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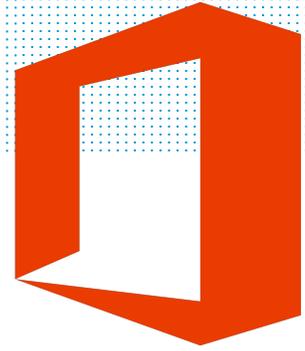
The Ultimate Guide to **Office 365**

A Training Guide for Office 365 Users from [BetterCloud](#)

**Note: This document will be updated over time. Please check back to see the updates.*

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Introduction

Welcome to our Ultimate Guide for Office 365!

The first item you should keep in mind when viewing this guide is that it is a **living document**. This means that it will continue to be updated as Office 365 evolves. We recommend that you save a shortcut to the Ultimate Guide's location, and only download or print when necessary.

The second item to note is that this guide will focus on **Office 365 for Business** and its accompanying **Office 2013/2016** applications. It includes information for both IT administrators and end users. When it's relevant, you'll see information about the online/web app versions of Office applications, as well as mobile apps. If you're an Office 365 user on a home or personal plan, you'll still find useful material here.

The Ultimate Guide for Office 365 is divided into several sections. In each one, you'll find helpful links that direct you to pages with information on relevant topics.

Getting Started

If you're just getting started with Office 365, there are a lot of great resources out there to support you. This section will give you a few resources for getting started on Office 365 for Business and the accompanying Office 2013 or 2016 applications.

The Beginning

- **Get started with Office 365:** Video and guides cover the basics of reading email, sharing documents, and more.
- **What's the difference between Office 365 and Office 2013/2016?**
- **How to sign in and sign out of Office 365:** The basic action of signing in and out, explained in a quick video.
- **Download and install Office 2013/2016 desktop apps:** Watch this video to install Office 2013 using Windows 8.1.
- Check the **Office 365 system requirements**.
- Do you have earlier Office versions? Set them up to work with Office 365 **here**.
- **Use Office 365 on any device.**
- **The basics of Office Online**, AKA Office Web Apps: This page from Microsoft provides useful overview information.
- **Use Office Online to work together:** This page offers some tips for getting started with sharing in Office Online.
- **Office Touch Guide:** Using a touchscreen? Check out this guide.
- **Can you run Office 2013/2016 without internet access?**
- **What does Office 365 have that Office 2013 doesn't?**

Getting Started

Here are a few things you can do in Office 365 and Office 2013 in order to customize your experience and make everything run a little more smoothly as you get started.

- **Personalize your online experience by changing your theme**
- **Add or change a profile photo**
- **Change the default home/landing page**
- **Change your Office 365 account settings (language, contact number, etc.)**
- **Customize the theme and colors of Office 2013/2016 apps**
- **Minimize or auto-hide the Office Ribbon**
- **Disable or remove the start screen of Office 2013/2016 apps**
- **Customize the Quick Access Toolbar**
- **Change the authors of a document**
- **Clear the recent document list**
- **Change the default save behavior**
- **Change color palettes**
- **Disable automatic bullets and numbering in Office**
- **Troubleshoot when your Office 2013/2016 app won't open**
- **Ensure your Office 365 account hasn't been compromised**
- **Troubleshoot the "something went wrong" error**
- **Encrypt Office 2013/2016 files with a password**
- **Add custom tiles and pin to the app launcher**
- **Deactivate Office 365 (so you can reinstall on another computer)**
- **Share large files using OneDrive for Business instead of Outlook**

OneDrive for Business and SharePoint Online

OneDrive for Business is the “work version” of Microsoft’s OneDrive storage solution, built on top of SharePoint architecture. The difference between OneDrive and SharePoint can be a little difficult to pin down, mostly because of the name and the way we talk about the two components, but we worked to demystify it for you with [this post](#).

OneDrive Tasks and Features

- [Free webinar: 10 Ways to Work More Efficiently in OneDrive for Business](#)
- [Save to OneDrive for Business](#)
- [Sync and find OneDrive for Business files](#)
- [Stop or pause syncing](#)
- [Use OneDrive as your default auto-recover location](#)
- [Create sharing links for OneDrive and SharePoint documents](#)
- [Require others to sign in to view shared documents](#)
- [Technical overview of OneDrive for Business in SharePoint Server 2013](#)

SharePoint Tasks & Features

- [Introduction to document libraries](#)
- [Update profile and privacy settings](#)
- [Follow content](#)
- [Move multiple/bulk files](#)
- [Start using a list](#)
- [Create and set up a list](#) (note that you’ll need permission to add an app to the site in order to create a list)
- [Create and manage a blog](#)
- [Create a wiki](#)
- [Organize and configure a library](#)
- [Post to a newsfeed within your organization](#)
- [Post to a team site feed](#)



Outlook

Many of us think of Outlook as simply email, but it also includes a calendar, task manager, contacts manager, and more. It's been around since the early 90s, and now it's part of Office 365 as both Outlook Online (also known as Outlook Web App) and Outlook 2013/2016.

- [Overview of supported email programs and features](#)
- [Set up your email account in Outlook 2013](#)
- [Webinar on the Outlook Web App](#)

Tasks and Features

Mail

- [Create a new message](#)
- [Change the view \(layout\) of your inbox, calendar, or other folder](#)
- [Change the layout of the preview pane](#)
- [Split the message window for easier composition](#)
- [Change your message preview settings](#)
- [Change what your unread messages look like](#)
- [Show your calendar and tasks in the inbox](#)
- [Prevent the first message from being automatically selected](#)
- [Create a folder](#)
- [Change the font of your messages](#)
- [Spell check email messages](#)
- [Add hyperlinks to email messages](#)
- [Insert and format tables](#)

Outlook

Mail continued

- [Send and open attachments](#)
- [Send or delete mail stuck in your mailbox](#)
- [Recall and replace sent messages](#)
- [Restore deleted emails](#)
- [Send automatic replies when you're out](#)
- [Enable the Bcc and From fields](#)
- [Group conversations together in your inbox](#)
- [Use email categories for organization](#)
- [Use rules](#)
- [Track email with read receipts & delivery confirmation](#)
- [Password protect your mailbox](#)
- [Turn off your email notification sounds](#)
- [Disable incoming desktop notifications](#)
- [Attach an email to another email or meeting invite](#)
- [Create a signature](#)
(or, for admins, [create a signature using a transport rule](#))
- [Open replies in a new window](#)
- [Set replies to always open in a new window](#)
- [Customize your spam filter with the safe senders list](#)
- [Forward/redirect your mail to a different account](#)
- [Create a new profile](#)
- [Add an additional email account to the Outlook desktop client](#)
- [Schedule emails](#)
- [Undo send with this delay setting](#)
- [Overview of add-ins and how to disable them](#)

Contacts

- [How to add contacts](#)
- [Import and export vCards \(virtual business cards\)](#)
- [Create contact groups/distribution lists](#)

Outlook

Calendar

- [Calendar basics](#)
- [Create meetings](#)
- [Add holidays to your calendar](#)
- [Share your calendar with others](#)
- [Check coworkers' schedules](#)

General Search and Management

- [Tips for Outlook search webinar](#)
- [Use Instant Search to find messages](#)
- [Use Instant Search to find contacts](#)
- [Use Instant Search to find calendar items](#)
- [Create or delete a search folder](#)
- [Set up an archiving/retention policy](#)
- [Archiving items webinar](#)

Online/Web App-specific

- [Built-in Outlook filters: all, unread, to me, flagged](#)
- [Add an image to your signature in Outlook Web App](#)
- [Save files directly to OneDrive for Business from Outlook](#)
- [Sweep](#)

Skype for Business/Lync

Microsoft's instant messaging client is **Skype for Business**, which replaced **Lync** in 2015.

Skype for Business is used for basic instant messaging as well as group chat, voice calls, and video conferencing. We're keeping our Lync archive below, but it will be removed in 2016.

Lync Tasks and Features

- [Set up Lync](#)
- [Install Lync](#)
- [Open Lync](#)
- [Sign into and out of Lync](#)
- [Set your conversation history](#)
- [Set up your audio and video](#)
- [Add a contact in Lync](#)
- [Send an instant message](#)
- [Check someone's availability](#)
- [Change your presence status in Lync](#)
- [Add your mobile number](#)
- [Make and receive a Lync audio call](#)
- [Make or receive a video call](#)
- [Find a previous Lync conversation](#)
- [Disable Lync conversation history](#)
- [Set up a Lync Meeting](#)
- [Join a Lync Meeting](#)
- [Share your desktop or a program in Lync](#)

Skype for Business/Lync

Get familiar with the new Skype for business—make calls, schedule meetings, share files, and more.

Skype Tasks and Features

- [Quick Start guides](#)
- [Install Skype for Business](#)
- [Start a call](#)
- [Make a direct call to an individual](#)
- [Make and receive calls](#)
- [Schedule a video/audio call](#)
- [Add contacts](#)
- [Send IMs](#)
- [Record meetings](#)
- [Share your screen or program](#)
- [Control access to your presence info](#)
- [Set Call Forwarding options](#)



Word

With dozens of releases on multiple platforms dating back to the 80s, Microsoft Word has extensive reach and history. Used across cultures and demographics, the word processing app is both simple and powerful. In Office 365, it lives purely on the cloud as Word Online, as well as in a familiar (cloud-connected) desktop version as Word 2013/2016.

Tasks and Features

- [Create a document](#)
- [Landscape vs. portrait orientation](#)
- [Custom margins](#)
- [View the ruler](#)
- [Basic Table of Contents overview](#)
- [Add page numbers](#)
- [Alphabetize a list](#)
- [Add, reply to, and complete comments](#)
- [Track changes](#)
- [Insert symbols and special characters](#)
- [Work with word counts](#)
- [Create labels](#)
- [Footnotes](#)
- [Mirror margins](#)
- [Use find and replace](#)
- [Add columns](#)

Tasks and Features

- [Turn off paragraph marks and formatting symbols](#)
- [Using WordArt](#)
- [Intermediate Table of Contents](#)
- [Using Styles](#)
- [Watermarks](#)
- [Basic mail merge + advanced mail merge + next level mail merge](#)
- [Advanced Table of Contents](#)
- [Collapsible headings](#)
- [Center a picture or object in the middle of a page](#)
- [Delete an unwanted blank page](#)
- [Paste options](#)
- [Modify and customize the AutoCorrect](#)
- [Use Word 2013/2016 to open up a Google Doc](#)
- [Convert a Word doc to a PDF](#)
- [Edit PDFs with Word](#)
- [Migrate Gmail contacts to Outlook](#)
- [Create a resume with Word 2013/2016 or Word Online](#)

Online/Web App-specific

- [Introduction to Word Web App](#)
- [Top tips for working in Word Online](#)
- [Basic tasks in Word Online](#)
- [Collaboration and co-authoring](#)
- [Web App training on Lynda.com \(note: cost associated\)](#)



Excel

Excel and spreadsheets are practically synonymous. At its most basic, it is a data tool comprised of a grid of cells arranged into rows and columns, but quickly gets more complicated with features including calculation, graphing, pivot tables, and Visual Basic. (Note: VBA is not covered in this guide.) Excel serves the needs of many different users and industries.

Tasks and Features

The possibilities are endless with Excel, but we'll get you started with some of the most useful things you can with this tool. Check out the Web App-specific links for some advice if you're not using Excel 2013 or 2016 (though we recommend that you do in order to take advantage of all of Excel's features).

- [Create a workbook](#)
- [Freeze or lock panes](#)
- [Insert a line break](#)
- [Add hyperlinks](#)
- [Make text appear on multiple lines \(wrap text\) in a cell](#)
- [Show or hide columns and rows](#)
- [Switch data from rows to columns](#)
- [AutoFit Cell Width and Height to Cell Data in Excel](#)
- [Create a chart](#)
- [Create a drop-down list](#)
- [Find the largest number in a spreadsheet](#)
- [Understand and use cell references](#)
- [Insert headers and footers](#)
- [Sort and alphabetize columns](#)
- [Filter data](#)

Tasks and Features

- [Remove duplicate values](#)
- [Split or merge cells](#)
- [Print worksheets and workbooks](#)
- [Create a survey](#)
- [Create a calendar](#)
- [Add numbers](#)
- [Basic math](#)
- [Password protect workbooks and worksheets](#)
- [Use Auto Fill and Flash Fill](#)
- [Replicate/concatenate data across cells](#)
- [Use simple formulas](#)
- [Add or subtract time](#)
- [Average a group of numbers](#)
- [Simplifying your Excel data webinar](#)
- [Use conditional formatting](#)
- [Advanced conditional formatting](#)
- [VLOOKUP](#)
- [Advanced IF functions](#)
- [Array formulas](#)
- [Create and manage drop-down lists](#)
- [Create a PivotTable and analyze data](#)
- [Understanding the Excel Data Model webinar](#)
- [Understanding Power Pivot webinar](#)
- [Work with macros](#)

Online/Web App-specific

- [Top tips for working in Excel Online](#)
- [Basic tasks in Excel Online](#)



PowerPoint

Microsoft PowerPoint has long been the go-to application for presentations and slideshows, with a final product that can be printed, displayed on a computer or video projector, and/or navigated through by a presenter. Slides can include text, graphics, sound, movies, and other objects, and movement is included via transition of elements and slides as well as custom animation.

Tasks and Features

Learn to love PowerPoint! With these tips, you can go beyond simple slides with text and images (though you can learn to do that, too) and create beautiful, dynamic presentations.

- [Create a presentation](#)
- [Apply and change a theme](#)
- [Add hyperlinks to slides](#)
- [Duplicate, hide, or delete slides](#)
- [Apply transitions between slides](#)
- [Add sound effects to a transition](#)
- [Highlight text and change fonts](#)
- [Print slides, notes, or handouts](#)
- [Use Presenter view](#)
- [Backgrounds](#)
- [Change the size of a slide](#)
- [Insert and format images](#)
- [Use shapes instead of text boxes](#)
- [Crop a picture to fit a shape](#)

Tasks and Features

- [Use the eyedropper to match any color](#)
- [Add a watermark](#)
- [Working with handout masters](#)
- [Video in PowerPoint webinar](#)
- [Juggling multiple PowerPoints webinar](#)
- [Add bullets to text](#)
- [Add headers and footers](#)
- [Animate text](#)
- [Animate pictures, art, and other objects](#)
- [Using animation webinar](#)
- [Design motion paths](#)
- [Add sound effects to an animation](#)
- [Insert and format tables](#)
- [Create a flow chart](#)
- [Create an org chart](#)
- [Install a template](#)
- [Create a template from a presentation](#)
- [Insert a bar chart, line chart, or pie chart](#)
- [Rehearse timings for a slide show](#)
- [Use the laser pointer during a slide show](#)
- [Trigger an animation effect](#)
- [Use slide masters to customize a presentation](#)
- [Embed a PPT presentation on a webpage](#)
- [Embed YouTube videos in PowerPoint](#)
- [Print slides with or without printing speaker notes](#)

Online/Web App-specific

- [Introduction to PowerPoint Online](#)
- [Basic tasks in PowerPoint Online](#)



OneNote

OneNote is a free-form note-taking application that has awesome capabilities. You can take basic notes, but you can also take your notes to the next level with drawings, screen clippings, images, links, and embedded files. OneNote will help you stay organized.

- [Intro webinar](#)
- [Basic tasks in OneNote Online](#)

Tasks and Features

Once you master the common actions you can take with OneNote, you can really personalize your experience and make OneNote work for you. Take the first steps with these links, and then explore your possibilities.

- [Create a notebook](#)
- [Change the default font type and size](#)
- [Using tables](#)
- [Save and sync notebooks to OneDrive](#)
- [Sharing with OneNote webinar](#)
- [Add links](#)
- [Take screenshots](#)
- [Pull text out of images](#)
- [Password protect OneNote](#)
- [Email your OneNote notes pages](#)
- [Use OneNote to take awesome meeting notes](#)
- [Embed an Excel spreadsheet](#)
- [Create to-do lists](#)
- [Make and share shopping lists](#)
- [Capture audio and video](#)
- [Create an Outlook 2013 Task From OneNote](#)
- [OneNote Clipper extension for Google Chrome](#)
- [OneNote for students webinar](#)
- [Onetastic for OneNote webinar](#)
- [Use OneNote for a business training \(as a student\)](#)
- [Use OneNote for a business training \(as a trainer\)](#)

For IT Pros

IT administrators have a wide variety of responsibilities when it comes to managing Office 365. While this guide doesn't cover every single task an IT pro might deal with, we're providing some links that should cover the breadth of your work.

Resources and Training

- Check the [system requirements for Office 365](#)
- [Get started with O365 using FastTrack.](#)
- [Ignite Guides for Office 365](#) provide great introductions.
- Check out [Office 365 training from Microsoft Learning.](#)
- Browse the [Office 365 courses on Microsoft Virtual Academy.](#)
- Follow the [Garage Series for Office 365](#) for a fun take on technical topics.
- [Office 365 on TechNet](#) is a great resource for articles and information.
- Scroll through [Technet's library of articles on Office 365.](#)
- The Office 365 community has many valuable resources, including this [Manage Office 365 wiki.](#)
- Stay security-minded with the [Office 365 Trust Center.](#)
- Get some [FREE eBooks from Microsoft.](#)
- [Training from Pluralsight](#) on Office 365 administration. (Note: This training has a fee.)
- [Training from Lynda.com](#) on Office 365 administration. (Note: This training has a fee.)
- Learn about [using PowerShell to manage O365](#) and advance to some scripts [for managing users.](#)

Stay ahead of the curve

- Watch out for [known issues.](#)
- [Get early updates for your users.](#)
- Keep an eye on the [Office 365 roadmap](#) from Microsoft.

New Applications

Delve

Delve is a discovery and collaboration tool in Office 365 powered by Microsoft's machine learning capability, Office Graph.

- [Office Delve overview](#)
- [Finding people and information](#)
- [Grouping and sharing documents](#)
- [Disable Delve](#) (for admins)

Sway

Sway is a new way to present information that's similar to PowerPoint but taken to a new level. You can create and share interactive content: presentations, reports, personal stories, and more.

- [Office Sway](#)

Mix

Office Mix takes your PowerPoint slides and turns them into dynamic multimedia presentations that can include quizzes, on-the-spot written notes, recordings, and more.

- [Introduction to Office Mix](#)
- [Create a Video From a PowerPoint Presentation With Office Mix](#)

Other Applications & Platforms

Access

Access is a database management system that Office 365 users may use in a few different ways. Access Web App allows users to build a database in Access, then use and share with others as a SharePoint app in a web browser.

- [Access 2013 Quick Start Guide](#)
- [Access training courses](#)
- [Basic tasks for an Access app](#)
- [Basic tasks for an Access 2013 desktop database](#)

Project

Project is a project management program that assists PMs in planning, assigning tasks, tracking progress, budgeting, and analysis. Project Pro for Office 365 is available as a subscription through Office 365.

- [Project 2013 Quick Start Guide](#)

Publisher

Publisher is a desktop publishing application that emphasizes page layout and design. 2013 provides new ways to use picture and text effects.

- [Publisher 2013 Quick Start Guide](#)

Other Applications & Platforms

Visio

Visio is Microsoft's diagramming and flow chart application. Visio 2013 has updated diagram templates, new styles and themes, and other useful tools.

- [Visio 2013 Quick Start Guide](#)

Yammer

Yammer is the private social networking tool that increases collaboration and conversation in Office 365.

- [Activate Yammer](#) (for admins)
- [Create an internal group or external network](#)
- [Change your email notification settings](#)

Office for Mac

- [General requirements for Outlook 2016 for Mac](#)
- [What's new in Office 2016 for Mac](#)
- [Outlook 2016 for Mac basics](#)
- [Office for Mac help site](#)

Office for Mobile

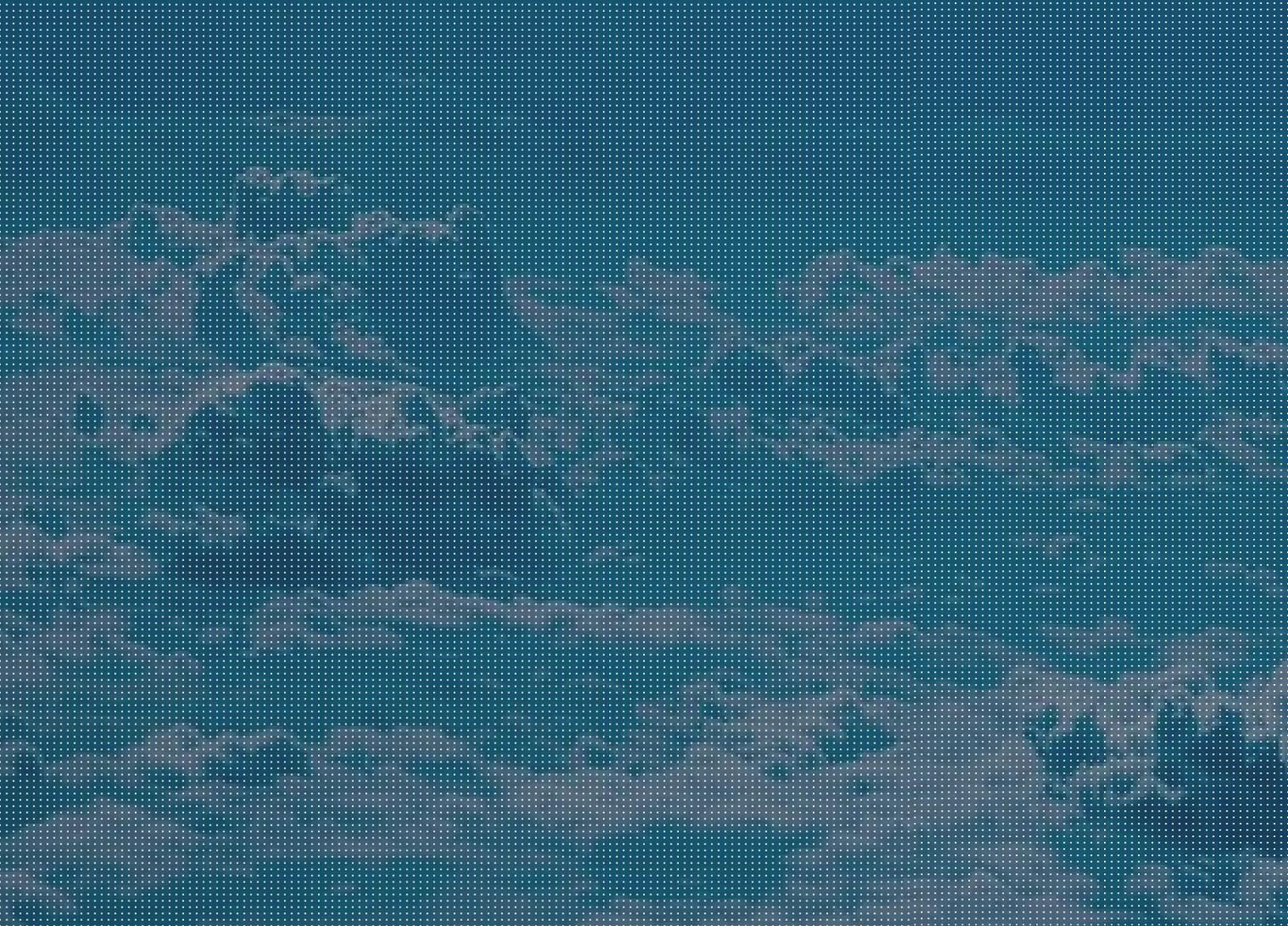
- [Overview of Office on mobile devices](#)
- [Use Office 365 on any device](#)

Just For Fun!

- [Add Clippy and friends to any website](#)
- [Find Clippy in Office 2013/2016](#)
- [Discover past Easter eggs in Microsoft products](#)
- [Check your humor proficiency level with Microsoft](#)
- [12 of Microsoft's Most Memorable Ads of All Time](#)
- [See beautiful art created in Excel](#)
- [Read a passionate defense of PowerPoint](#)
- [Outlook calendar trivia](#)

Conclusion

Office 365 is a powerful and trustworthy full-service productivity suite with a wide variety of capabilities for IT pros, power users, and true beginners. We hope you've found our Ultimate Guide to Office 365 useful, relevant, and comprehensive.



BetterCloud provides critical insights, automated management, and intelligent data security for cloud office platforms. By leveraging open APIs, BetterCloud securely connects with your data at its source, providing maximum control without requiring any cumbersome setup. BetterCloud is trusted by IT teams in over 50,000 organizations worldwide.

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