Office 365 Instructions

What is Office 365?

Office 365 includes a variety of Microsoft applications in addition to the standard Microsoft Office products. Most of the Office 365 applications (or apps) can be accessed online, downloaded to your computer, or accessed via an app that you download to your mobile device or tablet.

How do I log in/access Office 365?

- Log in to Webmail from any Ursinus College webpage and click on the Office 365 link at the top.

  OR

- Go to www.office.com. Click Sign In in the top right-hand corner and log in with your Ursinus email address, then Ursinus username and password.

How do I download Office 2016/Office 365 on my computer?

- Log in to Office 365 (www.office.com) and click on the button that says **Install Office Apps.** Then choose **Office 2016**.

What is the difference between Office applications on your computer vs. the web versions?

When you log in to Office 365, you will see Word, PowerPoint, Excel, Mail, and Calendar apps. These are similar to the Microsoft Office applications on your computer; they are just hosted online. They don't have all the features of the desktop applications. Therefore, if you are working in any of these apps online (e.g. Word Online) and you need additional features, you can click on a link that says "Open in…" or "Edit in…" to view and edit the file in the desktop application.
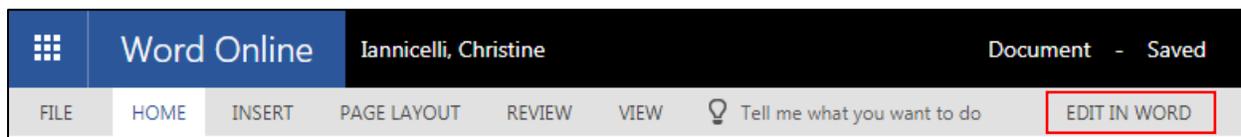
Any files you edit in the online apps (e.g. Word, PowerPoint, Excel) will automatically save to your OneDrive. If you click on "Edit in…" to edit the file in the desktop application, when you click Save, it will automatically sync and save it to your OneDrive.

What is OneDrive?

OneDrive is a file storage and sharing service that allows users to create, save, share, and co-edit files on their computer, web, and mobile devices. Changes made in OneDrive on your desktop, online, or in your mobile device automatically sync to the other formats. If you delete the file in one area (e.g. from OneDrive online), it also deletes it in the other versions (e.g. OneDrive on your computer and in the OneDrive app). Therefore, make sure you backup your files to another storage system periodically (e.g. the S-drive).

How do I access and use OneDrive online?

Log in to Office 365 (www.office.com) and click on the OneDrive app. Once there, you can click on **New** to create a new file or upload a website link to your OneDrive account. You can also select **Upload** to upload multiple files and folders that are stored on your computer. Click on the file name to edit the file.

How can I download and use OneDrive on my computer?

If you have Windows 10, OneDrive is already on your computer. Search for OneDrive through Cortana (circle icon on the taskbar) or by clicking the Windows icon. When prompted, sign in with your Ursinus credentials. If it doesn't prompt you to sign in, open OneDrive on your computer and right click the **blue cloud icon** in the bottom right-hand corner of your taskbar. Go to **Settings** and sign in with your Ursinus credentials. Contact Tech Support if you still cannot sync OneDrive with your Ursinus account.

If you don't have Windows 10 and need to download the OneDrive application on your computer, log in to Office 365 (www.office.com) and click on the OneDrive app. Select **"Get the OneDrive apps"** in the bottom left-hand corner of the screen. Follow the instructions to download OneDrive to your computer. It will prompt you to sign in with your Ursinus credentials.

Once you download OneDrive to your computer, the "**OneDrive – Ursinus College**" application should show in your favorites when you click on Windows Explorer (i.e. the folders icon) on the taskbar.

Any time you create a file on your computer and click Save As, you have the option of saving it to OneDrive-Ursinus College. You can also copy and paste or drag and drop files to your OneDrive folder.

How do I use OneDrive on my mobile device?

Install the OneDrive app on your mobile device and sign in with your Ursinus credentials. You can now view your files and upload new files. If you want to edit a file saved in OneDrive, you will also need to install the Microsoft app needed to edit it (e.g. Word, Excel, PowerPoint).

How do I share files/folders in OneDrive?

Log in to Office 365 (www.office.com) and select the OneDrive app. Click the circle next to the file(s) or folder(s) you want to share and select the **Share** button at the top. If you want to share it with only certain individuals, click the dropdown next to "Anyone with the link can view and edit" and choose **Specific People.** Type in the first person's name (last name first) or email address and then select their name from the dropdown. Do this for each person. Uncheck the box that says **Allow Editing** if you only want them to view the file(s). Then click **Apply.** They should receive an email with a link to the file(s).

Alternatively, you can click the circle next to the file(s) or folder(s) you want to share and select **Copy Link** at the top. Follow the instructions above if you want to share it with only Specific People, then copy the link and email it to those individuals.

You can share files and folders in OneDrive with people outside of Ursinus College. You can also edit shared documents at the same time in OneDrive. If two people are editing the same document in OneDrive online, each of you will see the changes in real time. You can also leave a comment on the document. If one person is editing the document in their desktop application

(e.g. Microsoft Word), that person needs to hit Save before the other individuals will see those changes.

What is an Office 365 Group?

An **Office 365 Group** allows users that are added to that group to:

- Share information with the group via a group email distribution list
- Access those emails (or conversations, as Microsoft calls it) in one place, even if you deleted the email from your personal inbox
- Post to and access a group calendar
- Create, store, collaborate, and access group files using Microsoft's SharePoint library
- Take and store meeting notes using OneNote (also called Notebook)
- Delegate tasks and monitor progress using Planner

## How do I create or access an Office 365 Group?

Students should contact Tech Support if they would like to create an Office 365 Group. Faculty and staff can log in to Office 365 and click on **People.** Any Groups you belong to will show on the left-hand side under **Groups.** Alternatively, if you have Outlook 2016 on your computer, you will see your Groups on the left-hand side under your email folders.
Click on **Discover** (you may have to scroll to the bottom of the Groups list and click on More to find it) to see what Office 365 Groups have already been created.

To create a new Group in Office 365, click on the + **icon** next to Groups. Choose **Standard Group** and give it a title (Choose a unique name that is reflective of the group's purpose. You cannot change the email address once it's created, though you can change the Group's title). Once you create the Group, the system will automatically add a **UCGroup_** prefix to it.
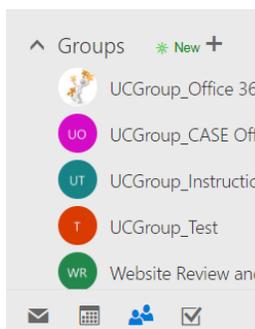
Alternatively, if you want to create a Group in Outlook 2016, right-click the Groups folder name and choose **New Group.**
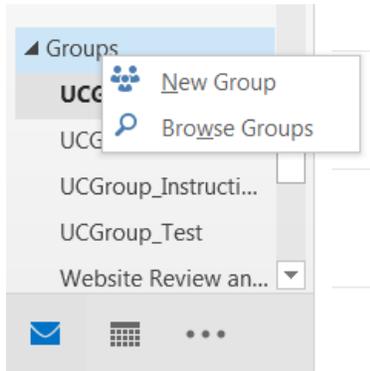
Once you give the group a title, set the group's privacy to **Private** (unless you want anyone at Ursinus College to have access to that Group's contents).

Check the box next to "Send copies of all groups messages…" (or "Subscribe new members…" if you are creating a Group in Outlook). Then click **Create.**

After you create a Group, you can add and remove members at any time by logging in to Office365, selecting the People icon, and clicking the Group name in the left-hand navigation menu.

How Do I Send Emails to the Group?

Compose an email message in Outlook and in the **To:** Field, type in or find the Group's email address (Remember: the group's name will begin with UCGroup_). Then send the message. Group members will receive the email in their personal Outlook. A copy will also be sent to the Group's conversation section. If a group member deletes the email in their personal Outlook, it won't affect the email in the Group's conversation section.

How do I Invite Group Members to an Appointment?

Create an appointment in your Outlook Calendar and click on **Invite Attendees.** Type in the Group's email address and send the appointment. Alternatively, you can go to your Group (either online in Office 365 under People or in Outlook 2016) and select Calendar. Post the appointment there to the Group's calendar (Note: Your personal calendar will show up in this section, but only you can see it).

Group members will receive the invite via email and it will place a tentative appointment on their personal Outlook calendar.

How do I Share Files with my Group?

Go to your Group by either clicking on the Group title in Outlook 2016 or logging in to Office 365, clicking on People, and then selecting your Group.

Next, click on **Files** at the top. If you are accessing your Group through Office 365 online, you will need to click on **Browse Library** in the right-hand corner to access the entire Group library. Group files are shared in Microsoft's SharePoint's library and all group members can view and edit these files.

SharePoint is similar to OneDrive, but it is a separate application. You can create new files or upload a website link in SharePoint by clicking on **New**. You can also click on the **Upload** button to upload multiple files and folders from your computer to your group's SharePoint library.

External users need to be part of an Office 365 Group to access the Group's files in SharePoint. You cannot share individual files and folders from SharePoint with external users as you can in OneDrive.

Just like OneDrive, you can also edit shared documents at the same time in SharePoint. If two people are editing the same document in SharePoint online, each of you will see the changes in real time. You can also leave comments on the document. If one person is editing the document in their desktop application (e.g. Microsoft Word), that person needs to hit Save before the other individuals will see those changes.

Can I Copy Files/Folders from OneDrive to SharePoint and Vice Versa?

Yes, you can! If you would like to copy a file you created in OneDrive to your Group's SharePoint library, go to OneDrive, select the file, and click on **Copy To** (if you don't see "Copy To" at the top of your screen, click on the three dots). Choose the Group you wish to copy it to.

To copy a file from a Group's SharePoint library to your personal OneDrive, go to your Group's SharePoint, select the file, and click on **Copy To** (if you don't see "Copy To" at the top of your screen, click on the three dots). Choose **Your OneDrive.**

How Do I Take Notes That The Entire Group Can Access?

Go to your Group by either clicking on the Group title in Outlook 2016 or logging in to Office 365, clicking on People, and then selecting your Group.

Next, click on **Notebook** at the top. This will bring up your Group's shared notebook in OneNote. From now on, you can also open your Group Notebook by opening the OneNote program on your computer or going to OneNote Online and choosing the group.

Within OneNote, you can create multiple tabs/sections and multiple pages. You can also link or embed files, record audio and video, and keep to-do lists.

How Do I Assign Group Members Tasks in Planner?

Go to https://tasks.office.com and sign in. Choose your Group on the left-hand side under Recent Plans or scroll down to the very bottom and choose the Group under All Plans. Click the + icon to add a task. Add a due date and assign it to someone, then click **Add Task**. Select the task again to add more details or mark the task as in progress or completed.