

***Microsoft®
Office Live***
FOR
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by Karen S. Fredricks



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About the Author

Karen S. Fredricks began her life rather non-technically growing up in Kenya. She attended high school in Beirut, Lebanon, where she developed her sense of humor while dodging bombs. After traveling all over the world, Karen ended up at the University of Florida and has been an ardent Gator fan ever since. In addition to undergraduate studies in English, Theater and Accounting, Karen has a Master's degree in Psycholinguistics. Beginning her career teaching high school English and theatre, Karen switched to working with the PC during its inception in the early '80s and has worked as a full-time computer consultant and trainer ever since.

Karen is an ACT! Certified Consultant, an ACT! Premier Trainer, a Microsoft Office User Specialist, and a QuickBooks Pro Certified Advisor. She is the author of four *For Dummies* books on ACT! In addition, she has co-written *Outlook 2007 Business Contact Manager For Dummies* and *Outlook 2007 All-in-One Desk Reference For Dummies*. A true fan of the Dummies series, she helped organize The Authors Unconference, the first ever gathering of *For Dummies* authors.

Karen resides in Boca Raton, Florida. Her company, Tech Benders, specializes in contact management and CRM software, and provides computer consulting, support, and training services. She is also a regular guest on several syndicated computer radio talk shows. In her spare time, Karen loves to spend time with family and friends, play tennis, workout, road bike, and write schlocky poetry.

Karen loves to hear from her readers. Feel free to send her your comments about the book to www.dummies@techbenders.com or visit her Web site www.techbenders.com to learn more about the products listed in this book.

Dedication

I dedicate this book to Gary Kahn. As the person in my life who put up with me as I wrote four books in less than a year he deserves a dedication, combat pay, and the Medal of Honor!

Author's Acknowledgments

This is my seventh book for Wiley Publishing and as usual they have made writing this book a pleasure! Thanks go out to Greg Croy, my Acquisitions Editor and Rebecca Senninger, my Project Editor. This is the third book I've worked on with each of them; as usual, they were great to work with! Barry Childs-Helton, the Copy Editor, had the unenviable task of making me look good; his edits were always right on! Technical Editor Kim Winton's sharp eye helped to spot all the changes between the Beta and final versions of Office Live.

Rich Tennant is the coolest cartoonist ever. I am astounded by the thought, research and time that he devotes to every one of his cartoons. I'm not sure which is funnier — his cartoons — or his stories about creating his cartoons!

The most important acknowledgment of all goes out to all of the readers of the *For Dummies* series, and more specifically the readers of this book. I hope you'll enjoy *reading* this book as much as I enjoyed *writing* it!

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Microsoft Office Live For Dummies

Introduction

Office Live is Microsoft's first true foray into Software as a Service (SaaS). And who knows what features are going to be added or modified over the course of the next several years? The cool thing is that you'll be able to grow right along with Office Live because you'll be receiving those changes immediately — without having to invest more money in upgrading. And because Microsoft is banking that many people are willing to give Office Live a try, you get a deal that you basically can't refuse.

The other exciting facet of Office Live is the capability to share your data online without having to fork over thousands of dollars for hardware, software, and IT consultants. Just sign on the dotted line, and your employees and customers have immediate online access to the information you want them to have. For many businesses, having the company data online represents a whole new way of doing business. Remote workers can access information from a variety of locations rather than having to waste time driving to the office. Road warriors find traveling a bit easier, knowing that they can get to the needed data anywhere, at any time.

There's another reason for excitement as well. The Office Live feature set is designed to save you time and help make you more efficient in the bargain. Accomplishing more in less time is an exciting thought — it allows you to quit work earlier. With Office Live it's easy to get up and running in a very short time. You'll be amazed not only at how easily you can set up a business but also at how quickly you can get back to work rather than spending time tinkering on your computer.

About This Book

Office Live For Dummies is a reference book. As such, you can read each chapter independently and in the order you want. Each chapter focuses on a specific topic, so you can dive right in, heading straight for the chapter that interests you most. Having said that, however, I've put the chapters in a logical sequence; if you're new to Office Live, you can just follow from chapter to chapter. If you're more experienced with Office Live, use the Table of Contents and the index to navigate from topic to topic as needed.

Essentially, this book is a nuts-and-bolts how-to guide for accomplishing various tasks. However, I also draw on many of my own experiences as a full-time consultant — and provide include specific situations that should give you a feeling for the full power of Office Live.

Conventions Used in This Book

As with most Windows-based software programs, you often have several different ways to accomplish a task in Office Live.

For the most part, I show you ways to perform a function by using the Office Live menus. When an instruction reads Choose File⇨Open, you access the File menu (located at the top of the Office Live screen) by clicking it with the left mouse button and then choosing the Open option from the subsequent menu that appears. In most cases, you can access these commands from anywhere within Office Live, although I generally advise new users to always start a task from the home page, which is the first page you see when Office Live opens. If you must be in a particular area to complete a task, I tell you where you need to go.

I also present you with keyboard shortcuts here and there. Generally, Office Live shortcuts are triggered by simultaneously pressing the Alt key and another key on the keyboard.

When you need to access a hidden menu, click an appropriate area of the screen with the right mouse button and then choose from the contextual menu that appears. In these instances, I'll simply say *right-click* when you need to right-click.

What You Should Read

Of course, I *hope* you're going to sit down and read this entire book from cover to cover. But then again, this book isn't The Great American Novel. And, come to think of it, the whole reason why you bought this book in the first place is to get organized as quickly as possible because you're probably finding yourself with too much to do and too little time in which to do it.

For the time being, I'm going to let you get away with reading just the parts that interest you most. I'll let you read the last chapter first and the first chapter last if you like because this book is designed to allow you to read each chapter independently. However, when you find yourself floating in a

swimming pool, soaking up the sun, and wondering what to do with all your spare time, you might want to go back and read some of those chapters you skipped. You just might discover something!

What You Don't Have to Read

This book is intended for both new and existing computer users. Most of the instructions apply to both groups of readers. Once in a while, I include some information that might be of special interest to more advanced readers. Newbies, feel free to skip these sections! Also, any information tagged with a Technical Stuff icon is there for the truly technically inclined; everyone else can just skip that info.

Foolish Assumptions

One of our least favorite words in the English language is the word *assume*, but I've got to admit that I've made a few foolish — albeit necessary — assumptions when writing this book. First of all, I assume you own a Windows-based computer — and that Internet Explorer is installed on it. Secondly, I assume you have a basic knowledge of how to use your computer, keyboard, and mouse, and that Office Live isn't the very first application you're trying to master.

I'm also going to assume that you have a high-speed Internet connection; you won't be able to use Office Live without Internet connectivity. And, although you can probably get away with using a dial-up connection, its speed will probably be too slow to be practical.

I assume you have a genuine desire to organize your personal life or business, and are intrigued by all that Office Live has to offer.

Finally (and I feel quite comfortable with this assumption), I assume you'll grow to love the whole concept of Office Live as much as I do!

How This Book Is Organized

I organized this book in five parts. Here's a brief description of each part, with chapter references directing you where to go for particular information:

Part I: Discovering This Thing Called Office Live

In Part I, you get an introduction to the concept SaaS (Software as a Service) and why Office Live is such a popular choice for computer users (Chapter 1). In this part, you also read about the three flavors of Office Live (Chapter 2) and how to sign up and start using the service (Chapter 3).

Part II: Getting Down to Basics with Office Live Basics

As its name implies, Part II focuses on the basics — including using e-mail (Chapter 4) and creating a Web site (Chapters 5). I even show you how to gauge the success of your site by using Site Reports (Chapter 6).

You also find out how to organize your day through the use of the Office Live calendar (Chapter 7).

Part III: Adding a Few Essentials

When you add Essentials into the mix, you get an online version of Business Contact Manager (Chapter 8) to help you keep track of your contacts. You also add the ability to set up Shared Sites that can be accessed by your employees and/or your customers (Chapter 9). If you travel a lot, check this out: You can synch Office Live to Outlook or your PDA (Chapter 10).

If you have a new business — or have been trying to conduct your business without the assistance of accounting software — you discover how to use Office Accounting Express 2007 with Office Live (Chapter 11).

Part IV: Getting Premium Service

A product name like “Premium” leads you to expect a lot — and Office Live doesn’t disappoint. Chapter 12 shows you how to work with the different business applications that come with Office Live. You can keep a company calendar and schedule resources with Time Manager (Chapter 13). You can manage major projects and share the data with both your employees and customers (Chapter 14). You find out how Office Live takes you through

every step of the sales process — from designing a marketing campaign and distributing collateral to creating estimates and taking orders (Chapter 15). You have a whole arsenal of human-resources tools at your disposal (Chapter 16) and have a bird’s eye view of the state of your entire business (Chapter 17).

Part V: The Part of Tens

With apologies to David Letterman, Part V gives you three of my Top Ten Office Live lists. If you have a business — or are considering starting one — I list some ways that using Office Live can help grow your business (Chapter 18). I move on to a list of the types of people I think can most benefit from Office Live (Chapter 19). Finally, I give you a closer look at the whole idea behind Office Live: Software as a Service (Chapter 20).

Icons Used in This Book



A Tip icon indicates a special time-saving tip or a related thought that might help you use Office Live to its full advantage. Try it — you might like it!



This icon alerts you to the danger of proceeding without caution. *Do not* attempt to try doing anything that you are warned not to do!



These icons alert you to important pieces of information that you don’t want to forget.



A Technical Stuff icon indicates tidbits of advanced knowledge that might be of interest to IT specialists but might just bore the heck out of the average reader. Skip these at will.

Where to Go from Here

If you’ve already dabbled a bit in Office Live, you might want to at least skim the entire contents of this book before hunkering down to read the sections

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Microsoft Office Live For Dummies

that seem the most relevant to you. Office Live has a lot to offer — and you might have missed some of its functionality along the way!

For the Office Live newbie, I recommend heading straight for Part I, where you can acquaint yourself with Office Live before moving on to other parts of the book and the Office Live program.

Part I

Discovering this Thing Called Office Live

The 5th Wave

By Rich Tennant



"Well, the first level of Office Live security seems good-I can't get the shrink-wrapping off."

In this part . . .

I know you're excited about all the possibilities that Office Live has to offer, and want to dive into the program as soon as possible. Here's where you find an overview of some of the cool features you find in Office Live. You become familiar with the concept of Software as a Service. Then, like a little kid in the ice cream shop, you get to pick your favorite flavor of Office Live. After you have those basic concepts down, you go on a whirlwind tour designed to getting you up and running on Office Live in a jiffy.