Microsoft Public Cloud Services
Setting up your business in the cloud

Use Microsoft cloud services to help build a more competitive, agile business

Grow your business with Microsoft public cloud services—without costly new hardware or IT staff. Discover high-value services including Microsoft Office 365, Microsoft Intune, Azure, OneDrive for Business, and Windows Server 2012 R2 in the cloud. Set up your work environment, build websites, customize apps, market online, and more!

This Microsoft book:
• Walks you through setting up your business in the cloud
• Presents easy instructions to help you get started fast
• Links online demos, hands-on labs, and additional free training through the Microsoft Virtual Academy
• Covers all types of Microsoft public cloud services: software as a service (SaaS), infrastructure as a service (IaaS), and platform as a service (PaaS)

Get the benefits of new technology without the hassles
• Deliver powerful Office 365 productivity tools on smartphones, tablets, and PCs
• Store files by using the built-in security features of Microsoft OneDrive for Business
• Collaborate via Skype for Business and Microsoft Dynamics CRM Online
• Manage all your Windows, iOS, and Android devices with Microsoft Intune
• Create virtual servers to handle your workload tasks
• Quickly extend business software to new users by using Microsoft Azure RemoteApp
• Access and use cloud applications from within the Azure Application Gallery
• Build new websites by using Azure Websites
• Develop mobile apps by using Windows App Studio

About the Author
Blain Barton is a Senior Technical Evangelist with Microsoft. He has been with Microsoft for more than 20 years, serving the IT Pro Community. He has a radio show, has presented at hundreds of technical events, and has received numerous speaking awards throughout his career. Blain’s blog can be found at aka.ms/blainbarton.

Also look for
Microsoft SharePoint Online for Office 365: Administering and configuring for the cloud
Bill English

Foreword by Tracey Lanham
Master of Science in Computer Information Technology, Program Chair of the CIT Programs, Hodges University

Microsoft Public Cloud Services
Setting up your business in the cloud
Blain Barton

Microsoft Press
Celebrating over 30 years!
Microsoft® Public Cloud Services

Setting up your business in the cloud

Blain Barton
Contents at a glance

Foreword xiii

Introduction xv

CHAPTER 1 What the cloud can do for your business 1
CHAPTER 2 Get started with Office 365 7
CHAPTER 3 Store your files in the cloud by using OneDrive
   for Business 35
CHAPTER 4 Keep track of customers by using Microsoft Dynamics
   CRM Online 53
CHAPTER 5 Manage devices in the cloud by using Microsoft Intune 85
CHAPTER 6 Build and run servers without using hardware 129
CHAPTER 7 Understand Server Manager 175
CHAPTER 8 Run Windows apps remotely 189
CHAPTER 9 Give users access to third-party apps 205
CHAPTER 10 Build a website for your business 221
CHAPTER 11 Build a Windows app by using Windows App Studio 241

Index 277
This page intentionally left blank
## Contents

*Foreword*  
*Introduction*

### Chapter 1  What the cloud can do for your business  1

- What is the cloud? ................................................ 1
- What kinds of Microsoft public cloud services are available? ........ 2
- What can Microsoft public cloud services do for your business? .... 3
  - *Sidebar: Preparing your plan*  
- Putting it all together .............................................. 4
- Summary .................................................................. 5

### Chapter 2  Get started with Office 365  7

- Introduction to Office 365 ........................................ 7
  - *Sidebar: Skype for Business*  
- Under the hood of Office 365 .................................... 9
- Find the right subscription ......................................... 10
  - Office 365 Business subscription options for small and medium organizations  
  - *Sidebar: Office Online web apps*  
  - Using the 30-day trial  
- Sign in for the first time ............................................ 12
- Explore the Office 365 Admin Center ............................ 14
- Configure a custom domain ....................................... 14

---

What do you think of this book? We want to hear from you!  
Microsoft is interested in hearing your feedback so we can improve our books and learning resources for you. To participate in a brief survey, please visit:

http://aka.ms/tellpress
Add, edit, and delete user accounts ............................................ 22
Work with files ............................................................................. 27
Use Office Mobile on all your devices ........................................ 30
Summary ...................................................................................... 32

Chapter 3  Store your files in the cloud by using OneDrive for Business 35

Introduction to OneDrive for Business ........................................ 35
Sidebar: It’s not personal…it’s business ........................................ 36
Find the right subscription ........................................................... 36
Explore OneDrive for Business .................................................... 37
Copy files to OneDrive for Business ............................................ 38
Save and open files within OneDrive for Business ....................... 39
Manage files .................................................................................. 39
Create a new file or folder ......................................................... 41
Sidebar: Create a new document from OneDrive for Business .... 42
Share a file or folder ..................................................................... 42
Sidebar: Follow shared files ......................................................... 44
Work on shared files .................................................................. 44
Chek out a file .............................................................................. 44
View a file’s version history ....................................................... 45
Sync OneDrive for Business to your computer ......................... 46
Use OneDrive for Business on the go ....................................... 47
Access OneDrive for Business on an Internet browser ................ 47
Use the OneDrive for Business app .......................................... 50
Summary ...................................................................................... 50

Chapter 4  Keep track of customers by using Microsoft Dynamics CRM Online 53

What is Microsoft Dynamics CRM Online? ............................... 54
Find the right subscription .......................................................... 55
Set up alerts 98  
Create policies 101  
Install the Microsoft Intune client software on client computers 103  
Set up Microsoft Intune to work with mobile devices 108  
Prepare software for distribution 116  
Explore the Company Portal. ................................. 120  
Create your Company Portal 121  
Install the Company Portal app on your mobile device 121  
*Sidebar:* Terms and conditions 122  
Enroll a device in the Company Portal 122  
Install software on a computer or device from the Company Portal 122  
Summary. .......................................................... 126

**Chapter 6  Build and run servers without using hardware** 129  
What is IaaS? ........................................................... 129  
*Sidebar:* Azure in Action 131  
Set up your Azure subscription ................................. 131  
Get started with Azure.......................................... 133  
Create a storage account 133  
*Sidebar:* How many storage accounts can you have? 134  
*Sidebar:* What is geo-redundancy? 136  
Set up a virtual network 137  
*Sidebar:* What’s an IP address? 137  
Understand virtual machine templates ..................... 139  
*Sidebar:* Open source and third-party software 140  
Build your first virtual machine.............................. 141  
Define a data disk within the virtual machine 145  
Install Active Directory Domain Services on the virtual machine 148  
Azure monitoring and alerts.................................. 155  
Back up your files with Azure Recovery Services........ 157  
*Sidebar:* Azure Site Recovery as a disaster recovery solution 158  
Create a backup vault 159
Download the vault credentials, install the Azure Backup Agent, and register your server 159
Configure and schedule backup options 164
Run a manual backup 168
Recover data 168
Summary ................................................................. 174

Chapter 7  Understand Server Manager 175
What is Server Manager? ............................................. 175
Get started with Server Manager .................................. 175
Add roles and features ............................................... 176
  The Windows Server Essentials Experience role 181
  Set up the Windows Server Essentials Experience role 182
Sidebar: Why Learn Windows PowerShell? 186
Summary ................................................................. 188

Chapter 8  Run Windows apps remotely 189
Introduction to Azure RemoteApp ................................. 189
Set up your RemoteApp subscription ............................ 190
Create a RemoteApp service ....................................... 191
Add users to your RemoteApp service ......................... 192
Publish an app ................................................................ 196
  Sidebar: Remove an app 198
Configure user access ............................................... 198
Set up RemoteApp on a client computer or mobile device 199
Summary ................................................................. 203

Chapter 9  Give users access to third-party apps 205
Share third-party apps in the cloud .............................. 205
Set up your directory .................................................. 205
  Sidebar: Start out in the cloud with just a directory 209
Share the Intuit QuickBooks Online app ....................... 210
Set up the Access Panel Extension ............................................ 213
Allow users access to the third-party app ............................... 215
Access the third-party app ......................................................... 216
Summary .................................................................................. 220

Chapter 10 Build a website for your business 221
Azure websites ................................................................. 221
Plan your website ................................................................. 222
Create your website ............................................................... 223
  Sidebar: What is open-source software? 223
Customize your website ......................................................... 228
  Explore WordPress settings ................................................. 229
  Add content to your site ....................................................... 233
  Add pages to your site ......................................................... 235
  Apply a WordPress theme to your site ................................. 237
Summary .................................................................................. 239

Chapter 11 Build a Windows app by using Windows App Studio 241
Why build a mobile app? ......................................................... 241
Prepare to build your mobile app .............................................. 241
  Sidebar: Use the Lean Startup approach 242
Tools for building mobile apps ................................................. 243
  Sidebar: What is Microsoft BizSpark? 244
Create an empty app ............................................................... 244
Add data sources .................................................................... 246
  Add an RSS feed ............................................................... 246
  Sidebar: What is the emulator? ............................................. 248
  Add a static HTML page .................................................... 248
  Add a YouTube video page ................................................. 249
  Add a Flickr photo stream ................................................... 250
  Add a Bing news page ....................................................... 251
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add your Facebook page</td>
<td>252</td>
</tr>
<tr>
<td>Add your Instagram feed</td>
<td>253</td>
</tr>
<tr>
<td>Add a collection</td>
<td>253</td>
</tr>
<tr>
<td>Add a menu</td>
<td>255</td>
</tr>
<tr>
<td>Create a visually rich app</td>
<td>256</td>
</tr>
<tr>
<td>Apply a theme</td>
<td>256</td>
</tr>
<tr>
<td>Set the tile</td>
<td>258</td>
</tr>
<tr>
<td>Choose the splash screen</td>
<td>259</td>
</tr>
<tr>
<td>Enable ads</td>
<td>259</td>
</tr>
<tr>
<td>Create an About page</td>
<td>262</td>
</tr>
<tr>
<td>Test and export your app</td>
<td>263</td>
</tr>
<tr>
<td>Test your app</td>
<td>263</td>
</tr>
<tr>
<td>Export the package</td>
<td>264</td>
</tr>
<tr>
<td>Submit your app to the Windows Store and Windows Phone Store</td>
<td>265</td>
</tr>
<tr>
<td>Summary</td>
<td>275</td>
</tr>
</tbody>
</table>

**Index**

- About the author
- About the contributors
- About the technical reviewer

What do you think of this book? We want to hear from you!

Microsoft is interested in hearing your feedback so we can improve our books and learning resources for you. To participate in a brief survey, please visit:

http://aka.ms/tellpress
This page intentionally left blank
Foreword

Blain Barton has a passion for technology as well as a very deep passion for education. Throughout our years of working together, it has always been apparent that he values the engagement and participation of students as he delivers highly technical topics in a manner that they can enjoy and from which they can glean the technical knowledge he provides to further their education and success. He is both educational and entertaining with his classroom delivery!

I work very closely with local high schools, in addition to the National Center for Women and Information Technology (NCWIT), to provide opportunities for young women to engage in technology activities and further their education in technological topics. Blain has always provided great support for these initiatives and acknowledges the need for more women in technology careers. His support and understanding of these initiatives are greatly valued and have provided some awesome opportunities to our local young women.

Blain has shown great support for education at every level. I have worked with him on many projects, and his determination and excitement for making these platforms available to all individuals is unsurpassed by anyone else I know. He supports many of the initiatives that Hodges University implements to educate a highly diverse population that is inclusive of all who want to learn technology.

In this book, Blain orchestrates the blending of all of the various aspects of Microsoft public cloud services into a comprehensive guide for using these services to their maximum capacity. In doing so, he delivers an informative how-to platform that gives the reader step-by-step instructions to ensure a successful transition to taking full advantage of cloud services and the benefits that they provide. His hard work and dedication to educational platforms is evident from beginning to end. He is truly an educator at heart.

After reading this book, you will possess a greater understanding of the Microsoft Azure platform and the robust business support that it provides, and you will have the knowledge to properly implement the targeted functionality that a business necessitates. Leveraging technology to best suit specific business and financial needs can be difficult, but this book makes it understandable and attainable by providing you with the specific tools and the knowledge you need to properly implement them.

I wish you much success in all of your future endeavors!

—Professor Tracey Lanham

Program Chair of the Computer Information Technology Programs
Hodges University, Fisher School of Technology
https://www.linkedin.com/in/professorlanham
This page intentionally left blank
Introduction

Public cloud services give business owners a fantastic opportunity to use the latest technology without investing in hardware and an IT department. More and more businesses are turning to cloud deployments as an efficient way of doing business. Whether you’re a student, an entrepreneur, a startup, a small business owner, or a cloud computing professional, this book is for you if you are thinking about a public cloud deployment for your business.

This book steps you through the process of setting up your business in the cloud. It includes instructions and links to demos that will get you started, in addition to some advanced topics. The instructions take advantage of the trial versions of products from Microsoft so you can get up and running quickly and find the right tools for your business.

This “how-to” book assumes you have no working knowledge of Microsoft public cloud services and administration. That’s okay; the book will educate you about all the public cloud services that will help you make your business thrive.

Over the last 22 years with Microsoft, I’ve personally seen a revolutionary technical transformation from “traditional” on-premises infrastructures consisting of the procurement of physical hardware, the provisioning of physical operating system software from physical media, the testing of hubs, the configuring of switches, and the planning and implementation of network topologies. With today’s technology, you have the ability to manage all practical aspects of your business without major investments in hardware and software, and without being an experienced IT administrator or hiring a staff to maintain that infrastructure.

As I reflect back to 1988 when I started in Microsoft Manufacturing and Distribution, the company was leading the list of the “top” software companies. At that time, they were listed in order by revenue: Microsoft #1, Lotus #2, and Ashton-Tate #3. New products from Microsoft then included Basic Professional Development System (PDS), QuickBasic 1.0 for the Mac, and three new CD-ROM titles: Microsoft Small Business Consultant, Microsoft Stat Pack, and the Microsoft Programmers Library. The company established subsidiaries in Spain and Korea, and announced plans for a software center in India. Windows 286/386 was introduced, and the company shipped OS/2 with Presentation Manager. Mike Maples joined Microsoft to head the applications division. The Microsoft company meeting was held at the new Washington State Convention Center. The meeting’s theme was “Making It All Make Sense,” and the gift to attendees was a portable stereo/tape player. Boy, how times have changed.
In a relatively short time, we’ve moved from assembling “package software” to providing the devices and services available in the world today. The days of putting a CD-ROM or DVD into your computer tray and “locking and loading” the physical software from media are really coming to an end. Now you can pay only for services that you use, as you use them, and often it is just a matter of downloading the software to get started or subscribing to the services. For example, within the Microsoft public cloud, software services such as Microsoft Office 365, Microsoft Azure, and Microsoft Intune are provisioned right from within a Microsoft datacenter. (In the tech world, provisioning means providing everything you need related to a service.) When running these services, you don’t have to worry about hardware failures and electrical costs.

Over my career, I’ve personally seen this new technical transformation from physical packaged software to software and services that are accessed from an online portal. What motivates me is making sure we build great experiences that expand your digital lifestyles and work for your businesses, whether you are an individual user, an owner of a small business startup, a student, or one of the IT pros and developers in this world of cloud computing. I was inspired to write this book by a group of students, so I assume my homework assignment is completed.

Prerequisites for setting up your subscriptions

To complete the exercises in this book, you need an Internet browser and a connection to the Internet. You will be downloading free trial versions of various products.

**IMPORTANT** When you access a free trial version and set up your subscription, the clock starts ticking. You will have access to the product for a limited time. It is important that you do not set up your trial subscription until you need it for the chapter you are reading. If you set up your subscription ahead of time, the subscription might expire before you use it in the exercises in the book.

- **Office 365**  To get your trial version of Office 365, go to [http://aka.ms/office365plan](http://aka.ms/office365plan). Scroll down the column under Office 365 Business, and click Free Trial.

- **Microsoft Azure**  To get your free 30-day trial of Azure, go to [http://aka.ms/try-azure](http://aka.ms/try-azure).

- **Microsoft Intune**  To get your free trial of Microsoft Intune, go to [http://aka.ms/go-intune](http://aka.ms/go-intune).
About the companion content

In addition to the links to demos, articles, and free courses referenced in the book, companion content for this book can be downloaded from the following page:

   http://aka.ms/pcs/files

Acknowledgments

I’d like to thank the following people for their contributions to this book: Adnan Cartwright, Yung Chou, Jennelle Crothers, Joe Homnick, Alex Melching, Jeff Mitchell, Dan Stolts, Ed Wilson, Tommy Patterson, James Quick, and Kevin Remde. I also appreciate all the reviewers who generously contributed their time and provided feedback on the drafts of this book. A very special thanks to the folks on the editing team and to Karen Szall for her help in encouraging me to finish this project. Kathy Krause was the steady presence behind the scenes, managing all the pieces in motion. Randall Galloway jumped in with technical reviews, and extra help and advice on how to approach a constantly changing set of products. My thanks to everyone who helped bring this all together.

Free ebooks from Microsoft Press

From technical overviews to in-depth information on special topics, the free ebooks from Microsoft Press cover a wide range of topics. These ebooks are available in PDF, EPUB, and Mobi for Kindle formats, ready for you to download at:

   http://aka.ms/mspressfree

   Check back often to see what is new!

Microsoft Virtual Academy

Build your knowledge of Microsoft technologies with free expert-led online training from Microsoft Virtual Academy (MVA). MVA offers a comprehensive library of videos, live events, and more to help you learn the latest technologies and prepare for certification exams. You’ll find what you need here:

   http://www.microsoftvirtualacademy.com
Errata, updates, & book support

We’ve made every effort to ensure the accuracy of this book and its companion content. You can access updates to this book—in the form of a list of submitted errata and their related corrections—at:

http://aka.ms/pcs/errata

If you discover an error that is not already listed, please submit it to us at the same page.

If you need additional support, email Microsoft Press Book Support at:

mspinput@microsoft.com

Please note that product support for Microsoft software and hardware is not offered through the previous addresses. For help with Microsoft software or hardware, go to:

http://support.microsoft.com

We want to hear from you

At Microsoft Press, your satisfaction is our top priority, and your feedback our most valuable asset. Please tell us what you think of this book at:

http://aka.ms/tellpress

The survey is short, and we read every one of your comments and ideas. Thanks in advance for your input!

Stay in touch

Let’s keep the conversation going! We’re on Twitter:

http://twitter.com/MicrosoftPress
What the cloud can do for your business

■ What is the cloud?  1
■ What kinds of Microsoft public cloud services are available?  2
■ What can Microsoft public cloud services do for your business?  3
■ Putting it all together  4

What is the cloud?

The cloud: no doubt you’ve heard that term. But if you’re like a lot of people, you might not know what it means—or how it could help your business.

Simply put, the cloud refers to software and services that run on the Internet. This is in contrast to the software and services that run locally, on your computer. The cloud is also used to store data. When you store data or use a cloud service, you can access the data from anywhere, using any device that connects to the Internet—not just from your computer’s hard drive or your company’s network server.

Although people talk about the cloud like it’s a single entity, it is in fact made up of massive datacenters all over the world. These centers store the programs and services that people access online, in addition to any data that users upload to the cloud.

There’s more than one cloud, and many different types, too. These types include the following:

■ Private cloud  A cloud that is used solely by a single organization. In a private cloud, the datacenters that support the cloud are on the premises of the organization. The only people who can access the software and services in the cloud, or store data there, are people authorized by the organization to do so. Building and maintaining a private cloud can be a costly endeavor, and might be suitable only for very large organizations. Often, businesses use private datacenters because they need to support older physical computers that have been powering their organizations for years.
■ **Public cloud**  Technically, in terms of architecture, there is little difference between a private cloud and a public cloud. But a public cloud is accessible by anyone who wants to use it. Anyone can access software and services on a public cloud, or store data there. Usually, software and services on a public cloud are offered on a “pay-as-you-go” basis, although some are free.

■ **Hybrid cloud** A hybrid cloud is what you might expect—a combination of a private cloud and a public cloud. An organization might take the hybrid cloud approach if, for example, it wanted to store sensitive data on a private cloud, but be able to access that data by using a program on a public cloud.

■ **Community cloud**  In this model, a group of organizations with similar needs, interests, or concerns might share a private cloud in order to share resources.

The focus of this book is Microsoft public cloud services.

### What kinds of Microsoft public cloud services are available?

Microsoft offers more than 200 public cloud services. These services are divided into three main categories:

■ **Software as a service (SaaS)**  SaaS describes a way of licensing and delivering software by using a subscription model. Subscriptions can be paid on a monthly or yearly basis, or through special licensing programs. With SaaS, the software is located in the cloud, and users access it through the Internet. It is not installed on the user's computer. Examples of SaaS are Microsoft Office 365, Xbox Live, and Microsoft Intune.

■ **Infrastructure as a service (IaaS)**  With IaaS, users can rent compute, storage, and networking resources by using datacenter hardware to deploy virtual machines. (A virtual machine is a virtual computer within a physical computer, implemented in software. It emulates a complete hardware system, from processor to network card.) Users pay for these resources as they would a utility, like power or water, with the cost reflecting the actual amount of resources consumed. Examples of IaaS are virtual machines within Microsoft Azure.

■ **Platform as a service (PaaS)**  With PaaS, users can develop, run, and manage web apps in a ready-made, cloud-based environment. Examples of using PaaS include building an app, an SQL database, or a website.
What can Microsoft public cloud services do for your business?

Microsoft public cloud services can help your business in lots of ways. Most notably, they can save you money. For one thing, by using Microsoft public cloud services, you can avoid purchasing expensive servers. With cloud services, you can run your business by using devices like smartphones, laptops, tablets, and printers. You can also scale back your IT staffing. After all, less hardware to support means a smaller in-house staff to support it. But there are other, less obvious savings. For example, if your business uses cloud services, your staff might be able to work from home on a permanent basis. That will help you save on your lease, utility bills, garbage services, and office supplies.

Using Microsoft public cloud services can also help you grow your business. You can use the money you save to invest in other areas of your business, like people and marketing. As your business grows, you can scale up your use of these services.

Perhaps most importantly, with Microsoft public cloud services, you can focus on your business, not on the technology needed to run it. These services are always on and always connected. You pay only for what you consume, by using a transparent infrastructure that runs 24 hours a day, 7 days a week, and 365 days a year to meet the needs of your business. Unlike your staff, Microsoft public cloud services never take a vacation. Moreover, these services are constantly evolving, bringing more uptime, elasticity, scale, on-demand networking, computing, and storage.

Throughout the rest of this book, you’ll explore using several Microsoft public cloud-based tools to run your business. These include the following:

- **Microsoft Azure**  Azure is the Microsoft cloud platform, offering a collection of compute, storage, data, networking, and app services. It is both an IaaS and a PaaS and is used to build, deploy, and manage apps and websites.

- **Azure Site Recovery**  With Azure Site Recovery, employees can back up or replicate and recover important data.

- **Azure RemoteApp**  With RemoteApp, employees can access desktop programs on their local computers from any Internet-connected laptop, tablet, or smartphone.

- **Office 365**  Office 365 makes all the Office programs that office workers know so well (Microsoft Word, Excel, PowerPoint, Outlook, OneNote, Access, and Publisher) available online on a subscription basis.
- **Microsoft Intune**  With Microsoft Intune, employees can gain protected access to corporate programs, data, and resources from virtually anywhere, using almost any device.

- **Microsoft Skype for Business**  With this cloud service, employees can easily place audio and video calls and exchange instant messages.

- **Microsoft Dynamics CRM Online**  Drive sales and marketing with this online customer relationship management (CRM) solution.

- **Yammer Services**  With this private social network tool, employees can quickly self-organize, collaborate, and make decisions.

- **Office 365 Video**  Use this video-streaming service to bring world-class video streaming to your organization.

- **Server Manager**  With this tool, you can view and manage your server’s productivity both in the cloud and on-premises.

- **OneDrive for Business**  With OneDrive for Business, you can securely store all your files and share them with coworkers. Files can be synchronized across all your devices, so that you can access them anywhere, anytime, whether you’re online or not.

- **Windows App Studio**  Want to create an app? Then App Studio is for you. With App Studio, you can quickly build, test, and share Windows and Windows Phone apps.

---

### Preparing your plan

How do you know which Microsoft public cloud services are for you? To answer that, you’ll need a strong business plan. This book does not cover building a business plan, but I encourage you to seek out information about building one. (There are some great sample business plans in Office 365.) Building a business plan will help you identify the needs of your business. When you know these, you can determine what services you will need.

---

### Putting it all together

Each Microsoft public cloud-based service is a formidable tool in its own right. But it’s when you put them all together, creating an ecosystem of services and devices, that they really shine. Just imagine a scenario in which features like Office 365, Microsoft Intune, and Azure work with services like Windows Server, Microsoft Dynamics CRM Online, Yammer, and Skype for Business, all connected to your various devices. No matter where you travel, these services and your data travel with you. Even better, you leave all the hardware and maintenance to Microsoft, freeing you to focus on running your business (see Figure 1-1).
The cloud refers to software and services that run on the Internet. The cloud is also used to store data and build business intelligence.

When you store data or use a service in the cloud, you can access it from anywhere, with any device that connects to the Internet, including Windows, iOS, and Android devices.

The cloud is made up of massive datacenters all over the world. There is more than one cloud, and many different types. These include private clouds, public clouds, hybrid clouds, and community clouds.

Microsoft offers more than 200 public cloud services. These are divided into three main categories: software as a service (SaaS), infrastructure as a service (IaaS), and platform as a service (PaaS).

Using Microsoft public cloud services for your business can help you save money, grow your business, and focus on your business rather than on the hardware support needed to run it.

Although each public cloud-based service is a formidable tool in its own right, it’s when you put them all together, creating an ecosystem of services and devices, that they really shine.
This page intentionally left blank
CHAPTER 2

Get started with Office 365

- Introduction to Office 365 7
- Under the hood of Office 365 9
- Find the right subscription 10
- Sign in for the first time 12
- Explore the Office 365 Admin Center 14
- Configure a custom domain 14
- Add, edit, and delete user accounts 22
- Work with files 27
- Use Office Mobile on all your devices 30

Introduction to Office 365

Microsoft Office has long offered a range of applications to boost productivity. These include the following:

- **Word**  Microsoft Word is a word-processor program. It’s ideal for generating documents of all kinds.
- **Excel**  Microsoft Excel is a program for handling spreadsheets. You can use spreadsheets to store and analyze data in tabular form, which makes them ideal for handling accounting and bookkeeping tasks.
- **PowerPoint**  If your business requires you to create slideshows or presentations, you’ll appreciate the many robust and built-in features of Microsoft PowerPoint.
- **Outlook**  Microsoft Outlook serves as a full-featured email client, calendar, task manager, and address book.
- **OneNote**  With Microsoft OneNote, you can gather notes—even ones that are handwritten—drawings, screen clips, and audio files into one easy-to-access place. It’s great for brainstorming or just keeping track of ideas.
■ **Access**  Microsoft Access is a database management system. If you need to track data for your business, you can use Access to do it.

■ **Publisher**  With the Microsoft Publisher desktop-publishing application, users can quickly and easily design marketing materials like brochures, business cards, newsletters, calendars, and more.

Office 365 is like Office, except it expands its domain from the personal computer to the cloud. Office 365, one of the public cloud-based services offered by Microsoft, is a software as a service (SaaS) suite that includes not only the personal computer versions of Office, but also mobile versions and the server services needed to connect them. With Office 365, you can use the familiar applications you’ve probably run on your PC for years—Word, Excel, and PowerPoint, and in some cases, depending on which subscription option you choose, Outlook, OneNote, Access, and Publisher—to save, edit, and modify documents in the cloud. In addition, you can store the files you create in Microsoft OneDrive for Business, which is included with the bundle. (You’ll learn more about OneDrive for Business in Chapter 3, “Store your files in the cloud with OneDrive for Business.”)

**MICROSOFT VIRTUAL ACADEMY**  Get more information about Office 365 fundamentals at aka.ms/go-mva/o365fund.

Some subscription models of Office 365 also include the following:

■ **Yammer**  Yammer collaboration software is like a private social network. You can use Yammer to get connected to the right people, share information across teams, and organize around projects so you can go further, faster. With Yammer, collaboration just happens—even on the go. Yammer helps your company work like a network so you can listen, adapt, and grow in new ways.

■ **Office 365 Video**  Office 365 Video is a website portal where people in your organization can post and view videos. Essentially, it’s a streaming video service for your organization. Videos can be organized by channel. For example, you might have one channel for a specific group or department and another for a particular subject.

Of course, individual users can optimize their productivity by using the top-notch applications that Office 365 offers. But the power of Office 365 really lies in its support for collaboration and the sharing of information. With Office 365, teams can work together, tracking tasks, project timelines, documents, and emails all from one centralized place. If you’re ready to learn more about Office 365—what it’s good for and how to set it up—read on!

**IMPORTANT**  A detailed overview of the ins and outs of the various Office 365 applications—for example, Word and Excel—is beyond the scope of this book. Instead, this chapter will focus on getting you set up to use Office 365.
Skype for Business

Another program, Skype for Business, has recently been updated to work seamlessly with Office 365. With Skype for Business, previously known as Microsoft Lync, users can make calls online—including international calls—by using almost any device. Instant messaging is also supported. For more information, go to www.skype.com/en/business.

Under the hood of Office 365

There are three main functions inside Office 365 that support the collaboration and sharing of information, providing a singular experience:

- **Exchange Online**  
  Microsoft Exchange Online facilitates email management and administration. With Exchange, you can synchronize email, calendars, and contacts across all your devices.

- **SharePoint**  
  Every business has a repository of files used to conduct day-to-day business. Microsoft SharePoint provides a place to store and manage all those files, and to manage access to them. SharePoint also helps with keeping track of multiple versions of a file and setting up notifications when a new version is ready. SharePoint can even help with building workflows for business processes.

- **Skype for Business**  
  Skype for Business, previously known as Lync, integrates with Exchange and SharePoint to facilitate real-time communications like instant messages, video and audio meetings, and screen sharing, across all devices. This makes collaboration a breeze. You can also use Skype for Business to determine each user’s status—for example, “Available” or “In a Meeting,” with color coding to help convey information at a glance—thanks to a feature called presence. For example, if you have a meeting scheduled on your calendar, Skype for Business automatically sets your presence to “In a Meeting” and sets your color to red to indicate that you are busy.

  All this happens behind the curtain. There’s no need for you to manage these operations. Instead, you can focus on running your business!

**IMPORTANT**  
If you are using or are going to use Office 365, set up your tenant for Office 365 first, then Microsoft Intune, followed by Microsoft Azure Directory integration. You’ll find more information about tenants in Chapter 9, “Give users access to third-party applications.”
Find the right subscription

Office 365 is an SaaS suite. As such, it is subscription-based (also known as license-based). Microsoft offers various subscription plans to fit your needs. All Office 365 plans are billed monthly for the total number of users.

To determine which subscription option is right for your business, you must first identify your business needs. Then it’s a matter of determining which Office 365 features will help you meet those needs. With your subscription, you pay for only those features you need and that will deliver the most for your business right now. You can always upgrade (or downgrade) your subscription if needed.

All Office 365 subscriptions offer the following:

- **A 99.9-percent financially backed uptime guarantee** That is, the servers on which the Office 365 services are hosted are guaranteed to be up and running 99.9 percent of the time.

- **Phone and web support** Get help with critical issues 24 hours a day, seven days a week, not just during regular business hours.

- **A community forum** Use this to look up information and work with other users to find quick answers.

There are two primary subscription groups:

- **Office 365 Business** The options in this group are meant for organizations that have fewer than 300 users.

- **Office 365 Enterprise** Office 365 Enterprise does not have a user limit.

**TIP** Don’t be afraid if you’re on the edge of 300 users. You can easily upgrade your subscription from Office 365 Business to Enterprise.

Office 365 Business subscription options for small and medium organizations

The Office 365 Business subscription group offers the following options:

- Office 365 Business Essentials
- Office 365 Business
- Office 365 Business Premium

**NOTE** Because the pricing of each of these subscription options is subject to change, no pricing information is included here. For up-to-date information on pricing and features, go to products.office.com/en-us/business/compare-more-office-365-for-business-plans. When you are ready to choose a plan, go to aka.ms/office365plan.

Table 2-1 presents all the Office 365 Business subscription options and their corresponding features.
### TABLE 2-1 Office 365 Business subscription options

<table>
<thead>
<tr>
<th>Feature</th>
<th>Office 365 Business Essentials</th>
<th>Office 365 Business</th>
<th>Office 365 Business Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full, installed Office applications (Word, Excel, PowerPoint, Outlook, Publisher, and OneNote) on up to five PCs or Macs per user</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Office Mobile apps on up to five Windows Phone, Android, or iOS (Apple) tablets and phones per user</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Online versions of Office, including Word, Excel, and PowerPoint</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>File storage and sharing on OneDrive for Business with 1 terabyte (TB) of storage per user</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Business class email, calendar, and contacts with a 50-gigabyte (GB) inbox</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Unlimited online meetings, instant messaging (IM), and video conferencing</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>An intranet site for your teams, with customizable security settings</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>A corporate social network (Yammer) to help employees collaborate across departments</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Personalized search and discovery</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

### Office Online web apps

As shown here, some Office 365 subscription options include desktop versions of the suite’s various applications—such as Word and Excel. In addition to these versions, there are also Office Online versions of these applications. These online versions are Internet based. That is, you access and use them through your Internet browser—for example, Internet Explorer, Safari, Firefox, or Chrome. These applications have less functionality than the desktop versions but are great if you need to use them on devices that don’t have the desktop versions installed.

### Using the 30-day trial

Not ready to make a decision about which subscription option is right for you? Don’t worry. Microsoft offers a free 30-day trial for some subscription options. To use it, go to aka.ms/office365plan, click the appropriate Free Trial link near the bottom of the page, and follow the directions in this book’s introduction to set everything up.

**MICROSOFT VIRTUAL ACADEMY** Get more information about how to get the most out of your Office 365 trial at aka.ms/go-mva/office365trial.
Sign in for the first time

As soon as you’ve decided which subscription model you want to use and have set everything up, your next step is to configure the service and get started with some management tasks. First, however, you’ll need to sign in. When you access Office 365 for the first time, a Welcome page appears. Follow these steps to complete the first-time sign-in process:

1. Enter the requested basic information about who you are and where you’re located (see Figure 2-1). Click Next to continue.

   ![Figure 2-1](image1.png)
   **FIGURE 2-1** The first step in creating your new ID is to provide some basic information.

2. Create your user ID and password (see Figure 2-2), which you’ll use to access the service. Enter a user name (such as admin) and the domain name. Then create your password. Enter your password a second time for confirmation, and click Next.

   ![Figure 2-2](image2.png)
   **FIGURE 2-2** Create your user name and password.
IMPORTANT  Make sure you establish a strong password policy for all users. Strong passwords use a mix of uppercase and lowercase letters, numbers, and special characters such as the asterisk or dollar sign. Learn more about creating strong passwords at aka.ms/secure-password.

Notice the box to the right of the User ID box. It contains a blank space followed by the text .onmicrosoft.com. This text is part of a domain name that Microsoft automatically creates when you sign in to Office 365 for the first time. You provide the rest of the domain name by typing it into the blank space in the box. For example, suppose your company is called Trawbridge. In that case, you might enter trawbridge in the blank space. The domain name would then be trawbridge.onmicrosoft.com.

NOTE  A domain name is a string of text that appears in a URL or email address. For example, for the URL www.microsoft.com, the domain name is microsoft.com. Similarly, trawbridge.com is the domain name in the email address gchan@trawbridge.com.

NOTE  Don’t worry—if you already have a domain name for your company, you can associate it with Office 365. For example, if you already own the domain name trawbridge.com, you’ll have the chance to set that as your domain name, omitting the onmicrosoft, in a moment.

3. On the next page (see Figure 2-3), select either Send Text Message or Call Me. Depending on what you choose, you will receive either a text message or a phone call to confirm that you are who you say you are and to create a valid account. Enter your phone number. Then, depending on which option you chose, click Text Me (as shown here) or Call Me.

FIGURE 2-3  Complete the security verification to finish creating an ID.
After you enter the required information, you will receive a verification message via a text message on your phone. When you do, click Create My Account on the verification page.

### Explore the Office 365 Admin Center

You use the Office 365 Admin Center to set up your organization in the cloud. The Office 365 Admin Center opens to a Dashboard page. On the left is a navigation pane, which you use to access different areas of the Admin Center. Click the app launcher in the upper-left corner of the title bar to activate the app tiles, as shown in Figure 2-4. These tiles give you access to the settings for Exchange, Skype for Business, SharePoint, and any other apps you have installed. If you are the administrator, an Admin tile also appears.

![Office 365](image)

**FIGURE 2-4** The Admin Center provides quick access to various apps, so that you can set up new user accounts and manage your subscription.

### Configure a custom domain

**IMPORTANT** If you do not have a custom domain name at this time, use the default domain name created for you. You can always go back and change it after you have purchased a custom domain from a provider.

If your organization already has a custom domain name, configure it as follows:

1. In the Office 365 Admin Center, click the Domains link in the navigation pane on the left side of the page, as shown in Figure 2-5.
2. On the Manage Domains page, shown in Figure 2-6, click Add Domain. This starts a wizard that walks you through adding your domain to Office 365.

3. The Add A New Domain In Office 365 Wizard opens, showing a brief description of the three-step process of adding a domain (see Figure 2-7). Click Let’s Get Started.
4. Enter the name of the domain that you own—in this example, trawbridge.com, as shown in Figure 2-8—and click Next.

5. In the next step of the wizard, you will confirm ownership of the domain. How you do this depends on what Domain Name System (DNS) hosting provider, or registrar, you use. To find out what steps you must take, click the drop-down list and click your hosting provider.

6. After you complete the steps required by your hosting provider, you’ll be prompted to sign in to your account with that provider, as shown in Figure 2-9.

**NOTE** The remaining steps vary based on your setup and provider.
7. Enter the user name and password for your hosting account, as shown in Figure 2-10, and click Secure Login. The wizard checks to make sure that you own the domain name you have entered. (Note that this check can take up to 72 hours.)

**Figure 2-10** When prompted, enter the user name and password for your account with the hosting provider.

**IMPORTANT** You will sign in after the end of the subscription process, and the subscription process will sign you out. You then must sign in as the new account, which in my case is admin@trawbridge.com, with the same password that I had for the previous domain.onmicrosoft.com.
8. When prompted, confirm that you want to make a change to the domain by clicking Accept on the page shown in Figure 2-11.

![Figure 2-11 Confiming access.](image)

9. When the domain is confirmed, the wizard indicates that step 1, the verification process, is complete (see Figure 2-12). Click Next.

![Figure 2-12 Your domain has been verified.](image)
10. The Let’s Update Your Current Office 365 Users page appears (see Figure 2-13). For now, click Skip This Step. (You will learn how to add users in the next section.)

![Figure 2-13 Skip step 2 for now.](image)

11. The Get Ready To Update DNS Records To Work With Office 365 page appears (see Figure 2-14). Click Next.

![Figure 2-14 Begin step 3, updating DNS records to work with Office 365.](image)

12. The wizard asks you which services you want to use with your domain (see Figure 2-15). Select the Outlook For Email, Calendar, And Contacts check box. Also select the Lync For Instant Messaging And Online Meetings check box. Then click Next.
FIGURE 2-15  Select the Outlook and Lync check boxes and click the Next button to continue.

**NOTE**  You can find out more about Exchange Online by referring to the Exchange Guides at aka.ms/exchangeguides.

13. If your domain is registered with GoDaddy, you can add your DNS records automatically. Click Add Records, as shown in Figure 2-16, and Office 365 will do the rest. If your domain is registered with another provider, click Add These Records Yourself and follow the prompts.

FIGURE 2-16  If GoDaddy is your domain provider, click Add Records to set up the DNS records automatically.
14. After Office 365 validates that the records are configured correctly, you are redirected to the Manage Domains section of the Office 365 Admin Center, shown in Figure 2-17. Notice that the domain you added appears.

![Office 365 Admin Center](image)

**FIGURE 2-17** The domain you added appears on the Manage Domains page in the Admin Center.

15. Sign out from your Office 365 account. Then sign back in with the new account (in this case, admin@trawbridge.com) with the same password that you had for the previous domain.onmicrosoft.com (see Figure 2-18).

![Office 365 Sign-in](image)

**FIGURE 2-18** Sign out and sign back in using the new account.
16. The profile is updated with the new domain information and will be available when you sign in (see Figure 2-19).

![Office 365 admin center](image)

**FIGURE 2-19** The Active Users page in the Admin Center shows that the profile is updated with the new domain information.

**Add, edit, and delete user accounts**

Unless you run a one-person operation, you’ll likely need to add other users to your Office 365 subscription. When you do, they can use all the programs and features that Office 365 provides.

To add a user to Office 365, sign in to your Office 365 account and open the Admin Center. Then follow these steps:

1. Click Users and then Active Users in the pane on the left.
2. Click the Add User button (the plus sign). The Create New User Account page opens (see Figure 2-20).
3. Enter the following information. When you're finished, click Create.

- **First name**  This is the user's first name.
- **Last name**  This is the user’s last name.
- **Display name**  When you enter the user’s first and last names, they are automatically concatenated for the display name. If you want to change the display name to a nickname or some other type of shorthand, go ahead and do it now.
- **User name**  This is the name your new user will use to sign in to his or her account when accessing Office 365. Be sure to click your new custom domain in the drop-down list on the right.
- **Password**  If you leave the default Auto-Generated Password, a random password will be chosen and emailed to the user. Alternatively, you can set a password for the user. To do so, click Type Password and enter the password you want to use.

**NOTE**  The initial password is temporary. The user will need to change it within 90 days.
- **Make this user change their password with Outlook Web App on next login**  
  Select this check box if you want the user to change the password the next time he or she signs in.

- **Email password to the following recipients**  
  After you choose a password option, enter the user’s email address so that the password can be sent to that user. Also enter your own email address so that you, the administrator, also get the password, for safekeeping.

**NOTE** This email address should be one to which the user currently has access. Don’t send it to his or her new Office 365 email address.

4. A confirmation message similar to the one shown in Figure 2-21 informs you that the user account has been created. Click Close.

![Create new user account](image)

**FIGURE 2-21** You’ll receive a notification that the account has been successfully created.

If you prefer, you can add multiple users at the same time.
**TIP** Before you begin this process, make sure you have enough licenses for everyone you want to add. To find out how many subscriptions you have available, click the Billing option in the left pane of the Admin Center and click Subscriptions. If you need to purchase more licenses, click the Change License Quantity link and follow the prompts.

To add multiple users, follow these steps:

1. In Excel, create a spreadsheet with the following column headings:
   - User Name
   - First Name
   - Last Name
   - Display Name
   - Job Title
   - Department
   - Office Number
   - Office Phone
   - Mobile Phone
   - Fax
   - Address
   - City
   - State or Province
   - Postal Code
   - Country or Region

2. Populate the spreadsheet with the information for each person you want to add. The User Name and Display Name fields are required for each user. To leave other fields blank, enter a space followed by a comma. When you’re finished, save the spreadsheet.

3. In the Office 365 Admin Center, click Users and then Active Users in the pane on the left. Then click the Add Users button (the button with two people and a plus sign).

4. The Bulk Add Users Wizard starts. On the Select A CSV File page, click the Browse button and locate and select the spreadsheet you created in steps 1 and 2. Then click Next.

5. The wizard verifies that the entries in the spreadsheet are formatted correctly. If there are no errors, click Next. (If there are errors, view the verification log, and then correct the errors in your spreadsheet.)

6. On the Settings page, click Allowed. Then click the Select A Location drop-down list and click the country or region where these users are located. Finally, click Next.
TIP If you want to enter users from multiple countries/regions, you must create a spreadsheet for each country/region and run the Bulk Add Users Wizard for each spreadsheet.

7. On the Assign Licenses page, click the licenses you want to apply for the individuals listed in your spreadsheet. Then click Next.

8. On the Send Results In Email page, enter the email address of anyone who should receive a list of these new users, along with their temporary passwords, via email. Then click Create. The list is emailed to the address you specified.

9. The Results page lists the users whose accounts were created and their temporary passwords. Click Close to close the wizard.

10. Notify each user that his or her account has been created and supply each user with his or her temporary password.

NOTE If you want to notify users via email that their accounts have been created, be sure to use email addresses to which the users currently have access. Don’t send them to their new Office 365 email addresses.

Sometimes a user’s information changes. For example, a user might get married and change his or her name. Fortunately, editing a user account to reflect this and other changes is simple. To edit a user account, sign in to your Office 365 account and open the Admin Center. Then follow these steps:

1. In the Office 365 Admin Center, click Users and then Active Users in the pane on the left.

2. On the page that appears, click the user whose account you want to edit. Then click Edit.

3. The Details page appears. If the information on this page is OK as is, click Save. If you need to change any information on this page, do so before you click Save.

4. Click Settings. Follow the same procedure as with the Details page.

5. On the Licenses page, retain, replace, or add licenses as needed. Then click Save.
If a user leaves your organization, you should delete his or her account. Not only will this prevent the departed employee from accessing the account, it will free up the associated license for a new user. To delete a user account, sign in to your Office 365 account and open the Admin Center. Then follow these steps:

1. In the Office 365 Admin Center, click Users and then Active Users in the pane on the left.
2. On the page that appears (see Figure 2-22), click the user whose account you want to delete. Then click Delete.
3. In the confirmation message that appears, click Yes.

**Work with files**

Your Office 365 subscription includes SharePoint. SharePoint offers the following built-in tools:

- **Team sites**  With SharePoint, a team site is created automatically. You can create additional team sites as needed. These SharePoint team sites are used for collaboration within teams, such as for managing shared content, tracking tasks, posting announcements, and managing workflow.

- **Document libraries**  You can use SharePoint document libraries to store, organize, sync, and share documents. Because all your documents are in one place, everybody can access the latest versions whenever they need them. You can also use document libraries to sync your documents to your local computer for offline access. You can create document libraries for each project you’re working on or for specific types of documents, such as reports, presentations, or proposals.
• **Custom lists** With the Custom List app, you can build and share custom lists.

• **Task lists** You can use the built-in Tasks app to build and share task lists. That way, you can delegate to team members as needed.

• **Site Mailbox** The Site Mailbox app helps you keep emails and documents close together by connecting your site to an Exchange mailbox. You can then view your email on SharePoint and view site documents in Outlook.

In addition to these built-in apps, there are several other apps that you can add to your SharePoint team sites. Some are free, whereas others must be purchased. Adding apps really expands the functionality of SharePoint and, by extension, Office 365. For example, you can add a forms library (used to create and store forms), a picture library (great if you deal with a lot of images in your work), and even a wiki page library (handy if, for example, you want to build a wiki that outlines the various processes you use in your business). These and other apps, many of which are designed for a specific type of business or business process, are available from the SharePoint Store (see Figure 2-23). To access this page, click the Sites tile in Office 365, as shown in Figure 2-24. Then, in the Site Contents > Your Apps page, click SharePoint Store in the pane on the left (see Figure 2-25).

![SharePoint Store](image)

**FIGURE 2-23** You can buy many types of SharePoint apps in the SharePoint Store.
To explore your SharePoint tools and settings, sign in to your Office 365 account and open the Admin Center. Then follow these steps:

1. Click the Admin menu and choose SharePoint. Your main SharePoint page opens. Here the SharePoint team sites of which you are a member are displayed.

2. Click a team site to view the content created and shared by that team.

3. Click Documents in the navigation pane on the left to display a list of documents available on that team site—that is, the contents of the team site’s document library.
4. Click a document to open it. Alternatively, you can click the ellipsis (…) to the right of the document to open a preview of the document, as shown in Figure 2-26. You can click Edit to open and edit the document without checking it out and locking it so others cannot edit it while you are in the file. Also, you can click the ellipsis on the lower right to view a list of menu choices, and click Check Out to lock the file and check it out to you for edit. Figure 2-26 shows a SharePoint team site with the Office Online version of Excel and its menu displayed.

![Figure 2-26](image)

FIGURE 2-26 A SharePoint team site represents a centralized location for your organization's documents.

To make it easier for team members to find your files in a list or library, you can create a view. When you create a view, you can organize content, displaying it by type, date, author, or a custom value specific to your business. The view is added to the View menu for your list or library. For help adding views, see aka.ms/addingviews.

SharePoint supports document versioning. With versioning, you can have each update to a document saved and recorded as a new version. Alternatively, each update will overwrite the previous version of the file.

**TIP** Checking out a file is the safest way to edit a document. It ensures that there aren’t two people editing the document at the same time.

**Use Office Mobile on all your devices**

Your business can benefit by having Office available on all your mobile devices—including your Windows Phone, Android, or iOS (Apple) smartphone or tablet. As you discovered earlier in this chapter, in the section “Find the right subscription,” many subscription options allow for as many as five devices per user, including mobile devices.
NOTE  Find out more about purchase options or try Office for free on your device at aka.ms/o365ondevices.

You can use the following Office applications while you’re on the go:

- Word
- Excel
- PowerPoint
- OneNote
- Outlook
- Yammer

Figure 2-27 shows a device with Office installed. In addition, you can set up your mobile device to use OneDrive for Business and Skype for Business (Lync).

FIGURE 2-27  You can install Microsoft Office for iPad on your iPad.
How you set up your device depends on what type of device you have—Windows Phone, Android, or iOS. The following lists provide more information:

- **Windows Phone**
  - For help setting up Office Mobile on your Windows Phone, go to `aka.ms/win-phone-setup-office`.
  - For help setting up email on your Windows Phone, go to `aka.ms/android-phone-setup-email`.

- **Android**
  - For help setting up Office Mobile on your Android device, go to `aka.ms/win-phone-setup-email`.
  - For help setting up email on your Android device, go to `aka.ms/android-setup-email`.

- **iOS**
  - For help setting up Office Mobile on your iPhone, go to `aka.ms/iphone-setup-office`.
  - For help setting up Office Mobile on your iPad, go to `aka.ms/ipad-setup-office`.
  - For help setting up email on your iPhone or iPad, go to `aka.ms/iphone-ipad-setup-email`.

**Summary**

- Office has long offered a range of applications to boost productivity. Office 365 is like Office, but it expands its domain from the personal computer to the cloud.
- Office 365 is a software as a service (SaaS) suite that includes not only the personal computer versions of Office, but also mobile versions and the server services needed to connect them.
- With Office 365, you can use the familiar applications you’ve probably run on your PC for years—Word, Excel, and PowerPoint, and in some cases, depending on which subscription option you choose, Outlook, OneNote, Access, and Publisher—to save, edit, and modify documents in the cloud. Some subscription models also offer Yammer and Office 365 Video.
- Exchange facilitates email management and administration and can be used to synchronize mail, calendars, and contacts across all your devices.
- Every business has a repository of files used to conduct day-to-day business. SharePoint provides a place to store and manage all those files, and to manage access to them. SharePoint also helps with keeping track of multiple versions of a file and setting up notifications when a new version is ready. SharePoint can even help with building workflows for business processes.
Skype for Business integrates with Exchange and SharePoint to facilitate real-time communications like international calling options, instant messages, video and audio meetings, and screen sharing, across all devices. This makes collaboration a breeze. With Skype for Business, you can also view each user’s status—for example, “Available” or “In a Meeting,” with color coding to help convey information at a glance—thanks to a feature called presence. For example, if you have a meeting scheduled on your calendar, your presence is automatically set to “In a Meeting” and your color is set to red to indicate that you are busy.

Some Office 365 subscription offerings include the full Office desktop software version in addition to hosted versions of Exchange, SharePoint, Skype for Business, and OneDrive for Business, all of which can be accessed via Microsoft public cloud services. Office web apps offer more limited features but are free.

The first time you access Office 365, you will create a user account.

The Office 365 Admin Center lists links for your services and includes an Admin drop-down menu along the top of the page. This menu gives you access to Office 365 settings, in addition to settings for Exchange, Skype for Business, and SharePoint. On the left is a navigation pane, which you use to access different areas of the Admin Center.

If your organization has a custom domain, such as trawbridge.com, you can configure Office 365 to use it.

Unless you run a one-person operation, you'll likely need to add other users to your Office 365 subscription. When you do, they can use all the programs and features that Office 365 provides. Doing so is easy.

Your Office 365 subscription includes SharePoint. SharePoint offers several built-in tools, including team sites, document libraries, custom lists, task lists, and a site mailbox. In addition to these built-in apps, there are several other apps that you can add to your SharePoint team sites.

Your business can benefit by having Office available on all your mobile devices—including your Windows Phone, Android, or iOS (Apple) smartphone or tablet. Many subscription options allow for as many as five devices per user, including mobile devices. Although not all Office 365 applications are available for Office Mobile, you can use Word, Excel, PowerPoint, OneNote, Outlook, and Yammer while on the go. In addition, you can set up your mobile device to use OneDrive for Business and Skype for Business.
Index

A
A/B testing 80
Access 8
Access Panel Extension 213–215
Account Portal, Microsoft Intune 88–93
accounts
  associating 65, 66
  creating 63, 72
  Microsoft Dynamics CRM Online 63–65
  Microsoft Intune, managing 88
  Office 365, adding 22–26
  searching 65
actions 255
Active Directory Domain Services (AD DS)
  See also security
  ADSIEdit tool 149
  described 148
  role 176
  virtual machines, installing on 148
Active Directory Users and Computers tool 153
activities
  adding 72, 74–76, 78
  editing 78
  logging calls 75
  viewing 78, 79
AD DS (Active Directory Domain Services)
  See Active Directory Domain Services (AD DS)
ad unit ID 259
Add-WindowsFeature cmdlet 185
Admin Center
  adding users 22–26
  app tiles 14
  dashboard 14
  editing user accounts 26
managing domains 21
Office 365 14, 33
SharePoint 29, 30
Admin Console, Microsoft Intune 94, 95
ads, enabling on apps 259–262
ADSIEdit tool 149
alerts
  Microsoft Intune 95, 98–100
  public cloud services 155–157
Android
  Company Portal app 121
  email 32
  Microsoft Dynamics CRM Online app 82
  Office Mobile 32
  OneDrive app 50
  policy-managed apps 117
  programming languages 243
  RemoteApp, setting up 199–203
APNs (Apple Push Notification service) certificate 110–116
app ID 259
App Studio  See Windows App Studio
Apple Push Notification service (APNs) certificate 110–116
applications
  Office 365 7–9
  Office Mobile 11, 33
  Office Online 11
Application Server role 176
apps
  See also mobile apps; third-party apps
  Microsoft Dynamics CRM Online 82
  publishing 196, 197
  remote access 189
  RemoteApp 189
apps (continued)
  removing 198
  RSS feeds 246
  service plans 222
  sharing 210–212
  web options 222
  app tiles
    activating 14
    templates 258
  authentication
    domains 153–155
    virtual machines 153–155
  availability set 143
  Azure
    See also IaaS (infrastructure as a service); third-party apps; websites; virtual machines
    activity, monitoring 144
    alerts 155–157
    apps, publishing/unpublishing 196–198
    backing up files 157–159, 164–169
    backup vault 159
    billing rate 133
    cloud servers, managing 177
    cloud service, monitoring 155–157
    data recovery 168–173
    described 3
    directories, setting up 205–209
    disaster recovery (DR) 158
    DNS server, registering 137
    elements 130
    free trial 131
    geo-redundancy 136
    using in PaaS, example 131
    portal 210
    portal types 133
    Quick Start 194
    storage accounts 133–135
    subscriptions 131, 132
    tenant directory 209
    user interfaces 133
    virtual machines, adjusting size of 152
    virtual machine templates 139
    virtual networks, setting up 133, 137, 138
    web app service plans 222
    websites 3
    Windows Server Essentials Experience role 181
  Azure Backup 164, 165
  Azure Cost Estimator tool 133
  Azure for Business, free trial xiv
  Azure Recovery Services 157–159, 164
  Azure RemoteApp  See RemoteApp
  Azure Site Recovery 3

B
backing up files
  Azure Recovery Services 157–159
  configuring options 164–167
  encrypting 163
  manually 168
  passphrases 163
  retention information 166
  scheduling 164–167
  types of backups 167
  backup vault 159
  behavioral analysis tool 80
  Bing news page, adding to apps 251, 252
  BizSpark 244
  bringing your own device (BYOD) 85
building mobile apps
  See also mobile apps
  data sources, adding 246
  Lean Startup approach 242
  tools 244
business processes, Microsoft Dynamics CRM Online 76, 77
Buzz Report 81
BYOD (bring your own device) 85

C
calls, logging 75
campaign tools 79
cases
  activities, adding 72
  creating 70
  editing 72, 73
  resolved, marking as 73, 74
  viewing 72, 73
character delimiters 59
client computers, RemoteApp 199–203
client software  See Microsoft Intune
cloud
datacenters  1
deployment  189
managing servers  181
types  1, 2
cloud services  See public cloud services
cloud storage
benefits  35
status  95
cmdlets
  Add-WindowsFeature  185
  Get-Process  187
CMS (Content Management System)  223
collaborating
  on OneDrive  38, 44–46
  with Yammer  4, 8
collections  253–255
community cloud  2
companion content download  xv
Company Portal  120–126
computer
  adding  49
  displaying OneDrive library  47
  syncing with OneDrive  37, 46
contacts
  associating with accounts  66
  creating  72
  Microsoft Dynamics CRM Online  58–63
  searching  63
contact to order business process  77
Content Management System (CMS)  223
copying
  files to OneDrive  38
  files within OneDrive  40
CRM (customer relationship management)  4, 54
  See also Microsoft Dynamics CRM Online
cryptography  270
custom business processes  77
customer interactions, tracking  74–80
customer relationship management (CRM)  4
customer relationship manager (CRM)  4, 54
  See also Microsoft Dynamics CRM Online
customers  72
custom lists, SharePoint  28
cycle template, tiles  258

D
dashboards
  Admin Center  14
  Microsoft Dynamics CRM Online  56
  Microsoft Intune  88
data  3
data disks, defining  145–148
data recovery  168–173
datacenters  1
deleting users, Office 365  27
delimiters  59
desktop programs, accessing  3
device groups, Microsoft Intune  96, 97
devices
  apps, viewing  213
  enrolling  122
  IP addresses  137
directories
  accessing  210
  default  209
  setting up  205–209
  tenant  209
disaster recovery (DR)  158
display name, Office 365  23
DNS (Domain Name System)
  DNS Server role  177
  ownership, confirming  16
  records, updating for Office 365  19, 20
DNS server  137
DNS Server role  177
document libraries, SharePoint  27, 30
document versioning, SharePoint  30
documents
  creating within OneDrive  42, 48
  editing from OneDrive  37
  opening earlier versions  46
  viewing recent  49
Documents folder, OneDrive  38
domain controllers
  See also virtual machines
described  141
virtual machines, promoting to  150–152
Domain Name System (DNS)
  DNS Server role  177
  ownership, confirming  16
Domain Name System (DNS) (continued)
records, updating for Office 365 19, 20
domain names 13, 137, 209
domains
See also signing in
authentication 153–155
configuring 14–22
described 13, 150
hosting provider 16
managing 21
mapping 137
Microsoft Intune, configuring 90
ownership, confirming 16
trees 150
users, adding 153–155
downloading
files from OneDrive 40
OneDrive app 50
Dynamic Host Configuration Protocol Server role 176
dynamic resources 254
Dynamics CRM Online See Microsoft Dynamics CRM
Online
Dynamics Marketing See Microsoft Dynamics
Marketing

E
ebooks, free downloads xv
e-mail
contacts, exporting 58
contacts, importing 59–61
logging messages 75
marketing messages 80
notifications, Microsoft Intune 100
Office Mobile 32
email sales campaign business process 77
emulator 248
Endpoint Protection, Microsoft Intune 95
See also security
Enhanced IE Protection 160
enrolling devices 122
entities, creating in Microsoft Dynamics CRM Online 82
errata xv
Excel 7
Exchange and Skype for Business 33
Exchange Online 9, 20, 32
exporting apps 265

F
Facebook page, adding to apps 252
Fax Server role 177
features of servers
adding/removing 177–180
roles 176
feedback, providing xvi
File Explorer 46
File Services role 177
files
See also OneDrive
accessing from File Explorer 46
checking out 44, 45
following shared 38
history 45, 46
managing 37–40
on OneDrive, managing 38–40
permissions, OneDrive 43
recent 49
shared in OneDrive, working on 44–46
shared, location in OneDrive 49
sharing, OneDrive 37, 42–44, 48
syncing devices 40
Finder 46
Flickr photo streams, adding to apps 250, 251
flip template, tiles 258
folders
creating 41
permissions 41
sharing 37, 42–44, 48
subfolders, adding 41
forests 150
forms library, SharePoint 28
free trial versions xiv, 11, 36, 55, 86, 131, 190, 205

G
geo-redundancy 136
Get-Process command 187
GoDaddy domain provider, DNS recordings,
updating 20
guided service case business process 77
H

history, files 45, 46
hosting providers 16
HTML pages, adding to apps 248, 249
hybrid cloud 2 See also private cloud; public cloud
hybrid deployment 189

I

IaaS (infrastructure as a service) 2, 3, 130 See also Azure
iconic template, tiles 258
IDs, ad unit and app 259
IIS role See Web Server (IIS) role
importing contacts 58–61
infrastructure as a service (IaaS) 2, 3
Instagram feed, adding to apps 253
instant messaging, Skype for Business 4, 9
in-store excellence business process 77
Internet browser, accessing OneDrive 47
Internet Information Services See Web Server (IIS) role
Internet Protocol (IP) addresses 137
Intune See Microsoft Intune
iOS
Apple Push Notification service (APNs) certificate 110–116
Company Portal app 121
email 32
Microsoft Dynamics CRM Online app 82
Office Mobile 32
OneDrive app 50
policy-managed apps 117
programming languages 243
RemoteApp, setting up 199–203
iPad
Microsoft Dynamics CRM Online app 82
Microsoft Office for iPad 31
IP addresses 137
iPhone, Microsoft Dynamics CRM Online app 82

K

Key Influencers Report 81

L

Languages Report 81
leads
converting to opportunities 68
Microsoft Dynamics CRM Online 66–68
searching 67
Lean Startup 242
licensing
See also subscriptions
available subscriptions 25
Microsoft Intune 95
Office 365 26
subscription model 2
logging calls 75
Lync See Skype for Business

M

malware 95, 98
marketing See Microsoft Dynamics Marketing
marketing list builder business process 77
marketing messages 80
marketing reports 80
markets for mobile apps 269
menus, adding to apps 255
Microsoft Access 8
Microsoft Azure See Azure
Microsoft Azure Backup 164, 165
Microsoft Azure For Businesses, free trial xiv
Microsoft Azure RemoteApp See RemoteApp
Microsoft BizSpark 244
Microsoft Developer account 244
Microsoft Dynamics CRM Online
See also CRM (customer relationship management)
accounts data type 58, 63–66
activities, adding 78
activities, tracking 74–80
Android app 82
business processes, automated 76, 77
Buzz Report 81
case data types 58, 70–74
contacts, creating 61
contacts data type 58–62
contacts, editing 62
contacts, importing 58–61
contacts, viewing 62
Microsoft Dynamics CRM Online (continued)
customer interactions, tracking 74–80
Customer Service work area 56
dashboards 56
data types 58
described 4
e-mail marketing messages 80
e-mail messages, logging 75
entities, creating 82
free trial 55
iOS app 82
iPad app 82
iPhone app 82
Key Influencers Report 81
Languages Report 81
leads data type 58, 66–68
logging calls 75
Marketing work area 57
Microsoft Dynamics Marketing 54, 79, 80
Microsoft Social Listening 54
Microsoft Surface tablet app 82
mobile apps 82, 83
Office 365, integrating with 54, 57
opportunities data type 58, 68–70
Sales work area 56
Sentiment History Report 81
Sentiment Share of Voice Report 81
Sentiment Summary by Sources Report 81
signing in 55
social media, tracking 80, 81
Sources Share of Voice Report 81
Sources Summary Report 81
subscription types 55
tasks 78
tools 54
Trend Report 81
user accounts, Office 365 57
Volume History Report 81
Windows Phone app 82
work areas 56
Microsoft Dynamics Marketing 54, 79, 80, 83
Microsoft Excel 7
Microsoft Exchange Online See Exchange Online
Microsoft Intune
Account Portal 88–93
accounts, managing 88
Admin Console 94, 95
alerts 95, 98–100
apps, managing 95
benefits of 85
client software, installing 103–107, 122–125
client software, uninstalling 108
Company Portal 120–126
Dashboard 88
described 4
device groups 96, 97
device management 85
domains, configuring 90
Endpoint Protection 95
free trial xiv, 86
groups 95–98
installing 103–107, 122–125
licenses 95
mobile devices 94, 108–116, 120–122
notifications via email 99, 100
policies 95, 101, 102
portal 210
reports 95
software, distributing 116–121
subscriptions 85, 86, 89
support 89
System Center Configuration Manager and 86–88
templates 102
uninstalling 108
updates, managing 95
user accounts 90–93
user groups 98
Microsoft Intune Center 106
Microsoft Lync See Skype for Business
Microsoft Office for iPad 31
Microsoft OneNote 7
Microsoft Outlook 7
Microsoft PowerPoint 7
Microsoft Press Book Support xvi
Microsoft pubCenter 259
Microsoft public cloud services, categories 2
See also public cloud services
Microsoft Publisher 8
Microsoft SharePoint See SharePoint
Microsoft Social Listening 54, 80, 81
Microsoft Surface tablet, Microsoft Dynamics CRM
Online app 82
Microsoft System Center 2012 R2 Configuration Manager  See System Center Configuration Manager
Microsoft Virtual Academy (MVA) xv
Microsoft Word  7
mobile apps  
See also apps; building mobile apps; Windows App Studio
About page, creating  262
accounts required  244
actions  255
ads, enabling  259–262
ad unit ID, obtaining  259
app ID, obtaining  259
Bing news page, adding  251, 252
building, tools  243, 244
collections  253–255
cryptography  270
data sources, adding  246
dynamic resources  254
empty apps, creating  244, 245
eulator  248
exporting  264, 265
Facebook page, adding  252
Flickr photo streams, adding  250, 251
HTML data source, adding  248, 249
Instagram feed, adding  253
Lean Startup approach  242
markets, selecting  269
menus  255
Microsoft Dynamics CRM Online  82, 83
naming  268
PhoneGap  243
planning  241, 242
platforms  242, 243
programming languages  243
publisher ID  270
publishing  264, 265
reasons for building  241
RSS feeds  246–248
source code  264
static resources  254
templates  245
testing  263, 264
themes, applying  256, 257
tiles  258
tools for building  243, 244
videos  249, 250
Windows App Studio  243
Windows Phone Store, submitting to  265–274
Windows Store, submitting to  265–274
Xamarin  243
YouTube page, adding  249, 250
mobile devices
actions  255
Apple Push Notification service (APNs)
certificate  110–116
apps, running  189
Company Portal app, installing  121, 122
e-mail  32, 181
enrolling in Microsoft Intune  108, 109, 120, 122
Microsoft Intune  94, 108–116
Office Mobile  30–32
OneDrive app  50
OneDrive for Business  31
policy-managed apps  117
RemoteApp, installing  199–203
Skype for Business  31
testing apps  264
multichannel sales campaign business process  77
multiple users, Office 365  25
MVA (Microsoft Virtual Academy) xv

N

network health, monitoring  181
networks  See virtual networks

O

offers, emailing  80
Office 365
  Admin Center  14, 21–26, 29, 33
  applications  7–9, 11, 30–32
  app tiles, activating  14
  collaborating  8, 9
  deleting users  27
  described  3
desktop applications  11
display name  23
DNS records, updating  19
Office 365 (continued)
documents on OneDrive, managing 42
domain names, associating with 13
domains, configuring 14–22
e-mail 11
Exchange Online 9
file storage 11
files on OneDrive, saving 39
free trial xiv, 11
intranet sites 11
Microsoft Dynamics CRM Online 54, 57
mobile applications 11, 30–32
multiple users, adding 25
Office Mobile 11, 30–32
online versions 11
passwords 23, 24
portal 210
as SaaS 8–10
SharePoint 9, 27–30
sharing files/folders 43
signing in 11–14
Skype for Business 9
storage space 36
subscriptions 10–12, 25
user accounts 57
user accounts, managing 22–27
user accounts, synchronizing 181
user names 23
vs. Office 8
Office 365 Business Essentials subscription 10, 11
Office 365 Business Premium subscription 10, 11
Office 365 Business subscription 10, 11
Office 365 Enterprise subscription 10
Office 365 Video 4, 8
Office for iPad 31
Office Mobile
applications 11, 33
deVICES 32
subscriptions 30
using 30–32
Office Online web apps 11
OneDrive
See also files; OneDrive app; OneDrive for Business
accessing 37
accessing via Internet 47
checked-out status 45
deleted files 38
document library actions 37
Documents page, exploring 37, 38
downloading files 40
file history 46
files, managing 37–40, 42–45, 48
folders, managing 37, 38, 42–44
following files 38
free trial 36
mobile devices 50
OneDrive for Business vs. 50
permissions 43
personal solution 36
photos 49
privacy setting 42
recent files 38
SharePoint, compared to 36
as stand-alone application 51
subscription plans 36
syncing 37, 40, 46
version history 46
web interface 48, 49
OneDrive app 50 See also OneDrive
OneDrive for Business
See also OneDrive
described 4
mobile devices 31
OneDrive vs. 50
OneNote 7
online calling, Skype for Business 9
on-premises infrastructures xiii
open-source software 223
opportunities, searching 69
opportunity to invoice (business-to-business) business
process 77
Outlook 7

P

PaaS (platform as a service) 2, 3
Parature Enterprise 55
passwords
Office 365 23, 24
strong 13, 142
temporary 195
virtual machines 142
permissions, OneDrive documents 43
phablets 85
PhoneGap 243
phone sales campaign business process 77
photos, storing in OneDrive 49
picture library, SharePoint 28
platform as a service (PaaS) 2
policies, Microsoft Intune 95, 101, 102
PowerPoint 7
Print and Document Services role 177
printer access, centralizing 177
private cloud 1 See also hybrid cloud
programs See apps
protection See Endpoint Protection, Microsoft Intune
provisioning xiv
pubCenter 259
public cloud 2 See also hybrid cloud; public cloud services
public cloud services 3
See also Microsoft public cloud services; public cloud advantages xiii
alerts 155–157
business advantages 3, 4
categories 2
cost benefits 130
monitoring 155–157
naming 142
personal identity, managing 209
tools 3, 4
public name space 151
Publisher 8
publisher ID 270
publishing apps 196, 197, 264, 265

QuickBooks Online app
accessing 216–219
sharing 210

recovering data 3
remote access 189
RemoteApp
apps, removing 198
benefits 189
client computers, installing on 199–203
collections, creating 191
deployments 189
described 3
free trial version 190
mobile devices, installing on 199–203
publishing apps 196, 197
storage space 190
subscription types 190
unpublishing apps 198
usage fees 203
user access, configuring 198, 199
users, adding 192–196
user types 194
Remote Desktop Services role 177
replicating data 3
reports
Buzz Report 81
customer sentiment 81
Microsoft Intune 95
social media posts 81
system 80
roles
Active Directory Domain Services 176
adding/removing 177–180
Application Server 176
DNS Server 177
Dynamic Host Configuration Protocol Server 176
Fax Server 177
File Services 177
Print and Document Services 177
Remote Desktop Services 177
Web Server (IIS) 177
Windows Server Essentials Experience 181
RSS feeds, adding to apps 246–248
SaaS (software as a service) 2, 8–10, 85

scripting, Windows PowerShell 186

searching
  accounts 65
  contacts 63
  leads 67
  opportunities 69

security
  See also Active Directory Domain Services (AD DS); Endpoint Protection, Microsoft Intune
  encrypting backups 163
  Enhanced IE Protection 160
  malware 95, 98
  passphrases 163
  remote access 181

security verification 13 See also signing in

Sentiment History Report 81
Sentiment Share of Voice Report 81
Sentiment Summary by Sources Report 81

Server Manager
  See also servers; Windows Server 2012 R2
described 4, 175
  Enhanced IE Protection 160
  features, adding/removing 177–180
  managing users/computers 153–155
  roles, adding/removing 177–180
  server status, monitoring 176

server productivity, Server Manager 4

servers
  See also Server Manager; virtual machines; Windows Server 2012 R2
checking status 176
  features 177–180
  managing 181
  multiple, managing remotely 187
  operating system 188
  roles 176, 177

service appointment scheduling business process 77
service case upsell business process 77

shared files
  following 38, 44
  location in OneDrive 49
  working on 44

SharePoint
  custom lists 28
described 9
document libraries 27, 30
document versioning 30
file management 32
forms library 28
picture library 28
site mailbox 28
Skype for Business, and 33
task lists 28
team sites 27, 29
tools 27–30
views, creating 30
wiki page library 28
Windows Server Essentials Experience role 181

SharePoint Store 28
sharing files/folders in OneDrive 37, 42–44, 48
sharing information See Office 365

signing in
  See also domains
  free trial versions 86
  Microsoft Intune subscription 87
  Office 365 11–14
  single sign-on 213
  site mailbox, SharePoint 28

Skype
  See Skype for Business

Skype for Business
  Exchange, and 33
  instant messaging 4, 9
  mobile devices 31
  online calling 9
  SharePoint, and 33

Social Listening 54, 80, 81
social media, tracking 80, 81
social networks See Microsoft Social Listening; Yammer
software
  distributing, Microsoft Intune 116–121
  open-source 223
  RemoteApp, using 200–203
software as a service (SaaS) 2, 8–10, 85
source code, mobile apps 264
Sources Share of Voice Report 81
Sources Summary Report 81
static HTML pages, adding to apps 248, 249
static resources 254
storage accounts
   capacity 133
   creating 133–135
   naming 135
streaming video 8
subscription models
   Office 365 3
   SaaS 2
subscriptions
   See also licensing
   Azure 131, 132
   free trial versions xiv
Microsoft Dynamics CRM Online 55
Microsoft Intune 86, 89
Office 365 10, 36
Office Mobile 30
OneDrive, adding 36
RemoteApp 190
types 10–12
support
   Microsoft Intune 89
   Microsoft Press Book Support xvi
syncing OneDrive and local computer 37, 40, 46
sysprepped images 139
System Center 2012 R2 See System Center
   Configuration Manager
System Center Configuration Manager 86–88

task lists, SharePoint 28
tasks, adding and assigning 78
team sites 27, 29
templates
   app tiles 258
   mobile apps 245
   policies, Microsoft Intune 102
   virtual machines 139
temporary passwords 23
tenant directory 209
terms and conditions, Company Portal app 122
testing mobile apps 263, 264
ThemeForest 239
themes
   adding to websites 237–239
   mobile apps, applying 256, 257
third-party apps
   See also apps; Azure
   accessing 216–218
   Access Panel Extension 213–215
   QuickBooks Online 210–212
   sharing 210–212
   single sign-on (SSO) 213
   user access permissions 215
tiles
   activating 14
   templates 258
tools
   Active Directory Users and Computers 153
   marketing campaigns 79
   Microsoft Dynamics CRM Online 54
   public cloud services 3, 4
   SharePoint 27–30
trees, described 150 See also forests
   Trend Report 81

U
Unified Service Desk 55
unpublishing apps 198
updates, Microsoft Intune 95
upsell after service interaction business process 77
user accounts
   authentication 153–155
   display names 23
   domains, adding 153–155
   Microsoft Intune, managing 90–93
   multiple countries/regions 26
   Office 365, managing 22–27
   passwords 23
   user names 23
user groups, Microsoft Intune 98
user names, Office 365 23
users
   RemoteApp, adding 192–196
   RemoteApp, configuring access 199
V

vault  See backup vault
version history, files  45, 46
versions
  documents, SharePoint  30
  opening specific  46
videos  8
video streaming  4
views
  organizing content  30
  SharePoint, creating  30
virtual machines
  See also Azure; domain controllers
  Active Directory Domain Services (AD DS), installing  148
alerts  156
authentication  153–155
availability set  143
billing rate  133
building  141–145
configuration extension options  144
data disks, defining  145–148
described  2, 130
disaster recovery (DR)  158
Linux operating systems  140
naming  141
Oracle-based  140
passwords  142
pricing structure  132
promoting  150–152
size, adjusting in Azure  152
sysprepped images  139
templates  139
tier options  132
user accounts, adding  153–155
Windows Server Essentials Experience role, installing  182
virtual networks  133, 137, 138
VM  See virtual machines
Volume History Report  81

W

web apps  223  See also websites
web browser add-ons, Access Panel  213–215
webinars  80
web interface, OneDrive  48, 49
Web Server (IIS) role  177
websites
  See also Azure; web apps; WordPress
  content, adding  233–235
  creating  223–229
  customizing  228
  pages, adding  235–237
  planning  222
  resource groups  239
  signing in  229
  themes, adding  237–239
  web app service plans  222
wiki page library, SharePoint  28
Windows 8 mobile platform  242
Windows apps  See apps
Windows App Studio
  application sections  246
data sources  246
described  4
  empty apps, creating  244–246
  RSS feeds, adding  246–248
  testing apps  264
Windows-based VMs  See virtual machines
Windows devices, Company Portal app  121
Windows Phone
  Company Portal app  121
  email  32
  Microsoft Dynamics CRM Online app  82
  Office Mobile  32
  OneDrive app  50
  programming languages  243
  RemoteApp, setting up  199–203
  Windows App Studio, building apps  243
Windows Phone Store, submitting apps  265–274
Windows PowerShell
  blog  187
  Get-Process command  187
  learning  186
  Windows Server Essentials Experience role  185
Windows Server 2012 R2
  See also Server Manager; See also servers  
servers, monitoring 175  
Windows Server Essentials Experience role 181  

Windows Server Essentials Experience role
  features 181  
  installing on a VM 182–185  
  setting up using Windows PowerShell 185  

Windows Store, submitting apps 265–274  

Word 7  

WordPress
  See also websites  
  content, adding 233–235  
  settings 229–232  
  ThemeForest 239  
  themes 237–239  
  websites, creating with 223–229  

X  

Xamarin 243  

Y  

Yammer 4, 8  
    YouTube page, adding to apps 249, 250
Raised in Spokane, Washington, Blain Barton has been with Microsoft for more than 22 years and has held many diverse positions, starting in 1988 as a Team Leader in Manufacturing and Distribution, then progressing to Team Manager for Microsoft Visual Basic within Microsoft Product Support, Product Consultant for the Microsoft Word Division, and OEM Systems Engineer. He currently serves as a Senior Technical Evangelist within the US Developer Experience and Evangelism - DX Team working with IT Professionals and startup companies.

Blain has organized and delivered a wide array of technical events. He has presented more than 2,000 live events and has received several “top-presenter” speaking awards. He has traveled around the world, delivering OEM training sessions about pre-installing Windows on new PCs.

In 2010, Blain co-founded IT Pro Camp, Inc., a 501(c)(3) charity in Tampa, Florida, raising sponsorship support for delivering IT pro events within his local communities. He attended Washington State University, graduating with a bachelor’s degree in English and business, with a minor in computer science. After college, Blain was a professional snow skiing instructor in the Cascade Mountains before starting his career with Microsoft. When Blain is not working in the IT field, he enjoys biking, boating, fishing, and drumming. In addition to his hobbies, he runs a 10-acre palm tree silviculture operation in Homosassa, Florida, and currently resides outside of Tampa, Florida. You can find Blain on Facebook and LinkedIn, read his blog (aka.ms/blainbarton), and follow him on Twitter @blainbar.
About the contributors

**Adnan Cartwright**  The CEO of Integrity Solutions, Inc., Adnan has worked with many companies to help them secure, expand, and maintain their networks by using the most up-to-date technology available. He is a recipient of the Microsoft Most Valuable Professional (MVP) award in Software Packaging, Deployment, and Servicing. A graduate from the ITT Technical Institute with degrees in Information Technology and Computer Networking Systems and Information Systems Security, Adnan is actively involved within the technical community and presents at numerous events. He is also the founder of the Florida IT Server Group, which is located both in South Florida and Jacksonville, Florida. Adnan has a passion for teaching and sharing technical knowledge with both young adults and IT professionals. Adnan is one of the organizers of the IT Pro Camp and a volunteer for the I Center Community Foundation, which teaches IT skills to at-risk kids.

**Yung Chou**  Yung Chou is a Senior Technical Evangelist within the Microsoft US Developer Experience and Evangelism - DX team. Within the company, he has had opportunities on serving customers in the areas of support account management, technical support, technical sales, and evangelism. Prior to Microsoft, he established capacities in system programming, application development, consulting services, and IT management. His technical focuses have been on virtualization and cloud computing with strong interests in hybrid cloud, Windows Azure Infrastructure Services, and emerging enterprise computing architecture. He has been a frequent speaker in technical conferences, roadshow, and Microsoft events.

**Jennelle Crothers**  Before joining Microsoft, Jennelle spent 15 years as a systems administrator “jack of all trades” overseeing Windows domains, Microsoft Exchange Server, desktops, and other IT infrastructure systems, where she struck fear into the hearts of end users with complex password policies and email retention tags. When not reading something related to technology, Jennelle helps raise puppies for Guide Dogs for the Blind and enjoys reading dystopian novels. One of these days, she’ll finish that quilt she started in 2011. Jennelle currently works on the US Developer Experience and Evangelism - DX Team as a Technical Evangelist. Follow her on Twitter @jkc137 or visit her blog at www.techbunny.com.

**Joe Homnick**  A Florida CPA, Joe has more than 30 years of IT experience and is a principal owner of Homnick Systems (HSI), an IT company located in Boca Raton, Florida. A Microsoft Certified Partner, HSI delivers services in the areas of system development and implementation through the practices of software consulting, development, training, and mentoring. They hold competencies in cloud implementation, business intelligence, software development, application life cycle
management, and portals and collaboration. Joe enjoys speaking and can be found presenting at conferences like Microsoft Tech Ed, the Microsoft Professional Developers Conference (PDC), and the SQL PASS Summit. Joe founded the Gold Coast Users Group (GCUsersGroup.org), which serves the South Florida area, delivering Microsoft SQL Server, operating systems, and developer knowledge to the community for more than 20 years. His previous professional experience includes being an adjunct professor at Florida Atlantic University and a computer audit specialist for KPMG. Check out his blog at JoeBlog.Homnick.com and network with him on Facebook, Twitter, and LinkedIn.

**Alex Melching**  
Alex works as a Senior Technical Specialist at TechHouse IT Consulting Solutions based in Sarasota, Florida, specializing in facilitating small businesses in the cloud with Microsoft Online Services, including Office 365, Microsoft Dynamics CRM Online, and Microsoft Azure. He is a member and speaker of the IT Pro Camp, a non-profit organization delivering free IT learning to local tech communities around Florida. Alex is an avid blogger for Alex’s Cloud (alexs-cloud.com) on the Microsoft Office 365 and Azure platforms. Alex is heavily involved in the local tech community around the Tampa Bay area of Florida and actively speaks and demos at colleges, universities, tech events, and conferences.

**Jeff Mitchell**  
Jeff Mitchell is an IT Pro and problem solver who brings passion, expertise, and finesse to his work with both people and technology. During his 14 years in the field, Jeff has identified and implemented IT solutions ranging from geographically dispersed systems for small and medium clients to enterprise deployments of private and hybrid cloud integrated solutions. Heavily tied into the community of Northwest Florida, Jeff has worked as Infrastructure Admin, Chief Technology Officer, Office 365 Practice Manager, and Director of IT and Cloud Infrastructure. Jeff has been a member of the Pensacola ITT Tech’s Program Advisory Committee, contributing to the school’s degree programs in Information Systems and Cybersecurity and Network Systems Administration. He has also spoken at IT Gulf Coast, IT Pro Camps, SQL Saturdays, and other events throughout the southeastern United States. Jeff lives in Fort Walton Beach, Florida, where Bit-Wizards’ corporate office is located. He knows more about Batman than you and enjoys New Orleans Saints football and playing the guitar. You can reach him on Twitter @JeffMitchellFL or at the following:

- **Speaker Blog URL:** bitwizards.com/Blogs/Jeff-Mitchell
- **Podcast: Full Frontal Nerdity – @ffntech ffntech.com**  
- **LinkedIn:** linkedin.com/in/jeffmitchellfl/
Tommy Patterson  Tommy began his virtualization adventure during the launch of VMware’s ESX Server’s initial release. At a time when most admins were adopting virtualization as a lab-only solution, he pushed through the performance hurdles to quickly bring production applications into virtualization. Since the early 2000s, Tommy has spent most of his career in a consulting role, providing assessments, engineering, planning, and implementation assistance to many members of the Fortune 500. Troubleshooting complicated scenarios and incorporating best practices into customers’ production virtualization systems has been his passion for many years. Now he shares his knowledge of virtualization and cloud computing as a Senior Technical Evangelist in the US Developer Experience and Evangelism - DX Team in Atlanta Georgia. You can follow Tommy at virtuallycloud9.com/.

James Quick  After graduating from Vanderbilt University with a double major in computer science and Spanish, James joined Microsoft as a Technical Evangelist in South Florida, focusing on mobile application development for Windows 8 and Windows Phone. Since joining Microsoft, he has worked with various Meetup groups, organizations, and schools, giving professional development training for Miami Dade High School teachers and college professors, leading numerous workshops in the community, and speaking at local events such as ITPalooza and South Florida Code Camp. James currently works as a Technical Evangelist on the US Developer Experience and Evangelism - DX Team.

Kevin Remde  A Senior Technical Evangelist at Microsoft and a highly sought-after speaker and IT community organizer, Kevin is also a prolific blogger. He shares his thoughts, ideas, and tips on his “Full of I.T.” blog (aka.ms/FullOfIT). Before joining Microsoft, Kevin held positions such as software engineer, information systems professional, and information systems manager. He loves sharing helpful new solutions and technologies with his IT professional peers. Kevin currently works on the US Developer Experience and Evangelism - DX Team.

Dan Stolts  Also known as the “ITProGuru,” Dan is a technology expert in systems management and security. He is a Senior Technical Evangelist at Microsoft and also owns a hosting and consulting firm (BayStateTechnology.com). He is proficient in many enterprise technologies, especially in the server area (Windows Server, System Center, Virtualization, and Azure) and holds many certifications, including MCT, MCITP, MCSE, and TS. Dan currently specializes in system management, virtualization, and cloud technologies. He is an enthusiastic advocate of technology and is passionate about helping others. Dan currently works on the US Developer Experience and Evangelism - DX Team in Boston, Massachusetts. You can reach him on his primary blog at itproguru.com or on Twitter @ITProGuru.
Ed Wilson  Ed Wilson is the Microsoft Scripting Guy and a well-known scripting expert. He writes the daily Hey, Scripting Guy! blog at blogs.technet.com/b/heyscriptingguy/. He has also spoken at TechEd and at the Microsoft internal TechReady conferences. He has written more than a dozen books, including nine on Windows scripting that were published by Microsoft Press. He has also contributed to nearly a dozen other books. His newest book by Microsoft Press is Windows PowerShell Best Practices. Ed holds more than 20 industry certifications, including Microsoft Certified Systems Engineer (MCSE) and Certified Information Systems Security Professional (CISSP). Prior to coming to work for Microsoft, he was a senior consultant for a Microsoft Gold Certified Partner, where he specialized in Active Directory design and Exchange implementation. In his spare time, he is writing a mystery novel. For more about Ed you can go to ewblog.edwilson.com/ewblog/.
About the technical reviewer

Randall Galloway is the technical editor for numerous computer-related books covering Microsoft Exchange, SharePoint, Windows Server, Windows, SQL Server, Hyper-V, Windows PowerShell, Office, Microsoft Intune, System Center, Windows Server Update Services, and Azure Active Directory. He also has experience in creating content for Microsoft Certified Professional exams, Microsoft Press Training Kits, and Microsoft Official Curriculum courseware.

Randall currently works as a trusted business advisor, aligning Microsoft services to customer priorities, with responsibility for service delivery and satisfaction with key stakeholders. He has been working in the computer industry for 21 years and is a 15-year Microsoft veteran.
Now that you’ve read the book...

Tell us what you think!

Was it useful?
Did it teach you what you wanted to learn?
Was there room for improvement?

Let us know at http://aka.ms/tellpress

Your feedback goes directly to the staff at Microsoft Press, and we read every one of your responses. Thanks in advance!