



# Using Office 365 and Windows Intune

Office 365 is a family of products organized in three product plans. Each plan is designed with features to best meet the needs of businesses based upon their size or other factors. The plans are referred to as small business, midsize business, and enterprise business. Office 365 Small Business and Midsize Business are fixed in size and configuration. Users of these plans must purchase all of the same subscription. The Enterprise plan has all of the different Office 365 options. The Office 365 Enterprise configuration allows mixing and matching features to create a customized subscription within the enterprise plan. The midsize and small business suites are restricted only to those products in those specific Office 365 plans.

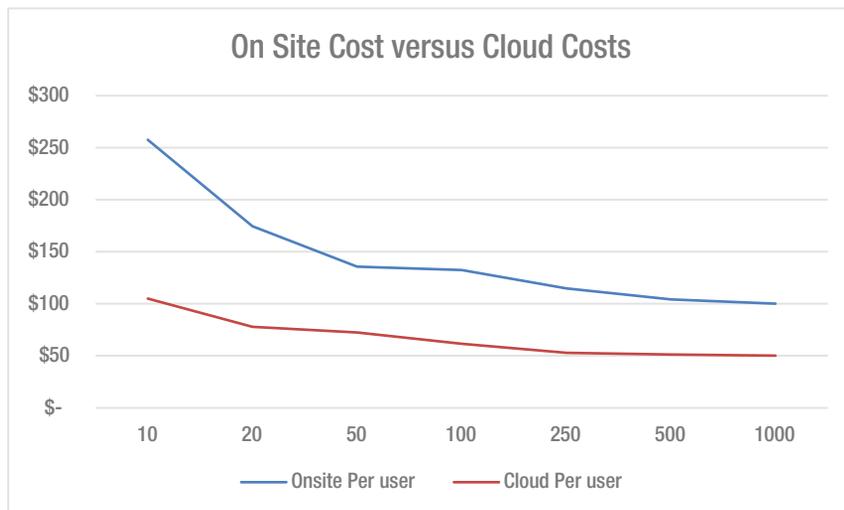
Office 365 is scalable for all business. An enterprise Office 365 subscription can be created for one user or 100,000 users. The scalability is achieved with service reliability, ease of use of the administration center, and flexible mixing of the different Office 365 plans. Our approach to an Office 365 configuration is to select the suite of products that best matches the roles of the employees and needs of the organization. The Office 365 Enterprise Suite allows the most flexibility in choosing product features.

This chapter details a day in the life of an Office 365 user and material for setting up one computer to use Office 365. This approach enables most end users to start an Office 365 trial subscription and successfully configure the service.

“A Day in the Life of an Office 365 User” explores the Office 365 capabilities in the Microsoft demonstration site and details the features of Office 365. Taking the time to test the service offering in this way tends to result in the most successful migrations. With a basic understanding of the service offerings, identifying the ones that match your business needs becomes simple.

## A Day in the Life of an Office 365 User

In the previous chapter, the Ready Design Cupcake Company (RDCC) completed a business analysis of the Office 365 cloud services and was ready to move to Office 365. The IT manager, Tom, looked at his total company spending, and with the help of his Microsoft Partner, determined that his on-site cost was about \$115 per user per month; and the Office 365 cost would be approximately \$53 per user per month (see Figure 2-1). These costs included ongoing support.



**Figure 2-1.** On-site costs versus cloud costs

However, Tom had questions about how Office 365 services would benefit his users at RDCC. He and his Microsoft Partner set up a demonstration. Most Microsoft Partners can set up different types of test environments, but in the RDCC case, the Microsoft Partner, KAMIND, choose to use an interactive training session using the Microsoft Customer Immersion Experience center (CIE), which provides a fully configured Office 365 experience. This exercise exposes Tom to the full range of Office 365 capabilities and features in such a way that he is able to relate his new knowledge to the Office 365 migration project for RDCC.

The Microsoft CIE is a preconfigured Office 365 organization that supports all of the Office 365 services, including Yammer, Project, Exchange, Lync, SharePoint, and CRM. RDCC is not interested in the CRM option at this time, but they are interested in using Windows Intune. Tom was looking for a way to reduce the costs of managing the Office 365 user's devices with a cloud solution so RDCC would not need to manage an On Premises solution using Microsoft System Center. Kamind1 suggested that Tom play the role of an end user in the Microsoft demonstration company, Contoso, Inc. Tom was assigned an Office 365 user account, and he assumed the hypothetical identity of a Contoso sales associate, Karen.

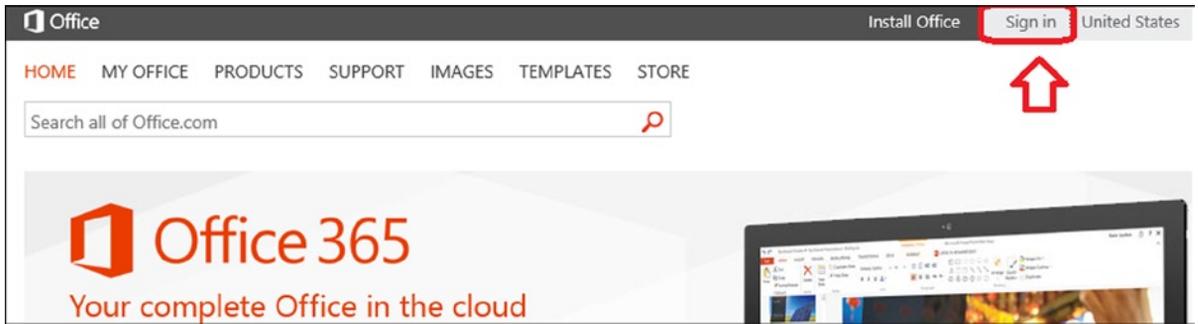
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■ **Note** “Where to start with Office 365” is a *hands-on tutorial*, not a *configuration guide*. In the second part of this chapter, we have all of the necessary configuration information to set up your desktop. The tutorial serves only to show the features of Office 365, so the ones you really need can be selected and applied to your specific work environment.

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## Where to Start with Office365? A Hands-On Tutorial

Start by opening up a web browser and logging in into the Office 365 site at <http://office.microsoft.com> (see Figure 2-2).



**Figure 2-2.** Log in to Office 365: login screen

Once you have entered your email address, Microsoft online services will determine if there are multiple accounts for different Microsoft services under your email address. Microsoft offers two different services for users: consumer services and business services. These services are represented as a Microsoft account and an Organization account. The Microsoft account is for Microsoft services that require a unique ID, such as your email address. Examples of these accounts are Hotmail, Microsoft Passport, Xbox Live, and volume license services (to name a few; there are other consumer services).

The Organization account is your Office 365 company business service account. The services of these two accounts are different and isolated from each other on different servers in one or more Microsoft Data Centers. It is very common that a user will have both an Organization account and a Microsoft account. When you access Office 365 services, you always use the Organization account.

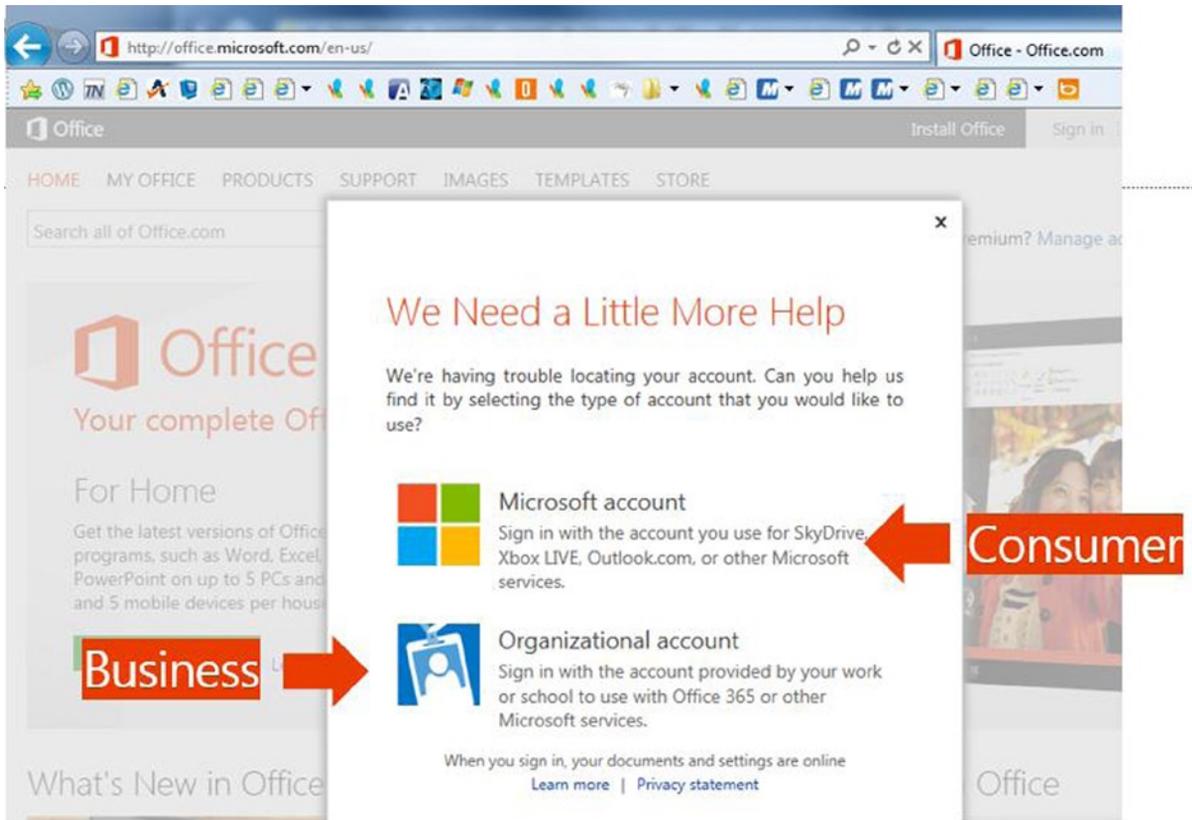
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■ **Note** You do not need to have a Microsoft account to use Office 365, only an Organizational account.

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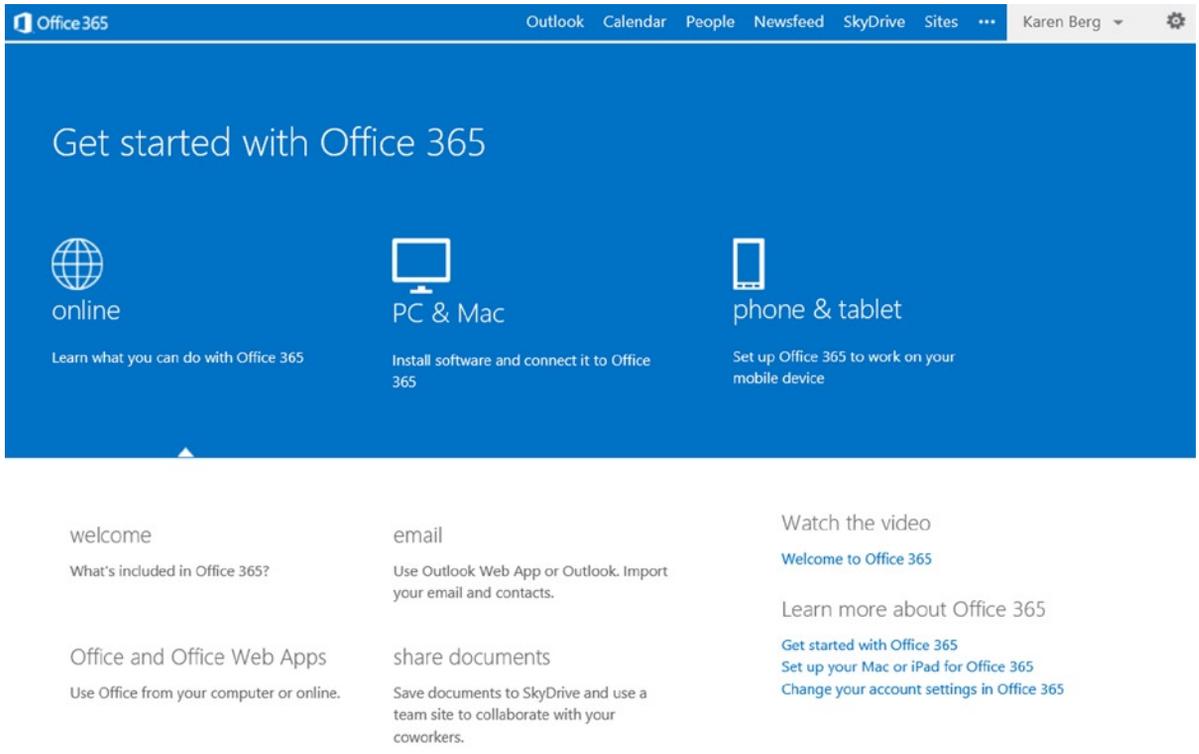
## Logging into Office 365

After you have opened a browser to [Office.microsoft.com](https://Office.microsoft.com), select the sign-in (Figure 2-2, upper right-hand corner) and enter your Office 365 company email address. If you have added consumer capabilities to your email address (found at [account.live.com](https://account.live.com)), then you will be presented with two choices (Figure 2-3). If you are going to access the Office 365, then select the Organizational account.



**Figure 2-3.** Access Office 365 using the Organization account

Once you have entered your password you will log in to Office 365 services. The next step is to explore the interface of Office 365. RDCC's IT manager chose to use the hypothetical persona of Karen Berg, a Sales Associate in the Contoso Company. He wanted to experience the operation of Office 365 from a productivity point of view as a user. When you log into Office 365 for the first time, a normal Office 365 user (like Karen Berg) sees an initial configuration screen that introduces Office 365 services to the user in the self-service portal (see Figure 2-4). Tom liked this approach because the self-service portal reduces the calls to his help desk and improves his users' satisfaction.



**Figure 2-4.** Office 365 first-time login

Tom, acting as Karen Berg, sees that he can continue to install the Office 365 software for his PC/Mac, phone, and tablet without any help desk support. He watches the “getting started” video to get a feel for the organization of Office 365. Tom explores the different services, such as Web Outlook and his personal cloud document storage, SkyDrive Pro. The self-service welcome portal (Figure 2-4) will stay visible until the Outlook services are accessed. Tom selects the Outlook tab (Figure 2-5) to see Karen’s email.

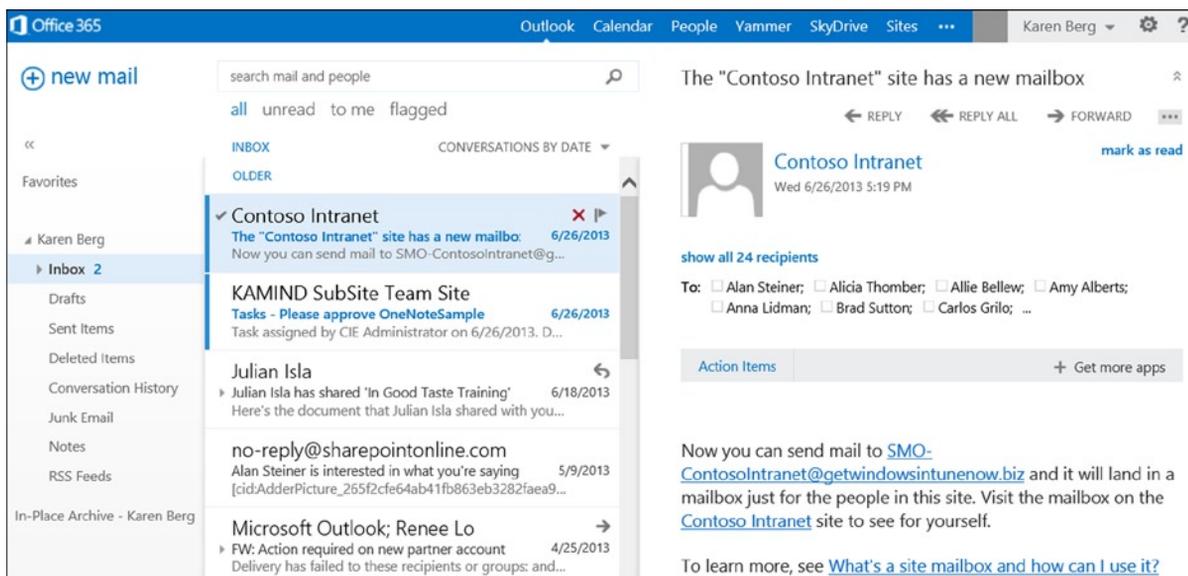


**Figure 2-5.** Accessing Outlook: Office 365

Office 365 Outlook mail services are designed to provide data synchronization between all devices that are using Office 365. The simplest way to look at this is that all information is synchronized, so in using email on his smartphone, Web browser, or local Outlook, Tom only needs to “read once” and/or “delete once” and all devices connected to Office 365 email services will sync his actions.

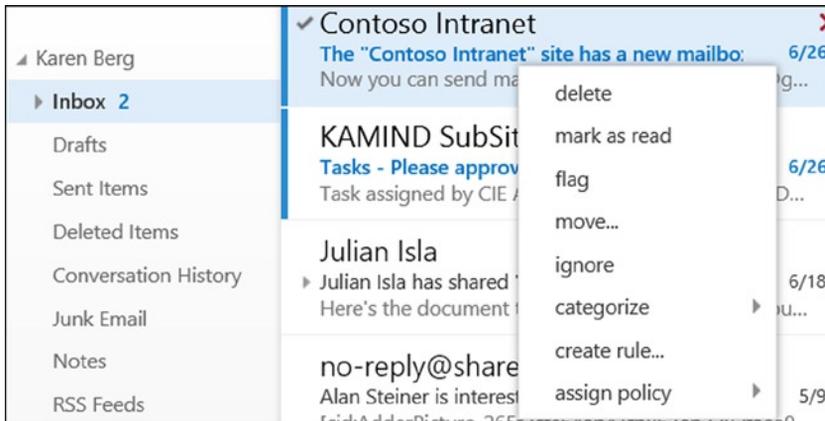
## Accessing Outlook–WebApp

Tom begins to explore the Office 365 web site. The Microsoft Partner informs him that after the initial login, all future logins to Office 365 will replace the user start page to either use Outlook or the Team site, depending on the license that is assigned to the user. As an example, if the user only has a SharePoint license the user will land on the “sites” page. If the user has an email license, then the user will land on the Outlook page (Figure 2-6). Karen’s license is a full Office 365 that includes access to SharePoint and Office 2013, so her default page is Outlook WebApp.



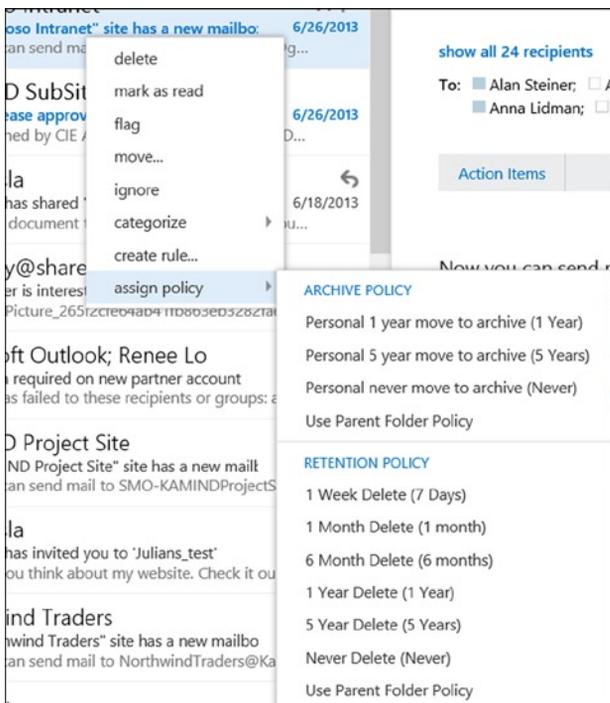
**Figure 2-6.** Office 365 landing page for user with an email account

Tom notices that the Office 365 web Outlook (Outlook WebApp) looks very similar to the Outlook client. The interface is crisp and simple to understand. The Outlook email, calendar, and People (contacts) are easily navigated. Tom notices that the Outlook WebApp supports right-click actions on the interface (Figure 2-7). This is important to Tom so that the sales staff may color code their email into different categories.



**Figure 2-7.** Outlook WebApp with right-click support

Tom also notices that he can assign an individual retention policy on his email. He right-clicks the message and selects “Assign Policy” (Figure 2-8) for email retention. In this case, he selects “never delete.” The Microsoft Partner informs Tom the email size is 50GB per user, and the per-user archive is unlimited. Tom quickly realizes that this is a big benefit to his users. They are constantly getting midnight calls from the president of the company, complaining about the limited size of user’s mailboxes. Most of us have, at some point, suffered the frustration of an over-full mailbox either as a sender or as a receiver.

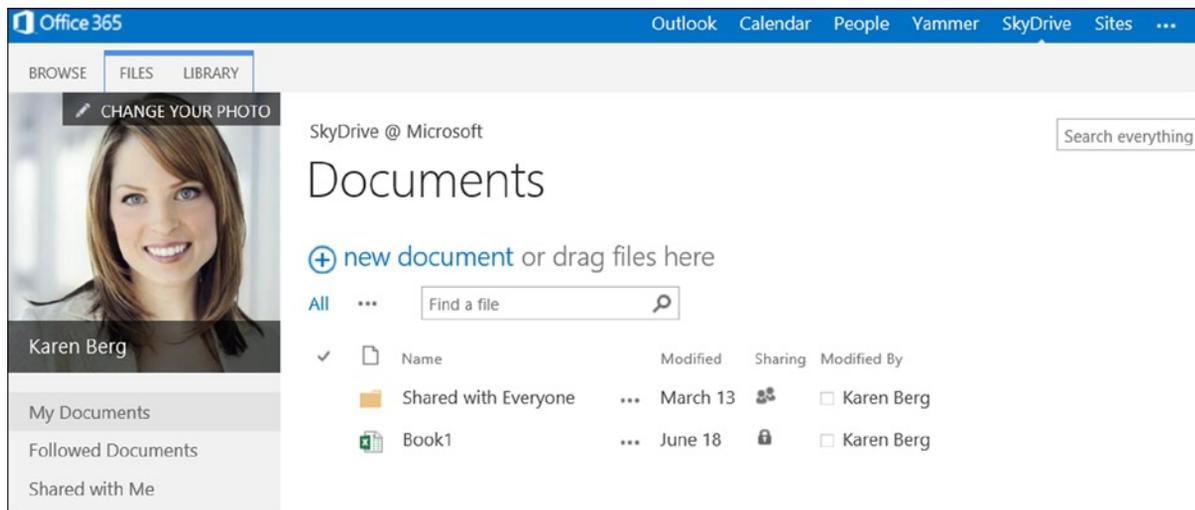


**Figure 2-8.** Email retention policy

■ **Note** IT policies can override individual policies on email retention. The default is to allow the user to determine the best way to save email. We have seen corporate email retention policies provide as little as 90 days history. Many of us expect to retain years of old emails.

## SkyDrive Pro–Overview

Tom reviews the Office 365 features and notices that there is support for SkyDrive, Sites, and Yammer. The Microsoft Partner explains that Office 365 document synchronization is part of SkyDrive. SkyDrive is Microsoft's document synchronization tool that synchronizes documents with Office 365 and all of the user's desktop or mobile devices. This allows the user Karen to access work documents on her phone, laptop, or desktop computer. The Microsoft Partner instructs Tom to access SkyDrive and select the SkyDrive menu item (Figure 2-9) to edit documents in the Office 365 cloud.



**Figure 2-9.** Karen's personal document storage in SkyDrive

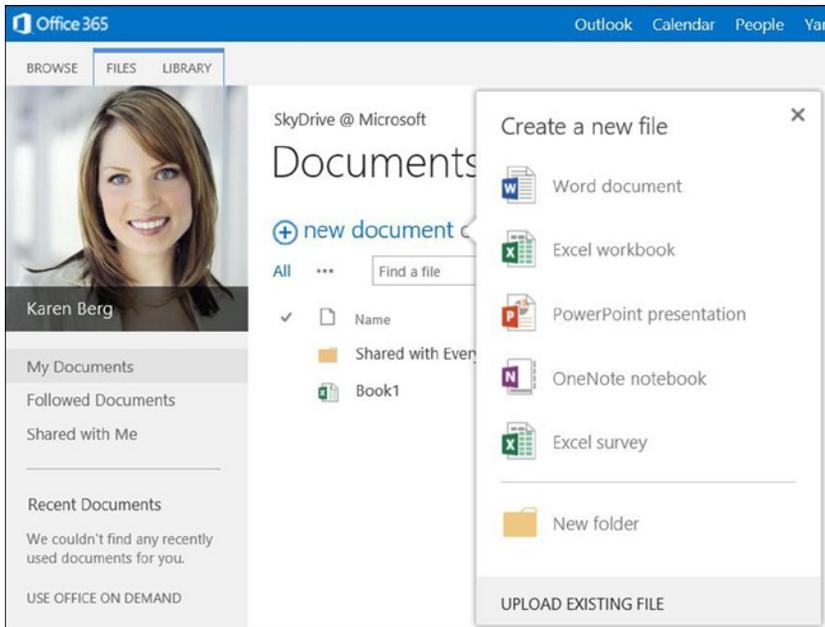
■ **Note** if this is the first time you are accessing the SkyDrive, setup can take a few minutes.

Once the setup is completed, Karen's private SkyDrive Pro cloud storage is built. Karen's initial SkyDrive Pro storage capacity can be set at levels between 25GB and 100GB. Tom thinks of RDCC sales associates who have a mobile laptop, iPad, and smartphone and considers that they are located in several different parts of the world. He realizes that SkyDrive Pro storage solves a problem for RDCC by easily maintaining control of company documents in a centralized team storage, without the associated overhead costs. His Microsoft Partner informs him that the SkyDrive is included in the subscription he plans to use for RDCC at no additional cost. The initial SkyDrive Pro size is set at 25GB.

Tom explores other aspects of using documents in the cloud and discovers that any document that is uploaded to the cloud can be used in any collaboration. Office 365 has two document storage areas. One is the personal SkyDrive site and the other is the company's "Team Site". The difference is that the personal SkyDrive site is managed by the user (Karen), and the Team Site is managed by the IT department.

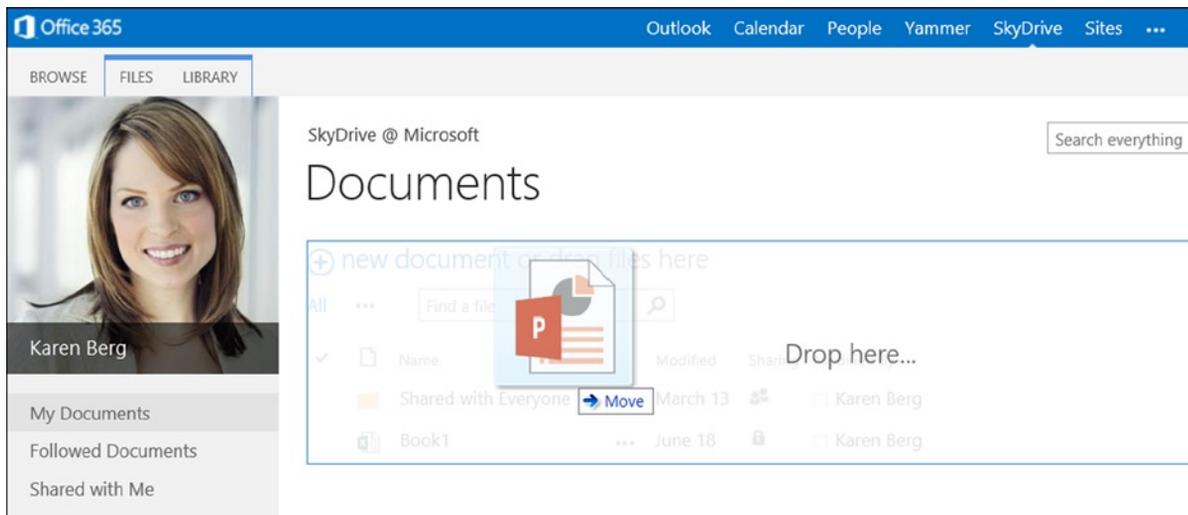
## Document Collaboration

The Office 365 SkyDrive and Team Site allow you to create documents specifically for collaboration. Just select the "new document" option in the "Create Document" box (see Figure 2-10) and proceed.



**Figure 2-10.** Office 365 document creation

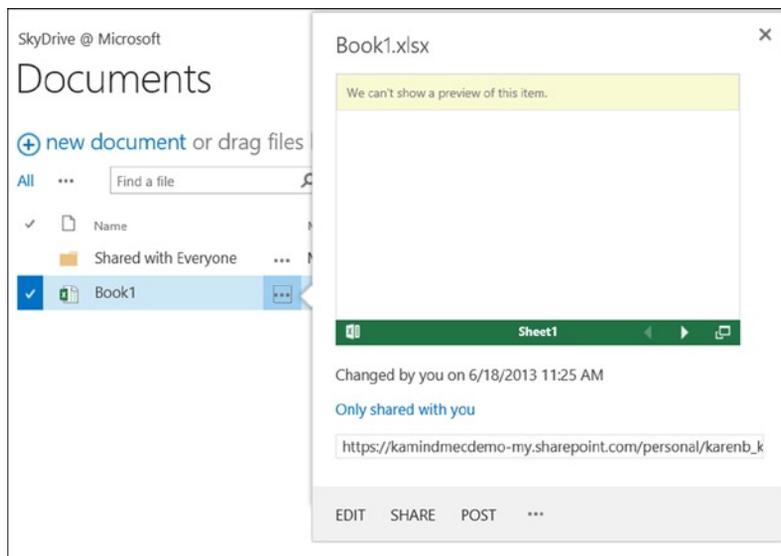
You can also upload documents from other systems to Office 365 using a drag-and-drop interface. Tom discovered that when he used Windows 8.1, he could easily drag documents (Figure 2-11) to the SkyDrive Pro site in the web browser and place those documents in his personal area on Office 365. He also experimented with the Team Site and discovered that he had the same capability there.



**Figure 2-11.** *Uploading documents to Office 365*

Once saved in Tom’s personal area of Office 365, documents could be shared with other members of the team as needed. Once the documents are uploaded, they also can be edited with Office 365 web applications (Word, Excel, OneNote, PowerPoint) or with the desktop (or mobile) Office Professional Plus software, which supports PC, Mac and Android devices).

Tom discovered that Office 365 documents can be shared between designated team members using the personal “share everyone” folder, or externally to users outside the company. Tom experimented with sharing documents by selecting the ellipses (...) and later the “Share” option in the pop menu. Tom was surprised to see a preview of the file with an option to allow you to explicitly share the document (Figure 2-12).



**Figure 2-12.** *Sharing documents in Office 365*

Once the sharing options are visible, just select “Share” and enter the necessary information (such as the user’s email address) to share the directory or the file for collaboration. The files/folders that are shared show the people icon (Figure 2-13). The files/folders that are not shared show the lock icon.

✓	📄	Name		Modified	Sharing	Modified By
	📁	Shared with Everyone	...	March 13	👥	<input type="checkbox"/> Karen Berg
✓	📄	Book1	...	June 18	🔒	<input type="checkbox"/> Karen Berg

**Figure 2-13.** Office 365 sharing icons

## Office 365 Yammer Configuration

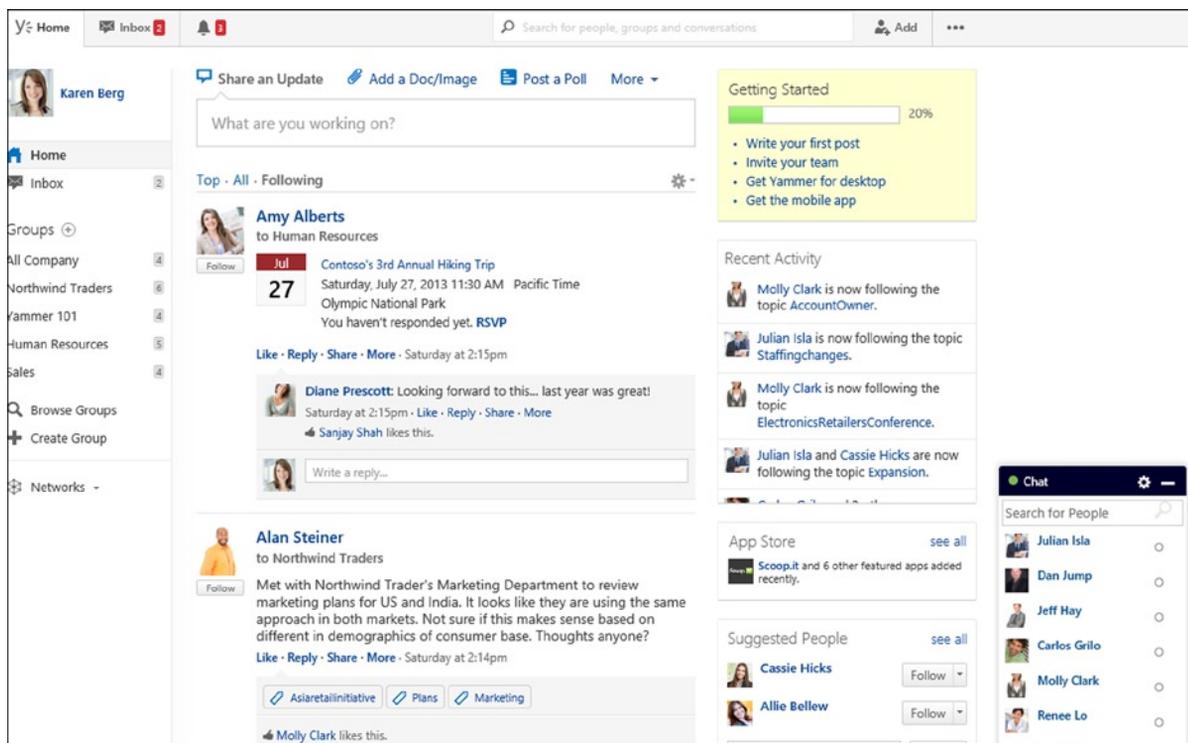
Tom has been impressed with the capabilities that he has encountered so far. He sees that Office 365 offers the opportunity to reduce both operational costs and license costs while rolling out new capabilities to his users. However, he still has questions. One of his unresolved concerns is compliance issues. As an example, his legal department has asked him to restrict social media access for users in the company. The legal department feels that too much proprietary information (company confidential information) is being discussed on external social media sites such as Facebook and Google Plus.

The legal department advises that loss of company information could hurt business growth and give RDCC competitors advance information on the direction of RDCC products. The Microsoft Partner suggested that Tom consider the Yammer social media service that is part of Office 365 as a solution. Yammer is a service, similar to Facebook, used to handle group interactions in a free-form manner. It is explained that with Yammer, the company information exchanged on this channel is owned by the company and not licensed to a third party. Usually, a free service has an intellectual property rights assignment that overrides the confidentiality of the company information.

Tom selected the Yammer login from Office 365 page (Figure 2-14) and logs into Yammer using Karen Berg’s Office 365 account. The first thing that Tom noticed (Figure 2-15) was the interaction of the different teams and the discussion groups. There were discussion groups for events, HR, and using Yammer itself. Tom could see that Yammer addressed one of RDCC business objectives: to make the company more integrated in their internal communications to improve productivity. The productivity gain addressed this directive and Yammer received full endorsement by the legal department.



**Figure 2-14.** Yammer access: Office 365 menu option



**Figure 2-15.** Yammer integration for Office 365

Tom quickly realized that one of the benefits of Yammer is that the service provides a tool for the group's communications that can be kept internal to the company. The problem with the traditional social media solutions is that RDCC proprietary information can be accidentally leaked to the public. Legal informed Tom that last year, some employees were using some free social media site to share information about a project. The legal department discovered the project discussed in the trade press. Tom was told about the data leak of company information at a company senior management meeting. Tom feels that Yammer will allow RDCC to control potential data leaks.

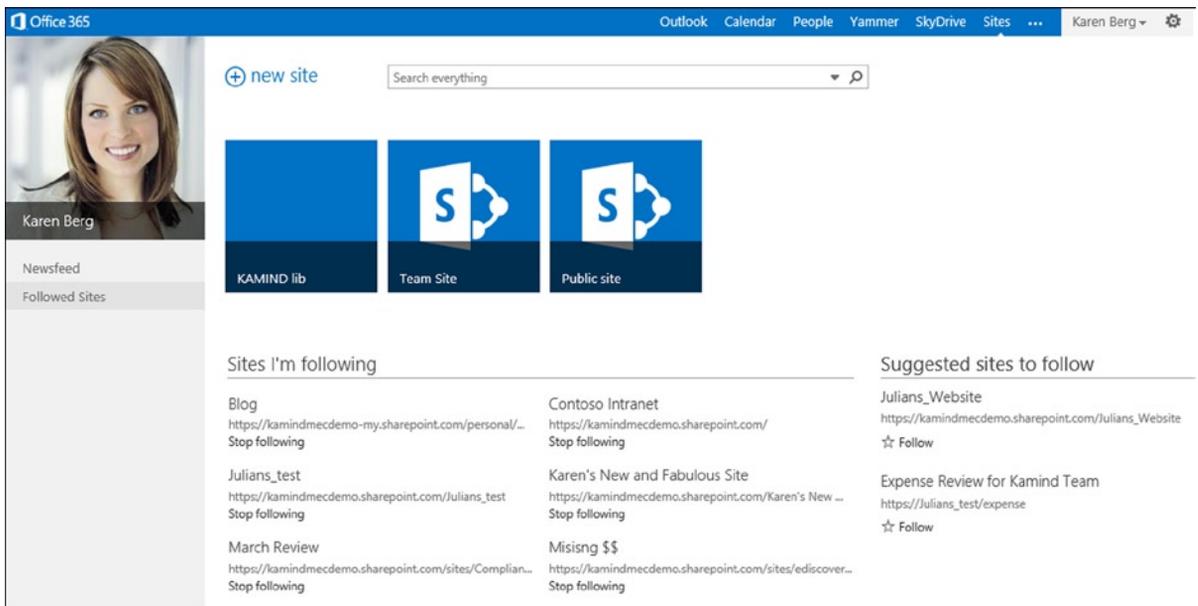
## Public Web Site

The final service that Tom reviews is the Team Site and the public web site. Tom has a business requirement to create a new company intranet and to help the company reduce the carbon footprint. He has a secondary objective to reduce the use of other file sharing services enabling the exchange of information with external parties. To access the Team Site, Tom returns to the main Office 365 page and selects "Sites" (Figure 2-16).



**Figure 2-16.** Selecting the Team Site from “Sites” menu

After selecting the sites, Tom is presented with two choices: accessing the “Team Site” (intranet) or the public web site. Office 365 supports multiple sites depending on the configuration of Office 365 services. All Office 365 configurations include a public web site. Tom selects the public web site icon (Figure 2-17) to see the public web site. Tom accessed Karen’s site, to discover that the user has the ability to follow changes made by others in the Team Site and to personalize their experience in using Office 365. Personalization allows you to follow changes in a team site, so if there are changes in the content, you are notified of the change.



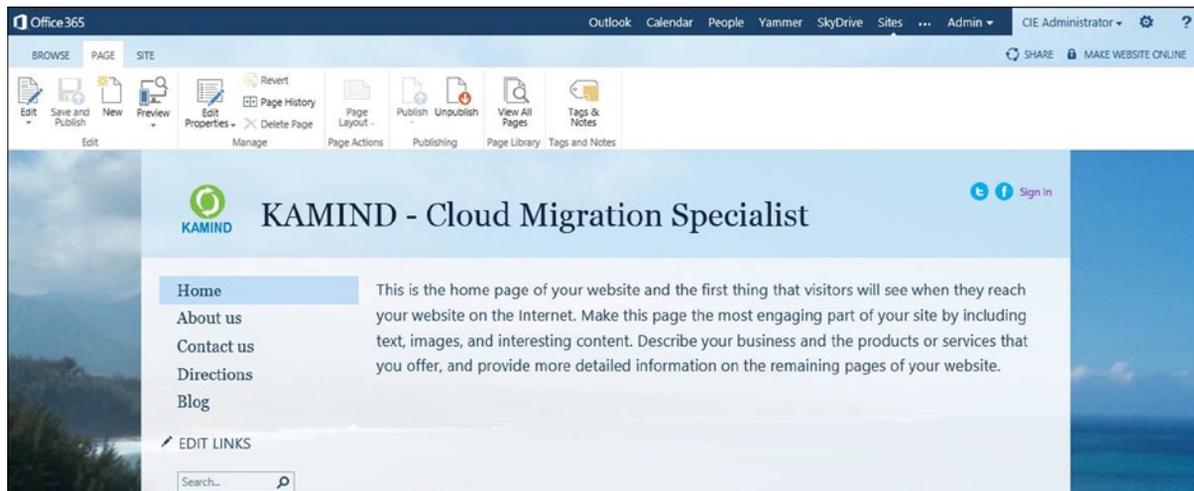
**Figure 2-17.** Sites that are accessed by users

Tom selected the “public site” icon to see the capabilities of the public site. The Office 365 public web site can be changed by the users using the web site integrated editor, using SharePoint designer (supplied as an optional tool download in Office 365).

Tom discovered that his access to the public web site configuration tools is based on permissions. If he changes from the user “Karen Berg” to a user that has permission to edit the web site, he can log into the web site (Figure 2-18, upper right-hand corner, sign in) and enter his administrator credentials. Once Tom logs into the administration panel of the public web site (Figure 2-19), he can use the Microsoft integrated tools to build the web site (see chapter 6 for more information). The “public web site” is a SharePoint site.



**Figure 2-18.** Office 365 public web site



**Figure 2-19.** Accessing the administration tools on the public web site

Tom discovered that the “public web site” in Office 365 is a private web site. The initial state of the public web site is offline. To convert the public web site to a visible web site, he simply assigned a domain to Office 365 and placed the web site online. Tom finishes exploring the public web site, returns back to the “Sites” menu, and then selects the “Team Site”. The Team Site is the company’s Intranet site (Figure 2-20).



**Figure 2-20.** Office 365 Team Site

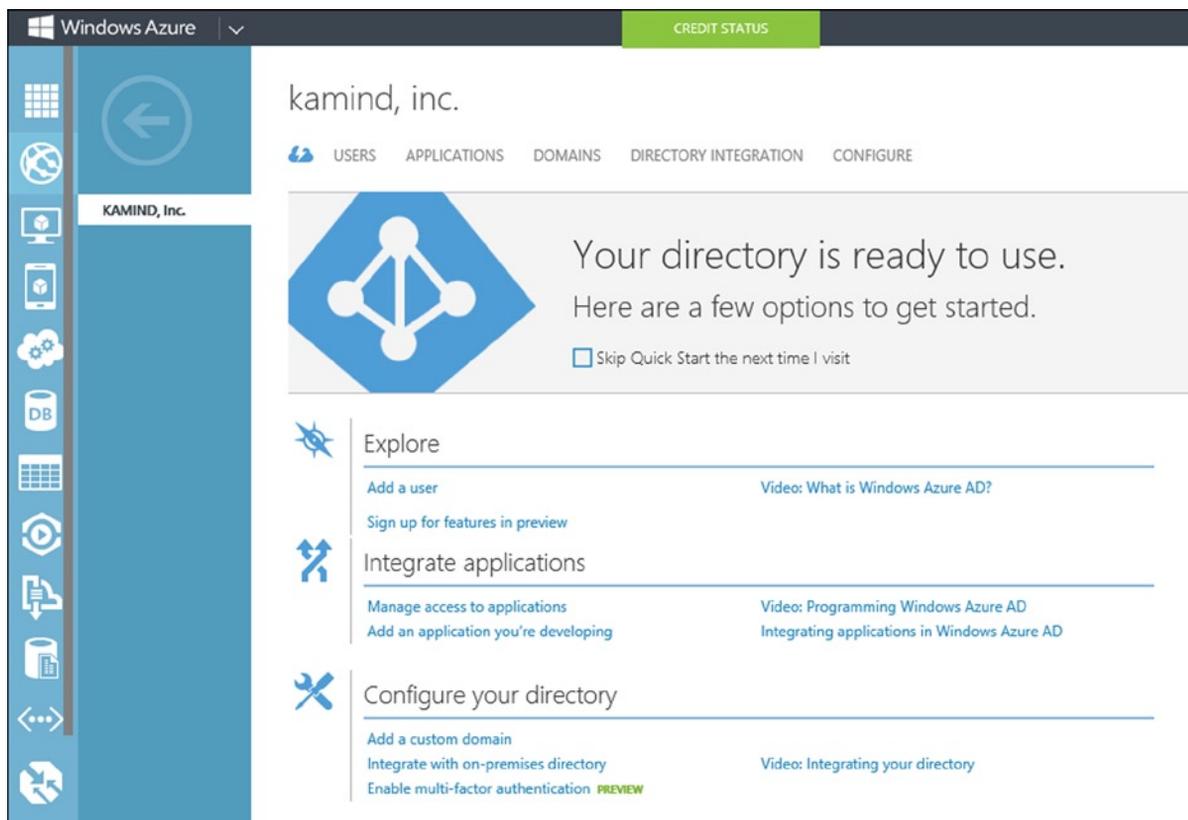
## Office 365 Team Site

The Microsoft Partner explains to Tom that the MEC demo Contoso site is a fully functional SharePoint site complete with document retention policies, work flows, and other productivity features. The Partner also explains that these capabilities can be used to improve the operation of RDCC business. Tom selects the “Team Site” icon and launches the Intranet site (Figure 2-20).

Tom looks at the team site and the servers they use in RDCC and realizes that he can add the functionality needed for each of the various teams to function. Tom realizes that he can assign user permissions, so individuals can have access to the different business areas. As an example, Karen can access the sales resources but have access to HR, IT, Operations, and account team only as it relates to her business role.

## Office 365 and Windows Azure Active Directory Security

Tom realizes that he can use either his on-premises servers’ Active Directory, to manage security, or the Office 365 security groups, to grant permissions. As an IT manager, Tom must have the maximum flexibility to restrict information as appropriate for individuals’ roles. The Microsoft Partner suggested that Tom review Microsoft’s Windows Azure Active Directory integration (Figure 2-21).



**Figure 2-21.** Windows Azure Account Management portal

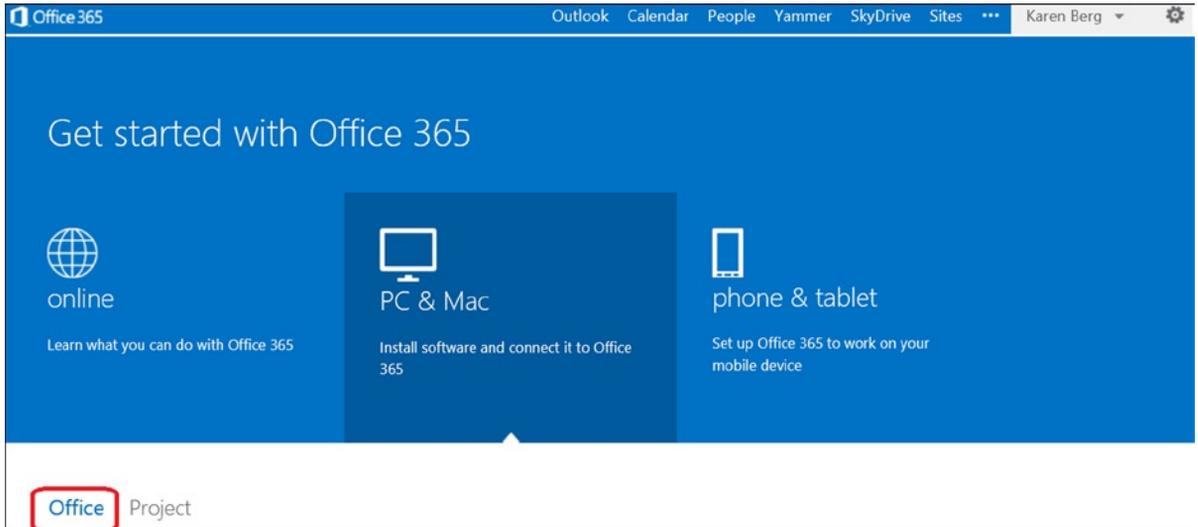
Windows Azure is integrated into Office 365 Active Directory. This makes it simpler to have a single sign-on for RDCC users. If an on-premise server is integrated into Office 365 (using any Active Directory integration tools), those on-premise security objects are also copied into Windows Azure. Tom feels that with this integration approach, he can manage the user security access using either on-premise services or Office 365. As an example, Tom was thinking of placing the accounting line of the business in a Virtual Windows Azure Server and integrating that server into Office 365 Active Directory.

RDCC's long-term strategy is to remove all on-premise servers and move them to the cloud. Tom feels there is no longer a business need for an on-premise Active Directory server. After looking at Windows Azure Active Directory integration and virtual server management, Tom recognizes that he may accomplish the server migration to the cloud as part of the move of RDCC to Office 365. This would significantly reduce RDCC's operation costs. Tom makes a note of this to discuss with the Microsoft Partner after the migration to Office 365 is completed.

## Office 365 Desktop Tools

The only issue Tom has not reviewed is desktop tools for Office 365. Tom returned to the Office 365 portal and installed the Client software. Tom has a misconception that Office 365 office tools only run in the cloud and that there is no desktop software. Tom learned that Office 365 is a suite of products, namely, desktop and cloud services, and that these products work together. While using the "Karen Berg" login address, Tom was able to use the cloud tools on Office 365 and use the desktop tool without being hooked to the internet, to do work offline on his PC or his

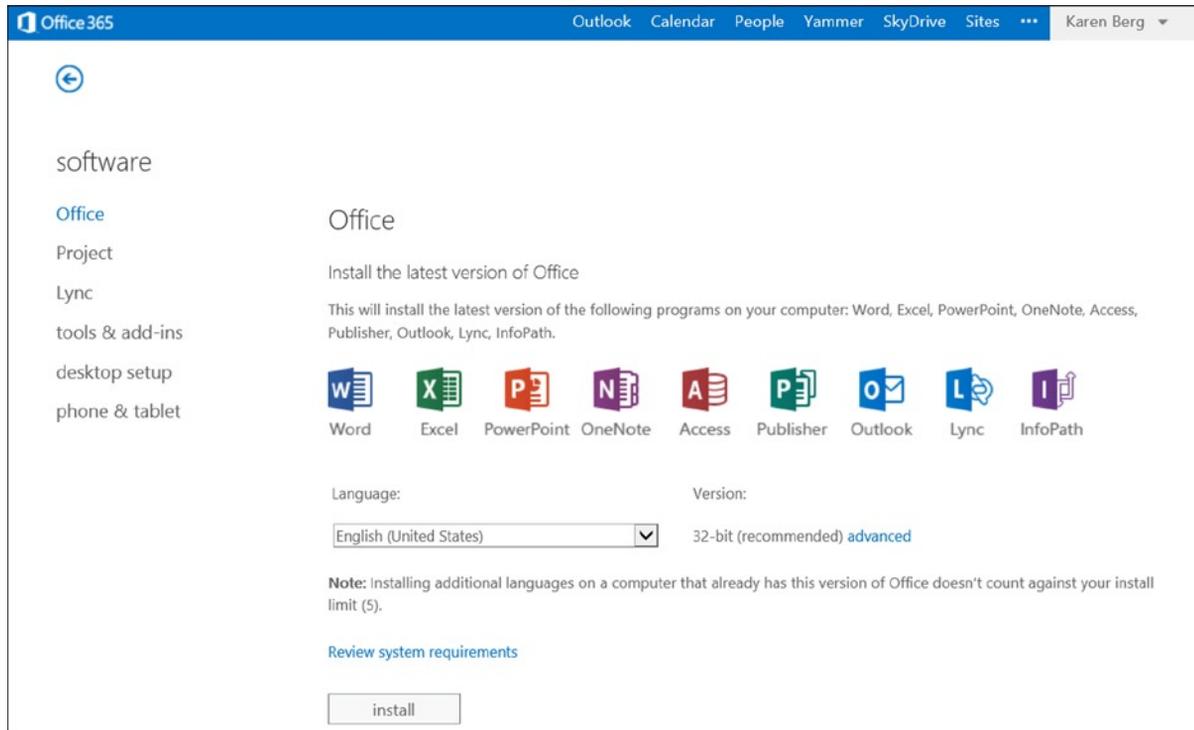
home Mac (Figure 2-22). The Microsoft Partner explains that Office 365 allows each user to have up to five copies of Office desktop software installed under the subscription. Tom thought about the cost savings from using subscription services to manage his software assets. Tom realized that he would no longer need to manage serial numbers or manage employees installing software on their own computers. Office 365 allowed Tom to remove the user software subscription when an employee leaves the company and no longer have any responsibility to remove the software. This is a business liability and huge labor effort that Tom realized he no longer needs to manage. Office 365 will significantly reduce his operations costs.



**Figure 2-22.** Installing Office Professional Plus desktop software

Tom remembers a discussion with one of his users on the differences between Office 2007 and 2010. His comment was that Office is Office; only the menus are different. The 2013 Office 365 is very similar to Office 2010. The major change is that Office 2013 is “aware” of the cloud so documents can be saved on the desktop and synced to Office 365 (using the SkyDrive Pro background synchronization tool), directly to the cloud or in the user’s local documents directory.

Tom begins the installation process of the Office Professional Plus software (Figure 2-23). He returns to the Office 365 portal, selects PC/Mac, and then selects Office software to begin the installation process. He notices that he can also add Microsoft Project to his plan by purchasing a license. Microsoft Project is an optional software package that Tom has licensed in Office 365. Tom clicks the install button to install the Office Professional Plus software on his desktop.



**Figure 2-23.** Office desktop software installation

The Office installation software is streamed (Figure 2-24 and Figure 2-25). Streaming means that the user can continue to work while the new software is being delivered from the Microsoft Office servers.



**Figure 2-24.** Streaming Office 365

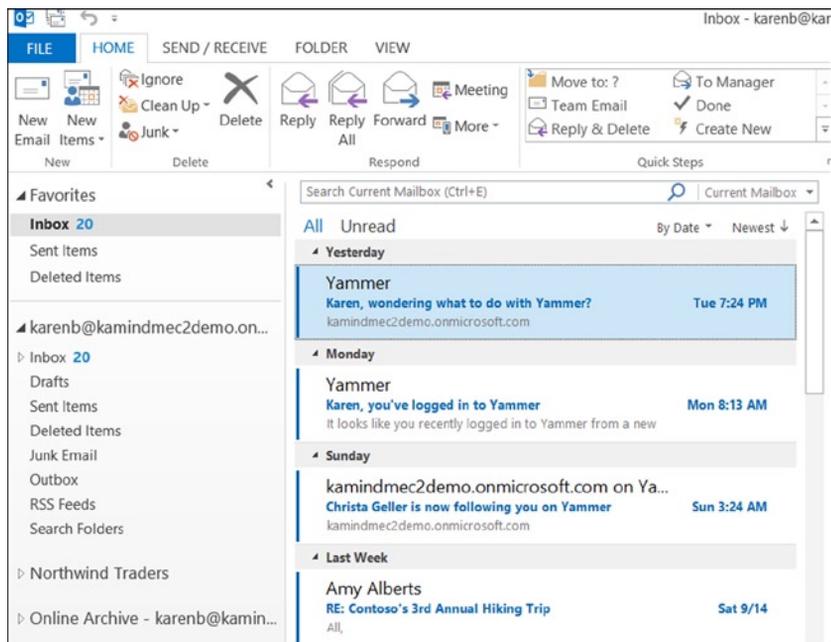


**Figure 2-25.** Streaming Office 365

Tom started the Office Professional Plus installation (Figure 2-24 and Figure 2-25). Once this was completed, he started up Outlook using Karen Berg's email address for the demonstration account. Tom started Outlook and selected a "New Profile." The installation process required Tom to enter Karen's email address, name, and password (see Figure 2-26). Outlook discovered the cloud service and downloaded Karen's email.

**Figure 2-26.** Outlook startup screen: creating new profile

Tom was off and running with Outlook. He selected finished (when prompted) and started Outlook. Karen's email is downloaded to Tom's client. Tom started the desktop Outlook (Figure 2-27), and he noticed that when he read an email in the desktop Outlook, the Office 365 Outlook WebApp had the same changes. Then, Tom noticed that his actions to email (reads deleted moves) were synced to the cloud. His users have always complained that the smartphones did not update the email status after a message was read or deleted. Tom no longer has to worry about this issue; all email is synced to the latest activity. Tom wanted to try one other test, so he disconnected his network connection, created a new email in Outlook, and sent it. Tom then connected his laptop back into the network and discovered that the offline email that was sent when Outlook was updated in the cloud.

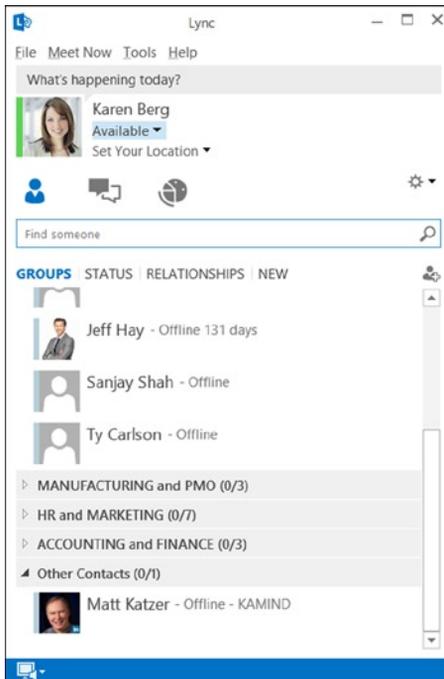


**Figure 2-27.** Karen's desktop Outlook

This solved a big problem for his users. Tom now had full business email, calendar, and contacts synchronization not only to his desktop Outlook, but also to his smartphone and iPad. He realized that the variety of third-party programs that his users were using to synchronize their contacts and calendars were no longer needed.

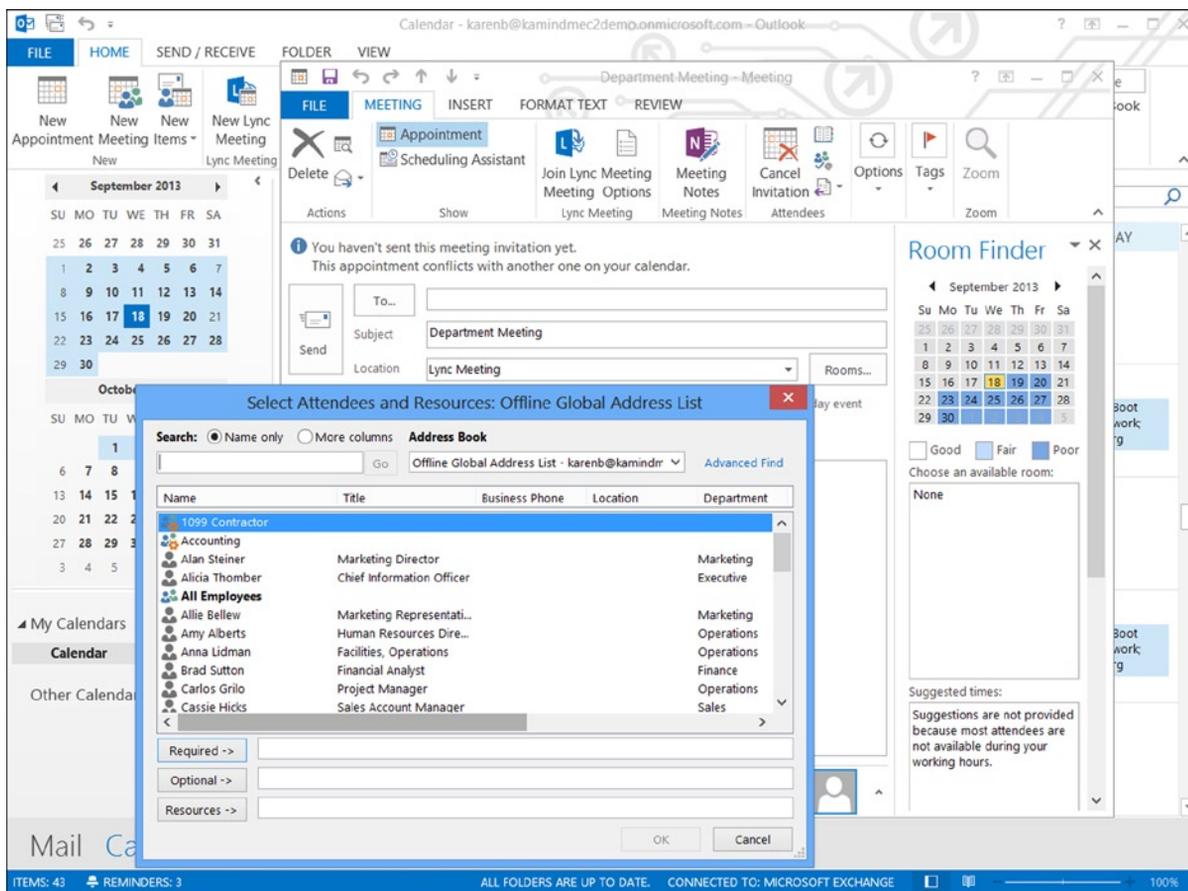
## Using Lync

One of the problems that Tom has is web conferencing. When he installed Office on the desktop, the web video conferencing tool Lync was also installed. His users currently use Skype over the public network to talk about business needs and issues. As Tom explored Lync (the Office 365 collaborative and video conferencing tool), he realized that he can now use Lync to talk to external Lync and Skype users outside of the company as well as internal RDCC employees. Using Lync, conversations (and text in Instant Messaging Windows) can be recorded (Figure 2-28). Lync is also an Enterprise voice solution, where both users can speak at the same time (Skype does not support this feature), and Lync can also replace his desktop phone and be placed on user's mobile devices (laptop, iPad, and smartphone). Tom was pleased to see this, since many new federal regulations require conversation recording to meet compliance rules.



**Figure 2-28.** Lync video conferencing and IM tool

Tom discovered that Lync is integrated into Outlook and he can send a meeting invite out to all employees from Outlook. Tom also discovered that Lync can support external voice conferencing such as intercall conferencing. This way Tom can send out meeting requests and have the meeting either as a web conference or as a video conference (Figure 2-29). Lync allows both sides to talk at the same time, compared to other services where only one person can talk. The ability for multiple people to talk simultaneously is important for enterprise business voice.



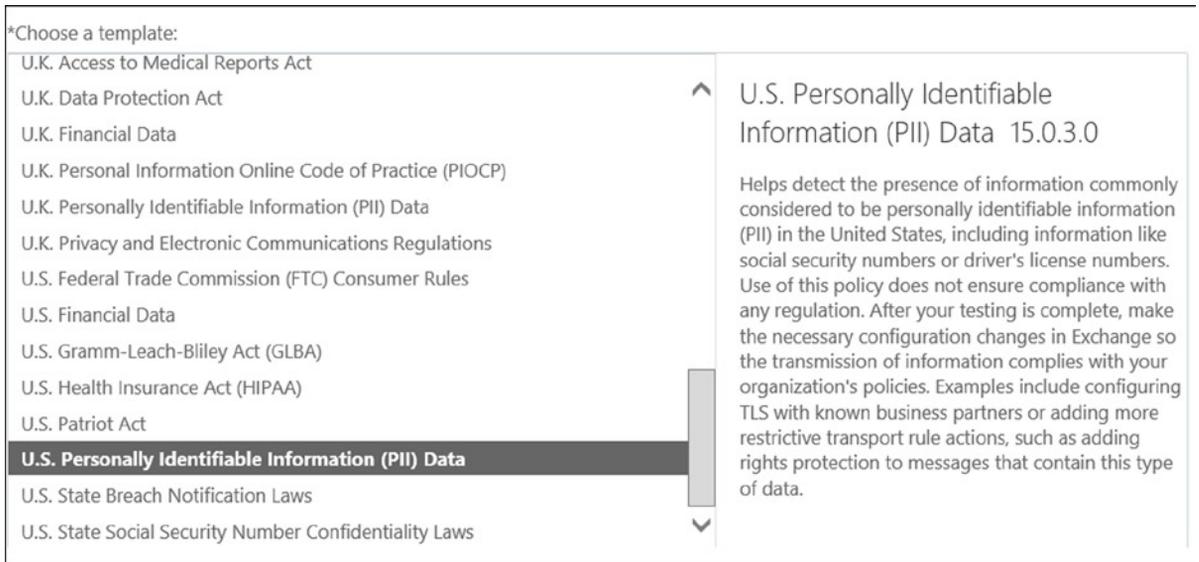
**Figure 2-29.** Outlook scheduling a video conference call using Lync

## Data Loss Prevention

Tom explored some of the additional features in Office 365. One item he wanted to verify was what happens if credit card information (embedded in emails or documents) is emailed externally from RDCC. So he emailed a test message to an external user, and the email was rejected (not delivered to the external user) with the following rejection message:

TRANSPORT.RULES. Reject Message; the message was rejected by organization

The Microsoft Partner explains that Data Loss Prevention (DLP) is a configured service that is part of Office 365. This service processes the email message content against various rules. One of the rules that emails can be processed against is a Personal Information Identification rule that detects credit card numbers in email and documents. Microsoft supplies a standard set of DLP template rules, but you can also have custom DLP templates built. As an example, if RDCC has internal proprietary information, you can construct a word template for those documents and an appropriate DLP rule that manages the information so it is not emailed externally. This way, RDCC will have maximum control (as much as possible) over the external communications to ensure that only appropriate information is delivered externally. The Partner showed Tom the available DLP rules (Figure 2-30) that can be easily added to Office 365.

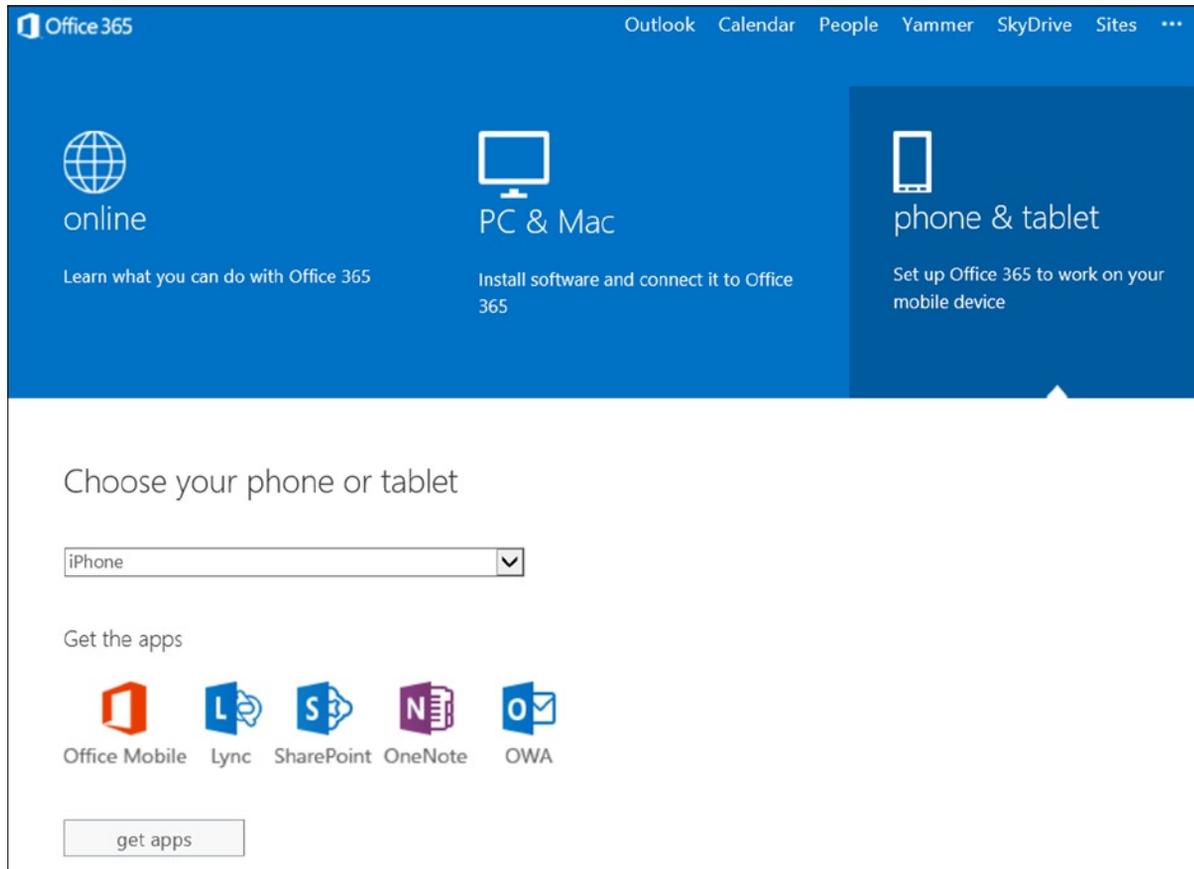


**Figure 2-30.** Office 365 data loss standard rules

Tom thought about his business requirements and the services that are part of Office 365. When he looked at the overall costs, Office 365 made business sense, and it reduces his overall expenses. With the different licensing models, Tom has the flexibility to purchase the services on a monthly invoice, or on a yearly invoice through a traditional reseller.

## Device Configuration

One of the last things that Tom looked at was the smart device support. With everything else that he has experienced, he was not surprised to see that his iPhone was fully supported with Office 365 as well as the Android devices and iPads (Figure 2-31).



**Figure 2-31.** iPhone-supported apps in Office 365

As Tom looked over Office 365, he became aware of its different configurations. Office 365 is a cloud-based service that does not care who is the manufacturer of the user's device. Tom's users have iPhone, Macs, PCs, laptops, and the new Chrome notebooks. Tom realizes that Office 365 supports all of these devices.

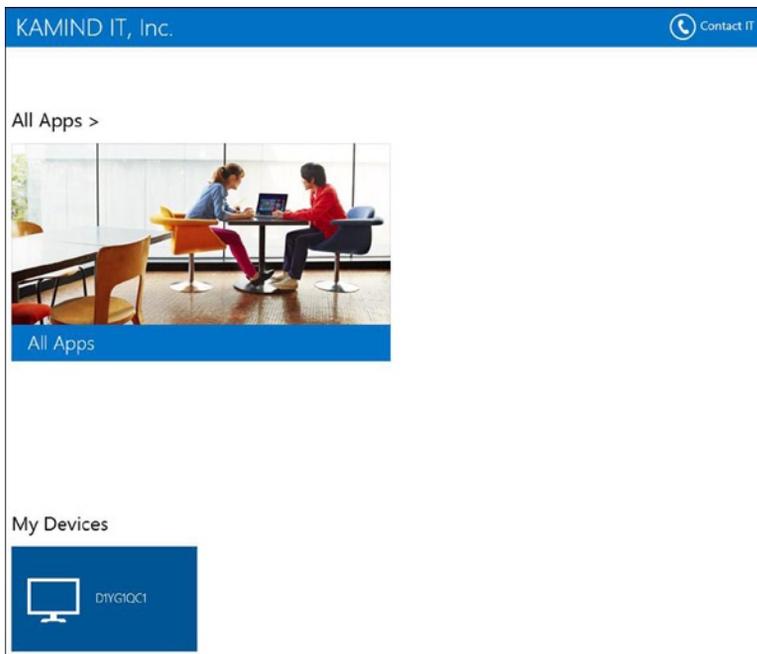
## Windows Intune

The Microsoft Partner suggested that Tom look at Windows Intune, so Tom enters the URL for Windows Intune (<https://account.manage.microsoft.com>) and starts to access the service (Figure 2-32). The Microsoft Partner remarked that Windows Intune is an integrated service that uses Office 365 Active Directory to manage desktop and mobile devices.



**Figure 2-32.** Windows Intune user page: [account.manage.microsoft.com](https://account.manage.microsoft.com)

Windows Intune (see Chapter 7) allows the IT organization to fully manage the user mobile devices and desktop devices with antivirus, policy management, updated management, and hardware and software inventory management. Windows Intune monitors the end user devices and sends notification to the administrator when there are issues associated with the user's system. Tom logged into Windows Intune (<https://account.manage.microsoft.com>), looked at the start screen (Figure 2-32), and proceeded to log in to the company portal (Figure 2-33).



**Figure 2-33.** Windows Intune company portal

The Microsoft Partner explained that Windows Intune is designed for the IT staff to reduce the cost of desktop management deployment. Windows Intune has a self-service portal that allows users to register their devices (mobile, laptops, desktop) into the Windows Intune deployment center. This allows the IT staff to manage those systems. Windows Intune also supports custom application deployment for mobile devices. Controlling the deployment of custom applications is a key benefit for RDCC because they no longer need to publish the mobile application to the Public cloud.

## MEC Summary

Using a “walk-through” approach has exposed you to the different capabilities of Office 365 from a very practical point of view: how you use the features. There is much more to Office 365 than we discussed, and we will cover that information in subsequent chapters. At this point, if you have a trial subscription, you are ready to try Office 365. The next section contains helpful hints on Office 365 configuration of your mobile devices and workstation.

## User Setup and Configuration

In our walk-through example, we wanted to give you a feeling of the capabilities of Office 365 and how to use those capabilities. We purposely skipped over the configuration: how to set up Office 365 and how to configure SkyDrive Pro and Lync. As you saw earlier, configuration is not difficult. The key to stressless configuration is noting where information is located. We have included additional workstation setup information on the following topics:

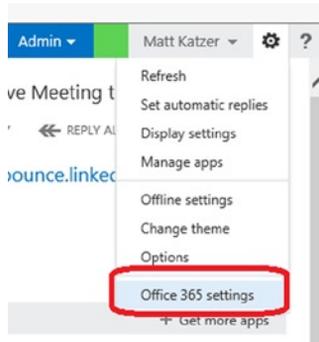
- Workstation Guides
  - Setup
  - Creating New Outlook Profile
  - Desktop Setup (office 2007/2010)
- SkyDrive Pro
  - Configuration
  - Planning
  - Team Site Caution
  - Changing Configuration
  - Office 2010 Support
  - Checking Storage Allocation
- Smartphone
  - Android (Motorola V2.2) and Other Devices
  - Windows Phone Office 365
  - Windows Phone Adding Multiple Exchange Accounts
- Lync
  - Skype Configuration
  - Creating a Microsoft Account for Skype
  - Using Skype to Call Lync
  - Troubleshooting
  - Firewall Ports

Please check [www.getoffice365now.com](http://www.getoffice365now.com) for the latest information on Office 365 configurations.

## Workstation: Setup Guide

The following steps are used by an individual who has Office Professional Plus licenses assigned to the users.

1. Start a web browser and sign in to Office 365 at [portal.microsoftonline.com](http://portal.microsoftonline.com)
2. On the right-hand side, select the Gear, then “Office 365 settings” (Figure 2-34)
3. Follow these steps

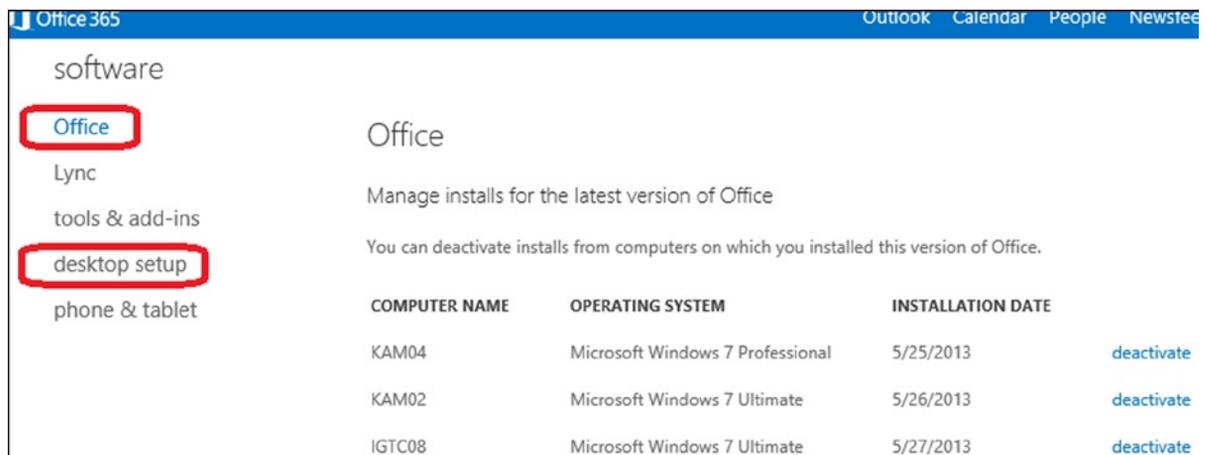


**Figure 2-34.** Office 365 software download

### Step 1: Install Office 2013 or Desktop Configuration

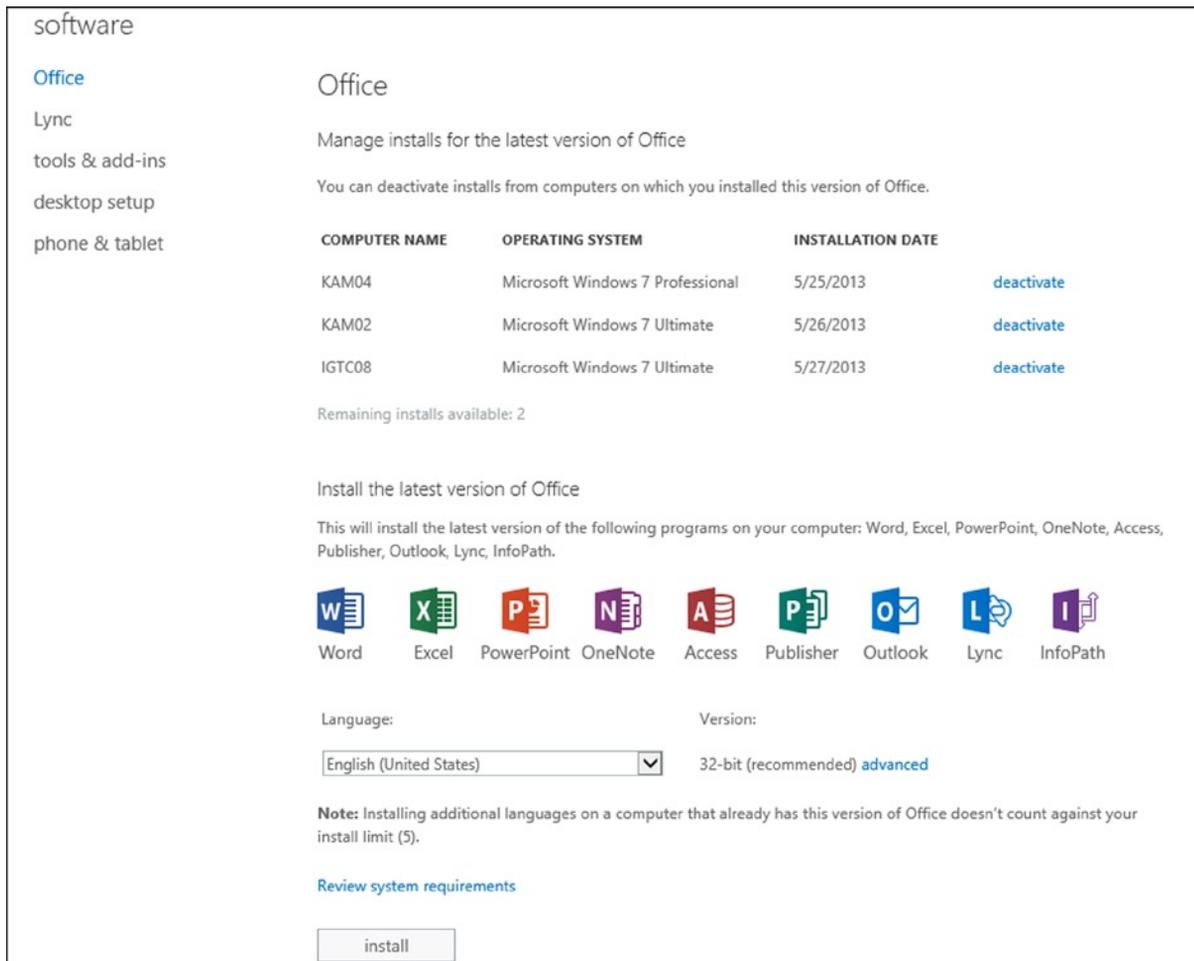
Select the gear, then “Office 365 settings” or, as an administrator, select software download (Figure 2-34).

1. You have two options to download software in Office 365. You can download the complete Office 2013 suite, or you can download the desktop setup (for older systems using Office 2007 or Office 2010). Select one of the options shown in Figure 2-35.



**Figure 2-35.** Software selection download showing three additional systems already running Office 2013

2. If you choose to install the full Office 2013, select “Office” to install the software (Figure 2-36). This option is available only if the Office Professional Plus software is part of your subscription.



**Figure 2-36.** Installing full Office 2013

3. If you choose not to install Office 2013 or if you do not have the Office Professional Plus as part of your subscription, then you must install the desktop setup (Figure 2-37).

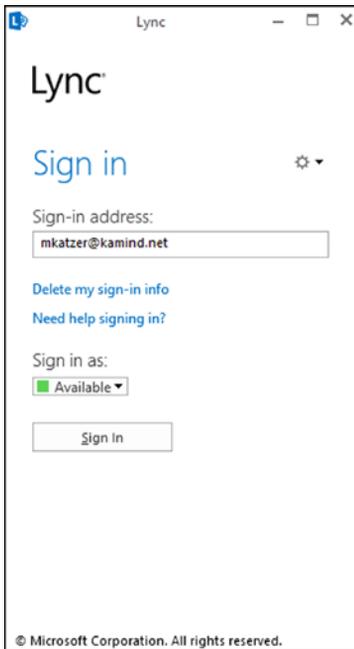


**Figure 2-37.** *Installing desktop setup*

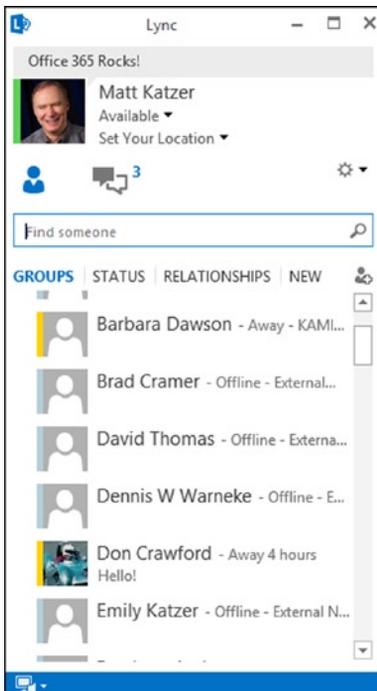
4. After you have installed the desktop setup, you can install software for your phone and tablet. Please see our phone tablet setup document for installation and configuration of these features.

## Step 2: Configuration of Lync

1. After you have installed Office 2013 or Lync, you need to configure Lync for your use. To use Lync, just log in using your Office 365 account.
2. Start Lync 2013 from your device and sign in (Figure 2-38 and Figure 2-39).



**Figure 2-38.** Starting up Lync



**Figure 2-39.** Starting up Lync

3. Skype Integration: If KAMIND has configured your site, it is enabled for Skype access. To send an Instant Message (IM) to a Skype user, use the formatted email address similar to “mjones(company.com)@msn.com” (example: mjones@kamind.net@msn.com), where the Microsoft Account for the Skype user to log in is mjones@company.com.
4. If your Lync client does not start up with a screen similar to the one in Figure 2-39, refer to the Lync troubleshooting notes for additional information.

## Step 3: Configuration of Outlook

Your network has been set up to support automatic Outlook configuration. (Your System Administrator has done this for you already when Office 365 was set up.) If this is a new installation for Office, to configure Outlook, select “New Profile” when prompted, enter the username and password, and then select “Next” (see Figure 2-40). If there is an existing Outlook profile, you need to enable a new profile option so you can create a new Outlook profile.

**Figure 2-40.** Outlook setup

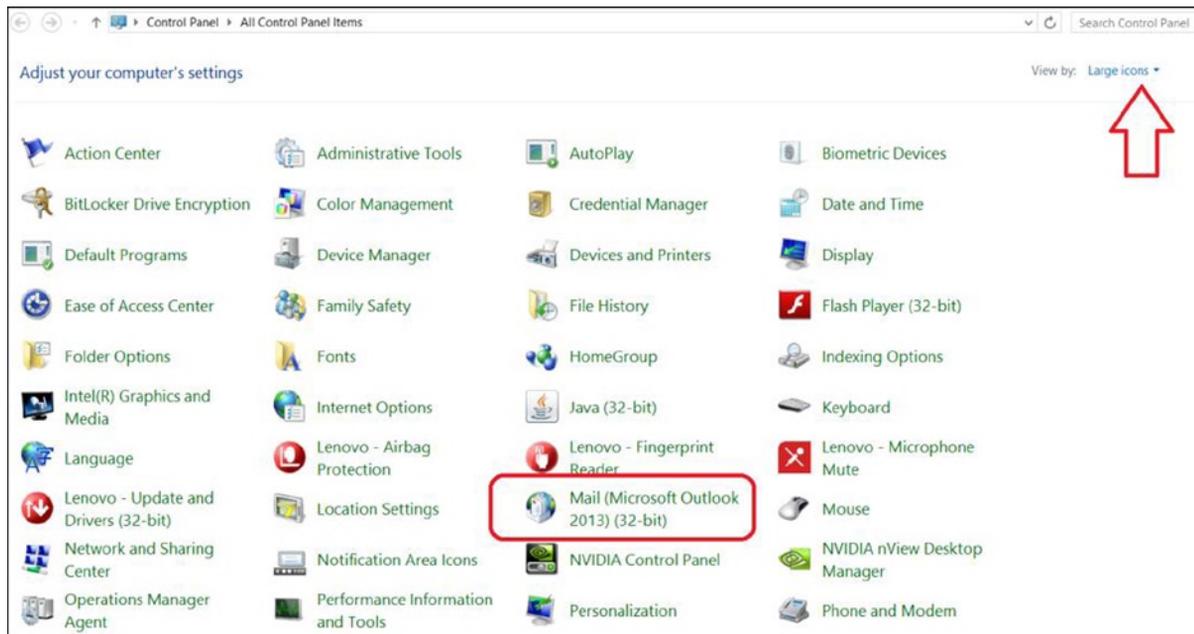
If you wish to speed up the configuration of Outlook to Office 365, log in to the Office 365 web site [www.Office365.com](http://www.Office365.com) as the user you entered in the Outlook startup screen (Figure 2-40). Outlook uses a secured https connection and will use the same connection details that you enter for your browser. The Outlook screen will complete, and you are ready to use Office 365. Close and restart Outlook. At this point you are finished with the installation! Enjoy using Office 365.

## Workstation: Creating a New Outlook Profile

Outlook operates on user profiles. You can have multiple profiles in Outlook; you just need to select which profile to use. This is useful if you need to have different email accounts running in separate Outlook profiles and isolated from each other’s mail service. The normal operation for Outlook is to autoload a profile.

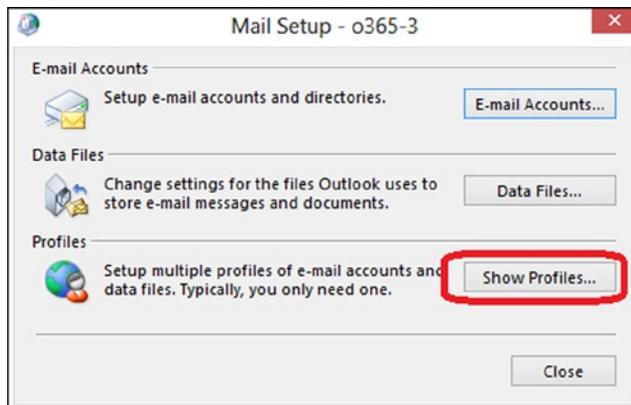
During Office 365 testing, it works best if you use multiple profiles and configure Office 365 in the second profile. To create a new profile, enable the “Prompt for Profile” option in the control panel. Follow the next steps:

1. Open up the control panel on your Windows 7 or Windows 8
2. In the upper right-hand corner, select “Display All Icons”
3. Select the “Mail” icon (see Figure 2-41)



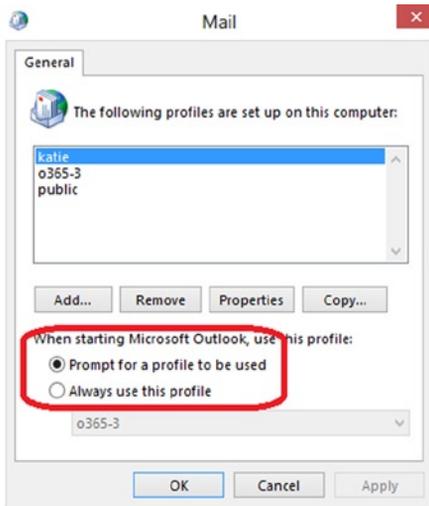
**Figure 2-41.** Control panel: changing mail profile

4. Select “Profiles” (see Figure 2-42)



**Figure 2-42.** Configuring for multiple profiles

5. Select “Show Profiles”
6. Change to “Prompt for a profile to be used” (Figure 2-43), then exit



**Figure 2-43.** Set to “Prompt for a profile to be used”

7. Select OK; then close. Now start up Outlook and the dialog box will prompt you for a new profile. Select “new,” repeat step 3, and enter the new email account information.

## Workstation: Desktop Setup Configuration

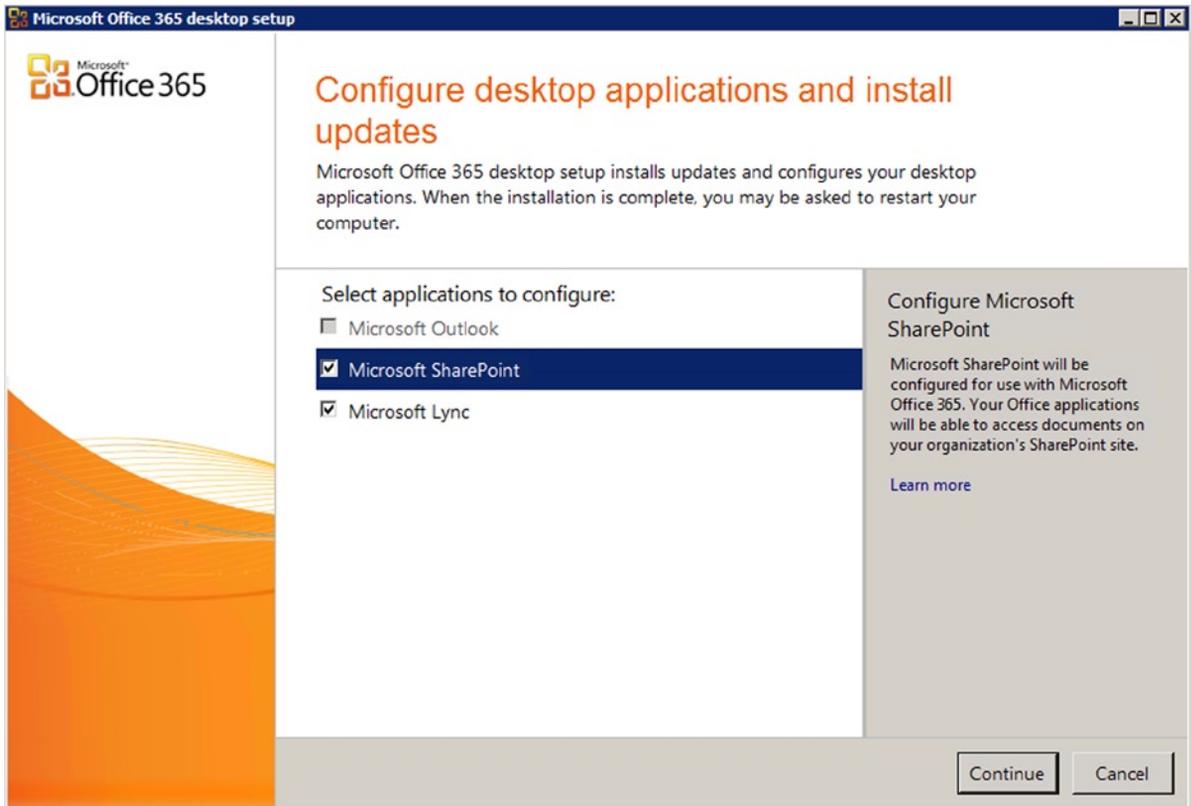
Office 2007 and Office 2010 require additional software to be installed on your desktop. When you run the desktop setup (Figure 2-44), Office 365 will download a setup configuration tool that will update your desktop and Office software with the latest patches and security information. Office 2013 was designed for the cloud and does not require any additional desktop configuration.



**Figure 2-44.** Installing desktop setup

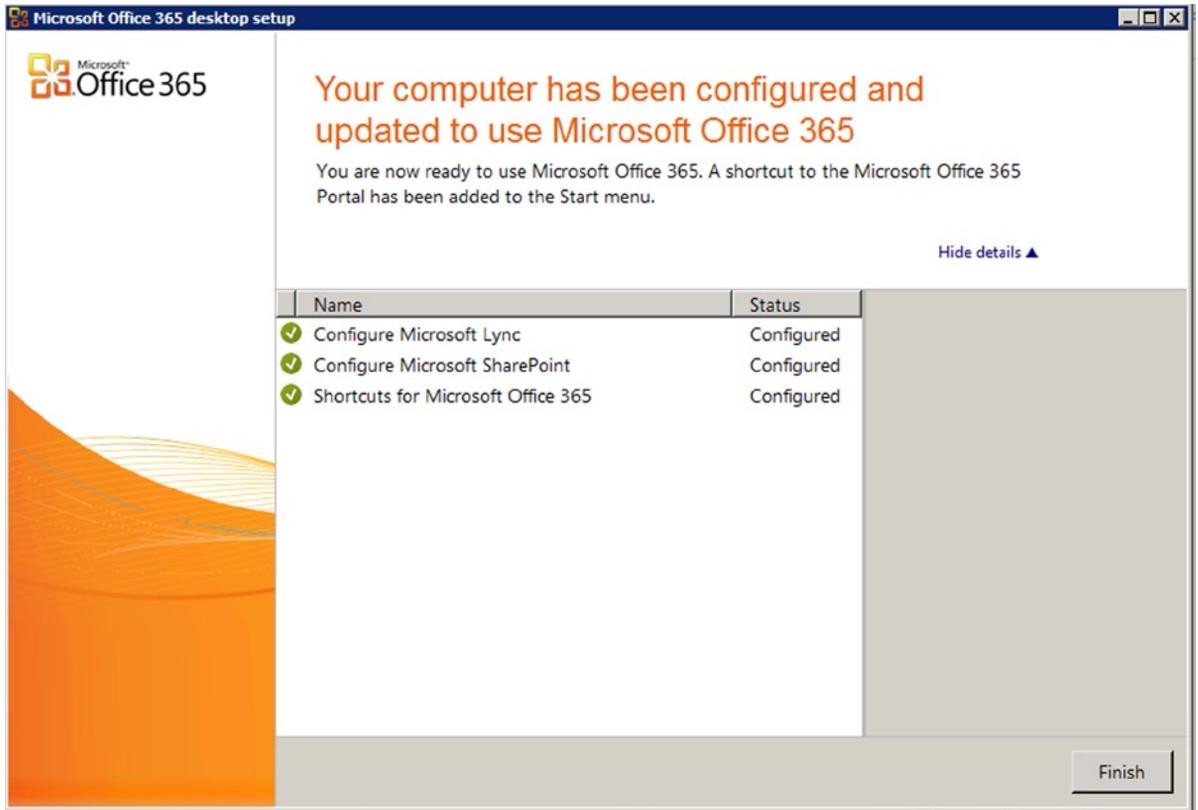
To install the desktop configuration tool, select “Setup.” This action will download the desktop configuration tool that will be streamed from the Office 365 servers. Once the desktop configuration tool is installed, click Setup in “Set up and configure your Office desktop apps” and follow the next steps:

1. Click the check box beside applications that need to be configured (Figure 2-45). Normally, the startup process will check the correct items. Click Continue. Close any applications that you need to.



**Figure 2-45.** Office 365 validation options

2. Click Finish (Figure 2-46). You might need to restart your computer.

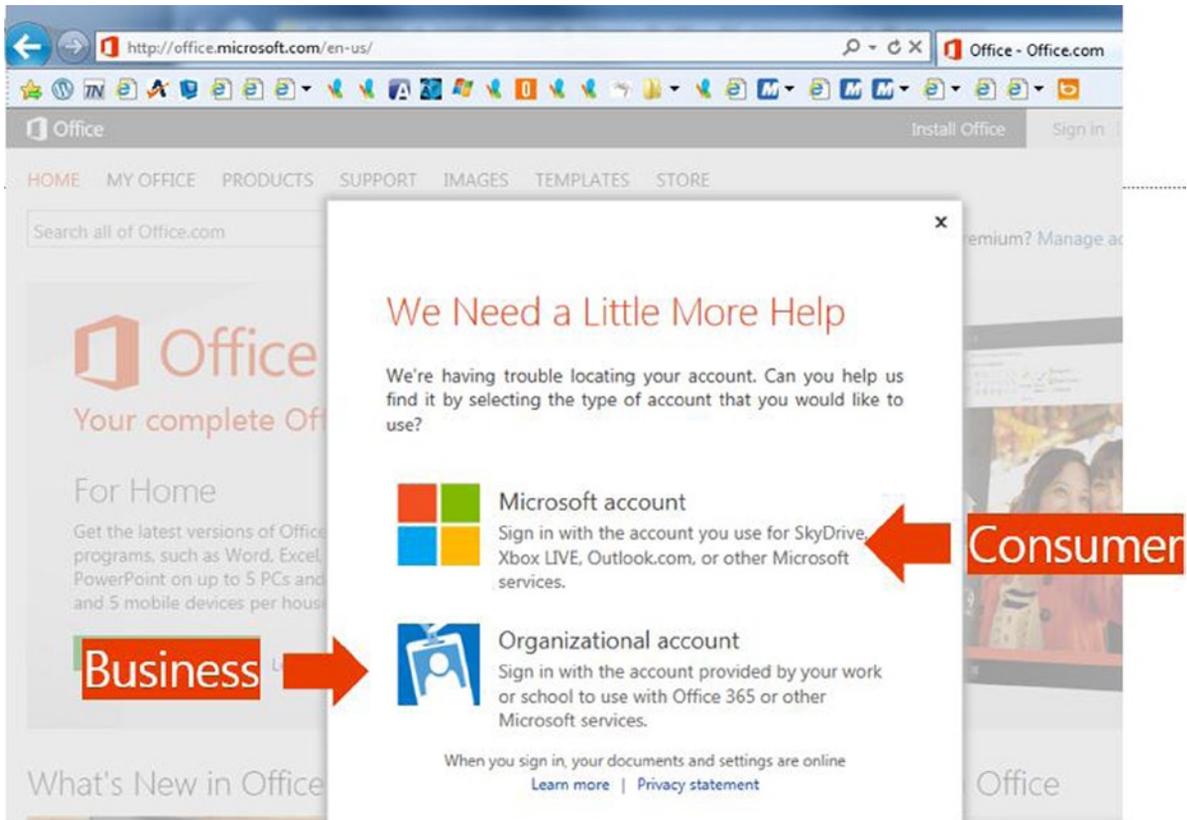


**Figure 2-46.** Office 365 successful configuration update

## SkyDrive Pro: Configuration

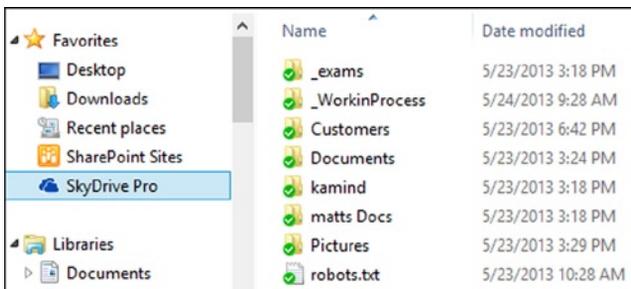
Office 365 SkyDrive Pro is a configuration tool that is designed to sync documents from your computer to Office 365. SkyDrive Pro automatically copies your documents to the cloud. This cloud synchronization tool can sync your desktop files (up to 100GB) to Office 365. You can synchronize one directory or multiple directories on your desktop, laptop, or smartphone. The maximum file size that can be synced is 2GB.

There are two versions of SkyDrive: SkyDrive Pro (for businesses) and SkyDrive (for consumers). You select the SkyDrive based on the login ID (Figure 2-47), in this case your Office 365 Organization Account.



**Figure 2-47.** SkyDrive Pro (business) or SkyDrive (consumer)

Any data you changed in the cloud is synchronized to your desktop. Files and directories that are synchronized with the cloud (SkyDrive Pro) are shown with green check marks (see Figure 2-48). You also can share the data with external users or members of your company from SkyDrive Pro (Figure 2-49) in Office 365.



**Figure 2-48.** Desktop SkyDrive Pro

<input type="checkbox"/>	Type	Name	Modified
<input type="checkbox"/>	Folder	_exams	5/23/2013 10:32 AM
<input type="checkbox"/>	Folder	_WorkInProcess	5/23/2013 10:31 AM
<input type="checkbox"/>	Folder	Customers	5/24/2013 9:30 AM
<input type="checkbox"/>	Folder	Documents	5/23/2013 10:31 AM
<input type="checkbox"/>	Folder	kamind	5/23/2013 10:31 AM
<input type="checkbox"/>	Folder	matts Docs	3/6/2013 8:39 AM
<input type="checkbox"/>	Folder	Pictures	5/23/2013 10:31 AM
<input type="checkbox"/>	Folder	robots <span style="color: green;">NEW</span>	5/23/2013 10:28 AM

**Figure 2-49.** Office 365: SkyDrive Pro: cloud directory

SkyDrive Pro is automatically installed when you install Office Professional Plus. You can edit files, copy new files, or delete files from SkyDrive Pro directory with any Microsoft Office application. All changes are copied to Office 365 without any actions on your part. If you edit documents offline and then connect to the Internet, the changes are uploaded to Office 365 automatically when you connect.

You can use SkyDrive Pro with your own personal site or with the Team Site. However, it is recommended that you use your personal document site (called “SkyDrive”). SkyDrive Pro is limited to 20,000 files and up to 100GB of data on your personal site. If you use SkyDrive Pro with the Team Site, you are limited to 7GB and 5,000 files.

## SkyDrive Pro: Planning for Personal and Team Site Document Storage

The following are common questions: What information do you place in SkyDrive Pro and what information do you place in your Office 365 team site? Typically, your work product can be classified in one of two categories: current or reference/archive. Current information is what you are currently using as a work in process. Reference/archive is information that is part of an older project which you may need to access every now and then.

If you look at the way you work, current information is what you want to replicate to your workstation, laptop, or tablet. It is information that you need to have access at any moment to complete a task. That is the information that you place in SkyDrive Pro and replicate to your device.

When you complete a project, you typically archive the project because the access is not needed on a daily basis. You are accessing the old project as needed. Completed projects should be placed in your Team Site, and not replicated to the desktop. If you are not going to access the information, why replicate the data? Documents in the Team Site still can be searched and downloaded when you need them.

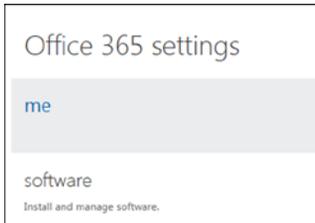
As you start to use SkyDrive Pro, remember these rules:

- If you exceed the limits or have a replication error, SkyDrive Pro stops working.
- SkyDrive Pro is limited to 100GB.
- SkyDrive Pro can replicate multiple libraries.
- SkyDrive Pro is limited to 20,000 files and the maximum file size cannot be over 2GB.
- Team Site replication is limited to 7GB and 5,000 files per Team Site library.

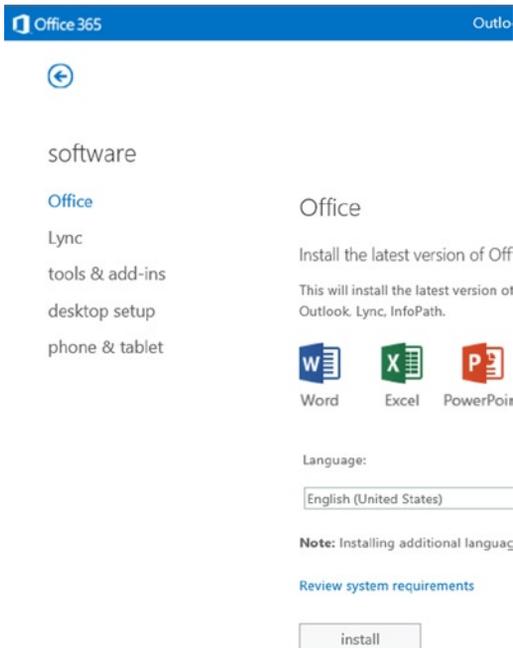
Follow the next steps to set up SkyDrive Pro.

## Step 1: Add SkyDrive Pro to Your Desktop

There are two ways to add SkyDrive Pro: as part of the Office 2013 download (Figure 2-50 and Figure 2-51) or as a separate download from [www.microsoft.com](http://www.microsoft.com) for Office 2007 or Office 2010. The simplest way to use SkyDrive Pro is to install Office 2013. To download Office 2013, log in to Office 365 (at <http://office.microsoft.com>) and download the Office 365 2013 software.



**Figure 2-50.** Selecting Office 365 software

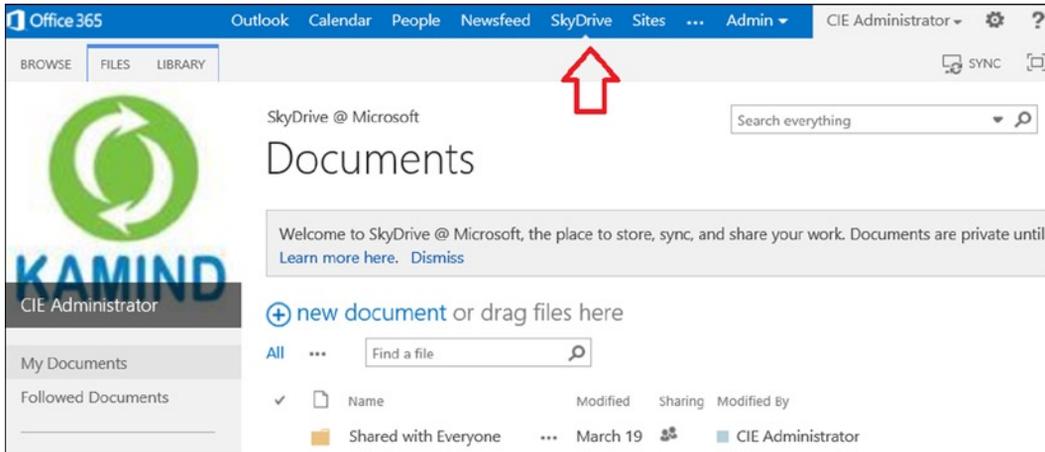


**Figure 2-51.** Selecting software download

1. Go to <http://office.microsoft.com>
2. Sign in (upper right-hand corner)
3. Select Organization Account
4. Click “gear” in upper right corner
5. Select Office 365 Settings
6. Select Software, and install

## Step 2: Office 365 SkyDrive Pro Configuration

The Office 365 SkyDrive Pro configuration is simple. You need to log in to Office 365 and select SkyDrive (see red arrow in Figure 2-52). If you have not accessed this site before, there is a 5–10 minute configuration (first time). This action will build your SkyDrive site. After you have built the SkyDrive Pro site, you are ready for step 3: adding libraries to sync to your device.

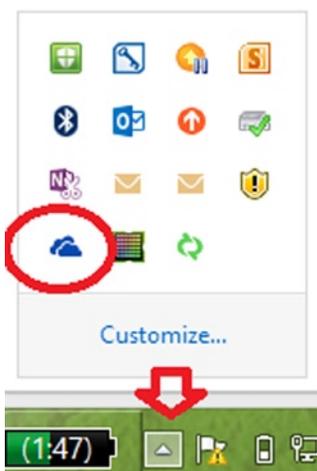


**Figure 2-52.** Accessing SkyDrive Pro

Once you have accessed SkyDrive Pro, you are ready to sync your data to the cloud.

## Step 3: Launch SkyDrive Pro on Your Local System

Depending on your system, the SkyDrive Pro software may not be installed. Check to see if the software is installed on your system (see Figure 2-53). If SkyDrive Pro is installed, then skip to step 4.



**Figure 2-53.** SkyDrive Pro icon

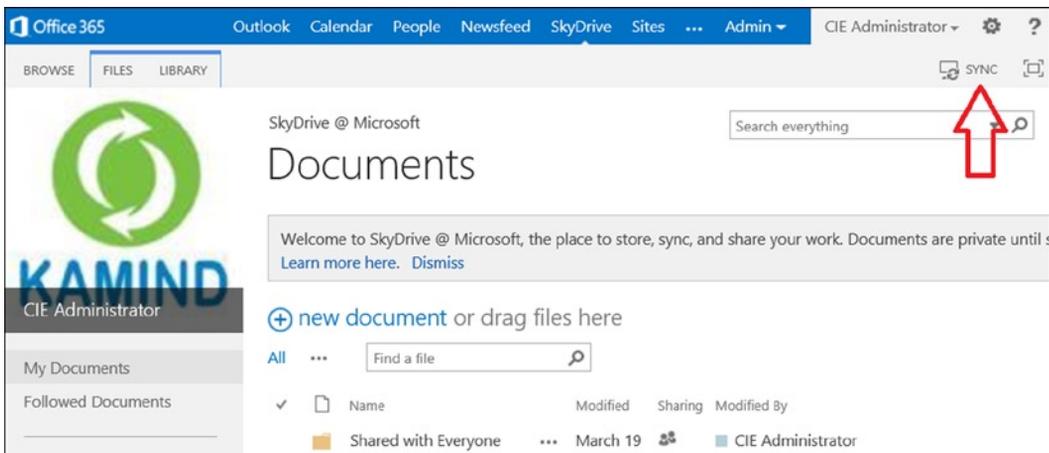
If you do not see the cloud icon, then you need to install the SkyDrive Pro desktop software. On Windows 8, click the SkyDrive Pro icon (Figure 2-54). If you are running **Windows 7**, select the SkyDrive Pro software from the *Program files - Office 2013* menu. You need to perform this action only once to install the SkyDrive Pro software.



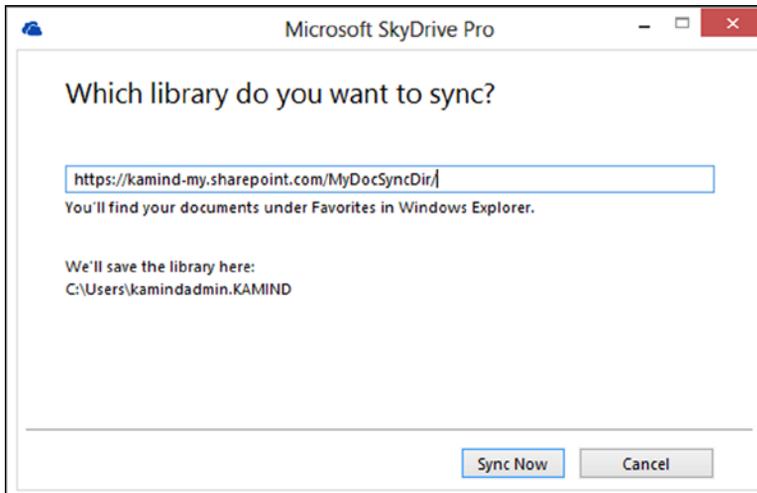
**Figure 2-54.** SkyDrive Pro icon

## Step 4: Office 365 SkyDrive Pro Configuration

If you have not installed Office 2013 or desktop tools, return to step 1 and install the software. Once you have installed the software all that is left is to start the SkyDrive Pro and sync the cloud to your desktop. Return to the Office 365 site, select “SkyDrive” (Figure 2-55), and then select the “sync icon” and identify the local system directory for synchronization (see Figure 2-56).



**Figure 2-55.** Setting up SkyDrive Pro Sync



**Figure 2-56.** Linking SkyDrive Pro to a local desktop location

Office 365 will begin the process to sync the cloud with your desktop. You will be prompted to identify an area where the synchronization folder should be added to your local system. Just click OK after you verify the location.

You do not need to configure anything else. The files and documents you place in the local SkyDrive Pro folder will be copied to Office 365. If you copy files to the SkyDrive Pro folder while you are not connected to the Internet, those files will be copied when you are back online.

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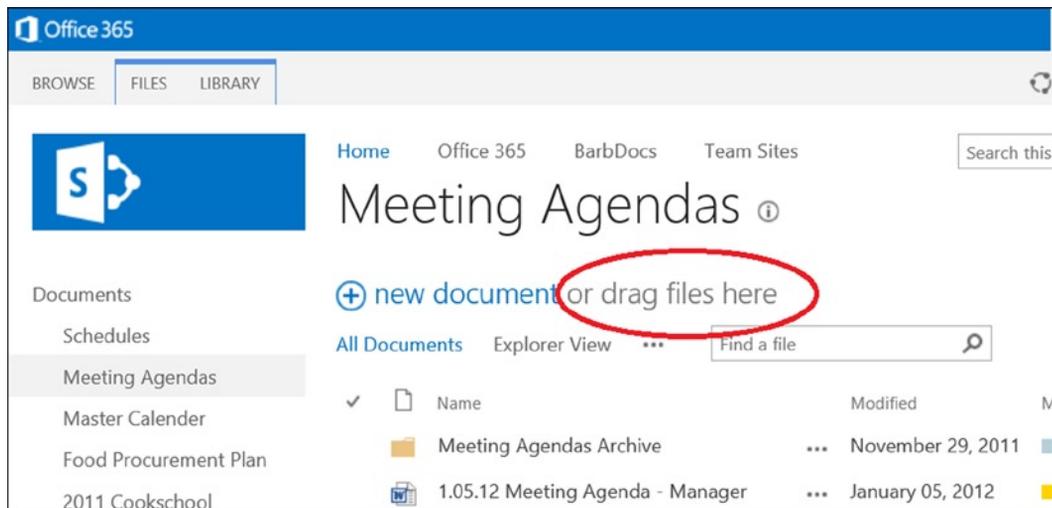
■ **Note** If the URL does not appear in the SkyDrive Pro library, you can manually insert the URL from your SkyDrive site or the Team Site. In Figure 2-56, the URL is truncated at the directory to sync.

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## SkyDrive Pro: Team Site Caution

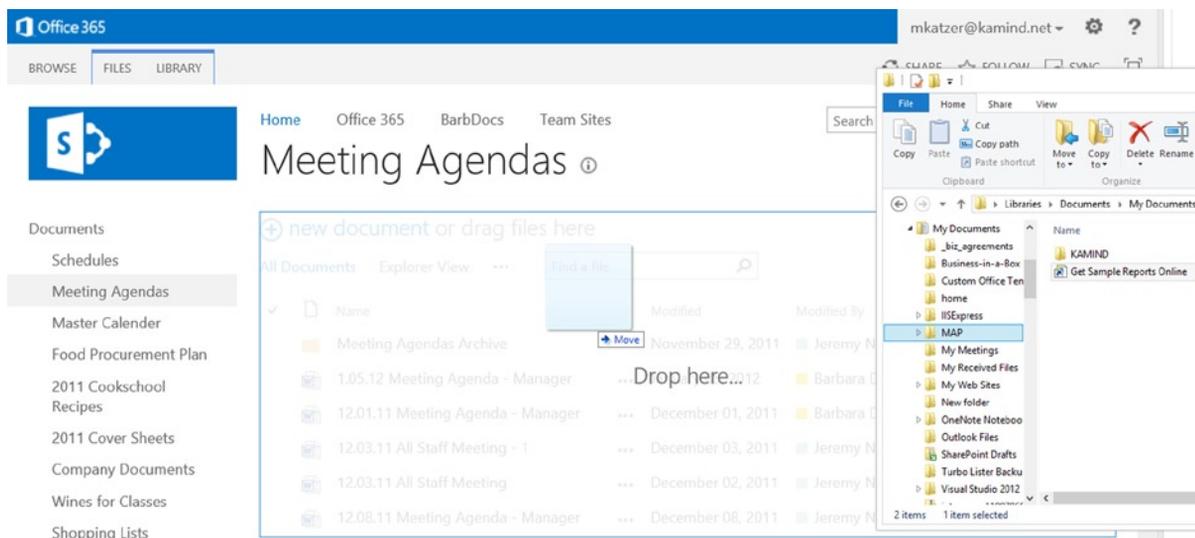
SkyDrive Pro is limited to 100GB of storage. Your Office 365 Team Site can be expanded to 2TB of storage. Typically, users have two types of data: personal files and team files. SkyDrive is designed for personal files. If you have a large number of pictures and you want to store them in the cloud, it is better to store them in the Office 365 Team Site than in your personal SkyDrive. Do not sync them to your desktop.

Many Office 365 users ask how they can bulk-add documents to the cloud. This is a very simple process. Just drag and drop the documents using Windows Explorer and your HTML5-compatible browser (Figure 2-57).



**Figure 2-57.** Drag-and-drop window

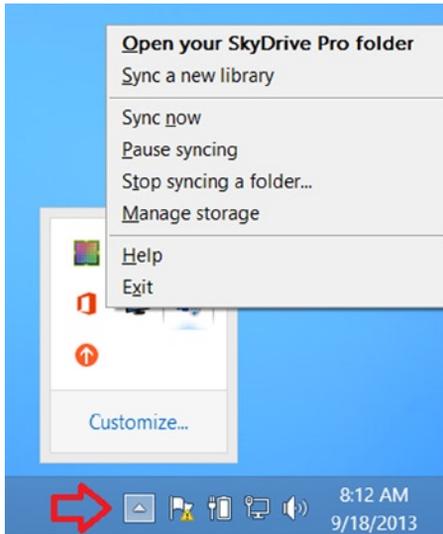
Figure 2-57 is the Team Site document window. The area in the circle is the destination for files or folders copied to Office 365. Just select a file from your desktop and drag it over to the “drop here” location (Figure 2-58). This will upload the files to the Team Site or your personal SkyDrive Pro site.



**Figure 2-58.** Drag-and-drop example in the Team Site

## SkyDrive: Configuration Changes

You can add multiple libraries to synchronize with Office 365. However, when adding files from the “Team Site,” there are limits to the number of files and the size of files you can sync. A different Team Site location can be added from the hidden icons by right-clicking the SkyDrive Pro icon as seen in Figure 2-59. To add a different library to sync to your desktop, select “Sync a new library.” If you wish to stop the Office 365 sync or to add a different location to sync content, right-click the SkyDrive icon and make the necessary changes.



**Figure 2-59.** SkyDrive Pro configuration changes

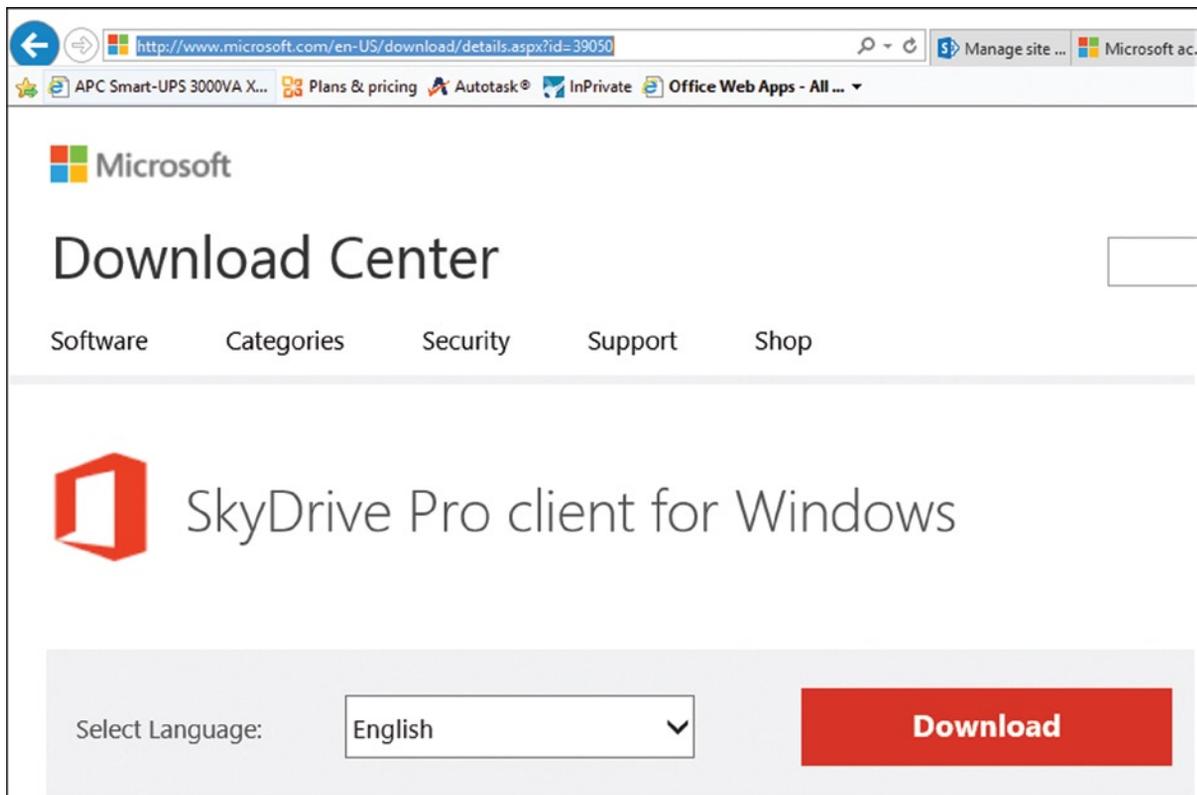
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■ **Note** If you stop syncing a folder, the desktop folder will be converted to a non-synced folder. You will not lose any data in this process.

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## SkyDrive Pro: Support for Office 2010 Users

You may download the standalone SkyDrive Pro sync client, which allows users of SharePoint 2013 and SharePoint Online in Office 365 to sync their personal SkyDrive Pro. SkyDrive Pro client can be installed side-by-side with previous versions of Office (Office 2010, Office 2007); see Figure 2-60. To download SkyDrive Pro, go to the Microsoft download site at [www.microsoft.com/en-US/download/details.aspx?id=39050](http://www.microsoft.com/en-US/download/details.aspx?id=39050)

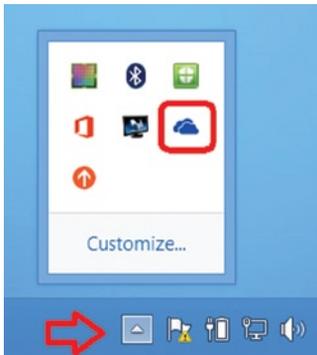


**Figure 2-60.** Download SkyDrive Pro: MS doc reference: 390050

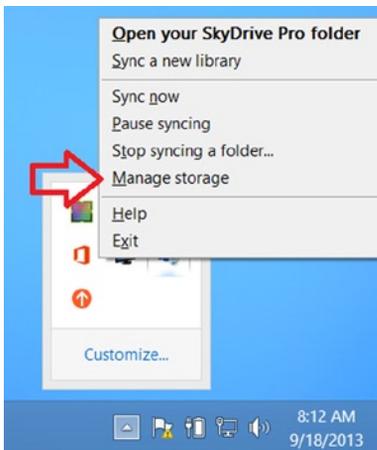
## SkyDrive: Checking Storage Allocation

Office 365 SkyDrive Pro supports up to 100GB of personal SkyDrive storage. To determine the storage you are using, access the SkyDrive status folder.

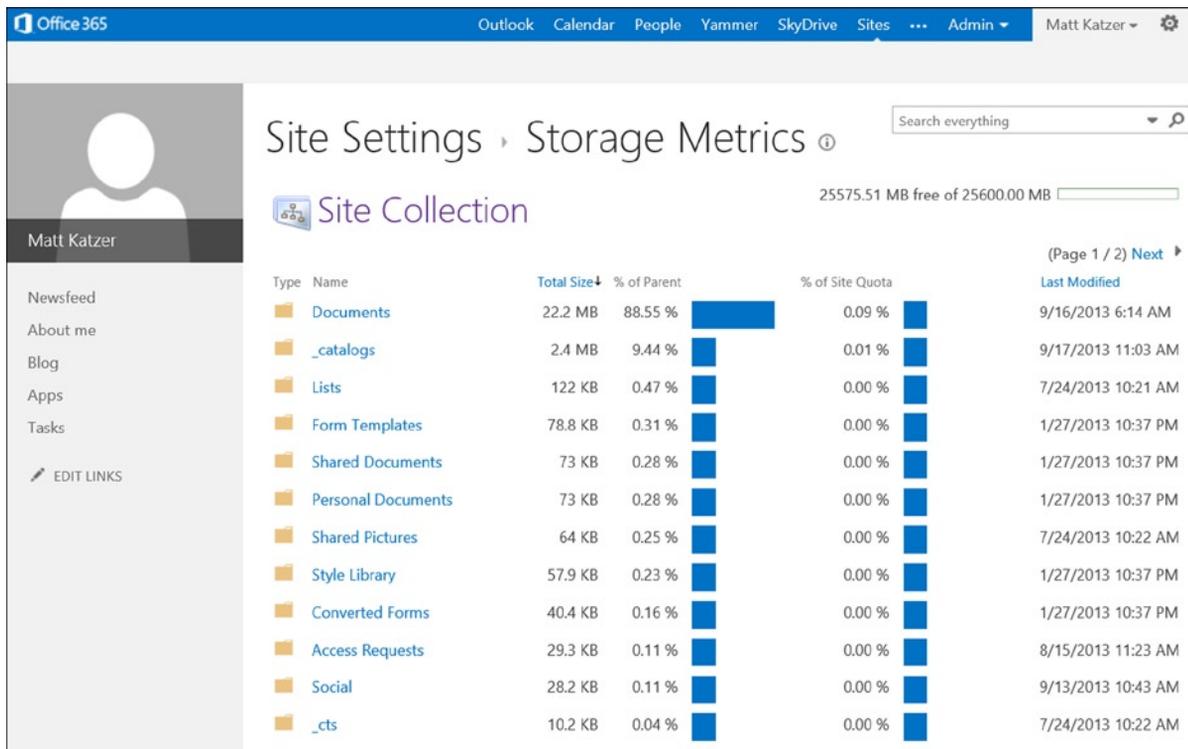
Once you have found the SkyDrive Pro icon from the hidden icons (Figure 2-61), right-click the SkyDrive Pro icon (blue cloud) and select “Manage storage” (Figure 2-62). This will launch the status of the SkyDrive Pro storage site. You have two options: view SkyDrive Pro Storage or open the SkyDrive Pro recycle bin. Select view “SkyDrive Storage” site. The personal SkyDrive storage (Figure 2-63) shows the storage allocation free in MB.



**Figure 2-61.** Finding SkyDrive Pro icon from the hidden icons



**Figure 2-62.** Selecting managed storage option



**Figure 2-63.** Displaying the SkyDrive storage allocation

Figure 2-63 shows that 25.6G were allocated and that 25GB are free for personal use. Your Office 365 administrator can increase your personal storage allocation to a maximum of 100GB.

## Smartphone: Configuration

Configuring your smartphone for Office 365 is simple. All you need is the same information that you used to configure Outlook: your email address and password (and sometimes the Exchange Server name: [m.outlook.com](http://m.outlook.com)). Depending upon your organization's password change policy, you may need to change your smartphone's password every 90 days. In the same screens that you use to initially set up email there should be a Password Change option.

### Key Configuration Items

1. The User ID is your email address
2. Always leave the Domain Name blank
3. Generic Hosted Exchange server name: [m.outlook.com](http://m.outlook.com)

## iPhone

Apple products have a very controlled environment. The current versions support the ability to have multiple exchange email accounts. Here is the process:

1. Delete any previous account(s).
2. On your iPhone or iPad, under Settings, select “Mail, Contacts, and Calendars.”
3. Press “Microsoft Exchange” to add your new account.
4. Enter your fully qualified email name (e.g., info@kamind.net) in both the email and username fields and your email password. Click “Next.”
5. The iPhone or iPad will use Office365’s autodiscover feature to fill in the server box. Click “Next.”
6. Synchronize contacts and email.

At this point, you have completed the necessary steps and your device will synchronize.

## Android Devices: Motorola Droid v2.2 (and Above)

The Droid environment is much less regulated (compared to iPhone or Windows Phone). These instructions may be slightly different depending upon your phone’s vendor (and carrier). Android uses the term “Corporate Email” for integration into Microsoft exchange server (Office 365 service). If you do not see “Corporate Email,” check with your phone supplier to verify that you have the latest version of the Android operating system on your phone.

1. Start by selecting: Home/“Settings” button (2nd from left)/Settings/Accounts & sync/“Add account”
2. Select “Corporate”
3. Enter your fully qualified email name (e.g. info@kamind.net) and password. Click “Next.”
4. This may fail. You will see a screen to allow you to re-enter your information. Re-enter your email at Domain\Username (the backslash is OK). (Your password has been kept from the previous entry.)
5. For Office 365, enter “[m.outlook.com](http://m.outlook.com)” in “Server.” (This should be automatic, but may not be.)
6. Keep “Use secure connection (SSL)” checked.
7. Press “Next.”
8. As part of the original setup, or later by selecting Home/“Settings” button (2nd from left)/Settings/Accounts & sync/your account (“under Manage accounts”), you can set the check boxes for “Sync Contacts” and “Sync Calendar”. Just above these Sync buttons is “Incoming settings.” Change your password here.
9. Under “Account settings” you can set:
  - a. “Account name” to a recognizable name (like ‘your org name here’)
  - b. “Your name”
  - c. “Signature”
  - d. “Amount to synchronize” (pick two weeks)
  - e. “Email check frequency” (choose Automatic (Push))

- f. “Default account” (check box for Yes: this is the one that email will be sent from)
- g. “Email notifications” (check box for Yes: show email available in status bar)
- h. “Select Ringtone”
- i. “Vibrate” options
- j. Incoming settings: This is also where you change your password (if it changes for your Office 365 account).
- k. Click “Sync Contacts” and “Sync Calendar”

At this point, you have completed the necessary steps and your device will synchronize.

## Windows Phone: Office 365

The Windows 7 Phone environment is very controlled, and also from the same vendor that makes the Exchange Server. You may have multiple email accounts.

This procedure connects your Windows Phone 7 (version 7.5 or later) to both your Hosted Exchange and SharePoint accounts.

1. Select Settings
2. Select Office Hub
3. Select Office 365 and Setup
4. Select Add an Account - Outlook
5. You will receive a message that allows you access to the Team Site (Office 365 SharePoint)
6. Select Finish

---

■ **Note** When you access the Office 365 team site, you will be prompted for username and password. Select “Always connected” to not be prompted for password.

---

At this point, you have completed the necessary steps and your device will synchronize.

## Windows Phone: Adding Another Exchange Account

Windows Phone allows connections to multiple Exchange Servers. This procedure connects your Windows Phone to another Exchange Server.

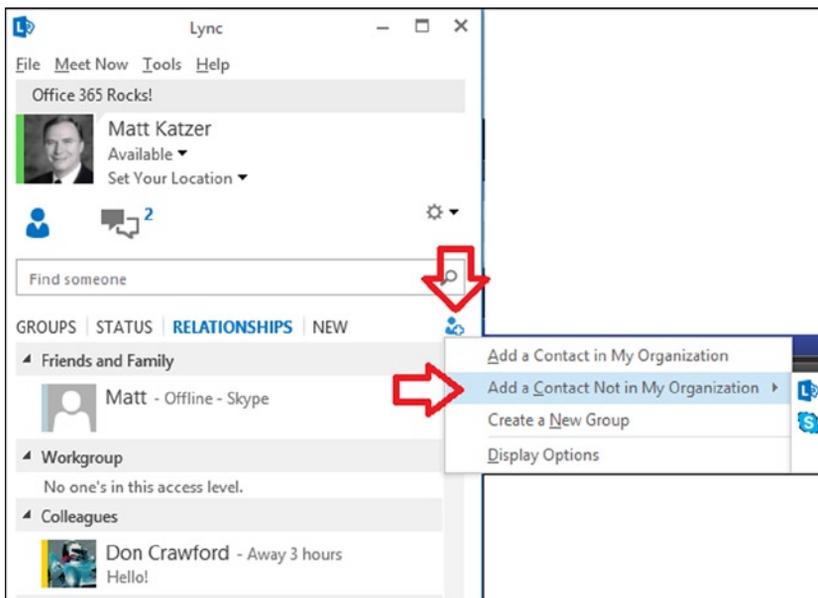
1. Select Settings
2. Select Email+ accounts
3. Select Add an Account
4. Select Outlook
5. Enter the email address and password
6. Select “sign in”

7. If prompted that credentials are bad, check your password with “show password”
8. Change username to email address
9. Select “sign in”
10. If promoted, select “advance”
11. Enter the server name: [m.outlook.com](https://m.outlook.com) or the physical exchange server (see Outlook Web Access)
12. Select “sign in”

At this point, you have completed the necessary steps and your device will synchronize.

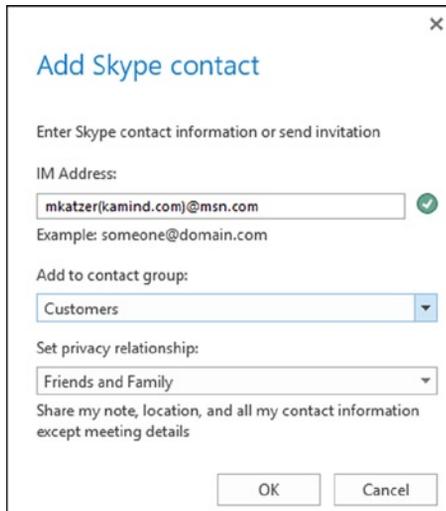
## Lync: Skype Configuration

Lync is the business communications software that is included in Office 365. Lync supports enterprise voice (both users can speak at the same time) and has all of the features that Skype does, and many more. KAMIND configures Lync in Office 365 to allow Lync to be used with Skype. Adding Skype users to Lync is simple; the same as adding contacts. Once you have added the Skype users to your Lync contacts, you can call those users using Lync. Likewise, a Skype user can contact you via your email address. This allows you to invite Skype users in Lync meetings and use Lync for web conferencing and other meetings. To add a Skype user, just select the contacts (see Figure 2-64) and add the Skype user using the option “Add a contact not in my Organization” with Skype icon.



**Figure 2-64.** Adding Skype via contacts

Once you select “Add the contact,” select the Skype user and fill out the additional information. In Figure 2-65, we have added the Skype user to the “Other Contacts” and set the privacy to the same as “friends and family.” With external contacts you set the relationship as needed. When you enter a Skype user, the green check is displayed.

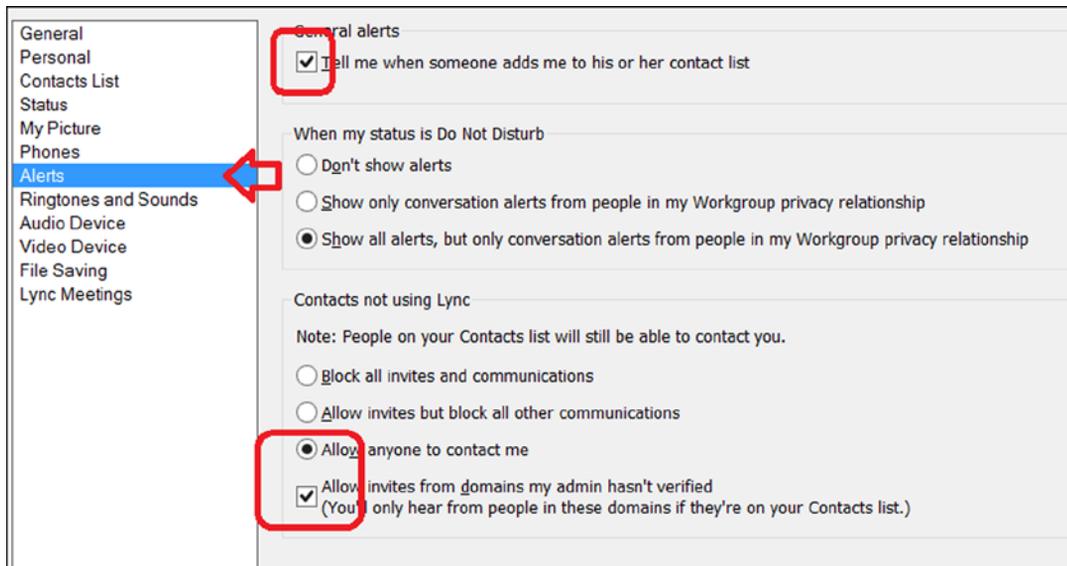


**Figure 2-65.** Adding the Skype contact

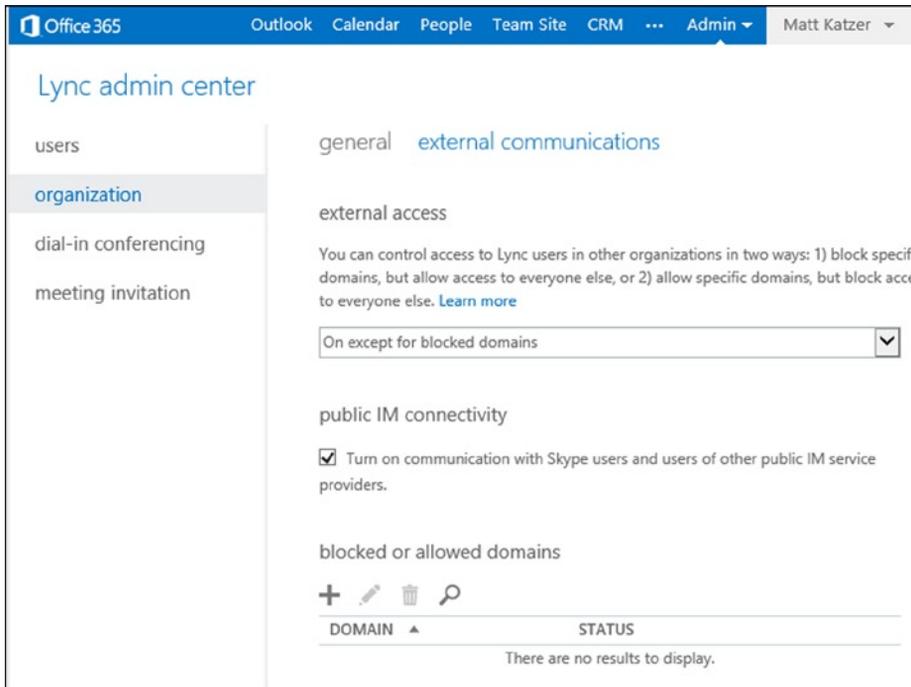
When you add a Skype user, the format must be in the form similar to “[mjones\(company.com\)@msn.com](mailto:mjones(company.com)@msn.com).” This is the same format that you would use for other IM providers. To ensure that you can add the Skype user, make sure your client is set up to allow external contacts and that Lync is set up to communicate with Skype (steps follow).

## Step 1: Enable Lync Client to Accept Skype User Calls

Enable the Lync client to accept calls from external users. Select the Lync options, then set to allow anyone to contact me (Figure 2-66). If you cannot connect to Skype users, verify the Service settings (step shown in Figure 2-67).



**Figure 2-66.** Setting Lync to accept calls form external users (aka Skype)



**Figure 2-67.** Enabling external communications

## Step 2: Verify Configuration of Office 365 with External Users

In the Office 365 admin center, select the Office 365 admin dashboard, service settings, and Lync. Enable the public IM connectivity (Figure 2-67) to allow Lync users to speak to Office 365 and Skype user external to your company.

## Lync: Linking Microsoft Account to Skype

Office 365 is integrated with Skype, and we covered how Lync talks to Skype users. But how do Skype users talk to Lync? When Skype was created the account names were random. Skype has changed its model to require an email address to log in rather than using the Skype “handle.” The email address in Skype is already linked to the Skype account; you just need to let Microsoft know that you want to link the email address to a Microsoft account (used for password security management). Most users by now will have a Microsoft account that is linked to Skype, so you may have done this already and are using the free SkyDrive. If you do not have an account that is linked, you will need to create one. Just follow the next steps to accomplish this. Log in to Skype with a Microsoft account (Figure 2-68).



**Figure 2-68.** Log in to Skype using a Microsoft account

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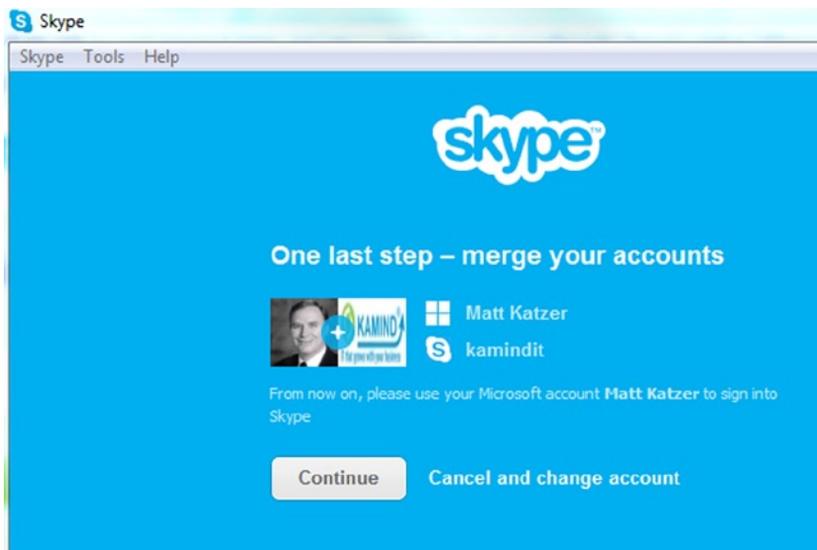
■ **Note** Lync users can call any Skype users, but Skype users need to ask permission (send a contact) before they can speak to Lync users.

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Then link your Microsoft account to your Skype account (Figure 2-69). If you do not have a Microsoft account, you need to create one. A Microsoft account is nothing more than your email address with security extensions. Skype and other Microsoft services use these security extensions to grant access to different services. To add Microsoft security to your email address, go to <http://account.microsoft.com> and select “new.” Fill in your email address for the account ID. You added consumer security to your email address. Remember that the Microsoft account is the consumer account and not your organization ID, unless you have previously linked them together (Figure 2-70).



**Figure 2-69.** Selecting Skype account to link to Microsoft account

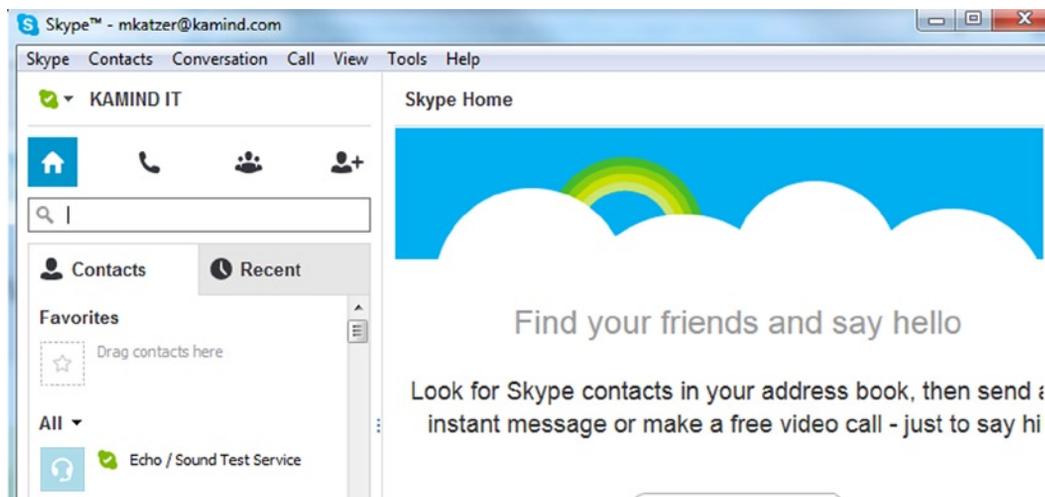


**Figure 2-70.** Merging the accounts

At this point, select continue to merge the accounts. The wizard will request you to update your profile and you are done. From now on when you call a Lync user, the user's address will appear in the format `mjones(company.com)@msn.com`.

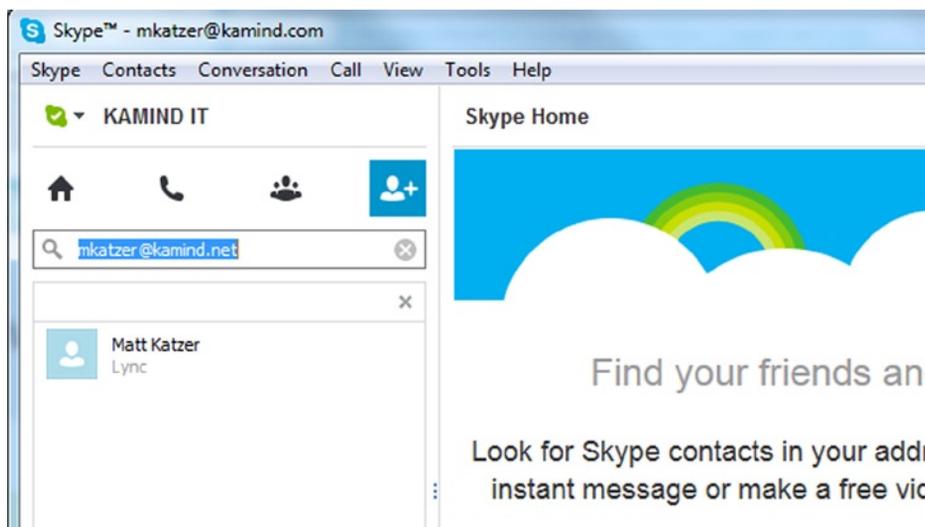
## Lync: Using Skype to Call Lync

Office 365 is integrated with Skype. But how do Skype users talk to Lync? You have already changed your Skype login ID to use a Microsoft account; you are ready to speak to Lync users (Figure 2-71). Once you have logged in, the setup screen looks similar to the one shown in Figure 2-71. (Make sure you have the latest Skype installed!)



**Figure 2-71.** Skype setup main dashboard with Microsoft account integration

Just add the email address of the Lync user (Figure 2-72), and they will show up on the Skype dashboard.



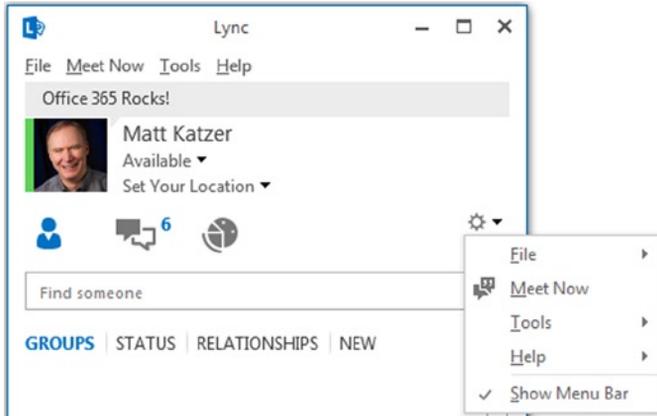
**Figure 2-72.** Adding a new contact from Lync

The Lync user will show up based on the settings on the Office 365 Lync Administration and the user's personal preferences. (Lync users can say no to adding the Skype users contact information.) Just select the user and add the contact to Skype. At this point you can call the Lync user. Your Skype address on Lync will be in the format "mjones(company.com)@msn.com" using the Microsoft account.

## Lync: Troubleshooting

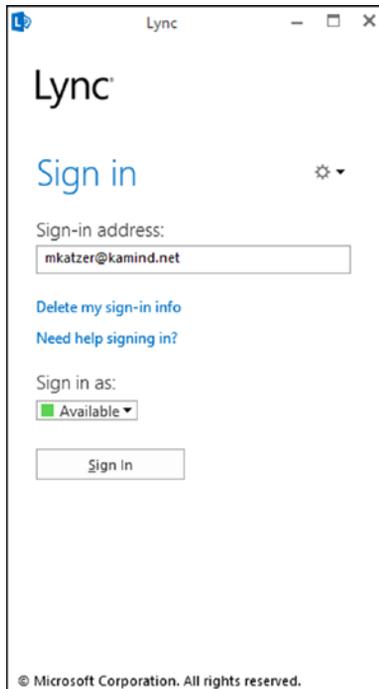
SITUATION: Microsoft Lync is set to autoconfigure, but sometimes Lync will not configure to the desktop correctly. To correct this problem, you need to configure the manual server connections by following these steps:

1. Start Lync
2. Select Gear (right-hand side: Figure 2-73)



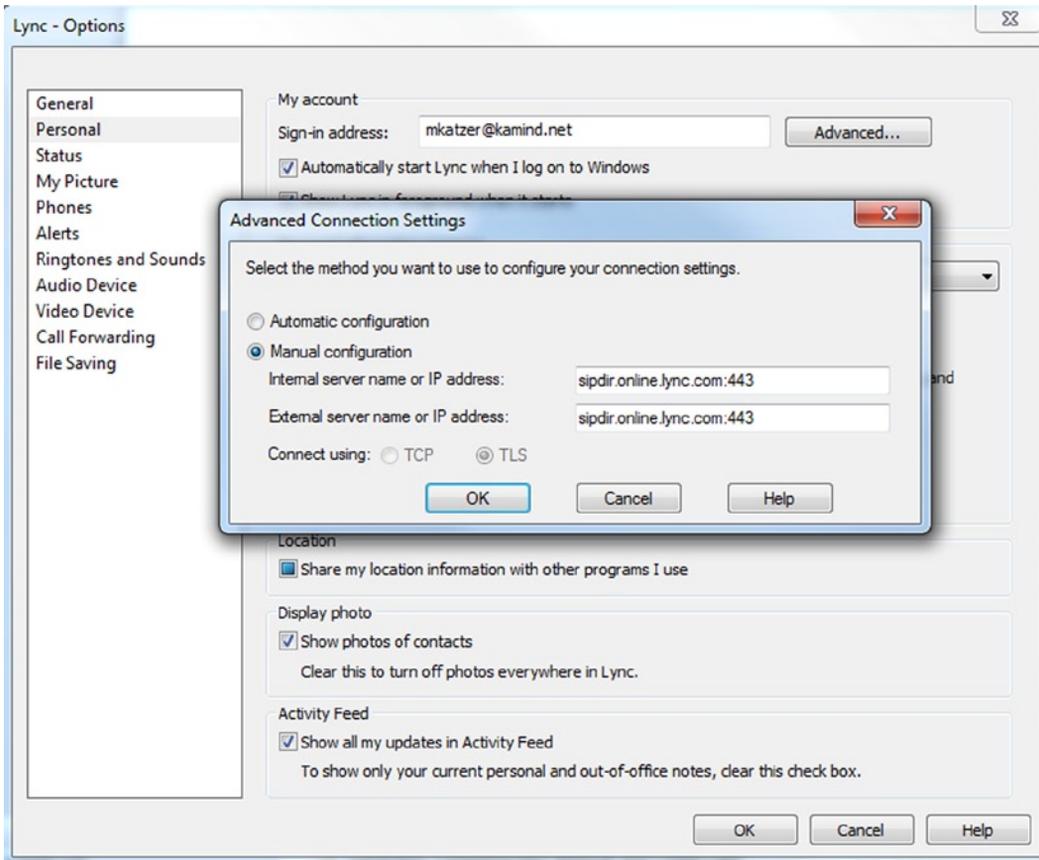
**Figure 2-73.** Lync configuration options

3. Enable "Show Menu Bar" (Figure 2-73)
4. Select Options (Figure 2-73)
5. Sign in (Figure 2-74)



**Figure 2-74.** Lync startup screen

6. Select Advance (Figure 2-75)



**Figure 2-75.** Lync: adding the manual server addresses

7. Enter `sipdir.online.lync.com:443` as the web address for both internal and external servers

## Lync: Firewall Port Configuration

Lync uses port 443 for incoming and outgoing TCP IP traffic. In addition to the TCP ports, the UDP ports that are required to support link are outgoing ports 3478 and 50000–59999. Any changes in this setup must be completed by your administrator.

## Reference Links

There is a lot of information about Office 365 on the web, but the issue is finding the right site. The information contained in this chapter is a combination of our experiences in doing deployments and knowledge of support information that has been published by third parties.

### Office 365 Learning Center

<http://office.microsoft.com/en-us/office-home-for-office-365-FX102821134.aspx>

### Office 365 Documents and Training Videos

<http://getoffice365now.com/Pages/doc.aspx>

### Using Office 365 SkyDrive Pro

<http://www.youtube.com/watch?v=c740qwwR-cs>

### Adding SkyDrive Pro for Office 2010 and 2007

<http://www.microsoft.com/en-US/download/details.aspx?id=39050>

### Update information from Office 365: Migrating and managing your business in the cloud

<http://getoffice365now.com>

## Next Steps

Your basic Office 365 systems have been set up and configured. At this point you understand the features of Office 365 and are ready to move forward. However, your work is not yet complete. There is more to do depending on your Office 365 configuration. It is recommended that you review Chapters 3, 4, 6, and 8 in preparation for deployment.

- **Chapter 3:** Office 365 Planning and Purchase
  - The key to a successful Office 365 migration is the planning and purchase process. There are three different categories of plans you may purchase from, but the secret to a successful migration to Office 365 is picking the correct plan that supports your business. Once you pick the plan, it is about planning the migration to Office 365 to ensure that the process is seamless for your organization. This chapter describes the basic purchase information and details the choices.
- **Chapter 4:** Office 365 Setup and Migration
  - Once you have selected your Office 365 plan, there are two different ways you can migrate to Office 365: via “cut-over” migration or federation. This chapter covers the most common approach to Office 365 migration.
- **Chapter 6:** Building Your Web Site
  - Office 365 includes a public-facing web site and the necessary developer’s tools to build out the web site. This chapter takes you from the basic Office 365 site to a fully functioning web site. Office 365 public-facing web sites fulfill basic web needs for 90 percent of businesses on Office 365. This chapter describes how to configure and build the public-facing web site for your business using the integrated Office 365 web site tools and SharePoint Designer: a design tool that is included with your Office 365 subscription.
- **Chapter 8:** Office 365 Administration
  - This chapter describes the different administration centers in Office 365 and the most common tools that you would use to administer your Office 365 company. Depending on your Office 365 services, there are five possible administration tools. This chapter focuses on the Office 365, Exchange, and Lync administration centers. The SharePoint and Windows Intune administration centers are described in their own chapters. We close the chapter with a guide to using PowerShell to manage your Office 365 environment.