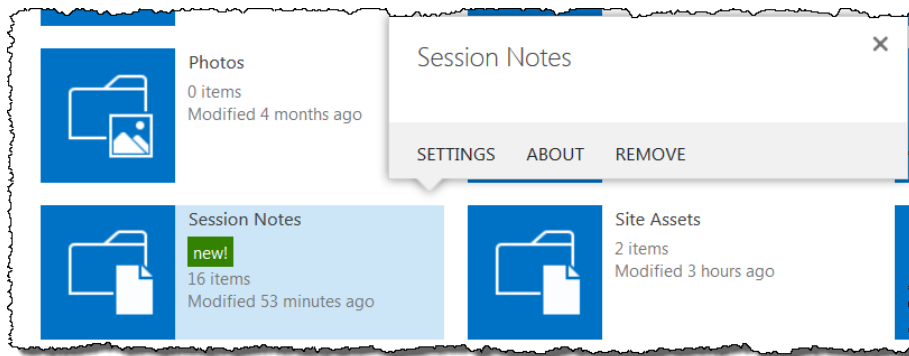


**Figure 108.** Clicking on an app in the SharePoint Store shows detailed information.

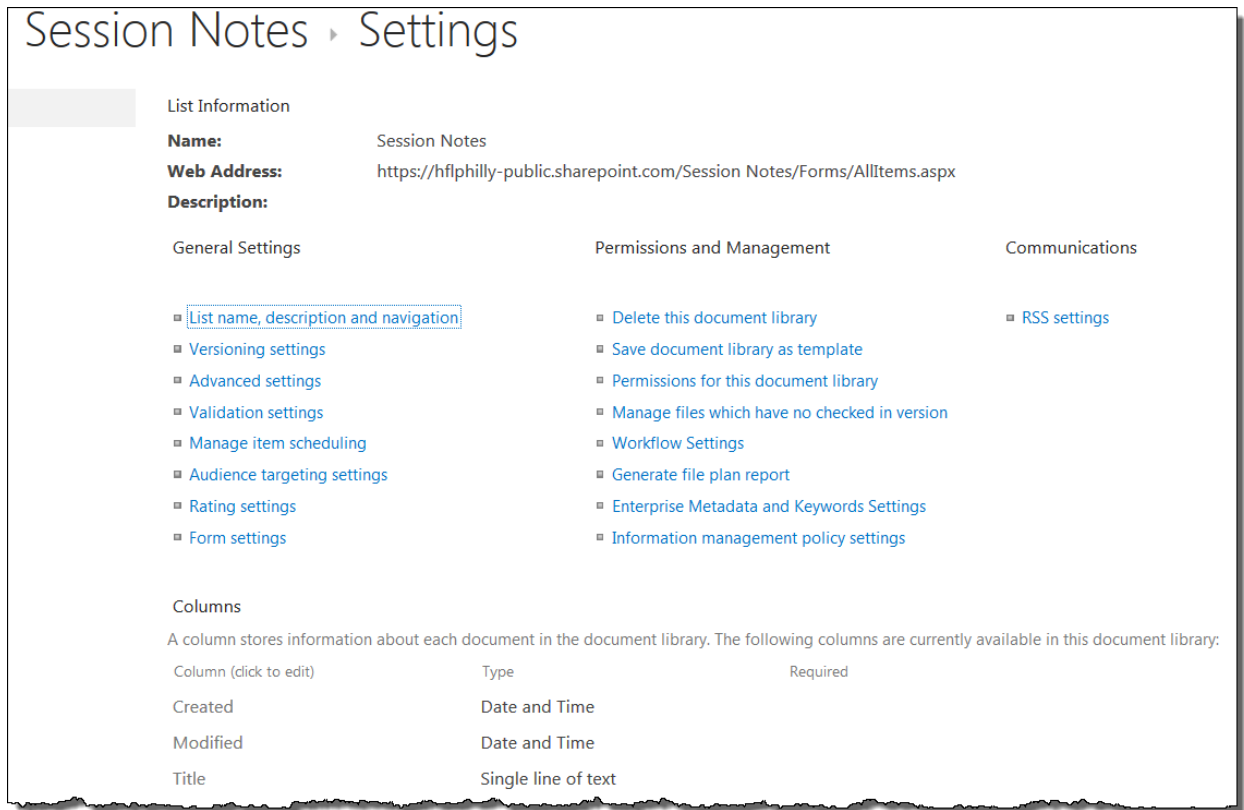
## Customizing apps

Many apps offer a variety of customizations other than just their content. In this section, we'll look at customizing Document Libraries and Custom Lists.

When you hover the mouse over an app on the Site Contents page, an ellipsis button appears. Click it and a callout for the app pops up. **Figure 109** shows an example. Both Document Libraries and Custom Lists include a “Settings” item on the menu; click it to begin customizing. **Figure 110** shows the Settings page for the Document Library called Session Notes where we put the white papers.



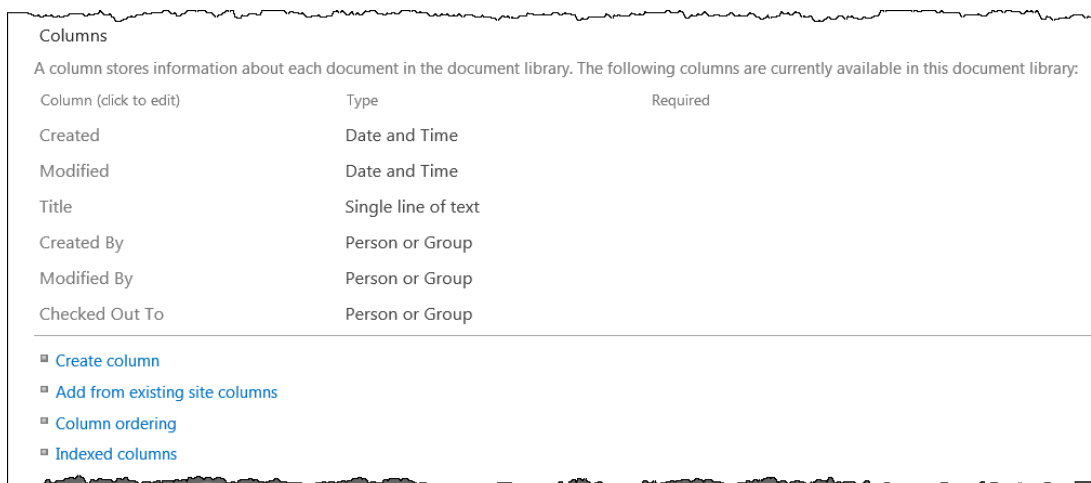
**Figure 109.** You can bring up information about each app in Site Contents. The callout includes a menu of options.



**Figure 110.** The Settings page lets you customize an app.

The links in the middle section of the page give you access to a wide variety of settings, many of which you're unlikely to want to change.

The next section of the page, shown in **Figure 111**, shows the fields for this app. (Many apps can be thought of as database tables, though some of the field content types are unusual for VFP developers.) You can add and modify fields, both from the page and directly when viewing the app.



**Figure 111.** The Settings page shows the field list for the app, and lets you add and modify fields.

We'll explore both approaches to adding a column. First, let's add one to hold the year each session was presented, using the Settings page. Click "Create column" and the page shown in **Figure 112** appears. Type "Year" for the column name and choose "Number" for the type. The lower part of the page varies depending on the column type selected; **Figure 113** shows the additional options for a numeric column, filled in appropriately for the Year column. Click "OK" to add the new field.

Settings > Create Column ⓘ

**Name and Type**

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Task Outcome
- External Data
- Managed Metadata

**Additional Column Settings**

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

Yes  No

**Figure 112.** You can add columns containing many different types of data.

When you return to the page for this Document Library (one way is to click its name in the "breadcrumbs" near the top of the page), the changes show up. As **Figure 114** shows, there's now a Year column.

**Additional Column Settings**  
Specify detailed options for the type of information you selected.

Description:  
The year this session was presented

Require that this column contains information:  
 Yes  No

Enforce unique values:  
 Yes  No

You can specify a minimum and maximum allowed value:  
 Min: 2004 Max: 2013

Number of decimal places:  
 0

Default value:  
 Number  Calculated Value

Show as percentage (for example, 50%)

Add to default view

[Column Validation](#)

OK Cancel

**Figure 113.** The lower part of the Create Column page changes depending on the field type selected.

## Session Notes

+ new document or drag files here

All Documents ... Find a file

✓	Name	Modified	Modified By	Year
	Granor_BindEvent ✱	... About an hour ago	<input type="checkbox"/> Tamar Granor	
	Granor_Business_Objects ✱	... About an hour ago	<input type="checkbox"/> Tamar Granor	
	Granor_Collections ✱	... About an hour ago	<input type="checkbox"/> Tamar Granor	
	Granor_Debugger ✱	... About an hour ago	<input type="checkbox"/> Tamar Granor	
	Granor_ExistingCode ✱	... About an hour ago	<input type="checkbox"/> Tamar Granor	

**Figure 114.** Changes to an app show up immediately.

However, on the home page for our site, the new column doesn't show up, as shown in **Figure 115**. This is because the web part on the home page retains the view it was already set for; see "Views," later in this document, for a discussion of views.

### Session Notes

✓	📄	Name	Modified	Modified By
		Granor_BindEvent ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor
		Granor_Business_Objects ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor
		Granor_Collections ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor
		Granor_Debugger ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor
		Granor_ExistingCode ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor

**Figure 115.** On the site's home page, the new column doesn't appear.

The easiest way to populate the new Year column is from the Session Notes page, by putting the Document Library into Quick Edit mode. Choose the "Library" tab and click "Quick Edit"; you'll see the grid-like form in **Figure 116**.

✓	📄	Name	Modified	Modified By	Year	+
		Granor_BindEvent ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor		
		Granor_Business_Objects ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor		
		Granor_Collections ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor		
		Granor_Debugger ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor		
		Granor_ExistingCode ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor		
		Granor_HelpfulInterfaces ✱	...	About an hour ago <input type="checkbox"/> Tamar Granor		

**Figure 116.** Quick Edit mode makes it easy to populate new fields in a Document Library or Custom List.

As you enter the years, a problem appears; because the years are numbers, they're formatted with commas. There are a couple of ways to work around this. One is to make the field text instead; the downside then is that you don't have control over what the user enters. The alternative I prefer is to use second, calculated, column to convert the number to the desired format. Calculated columns are columns based on other columns in the same table. They're read-only, so you don't run the risk that they can get out of synch with the original data. **Figure 117** shows the definition of a column called "Year no comma" from my public website; it uses the SharePoint TEXT() function to convert the number to a string in the desired format. (TEXT() is similar to VFP's TRANSFORM() function. This site has a



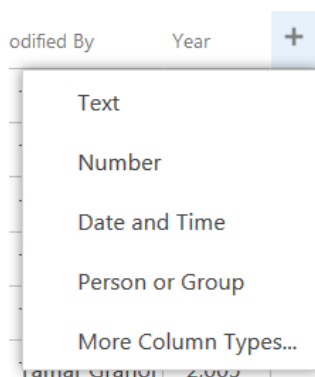
list of the functions you can use for a calculated column:  
[http://yalla.itgroove.net/2012/09/sharepoint-calculated-column-formulas/.](http://yalla.itgroove.net/2012/09/sharepoint-calculated-column-formulas/))

The screenshot shows the 'Add Column' configuration page in SharePoint. It is divided into two main sections: 'Name and Type' and 'Additional Column Settings'.  
In the 'Name and Type' section, the 'Column name' field contains 'Year no comma'. Below it, the 'The type of information in this column is:' dropdown is set to 'Calculated (calculation based on other columns)'.  
In the 'Additional Column Settings' section, the 'Description:' field contains 'Year with no comma'. The 'Formula:' field contains the formula '=TEXT(Year,"0")'. To the right of the formula field is an 'Insert Column:' dropdown menu with the following options: Created, Location, Modified, Month name, Month, Short name, Title, and Year. The 'Created' option is currently selected. Below the dropdown menu is a blue link that says 'Add to formula'.

**Figure 117.** Calculated columns let you reformat data as desired.

Another thing we'll often want to do is create a field that's limited to a few specific items. In our example, we want a new column to specify what track each session belongs to, based on the list of tracks we set up earlier.

Quick Edit provides an alternative way to add a column. Click the "+" above the extra column on the right. A menu of types appears, as in **Figure 118**. For a Track column, choose "More Column Types ..."; a cut-down version of the Add Column page appears (**Figure 119**).



**Figure 118.** You can add new columns directly from Quick Edit mode. Choose the type from this menu.

## Add Column

**Name and Type**  
Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- External Data
- Managed Metadata

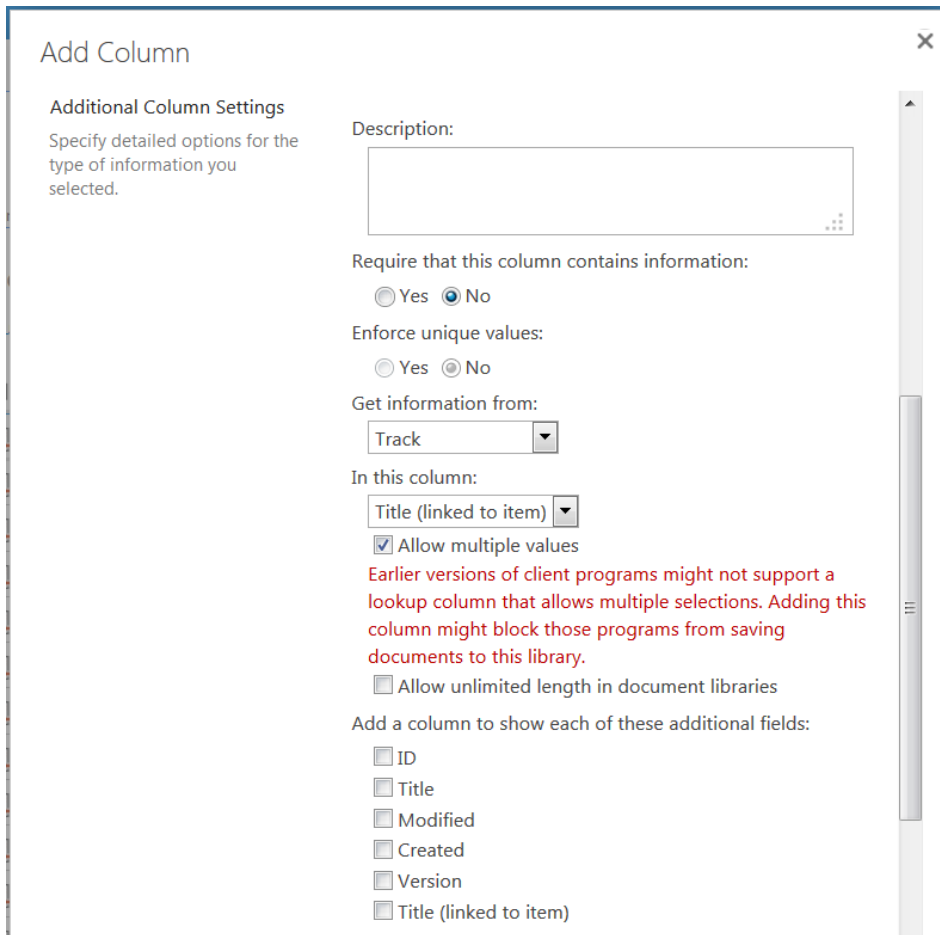
**Additional Column Settings**  
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:  
 Yes  No

**Figure 119.** Choose “More Column Types ...” brings up a variant of the Add Column page.

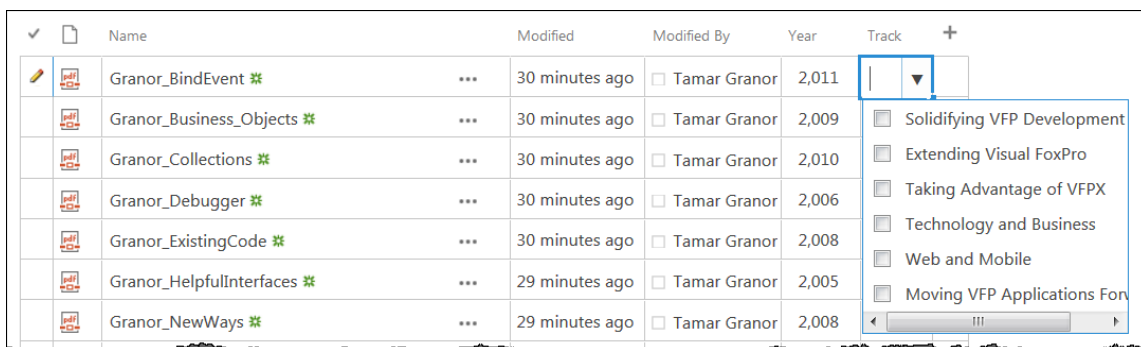
For the Track column, specify “Lookup (information already on this site)” as the type. Then, you get a chance to specify what app and field the data comes from, as in **Figure 120**. There are a couple of items worth noting there. You get to choose which field from the specified app populates your new field. In addition, you can choose whether your new field holds only a single look-up value or multiple values. In the form, but not shown in **Figure 120**, is the ability to set up relational integrity between this field and the source. You can choose to either restrict or cascade deletion of values in the source of the look-up.



**Figure 120.** You can specify that a column is based on the contents of another app.

In some cases, a lookup may be overkill. If you just need to restrict the results to a few specific items, consider using a Choice column.

When I return to the Session Notes page (still in Quick Edit mode), there's a new column for Track (though, of course, it's empty). When I click into the column (**Figure 121**), there's a dropdown showing my choices. Because I checked "Allow multiple values," each item is a checkbox and I can select as many as apply.



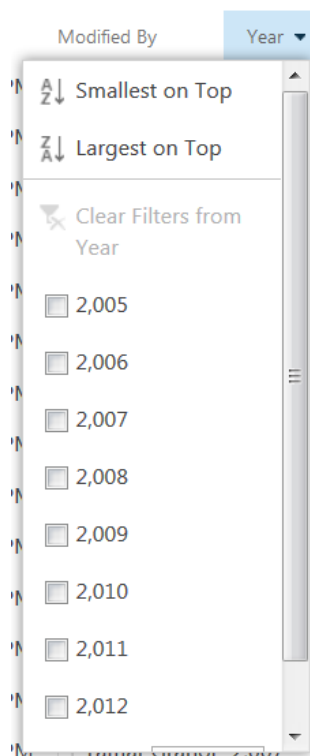
**Figure 121.** For a look-up column, the user sees a dropdown list of acceptable values.

The definition of any column in the app can be viewed and modified by clicking its name in the list of fields on the Settings page for the app (shown in **Figure 111**).

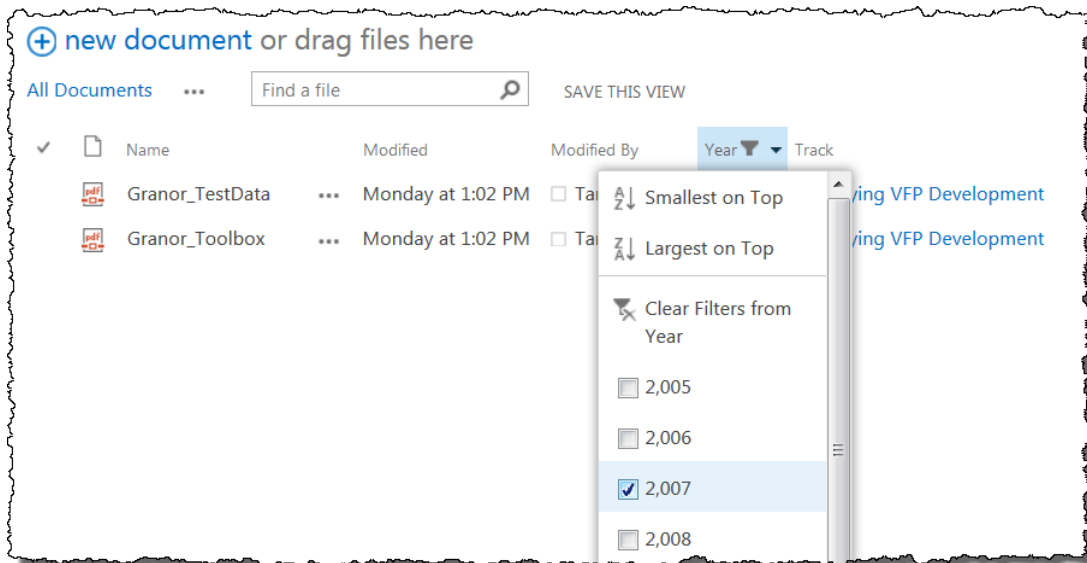
## Sorting and filtering in apps

The column headers in Document Libraries and Custom Lists (and presumably some other apps) let you sort and filter what you see. Click the name of the column to sort; one click sorts in ascending order, a second switches to descending.

Hover on any column header and you'll see a down-pointing arrow. Click the header to open a menu of sorting and filtering options, as in **Figure 122**. As soon as you check one of the items from the custom list, the Document Library shows only those items that match, as in **Figure 123**. You can filter on multiple columns at once.



**Figure 122.** Column headers in Document Libraries and Custom Lists have a dropdown menu that lets you sort and filter.



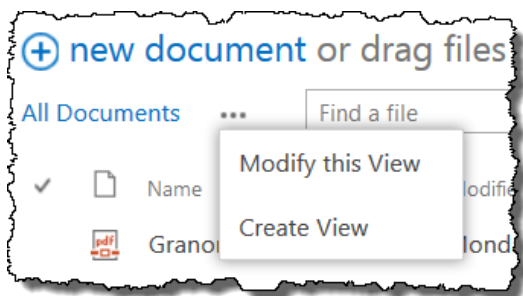
**Figure 123.** Once you filter, you see a subset of a Document Library or Custom List and the header indicates that a filter is in effect.

## Views

You can separate data from presentation, to some extent. Every app has at least a default layout, the way it appears if you do nothing. But for Document Libraries and Custom Lists (and presumably other apps), you can define additional presentations, called *views*, for the app's data, and then specify which presentation appears on a given page.

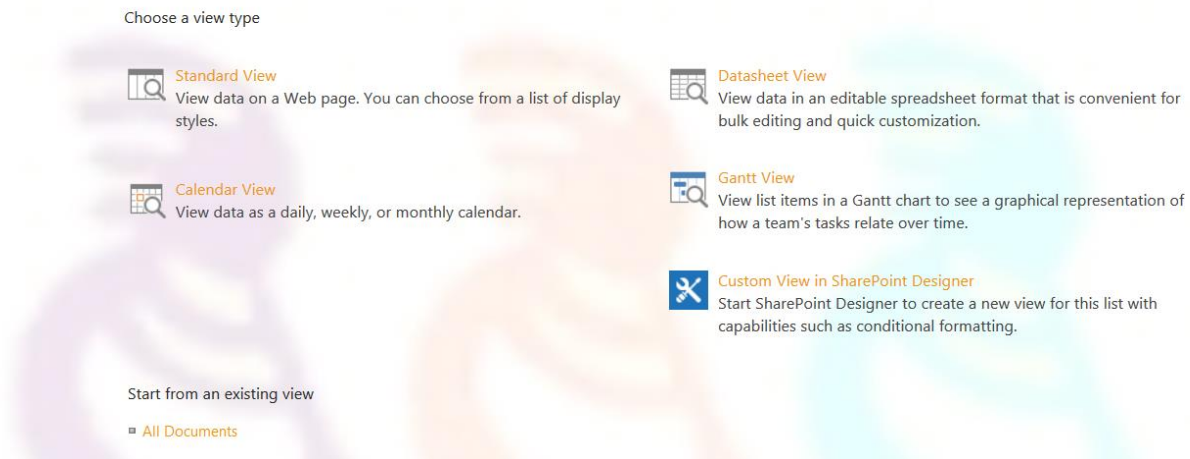
The default view for Document Libraries and Custom Lists is the one we've been seeing through this paper, a simple tabular view. This view is named "All Documents," for Document Libraries and "All Items" for Custom Lists. In **Figure 123**, you can see the current view name in blue at the top of the list.

The ellipsis next to the view names opens a dropdown (**Figure 124**) that lets you modify the current view and create new views. When you choose "Create View," you get a set of options for the type of view, including starting from an existing view; **Figure 125** shows the options.



**Figure 124.** The ellipsis button next to view names lets you work on views.

## Settings ▸ View Type



**Figure 125.** New views can take a variety of forms.

The Create View page that appears varies based on the view type, though all include a name for the view, and an indication of whether the view is private or public. Each also includes a way to select the columns that appear in the view, but the way they're specified varies.

Let's create a view for the session notes that shows only the title, year and track. To end up with a better result, I first changed the name of the Year column to Year-numeric and created a new calculated Year column, using a formula like the one in **Figure 117**. I also populated the Year and Track columns for all the papers.

For a Standard View, the field section lets you check the fields you want to include and specify the order in which they appear, as in **Figure 126**. Note that the Name column appears three different ways in this list:

- Name (linked to document with edit menu)
- Name (for use in forms)
- Name (linked to document)

Since we want the user to be able to open the document by clicking, we want one of the ones that includes "linked to document." But we don't have any reason to allow people to edit these documents, so no edit menu is needed.

You can also specify sorting and filtering options. As **Figure 127** shows, we want the papers in descending order by year, and then alphabetical within the year. You can filter on one or more columns, as well; in this case, we want all the papers to appear.

Display	Column Name	Position from Left
<input type="checkbox"/>	Type (icon linked to document)	4
<input type="checkbox"/>	Name (linked to document with edit menu)	5
<input type="checkbox"/>	Modified	6
<input type="checkbox"/>	Modified By	7
<input type="checkbox"/>	Year-numeric	8
<input checked="" type="checkbox"/>	Track	2
<input checked="" type="checkbox"/>	Year	3
<input type="checkbox"/>	App Created By	9
<input type="checkbox"/>	App Modified By	10
<input type="checkbox"/>	Check In Comment	11
<input type="checkbox"/>	Checked Out To	12
<input type="checkbox"/>	Content Type	13
<input type="checkbox"/>	Copy Source	14
<input type="checkbox"/>	Created	15
<input type="checkbox"/>	Created By	16
<input type="checkbox"/>	Edit (link to edit item)	17
<input type="checkbox"/>	File Size	18
<input type="checkbox"/>	Folder Child Count	19
<input type="checkbox"/>	ID	20
<input type="checkbox"/>	Item Child Count	21
<input type="checkbox"/>	Name (for use in forms)	22
<input checked="" type="checkbox"/>	Name (linked to document)	1
<input type="checkbox"/>	Title	23
<input type="checkbox"/>	Version	24

**Figure 126.** To choose the columns for a view, check the ones you want and set the desired order.

**Sort**

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

First sort by the column:

Year

Show items in ascending order (A, B, C, or 1, 2, 3)  
 Show items in descending order (C, B, A, or 3, 2, 1)

Then sort by the column:

Name (linked to document)

Show items in ascending order (A, B, C, or 1, 2, 3)  
 Show items in descending order (C, B, A, or 3, 2, 1)

Sort only by specified criteria (folders may not appear before items).

**Figure 127.** When creating a view, you can specify the default sort order.

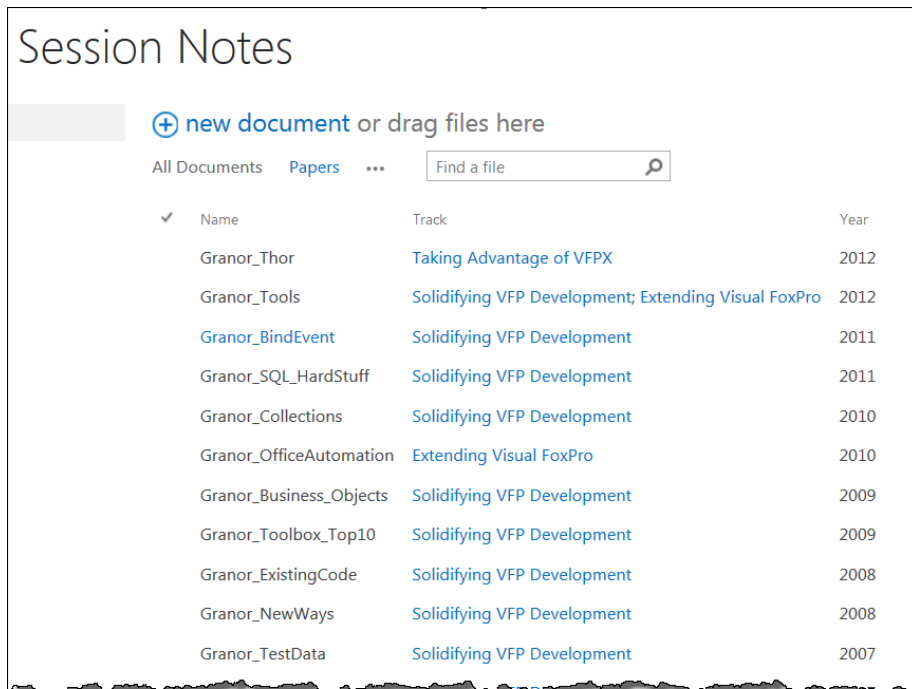
Additional fine-tuning is available. For example, you can group the view to get a treeview-type appearance. **Figure 128** shows the Articles page from my public site, where a Document Library of all my articles is grouped first by publication and then by type of article.



**Figure 128.** You can group items to produce a hierarchical view.

When you save your new view, it becomes the current view and its name also appears, as in **Figure 129**. Although the list appears sorted as specified in the view, you can still sort by clicking on column names or using the column header dropdowns.



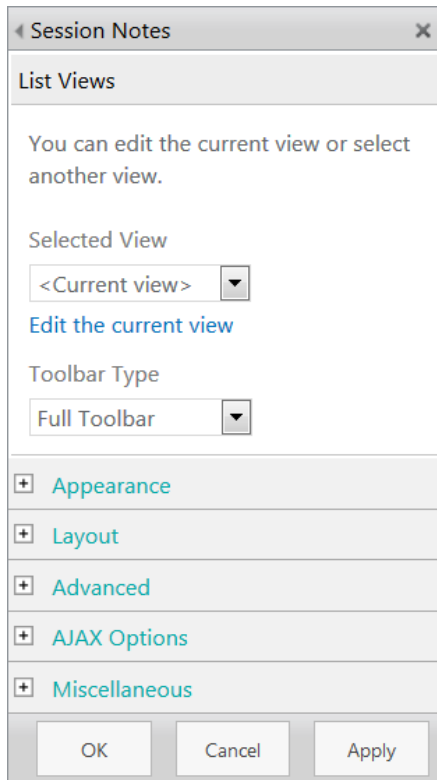


**Figure 129.** The new Papers view is current, so the name appears in the highlight color.

## Using Views on pages

Once you've defined a view, you can specify that a web part uses it. To do so, put the relevant page into edit mode and choose Edit Web Part from the web part's menu, shown in **Figure 101**. The pane in **Figure 130** appears to the right of the page.

Open the Selected View dropdown and choose the Papers view. A warning message appears when you do this, because in addition to choosing an existing view here, you can customize the current view and have it apply only to this use of the web part. Click OK or Apply to see the change, as in **Figure 131**.



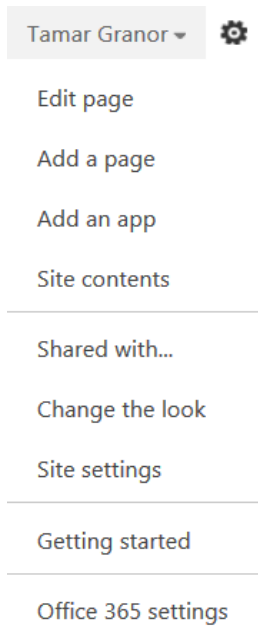
**Figure 130.** This pane lets you edit a web part.

✓ Name	Track	Year
Granor_Thor	Taking Advantage of VFPX	2012
Granor_Tools	Solidifying VFP Development; Extending Visual FoxPro	2012
Granor_BindEvent	Solidifying VFP Development	2011
Granor_SQL_HardStuff	Solidifying VFP Development	2011
Granor_Collections	Solidifying VFP Development	2010
Granor_OfficeAutomation	Extending Visual FoxPro	2010

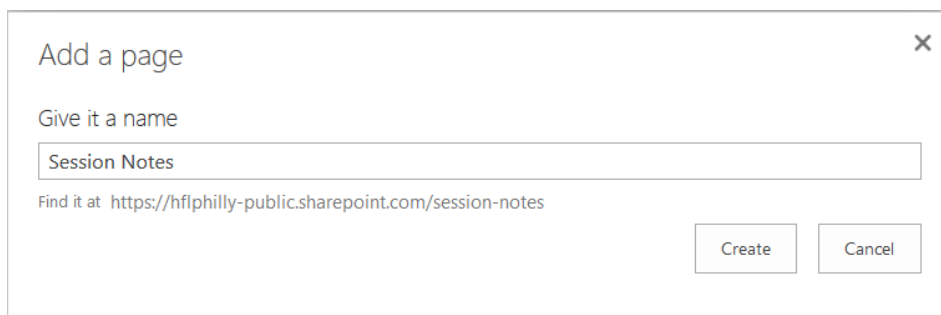
**Figure 131.** You can specify the view a web part uses.

## ***Adding pages***

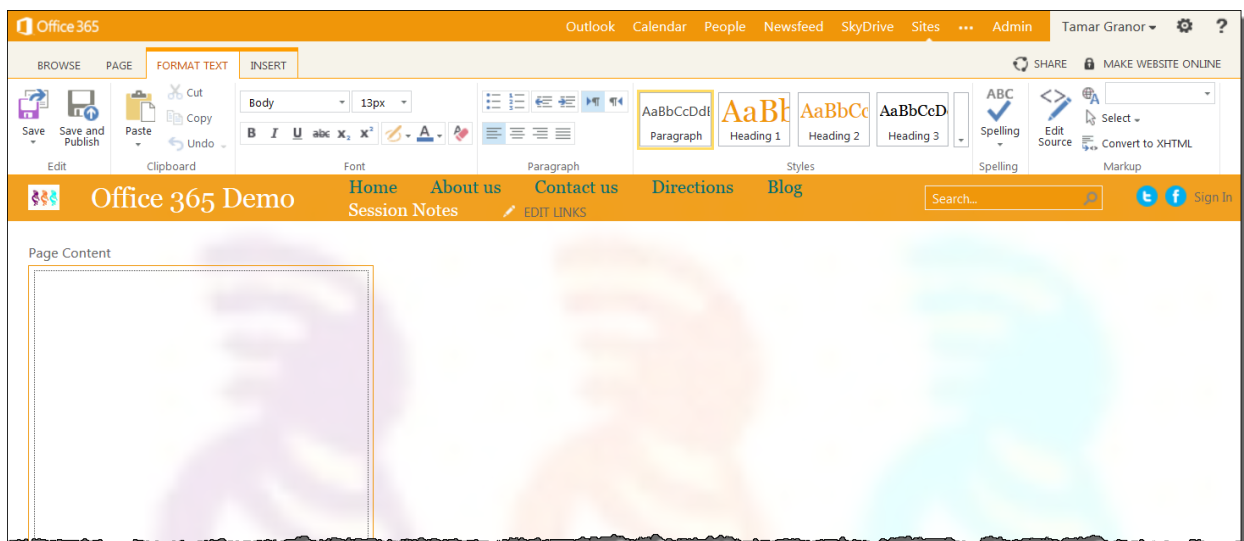
The public site starts with a set of pages, which may or may not be the ones you want. You can add new pages by choosing “Add a page” from the Settings menu (**Figure 132**). A pop-up (**Figure 133**) appears for you to name the page; the name you specify here is added to the site’s menu. A blank page (with the site’s specified appearance) opens, for you to populate it; see **Figure 134**.



**Figure 132.** Choose “Add a page” from the Settings menu to create a new page for your site.



**Figure 133.** Give your new page a name. This is the name that appears in the site’s menu.



**Figure 134.** You can specify the new page by simply adding text and graphics.

You can populate the page using the WYSIWYG editor shown. If you prefer, you can click “Edit Source” and write (or paste) HTML. Of course, you can also add apps to the page as described in “Putting a Document Library on a page,” earlier in this document.

## Navigation

Public sites have a navigation menu along the top or one side, depending on the layout you choose. By default, it lists all the pages in the site. (For a team site, you have to explicitly add pages.)

You can customize the navigation bar. Click the Edit Links link. **Figure 135** shows the navigation bar ready for editing.



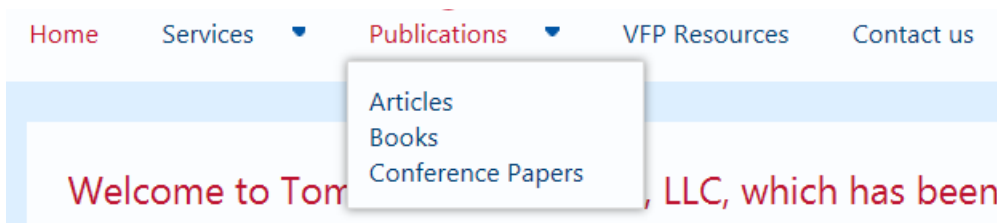
**Figure 135.** You can customize the navigation bars by clicking Edit Links.

You can add links manually by clicking the “+link” link (the word “link” next to the plus sign in the figure is nearly invisible because of the color scheme), or drag items in to add links. You can hide links by clicking the “eye” icon next to a link; when you do, the icon becomes a straight line. You can rearrange links around by dragging and dropping them. **Figure 136** shows the navigation bar in edit mode after hiding the Directions and Blog items.



**Figure 136.** Click the “eye” icon next to a menu item to hide it.

You can build a hierarchical menu by dropping an item onto another item. Doing so makes the dropped item a child of the parent in the menu. **Figure 137** shows the top navigation bar from my public site. Both Services and Publications have submenus.



**Figure 137.** You can build hierarchical menus by dropping items onto other items.

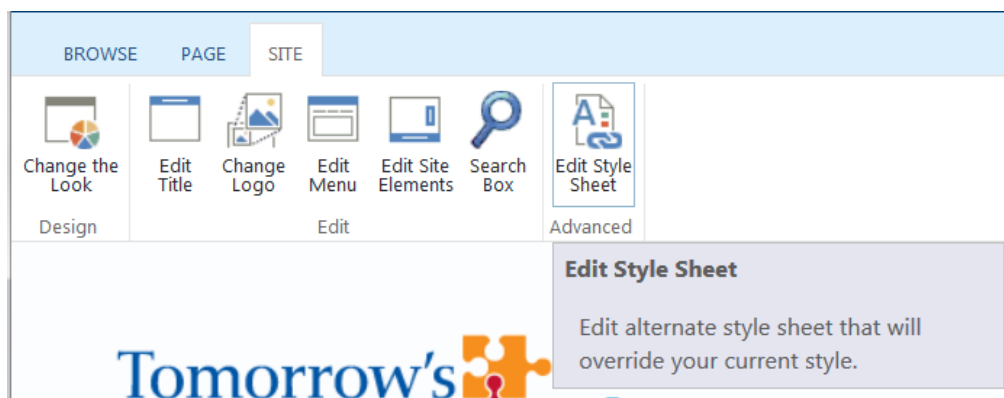
Be aware that the navigation bar determines the URL for a page. Items listed on the navigation bar itself have URLs in the form [www.yourcompany.com/ItemName](http://www.yourcompany.com/ItemName). When you

drag an item to create a hierarchical menu, the URL for the corresponding page changes to reflect the hierarchy. So, in **Figure 137**, the URL for the Publications page is <http://www.tomorrowssolutionsllc.com/publications>, while the URL for the Books page listed on the Publications menu is <http://www.tomorrowssolutionsllc.com/publications/books>.

## **Customizing your site's design**

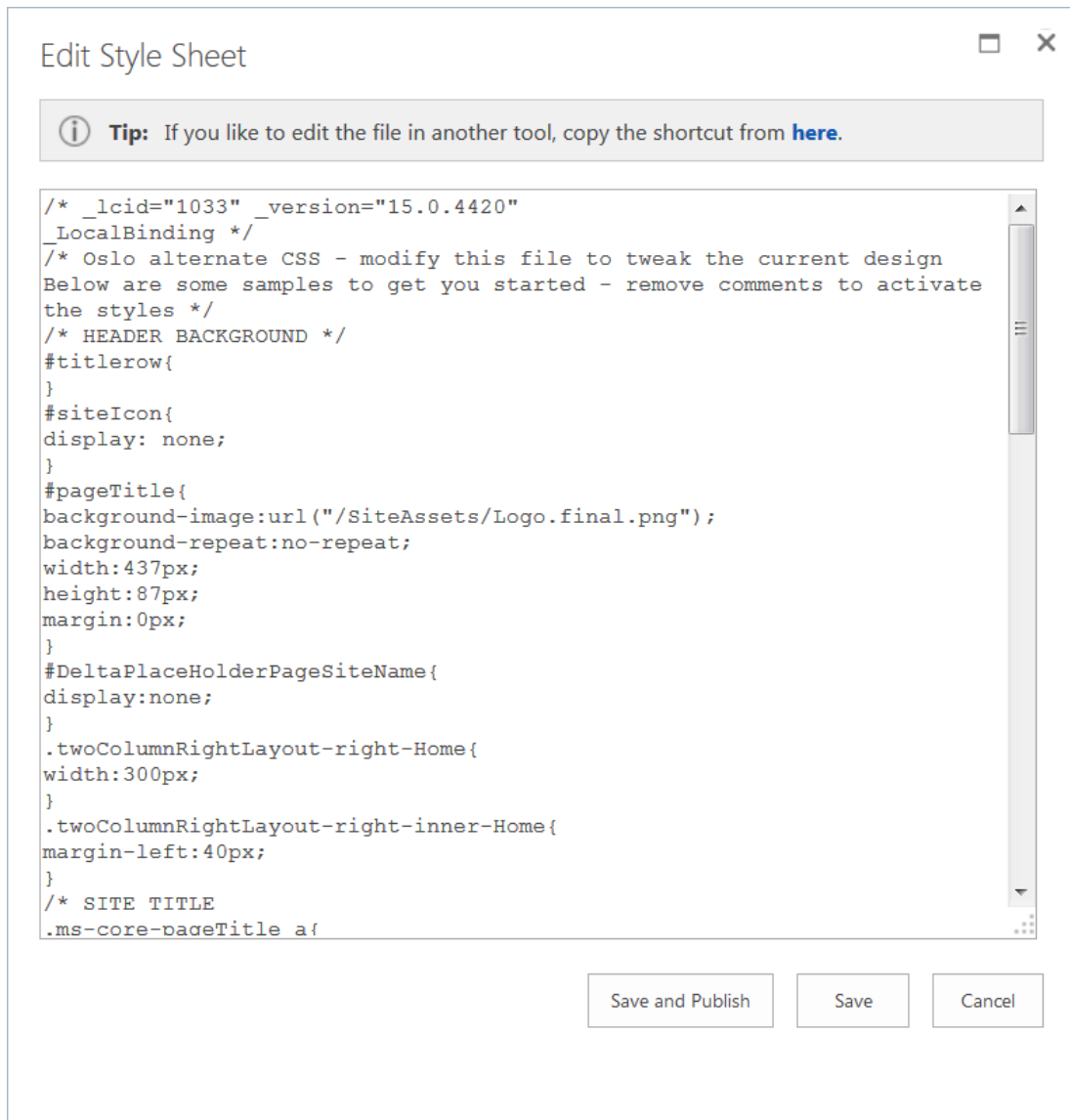
In “Choosing a style” and “Personalizing your site,” earlier in this paper, we saw how to choose a style and layout and make some changes to make the site appropriate for your organization. But you can actually go much farther and for public sites, it's reasonably straightforward.

The simplest way to customize a public site is to edit the site's CSS style sheet. You can access it through the Site tab on the ribbon, as in **Figure 138**. When you click the “Edit Style Sheet” item, a pop-up window appears showing the CSS, as in **Figure 139**.



**Figure 138.** The Site tab appears on the ribbon for the public site, and gives you direct access to the site's CSS style sheet.

You can edit the CSS to change some of the fundamental things about the site's layout. For example, for my public site, I removed the small version of the site icon and instead set up my company logo to be the page title. You can see the result in **Figure 140**.



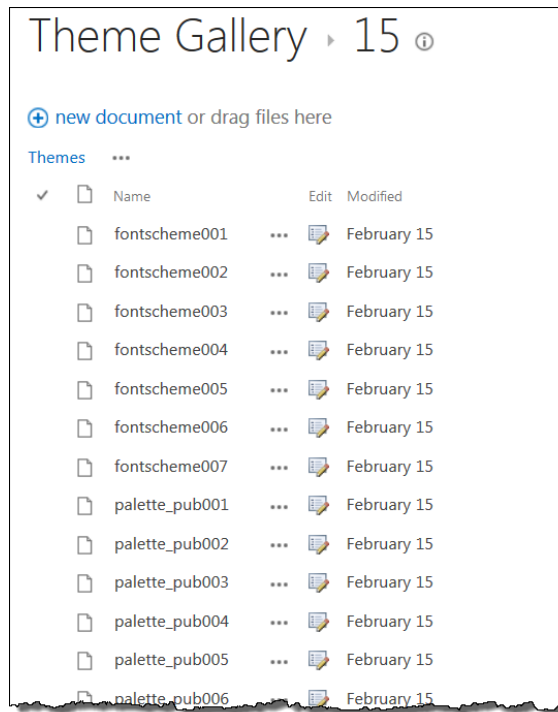
**Figure 139.** The public site's CSS can be edited in this window or opened with another tool for editing.



**Figure 140.** For my public website, I modified the site's CSS to use my company logo as the page title, and to remove the icon that normally appears to the left of the title.

A more complex change is to modify the color schemes that go with the theme you selected. For my public site, I wanted text colors to match the colors in my logo. The way to do so is to create a custom color palette, add it to SharePoint and then set your site to use it.

Step 1 is finding the color palette your site is currently using (which assumes that it's close to what you want). To see the color palettes for your site, choose "Site Settings" from the Settings menu. From the Web Designer Galleries section, click "Themes." Then click the folder named 15. This folder is a list of font schemes and color palettes (and is likely two pages long), as in **Figure 141**.



**Figure 141.** The Theme Gallery\15 folder contains the font schemes and color palettes for the theme you selected for your site.

Figuring out which one you're currently using is a little tricky (and you actually should do it before you go to get to the list of palettes). In the second page of the "Change the look" wizard, there's a dropdown list of color palettes to choose from. Count from the top until you get to the one you've selected. The palette file you want should be "palette\_pub" plus that number.

The palette file is just XML, assigning hexadecimal colors to a set of characteristics. You can edit it with any text editor. My suggestion is that you save your edited file with a new name, so you don't overwrite any of the default palettes. (Do make sure to keep the .spcolor extension.) Then drag and drop the file back into the Theme Gallery\15 folder.

To choose your new palette, you have to use the "Change the look" wizard. Choose "Change the look" from the Settings menu. On the first page, click the first item, which is labeled "Current" and is your current set-up. On the second page, open the Colors dropdown and

find your new color palette. Unfortunately, the dropdown doesn't show you the name of the palette file, so I recommend you name the palette in a way that puts it either at the top or the bottom of the dropdown. For my site customization, I named my palette `palette_tslc`, which makes it last in the dropdown.

After selecting your new palette, click the "Try it out" link. My experience was that the changes I'd made in the palette didn't show up on that page, but that refreshing the browser at that point fixed it.

Expect a fair amount of trial and error in tweaking the color palette. I found this article (<http://msdn.microsoft.com/en-us/library/jj945889.aspx>) helpful to explain what each color is used for.

You can customize your site in other ways. The font scheme files are also XML and can be edited. You can also go much deeper and design your own master pages and page layouts and so forth. This page (<http://msdn.microsoft.com/en-us/library/jj733518.aspx>) can get you started.

## ***Publishing a public site***

Getting from your design to something the public can see turns out to be a little tricky. Once the pages have been created, you have to publish the pages and make the website public. In between those two steps, you can invite individuals to review the site and give you feedback.

As noted earlier, SharePoint has version control built in, so when you create and edit pages, they're not visible to everyone. In order to make them available to others, you have to publish them. When you're editing a page, you can choose to save and publish in one step (by choosing "Save and Publish" from the Page tab of the ribbon).

To publish any pages where you haven't done that, go to Site Contents and click on the Pages app. You'll see a list of the pages for your site. You have to publish each one individually. Click an unpublished file to select it, then choose "Publish" in the Files tab of the ribbon. A dialog opens for you to add a comment about this version of the page. When you click OK, the page is published.

Before taking the website online, you may want to ask others to review it. Click the "Share" link on the right-hand side of the ribbon. The form in **Figure 142** appears; enter email addresses (or names of people within your organization) to give them access to the site. When you click "Show Options," the form expands and you can set the permission level for those you're inviting. Click "Share" to send the invitation.



The screenshot shows a 'Share' dialog box for a site named 'Tomorrow's Solutions, LLC'. At the top, it says 'Shared with lots of people'. Below that, it prompts to 'Invite people to 'Design'' and provides a text input field for names, email addresses, or 'Everyone'. There is also a larger text area for an optional personal message. At the bottom, there is a 'SHOW OPTIONS' link and two buttons: 'Share' (in blue) and 'Cancel'.

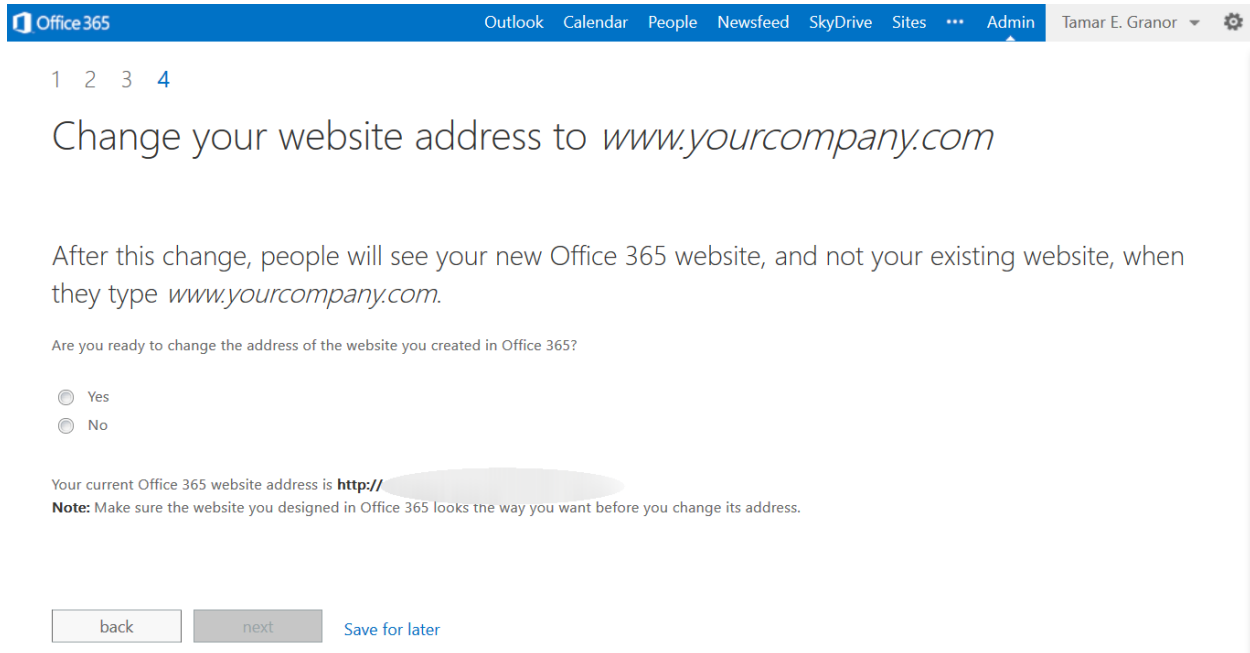
**Figure 142.** Use this form to invite others to review your site.

Once you're ready to take the site public, there are a couple of steps. First, click the "Make Website Online" link. This publishes the site to the Internet. However, it publishes it as <http://yourcompany-public.sharepoint.com>, where "yourcompany" is the name of your company in Office 365.

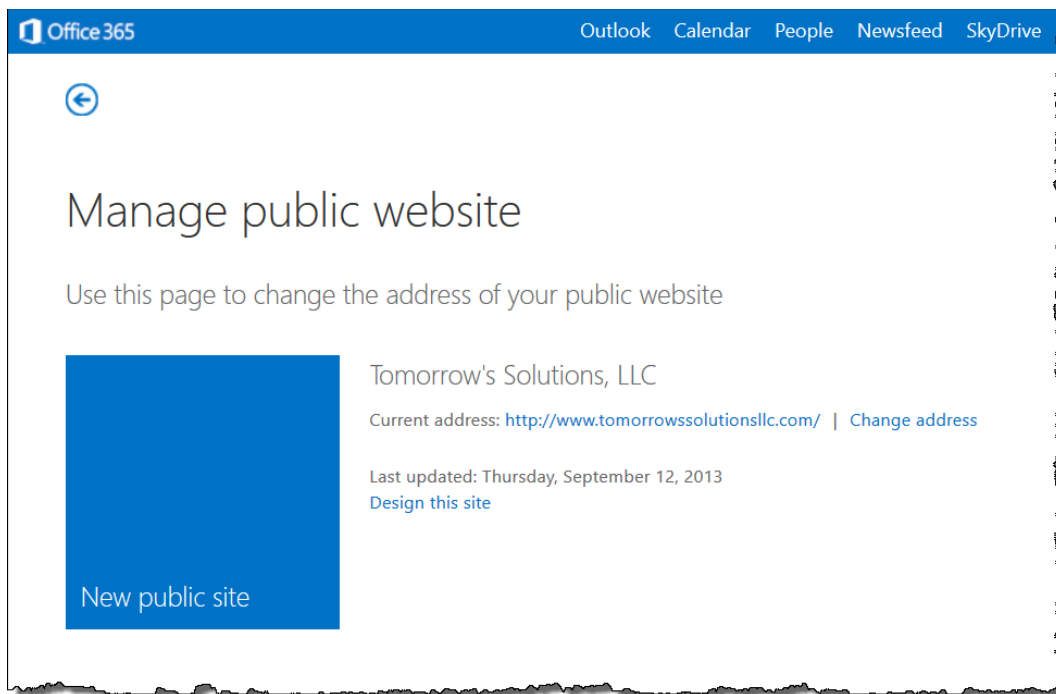
To publish the site to your actual domain name (the one you specified when customizing your email), you can use the "Public Website" tile in the Getting Started pane on the Admin page. Clicking "Step 4" ("Change your website address to [www.yourcompany.com](http://www.yourcompany.com)") navigates to the page in **Figure 143**. When you choose "Yes" and click "Next," the appropriate DNS records are edited and/or added. If you'd originally set things up so that your domain still pointed to an existing website, that setting is removed.

One caveat: when I got to this point, it didn't work properly. I'm reasonably sure that had to do with some manual changes I'd made to the DNS settings, and that it works right for most people. But with that in mind, here's another way to get this done.

From the Admin page, click "Manage your public website." The page in **Figure 144** appears. Click "Change address." From the dropdown that appears, choose your custom domain and click "Save."



**Figure 143.** Use this page to set your SharePoint site to use your custom domain.



**Figure 144.** You can also use this page to set your custom domain to point to your SharePoint site.

## ***Creating team sites***

The public site is your organization's face to the world, but Office 365 also lets you create as many private, team sites as you'd like.

To start a new team site, click the “New Site” link on the Sites page; you’re prompted to provide a name for the site, as in **Figure 145**. Once you click “Create,” after a brief wait, you’re brought to the home page for your new site, shown in **Figure 146**. As with the Office 365 Admin page, there are tiles to get you started on the major tasks. Once you’ve done most of the work, you can click “Remove This” to get rid of the tiles. All of the actions provided by the tiles are also available elsewhere, of course.

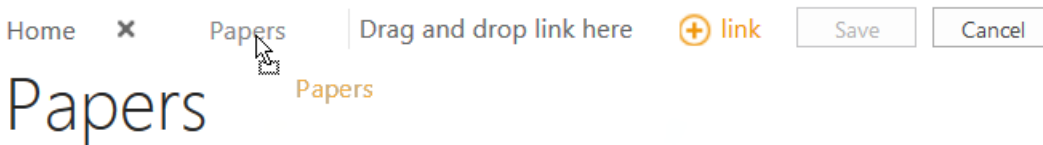
**Figure 145.** You start creating a new site by giving it a name.

**Figure 146.** Adding a site sets up a default home page.

Designing a team site is similar to designing a public site, but there are differences. There are fewer themes available and they’re simpler than the ones for public sites. There are also fewer layout choices.

A team site can have one or two navigation bars. No matter which layout you choose, you have a top navigation bar, but you can also have a set of links along the left-hand side (called the *left navigation bar*). It tracks where you are in the site and is meant to serve as a quick launch bar.

When you add a page to a team site, it's not automatically added to the navigation bar. To add it, you can put the navigation bar into edit mode and then drag the page title and drop it, as in **Figure 147**.



**Figure 147.** You can add a page to a navigation bar by dragging and dropping its title.

Team sites don't require publication like the public site. However, you still use Share to control who has access to the site. In addition, on a team site, Document Libraries and Custom Lists can allow visitors to add items (which makes sense when you consider that team sites are intended to promote collaboration).

### ***Editing sites***

You can modify existing sites fairly easily. For a team site, simply navigate back to the site and make the change. For public sites, there's a bug that makes it hard to start editing the site, once you've published it to the Internet. When you click "Sites" in the suite bar and then click "Public Site," you see your public site, but the menus and other control features don't appear.

To get to your public site in edit mode, you need to navigate directly to something inside the site that's not normally displayed. I've used a link like this effectively:

[https://yourcompany-public.sharepoint.com/\\_layouts/15/viewlsts.aspx](https://yourcompany-public.sharepoint.com/_layouts/15/viewlsts.aspx)

Substitute your domain into the link before "-public". In my experience, once you've done this in a particular browser session, you don't have to do it again. Navigating back to the site gets you there in edit mode.

For the public site, when you change a page, you need to publish that page again before the public sees it. The editor reminds you if you save it without publishing, as in **Figure 148**.

While modified pages have to be published, additions to Document Libraries, Custom Lists, and Posts (an app that contains blog posts for the site) are shared automatically as soon as you save them.



**Figure 148.** If you save a changed page of the public site without publishing it, you get this reminder that others can't see the change.

## SkyDrive Pro

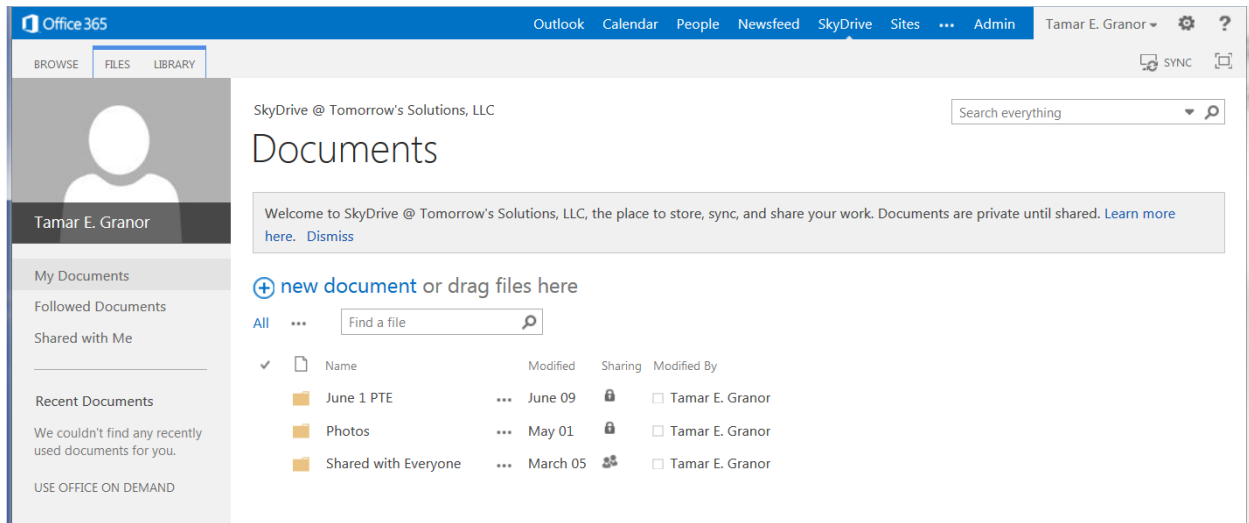
Office 365 includes 25GB of storage on SkyDrive Pro per user (up from 7GB earlier in the product cycle). While the name suggests that SkyDrive Pro is simply a “pro” version of Microsoft’s SkyDrive cloud storage service, in fact, SkyDrive Pro is really an enhanced SharePoint Document Library.

As with a Document Library, you can store whatever files you want and share each with whomever you want, giving different users different rights to each document. You can organize documents into folders, and share entire folders.

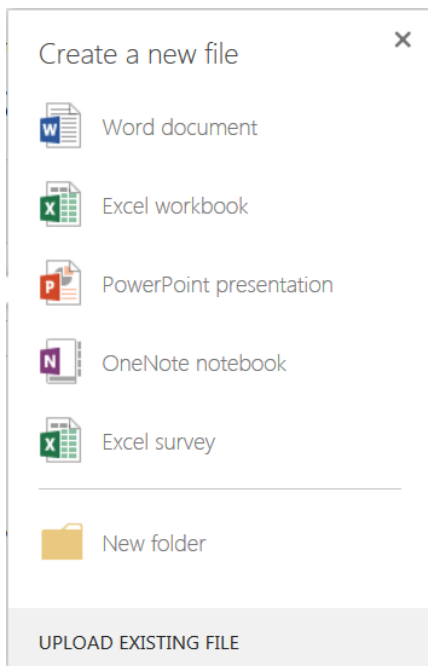
To use SkyDrive Pro, click “SkyDrive” on the suite bar. Not surprisingly, the page you land on (**Figure 149**) looks like a Document Library. You can drag and drop files to add them, or create new documents directly. Clicking the “new document” link opens the form shown in **Figure 150**; note that you can create folders from there, as well as upload existing documents.

While you can't create non-Office documents here, there's no problem adding them.

Files you put in the Shared with Everyone folder are available to everyone in your organization. You can also invite people outside the organization to share them, as you can with any other documents.



**Figure 149.** The home page for SkyDrive Pro in Office 365 looks like a Document Library, because it is one.



**Figure 150.** You can create files and folders inside SkyDrive Pro.

## ***Excel surveys***

As **Figure 150** shows, there's one special kind of document available, an Excel survey. A detailed description of this feature is beyond the scope of this session, but here's a quick overview. When you choose to create an Excel survey, Excel opens and displays a form that lets you easily create a set of questions, offering different types of answers (free-form text, number, date, choice, etc.), and even setting a default answer, if you wish. Once the survey is complete, you can give a link to it to those you want answers from. When the user navigates to that link, a page opens showing the survey question, as in **Figure 151**. When

the user clicks “Submit,” the answers are sent to the Excel workbook you created. **Figure 152** shows the workbook after a couple of responses have been received.

The screenshot shows a survey form titled "Tamar's sports survey" with the subtitle "A little survey to test the Excel survey feature of SkyDrive Pro." The first question is "What's your favorite team?" with a dropdown menu showing "Phillies". The second question is "What's the best sport?" with a text input field containing "Baseball". At the bottom, there is a green "Submit" button and a security warning: "Never give out your password. Don't give your personal information to someone you don't trust." The footer includes the Microsoft Excel logo and the text "Powered by Microsoft Excel" and a "Give Feedback" link.

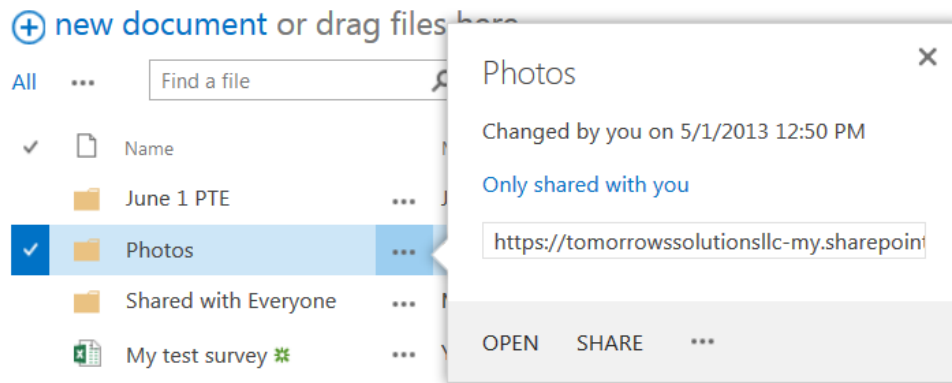
**Figure 151.** SkyDrive Pro lets you create surveys in Excel and collects the responses for you.

	A	B
1	What's your favorite team?	What's the best sport?
2	Phillies	Baseball
3	Eagles	Pingpong
4		

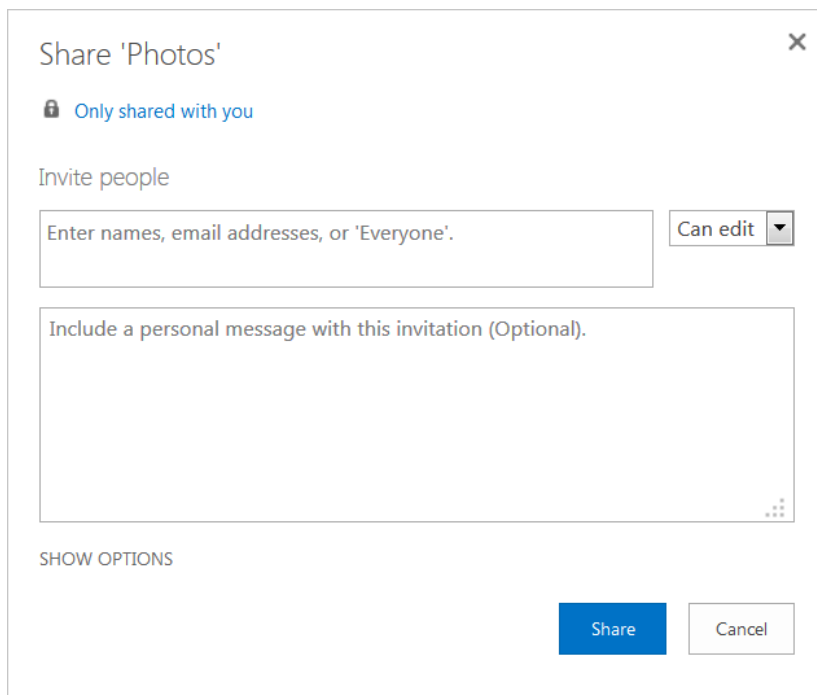
**Figure 152.** Survey responses are collected in the workbook.

### **Sharing SkyDrive Pro documents**

Sharing the documents you store in SkyDrive Pro is straightforward (and pretty much the same as sharing documents in a document library on a site). Click the ellipsis next to a document or folder to open a callout (**Figure 153**) for the document or folder. Click the “Share” item on the bottom menu to open the Share form shown in **Figure 154**. Specify one or more people; use the dropdown to indicate whether they can edit or only view the document or the documents in the folder. When you click “Share,” an email is sent to each person containing a link to the shared document or folder.



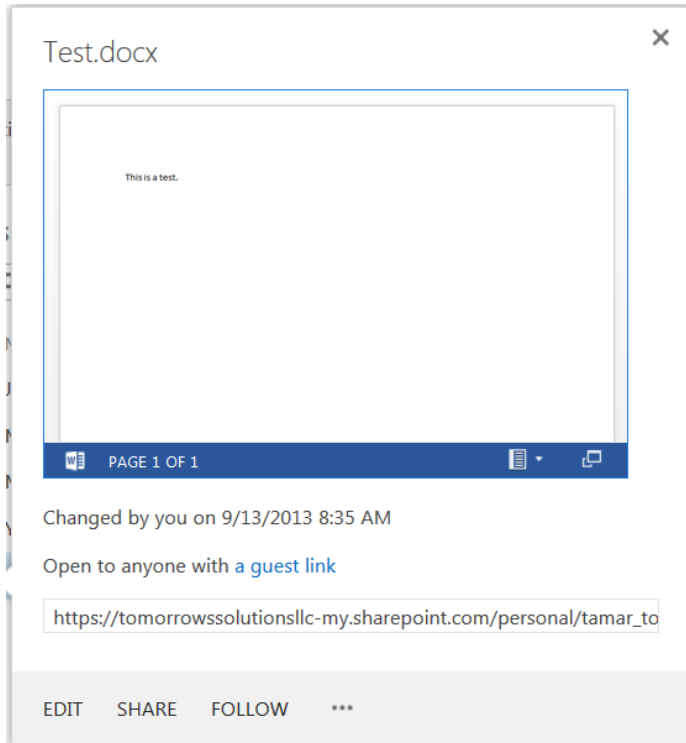
**Figure 153.** The ellipsis next to a document or folder opens a callout for it.



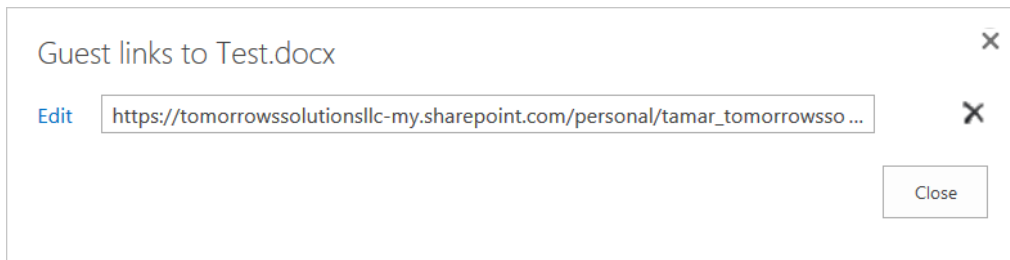
**Figure 154.** Use this form to invite people to share a document. The dropdown lets you decide what rights they have.

Individual documents (but not folders) can also be shared using a *guest link* (like the one described in the preceding section “Excel surveys”). When you choose to share an individual document, the Share dialog includes an additional checkbox, “Require sign-in.” Clearing that checkbox generates a guest link for the document, which you can provide to anyone. (In my experience, you still have to share the document with at least one person in order to actually generate the guest link.) To see the guest link, click the ellipsis for the document; the callout now includes the phrase “Open to anyone with a guest link,” as in **Figure 155**. Click the words “a guest link” and the dialog in **Figure 156** opens. You can copy the guest link here to paste into a browser or an email. You can also remove the guest link, by clicking the “X” next to it.





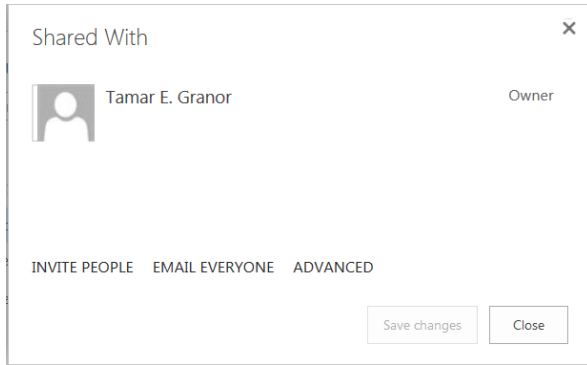
**Figure 155.** When you share a document without requiring sign-in, a guest link is generated.



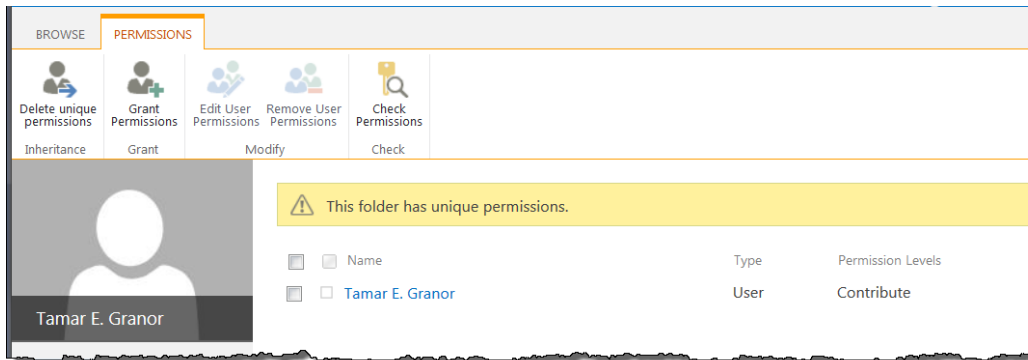
**Figure 156.** This dialog lets you copy or remove the guest link.

Removing people from those who share a document is harder. How you do it depends on whether the person is in your organization or not and, for external users, on whether he or she has clicked the link in the email yet to accept the invitation.

For internal users, either click the icon in the Sharing column of the document list (which looks like two people for a shared document; for an unshared document, it looks like a lock), or click the ellipsis, then click the ellipsis in the menu and choose "Shared With." In either case, the form in **Figure 157** opens, showing you who shares the document. To remove people, click "Advanced," which navigates to a permissions view for the document, shown in **Figure 158**.

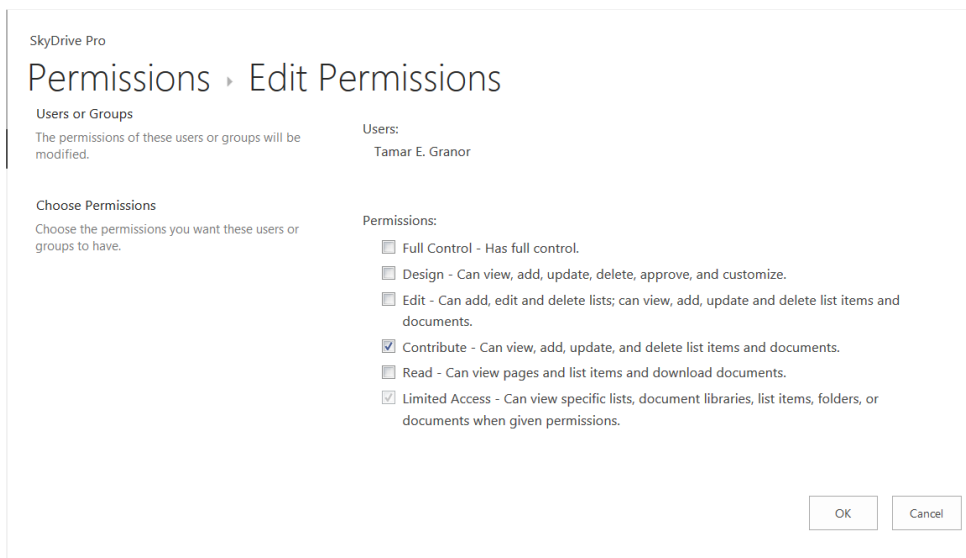


**Figure 157.** This form shows you who shares a document or folder.

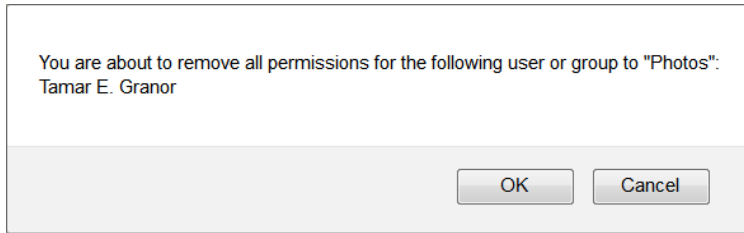


**Figure 158.** This view lists all the users inside your organization who have access to a document or folder.

To change a user’s permissions, check the checkbox next to his or her name; the “Edit User Permissions” and “Remove User Permissions” buttons on the ribbon are enabled. Clicking “Edit User Permissions” brings you to the Edit Permissions page for the document, shown in **Figure 159**. Clicking the “Remove User Permissions” button displays a warning, shown in **Figure 160**.

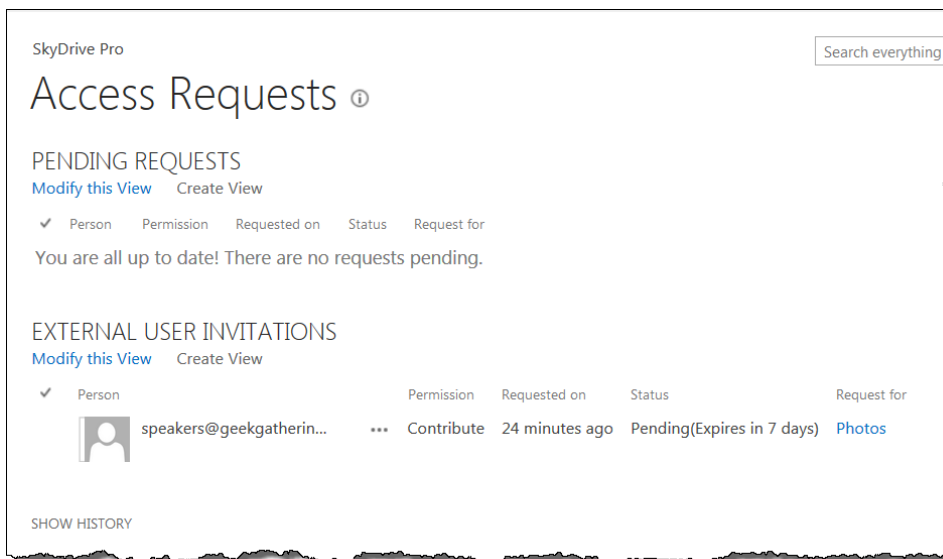


**Figure 159.** Use this page to change a user’s permissions for document or folder.



**Figure 160.** This warning appears when you remove an internal user’s permissions for a document or folder.

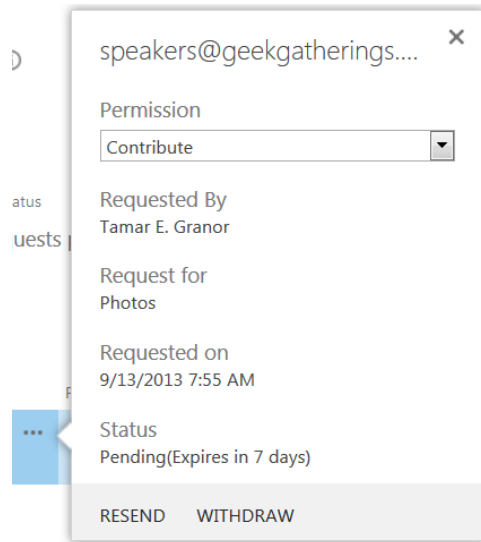
If a user outside your organization hasn’t yet accepted the invitation, you can withdraw it. Click “Site Settings” from the Settings menu in the suite bar. Then, in the Users and Permissions group, click “Access requests and invitations.” The Access Requests page (**Figure 161**) opens.



**Figure 161.** This page shows you all the pending invitations to external users.

To change or withdraw an invitation, click the ellipsis button next to the relevant person; the form shown in **Figure 162** appears. You can use the dropdown to change the permission you’re extending and then resend the invitation, or you can withdraw it entirely.

I cannot find a way to change or withdraw permission once the user has accepted the invitation.



**Figure 162.** Use this form to modify or withdraw invitations to external users.

## ***Synching SkyDrive Pro with the desktop***

You can synch documents in SkyDrive Pro to your desktop. For Office 2013, this ability is built in. For Office 2007 and Office 2010, you have to install a client application. To do so, click the Software tile on the Office 365 Admin page. The page shown in **Figure 163** appears. Click “Set up your software” to see the page shown in **Figure 164**. Click Setup to install the add-on and follow the instructions that appear.

### Get started with software

Set up software and mobile apps for yourself and your coworkers.

- 1 [Set up your software](#)  
Set up an existing copy of Office to work with Office 365.
- 2 [Go mobile](#)  
Use Office 365 with the mobile apps.
- 3 [Get your team set up](#)  
Learn how your coworkers can set up their software and mobile apps.

[Save for later](#)

**Figure 163.** This page starts the process of installing software related to Office 365.

## Set up your software

Set up your desktop applications to work with Office 365

If you already have Office 2010 or Office 2007 installed on your computer, click **Set up**. You don't need to do this if you've installed the latest version of Office.

This will update the copy of Office on your computer so you can:

- Use Outlook and Office 365 together for email and more
- Save Office documents to SkyDrive

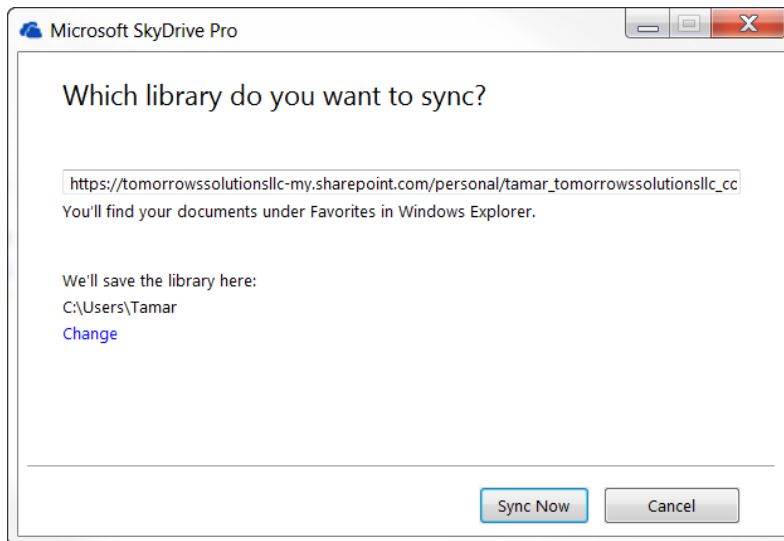
[Learn more](#) | [Review system requirements](#)

set up

**Figure 164.** Use this page to install the add-on that lets Office 2007 and 2010 save files right to SkyDrive Pro.

(This installation process did not work for me. Instead, I found the free download for the SkyDrive Pro client for Windows at <http://www.microsoft.com/en-US/download/details.aspx?id=39050> and installed that.)

Once you have a SkyDrive Pro client installed, you can sync any Document Library (not just the SkyDrive Pro Document Library) to your computer. Click the “Sync” button on the right-hand side of the ribbon and the dialog in **Figure 165** appears. You can specify where to store the document library by clicking the “Change” link. When you click “Sync Now,” you may be prompted to provide your Office 365 credentials.



**Figure 165.** When you click the SYNC button in SkyDrive Pro or a team site, this dialog appears.

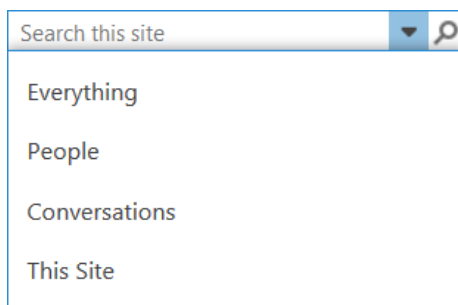
Once you've synched the document library, you can edit the documents on your computer. After you save your changes, they're sent back to SkyDrive Pro. (Obviously, you need an Internet connection for that to happen.)

You can also save documents directly to Document Libraries by pasting the correct address into the Office Save As dialogs.

## Searching in sites and SkyDrive Pro

The SharePoint piece of Office 365 offers a fairly comprehensive search capability. (Searching in the Outlook/Exchange part of Office 365 is discussed earlier in this paper, in “Searching in Outlook.”) A single search box lets you search all your sites and all files to which you have access in SkyDrive Pro. Using it searches not just the pages of sites, but both the metadata and contents of the documents included there and in SkyDrive Pro, and the contents of any apps that properly plug into search. So, for example, the data in Custom Lists is included in search.

The search box appears at the top of the Sites page and on the right side of any team site and of SkyDrive Pro. The box is actually a dropdown (shown in **Figure 166**) that lets you choose what to search. By default, the search box is set to “Everything” on the main Sites page and in SkyDrive Pro, and to “This Site” for individual sites.

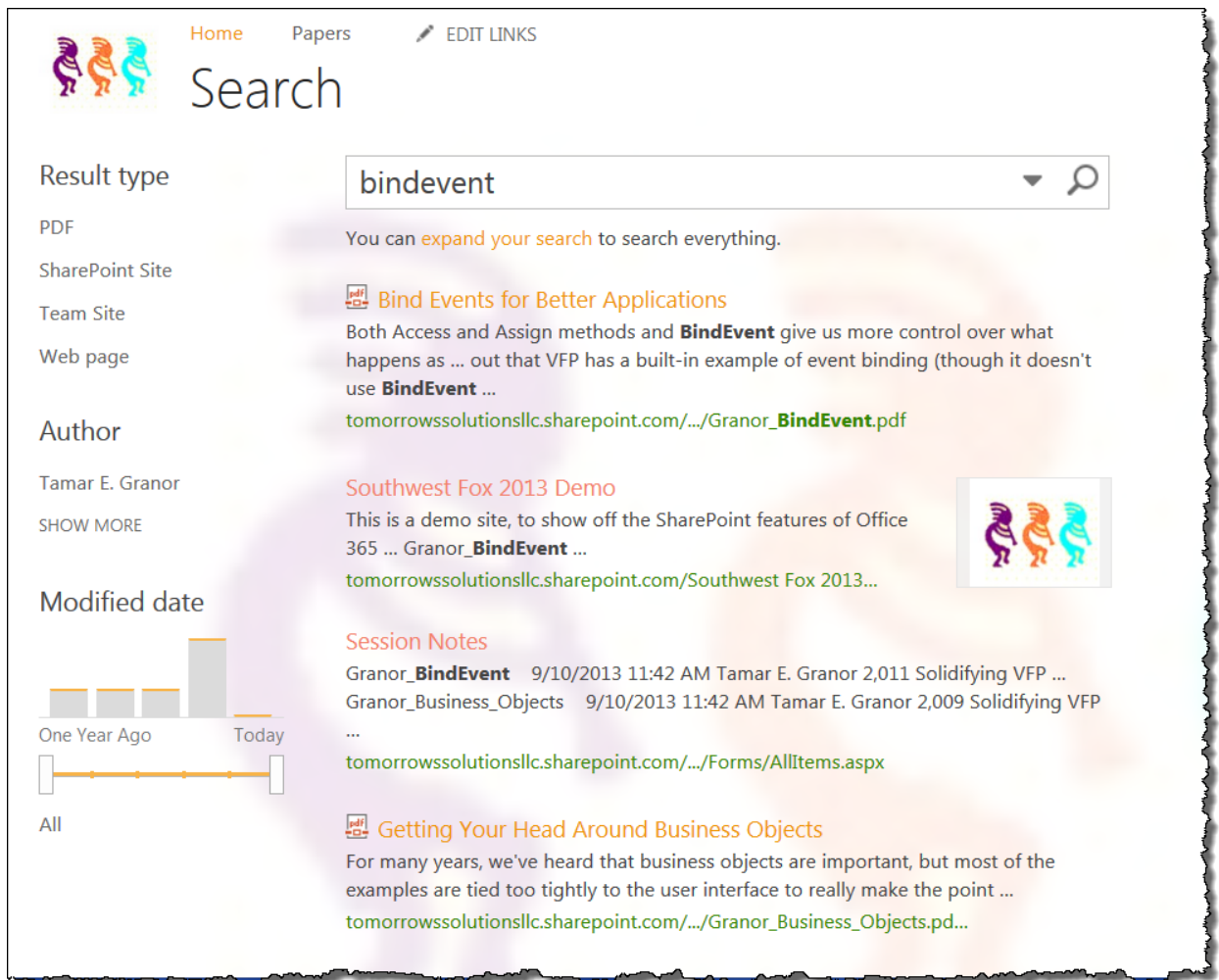


**Figure 166.** All the SharePoint-based components of Office 365 share a search facility. You can determine where to search using this dropdown.

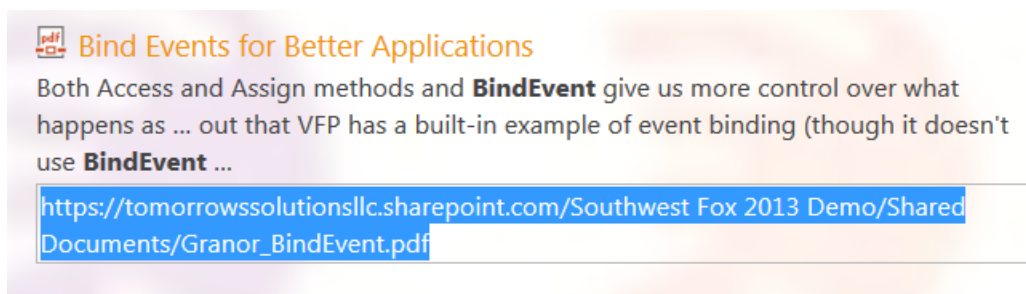
“People” refers to people in your organization, that is, people with accounts in Office 365 (so for my one-person organization, this search is useless). “Conversations” searches the Newsfeed, which isn’t covered in this paper, but among other things, tracks activity in Office 365.

When you search “Everything” or a particular site, as noted above, you search page and file content. For example, I searched a team site quite similar to the public site created in this paper for “bindevent”; **Figure 167** shows the top of the results page. The left pane offers ways to narrow the search results, while the rest of the page shows the results.

Hovering the mouse over a result shows a preview or callout, depending on the result type, and clicking on the title of a result navigates to it. One of the cool things in this search is that clicking on the link displayed for each result gives you an easy way to copy the link, so you can share it with others. In **Figure 168**, I’ve clicked on the link for my paper about BindEvent.

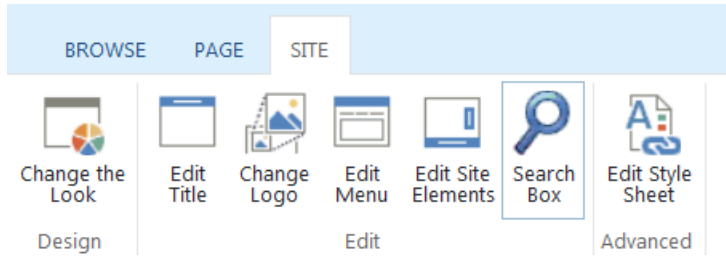


**Figure 167.** The results of a search can include pages and documents.

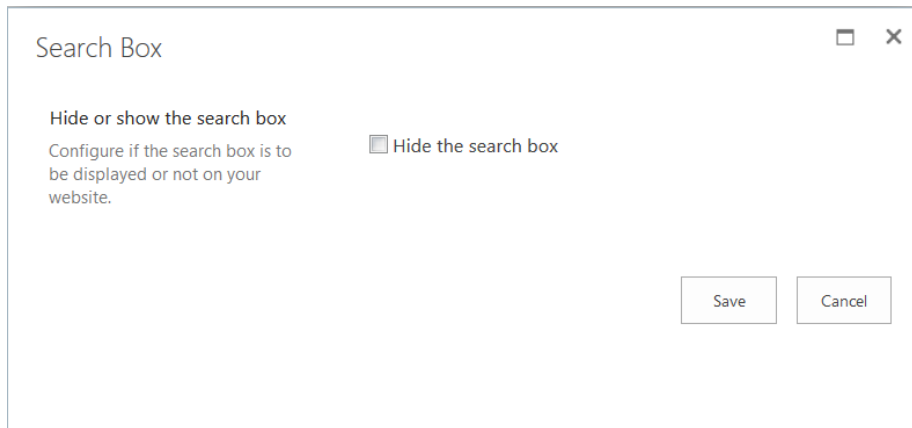


**Figure 168.** Clicking on the link that's shown for a search result selects the link, so you can copy it.

For the public site, search is a little different, though it, too, searches the entire site. First, you can control whether your site includes a search facility. To toggle the setting, click “Search Box” on the Site tab of the ribbon for editing the team site; see **Figure 169**. The Search Box, shown in **Figure 170**, dialog opens.



**Figure 169.** You can determine whether the public site offers search.



**Figure 170.** This dialog lets you choose whether to include the search box in your public site.

If you include the search box in a public site, it appears on every page. There's no dropdown to determine what to search; it simply searches the entire site, including documents. However, unlike search inside Office 365, pages or controls where the search string appears only because it's part of a row in a Document Library or Custom List aren't included in the search results.

For example, **Figure 171** shows the result of searching for "bindevent" on my public site. Multiple articles that include the string "bindevent" are listed, but the Document Libraries that contain those articles and the pages on which the Document Libraries sit aren't shown. That makes sense because a typical visitor to a website doesn't want to know about the structure that underlies the site, only the content.





**Figure 171.** In the public site, search results don't include Document Libraries or other apps.

## Resources

In addition to the Microsoft support site accessed through Office 365, there are a number of sites that provide support. Here are some I found useful as I was getting started and in writing this paper.

I created my public site in the first months after the 2013 version of Office 365 was released, so there wasn't much third party material. Therefore, I relied heavily on Microsoft's KB and other documentation.

This article was extremely useful in getting things set up initially:  
<http://onlinehelp.microsoft.com/en-us/office365-smallbusinesses/gg584195.aspx>

Here's a direct link to the Office 365 forums: <http://community.office365.com/en-us/forums/default.aspx>

The SharePoint team blogs at <http://blogs.office.com/b/sharepoint/>. (If you look hard enough, you'll find a couple of entries by my son.)

As more time passes, more third party material should become available.

## Acknowledgements

Tremendous thanks to my son, Nathaniel Granor, for his support as I got started with Office 365 and for tech-editing this paper. Any mistakes that remain, however, are mine, not his.

*Copyright, 2013, Tamar E. Granor.*