

LEARNING MADE EASY



3rd Edition

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Office 365®

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Collaborate in
real time

Utilize social networking
in your daily tasks

Increase productivity and
work from anywhere

Rosemarie Withee
Ken Withee
Jennifer Reed

Office 365[®]

for
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Office 365[®]

3rd Edition

**by Rosemarie Withee, Ken Withee,
and Jennifer Reed**

for
dummies[®]
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Office 365® For Dummies®

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Introduction

Over the last few years, a massive shift has occurred at Microsoft. Microsoft has transitioned from selling software that large customers install locally to a company that sells cloud-based services. Office 365 is just such a service. Microsoft is not the only company that has done this. Just about every traditional software company now offers its product over the Internet as a service.

As a user in this new service-based software world, you have all the power. You can start using advanced software in a matter of minutes that only a decade ago was reserved for the largest corporate entities with dedicated teams and huge budgets. You can decide to start using software one day and decide to stop using it — and stop paying for it — a week later. You can add more user licenses to your subscription or remove them when you don't need them. In short, it is a great time to be a consumer of software.

About This Book

This book is about understanding Microsoft Office 365 at a fairly high level. It includes some of the administrative tasks of setting up and managing the software along with using some of the most well-known applications. The Office 365 product consists of many applications, and the book walks you through some of the major ones.

Microsoft is constantly adding new features and products to Office 365 so this book should be used as a base to get started. You can then explore further on your own. In fact, in most cases there are books dedicated to each app in particular. For example, if you want to learn more about Excel, you can pick up a book about Excel. The same goes for other apps like Outlook and Word, as well as apps that need extensive administration and management like SharePoint, Exchange, Teams, and others. We try to balance our coverage to provide a high-level view that can be used to get you started. Think of this book as the entry door to the whole enchilada known as Office 365.

If you are considering moving to Office 365 or have already moved, then this book is the first book you should read to get up to speed on the concepts and terms as quickly as possible.



TIP

In this book we focus on Microsoft's Office 365 software because we are big fans of it and use it regularly. With that said, it is not the only game in town. You will find similar offerings from Google, Dropbox, Facebook, and nearly any other large — and small — software company on the planet. Much of the feedback we have received from previous editions of the book dinged us for being too obsessed with the Microsoft tools and trying to sell for Microsoft. Though we are fans of Office 365, we often recommend other options as well depending on the specific needs of the customers we are working with. We have decades of experience and we tried hard to bring that to this book on Office 365. We hope that you will get value out of all of our hard work through trials, failures, and successes, and we hope you enjoy the book.

How to Use This Book

This book is designed to be read as you want to find out about specific components of Office 365. You do not need to read the chapters of the book in any order; however, we recommend you read the first part first to gain foundational knowledge of service-based software and in particular Office 365. Then feel free to jump around as you see fit.

The familiar *For Dummies* icons offer visual clues about the material contained within this book. Look for the following icons throughout the chapters:



TIP

Whenever you see a Tip icon take note. We use the tip icon whenever we want you to pay particular attention. Throughout the process of writing the book, we worked closely with Microsoft on any bugs or issues that have come up. When we found something worth a special note, we use this icon for emphasis.



REMEMBER

Whenever you see a Remember icon, get out your notebook. The Remember icon is used to point out key concepts that you should remember as you walk through the Office 365 product.



WARNING

Throughout our careers we've come across many roadblocks. It often takes hours to figure something out the first time and then only minutes the next time you encounter it. Often the root cause of your problems is a bug or some quirky behavior. We have tried to call out whenever you should take note of something and beware of how it will affect your Office 365 environment.



Office 365 is designed to be simple and intuitive; however, nothing is ever as easy as it appears. When we talk about something that is fairly technical in depth, we use the Technical Stuff icon. You definitely don't need to understand every technical detail, but it is there if you decide you want to dig further.

Beyond the Book

The Internet is huge! Search www.dummies.com for additional information about Office 365. Simply enter *Office 365 For Dummies Cheat Sheet* in the Search box to bring up several additional articles about the Office 365 tools.

Let's Get Started!

Office 365 is a service-based offering by Microsoft and bundles software such as SharePoint, Exchange, Teams, along with the traditional Office apps, Word, Excel, PowerPoint, OneNote, Outlook, and countless other new products into a single subscription. The software is accessed over the Internet and paid for on a monthly basis per user.

The traditional Office products are downloadable to many different devices, including iPhones, iPads, Macs, and Android-based phones and tablets, in addition to the familiar Windows-based devices. Microsoft runs the server products in their data centers with their engineers looking after them. You can be assured that they know what they are doing. After all, who better to manage these products than the same people who actually built them in the first place? To ease the mind of the risk averse, Microsoft puts their company name and piles of cash behind Office 365 in a very attractive service-level agreement.

This book is the first step in your Office 365 journey and is designed to get you up to speed as quickly as possible. If you're ready to take your first step, then you can get started!

1 Keeping Up with the Cloud Computing Environment

IN THIS PART . . .

Start with an overview of how the workplace has changed since the arrival of cloud computing.

Get an understanding of the current threat landscape with the proliferation of hacking as a cottage industry. Learn how bad actors use social engineering to trick you into giving away the keys to your kingdom.

Get your feet wet with a broad understanding of the Microsoft cloud and how Office 365 fits into the mix.

Look into Office 365 and all the products stuffed into the offering, including Exchange Online for email, SharePoint Online for your portal needs, Microsoft Teams for instant and ad-hoc meetings and communication, and Office ProPlus for your desktop productivity needs.

- » Understanding cloud computing and its value in the current threat landscape
- » Getting to know the cloud deployment and service models
- » Determining the right Office 365 plan for your organization

Chapter **1**

Understanding Cloud Computing and the Current Threat Landscape

The way we work today is vastly different from the way we worked in the past. Gone are the days when we worked from 9 a.m. to 5 p.m. in one location using one desktop computer and software that didn't connect to the Internet. Today we get our work done using a desktop, a laptop, a smartphone, or a tablet while on the bus, at the doctor's office, during a run, at a coffee shop, and even when we're on vacation.

Welcome to the new world of work. It is the way most organizations are working, and it is the way the modern and younger workers expect to work.

As more companies embrace the opportunities presented by cloud and mobile computing, they also take on new risks. One of the most significant challenges in today's computing environment is ensuring security, privacy, and compliance. In fact, there is a consensus in the business world that there are only two types of

organizations: those that know they've been hacked, and those that don't know they've been hacked. By the end of 2017, more than 28,800 data breaches had occurred globally with over 19 billion — again, that's *billion* — records exposed stemming from over 20,000 types of vulnerabilities.

The security issues we know today are not isolated to Fortune 500 companies. The reality is that small and medium-sized businesses (SMBs) are just as vulnerable to attacks. In fact, SMBs face more serious risks for a variety of reasons, including the scarcity of security talent in the industry; their inability to identify, assess, and mitigate security risks; the lack of familiarity with security best practices and the overall threat landscape; and confusion from the multitude of security solutions from which to choose.

One might conclude that the best defense against cyberattacks is to have a computing environment that's not in the cloud (rather *on-premises*, as technologists call it), and is protected by firewalls using the best encryption technology and running the latest anti-virus software. The problem with this approach is that all it takes to start a breach is one simple human error, such as clicking on a link or opening an attachment in an email. The reality is that as software and platforms are getting better at combatting cyberthreats, attackers are shifting their focus to the human element to hack the users through social engineering.

But what is *social engineering*? Consider the following real-life example:

Cloud611, a Microsoft Cloud Solutions Provider, resells Office 365 licenses to SMBs. Recently, a customer forwarded an email to Cloud611 asking why the company was warning him that his account could be deleted or closed. The exact language of the email read:

Your account will be disconnected from sending or receiving mails from other users because you failed to resolve errors on your mail.

Confirm your activities [here](#).

Regards,

The Mail Team

Under the guise of being a solutions provider, the attacker tried to use a scareware tactic to trick the customer into clicking on the word “here,” which is hyperlinked to a site that then downloads and installs malware on his computer. Fortunately, the customer did not completely fall for it, and the attacker failed — this time.

Social engineering comes in many forms: phishing, spear phishing, scareware, and more. These tactics all attempt to psychologically manipulate a user into divulging information or influence an individual to perform a specific action. The end game is usually to gain access to the computing environment to do harm.

The good news in this story is that the customer did not have to invest thousands of dollars to implement an end-to-end security solution nor hire an expensive security expert to protect his small business. For a mere \$2 per user per month, the customer added Advanced Threat Protection (ATP) to his Office 365 Business Premium license to secure his mailboxes, files, online storage, and even his Office applications against advanced threats.

This chapter is for those of you who have a keen interest in understanding the basic principles of cloud computing with the intent of utilizing the benefits of the cloud to run your business in a way that increases employee productivity while keeping your environment secure. It covers the various services offered within Office 365, including what they cost and the latest security and privacy features built into the services. With the knowledge you gain from this chapter, you will be better prepared run a more secure, productive organization.

Understanding Cloud Computing

The “cloud” is a metaphor for the “Internet.” In simplistic terms, *cloud computing* means that your applications or software, data, and computing needs are accessed, stored, and occur over the Internet “in the cloud.”

If you’ve had a Facebook account, played online games, shared files with Dropbox, or shared a photo of your new haircut on Instagram, you’ve been computing in the cloud. You’re using the services of an entity to store your data, which you can then access and transfer over the Internet. Imagine what life would be like if you wanted to share photos of your lunch with all of your 500 friends and cloud computing didn’t exist.

For businesses and other organizations, cloud computing is about outsourcing typical information technology (IT) department tasks to a cloud service provider who has the experience, capability, and scalability to meet business demands at a cost that makes sense.

For example, let’s look at a small business such as a boutique accounting firm that services over 200 businesses locally. Email is a critical communication platform for the firm. To be productive, the firm decided to hire an independent IT consultant to install an email server in the office. The deal was that the IT consultant would train a couple of people from the firm to do basic server administration. Beyond the basics, the consultant would be available to remotely access the server to troubleshoot or show up in person if something breaks.

Like most horror stories we've heard from people who try to manage their own servers without a highly trained IT staff, the situation turned out to be a nightmare for this firm. The email server went down during tax season when the IT consultant wasn't immediately available. In an industry where highly sensitive data is exchanged and customer trust is paramount, you can imagine the stress the company owner experienced dealing with email that contained sensitive attachments ending up in a black hole, irate customers who didn't get a response to their time-sensitive requests, and lost opportunities beyond quantifying.

Cloud computing for members of this firm meant migrating their email to Office 365. So instead of running their own email server, fixing it, patching it, hounding their IT consultant, and dreading another doomsday, they simply paid a monthly subscription to Microsoft, which is the entity responsible for ensuring the services are always up and running. They also know that email will not be lost, because they don't rely on one piece of equipment getting dusty in a corner of their office break room. Instead, they're taking advantage of Microsoft's huge and sophisticated data centers to replicate and backup data on a regular basis.

The basic premise of cloud computing is that organizations of any size can take advantage of the reduced cost of using computing, networking, and storage resources delivered via the Internet while at the same time minimizing the burden of managing those complicated resources.

Breaking down the cloud deployment models

Not all organizations are created equal. For example, a financial organization has different requirements than a nonprofit organization or a government organization. To address these varied needs, cloud service providers offer different deployment options.

Public cloud

The type of deployment model the boutique accounting firm used in the previous section is referred to as the *public cloud*, where the cloud computing service is owned by a provider (Microsoft) and offers the highest level of efficiency in a shared but secure environment. The firm did not own or maintain any hardware. It accessed and used the email and other services from the public cloud on a subscription model. In cloud computing-speak, this firm is referred to as a *tenant* in a public cloud. There are multiple tenants in a public cloud. Each tenant is isolated from the other with security boundaries so there is no data leakage. As illustrated in Figure 1-1, Enterprises A, B, and C can access the same application services in a public cloud, but their data is isolated from each other.

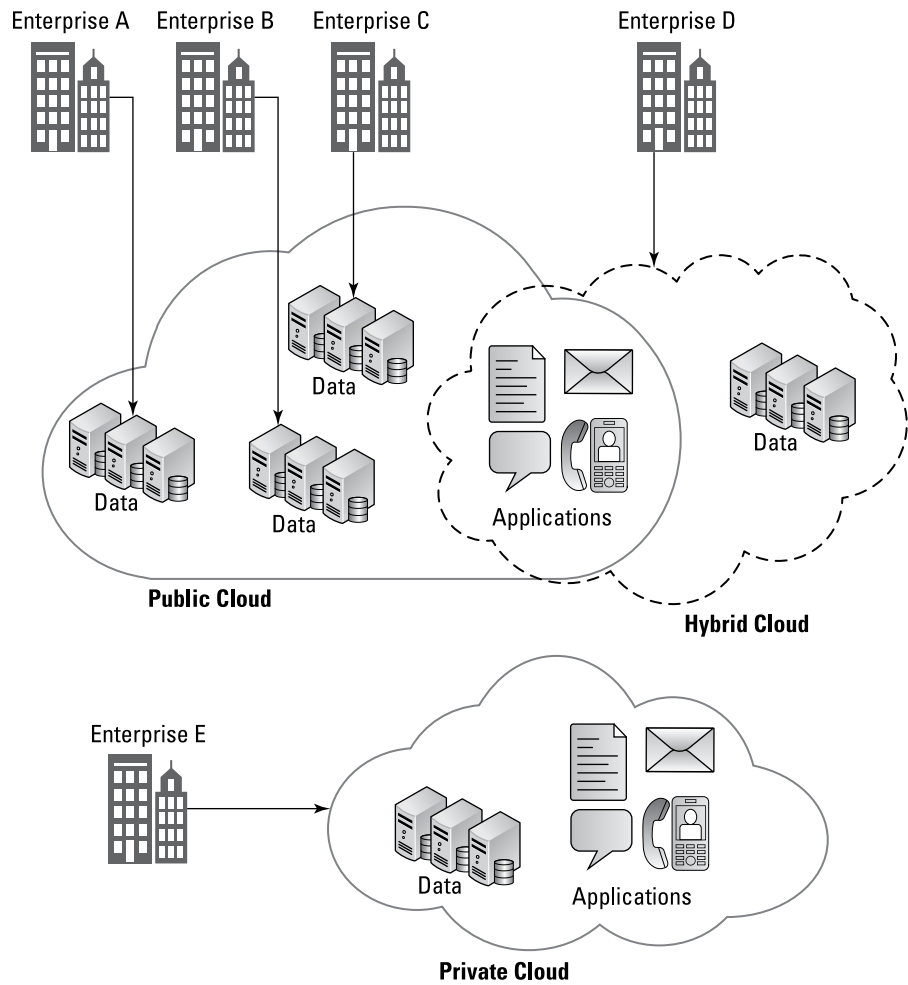


FIGURE 1-1:
Cloud computing
deployment
models.

Using a public cloud is like using electricity. You only pay for what you use. And just like electricity, you don't need to maintain the power plants — the provider does that. You only maintain the devices using the electricity. In this example, you don't need to maintain and patch the servers running your cloud services, but you do need to maintain the computers and laptops accessing or using the cloud services.

Private cloud

A *private cloud* typically is dedicated to one organization on its own highly secure, private network located at a company's on-site data center or at a colocation facility or *colo*. A *colo* is a data center facility that rents space for servers to other companies.

Unlike the public cloud, a private cloud doesn't share computer, networking, and storage resources with other tenants. This allows for a higher degree of flexibility in customizing the cloud environment, as any configuration done in a private cloud only applies to that environment. Industries with privacy concerns such as financial institutions and healthcare organizations typically opt for a private cloud. The same is true for government organizations, which have more stringent security and privacy requirements.

Hybrid cloud

A *hybrid cloud* is simply a combination of the public and private clouds. For example, an organization may run its email applications in a public cloud, but store customer information in a database in a private cloud to meet business and regulatory requirements. This scenario can be seen as the best of both worlds because an organization can maintain control of the resources it is running on the private cloud, while at the same time take advantage of the scalability of the public cloud to quickly provision additional resources to meet spikes in demand. This is called “cloud bursting.”

Regardless of the deployment model used, cloud computing has afforded organizations of any size the flexibility of being able to scale resources up or down based on its needs at a faster pace and lower cost than before. In fact, cloud computing is the greatest equalizer for businesses as it breaks down the barriers for small and even one-man-show businesses from competing in the global market. For a small monthly fee, any business can use the same productivity tools and built-in security features that large enterprises use.

Knowing the common cloud service models

Contrary to general belief, cloud computing isn't a new concept. The idea of an “intergalactic computer network” was first introduced in the 1960s by J. C. R. Licklider, one of the most influential men in the history of computer science. Other people attribute the emergence of cloud computing to John McCarthy, another computer scientist who in the 1960s proposed that computing be delivered as a public utility similar to service bureaus that provided services to businesses for a fee.

Back then, massive computing was conducted with supercomputers and main-frames occupying whole buildings. Thousands of central processing units (CPUs) were connected to divide the computing tasks of supercomputers in order to get results faster. The high cost of creating and maintaining these supercomputers precipitated the discovery of more economical computing means, which brings us to where we are today.

With cloud computing today, not only can businesses use the services of specialized providers for massive computing, they also benefit from the lower cost of these services stemming from the efficiencies of shared infrastructure. Generally, there are three types of cloud computing service models (see Figure 1-2):

- » Software as a Service (SaaS)
- » Platform as a Service (PaaS)
- » Infrastructure as a Service (IaaS)

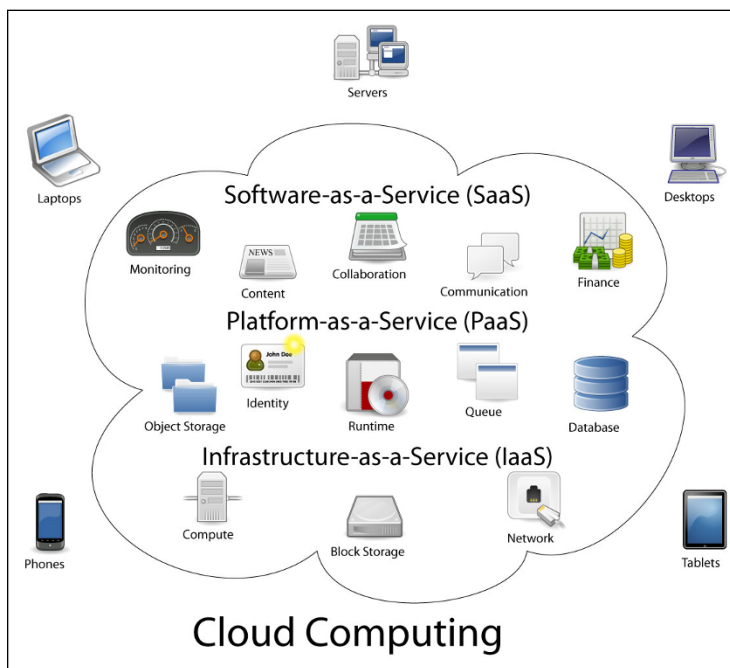


FIGURE 1-2: Cloud computing service models.

Illustration created by Sam Johnston using OmniGroup's OmniGraffle and Inkscape. Computer.svg courtesy Sasa Stefanovic.

Software as a service (SaaS)

A software as a service (SaaS) service model is where a software application is paid for on a subscription basis and installed from the cloud provider's data center. Office 365 is an example of a SaaS model where all your collaboration and productivity applications are bundled together as part of your subscription. You don't have to run your own email servers, for example, nor do you need to maintain and update the servers. For desktop applications like Office 365 Pro Plus, you can install the software from a web-based portal instead of buying the packaged

software from a store. After you've installed the software, updates and bug fixes automatically are installed in the background.

Platform as a service (PaaS)

In a platform as a service (PaaS) service model, developers can create online applications (“apps” for short) in platforms provided by the PaaS provider. The developers develop their own code for the apps, store it in the PaaS provider's data center, and then publish the apps. They don't have to worry about planning for capacity, security, or managing the hardware to run the apps — the PaaS provider does that. A PaaS model also cuts the time it takes to develop apps because of the availability of pre-coded application components such as workflows, security features, search, and so on. To some extent, PaaS is similar to creating a macro in Microsoft Excel where you use the built-in components of the software to run a code that automate tasks.

Infrastructure as a service (IaaS)

In an infrastructure as a service (IaaS) service model, organizations have access to computing power, network connectivity, and storage capacity, using a cloud provider's hardware. This model enables organizations to have control over the infrastructure and run applications in the cloud at a reduced cost and at a faster pace. The organization, however, is responsible for managing and updating the operating system running the applications. While capacity planning, security, and hardware management is the responsibility of the IaaS provider (similar to PaaS), it is the organization's job to monitor the performance of its apps and/or add more resources to meet the demand. Amazon Web Services (AWS) offer several IaaS cloud-hosting products that can be purchased by the hour. Rackspace is another player in the IaaS market offering managed and cloud hosting services. Microsoft Azure started out with a PaaS offering, but has since extended its services to include robust IaaS capabilities.

Determining the Right Office 365 Plan for Your Organization

Office 365 is a SaaS solution running in the public cloud offered on a subscription basis by Microsoft. Each subscription is comprised of one or more licenses depending on the organization's needs. Subscriptions can be purchased directly from Microsoft or through a Microsoft Cloud Solutions Provider (CSP). When you purchase your subscription directly from Microsoft, your support comes from Microsoft. If you purchase your subscription from a CSP, support for the services is provided by the CSP.