



# Do More with a Microsoft Account

Demo Guide

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## Prerequisites

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### Demo Login Information

This section contains specific information your team will need to login to the demo environment, or to access demo content. Include any URL's, login details and fictitious persona details.

For this demo, you will be using the Sally Smith persona, to set up a free Microsoft Account

**URL:** <http://www.outlook.com>

**Credentials:** The credentials will be created in the Post-Install Steps.

### First-Time Post-Install Steps

If this is the first time you are using the demo environment, complete the [Post-Install Steps](#) at the end of this document.

## Pre-Demo Setup Steps

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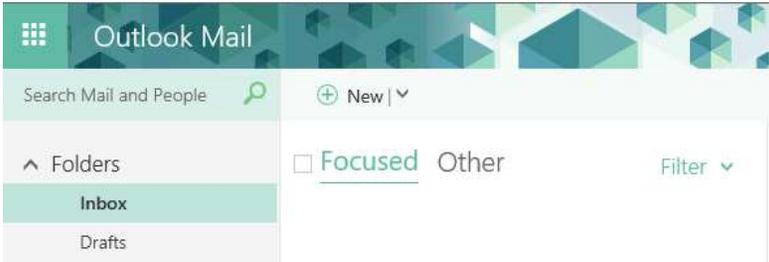
Complete the following steps prior to each presentation of the demo:

1. If you do not already have it open, start a browser session and go to <http://www.outlook.com>.
  - a. Sign in using Sally Smith's credentials created in the Post-Install Steps, and begin in the **Inbox**.

## Do More with a Microsoft Account - Demo Steps

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Speaker Script	Click Steps
<p><b>Take control. Do more.</b></p> <p>Sally Smith has just finished creating a free Microsoft account, and is starting out by exploring her new Outlook inbox.</p>	

Speaker Script	Click Steps
<p>Outlook is the free email and calendar service that helps Sally stay on top of what matters, and get things done.</p> <p>The Focused Inbox feature will help Sally by prioritizing important emails into this <b>Focused</b> view.</p> <p>Focused Inbox intelligently presorts your email so you can focus on what matters. It places your most important emails in Focused and the rest in <b>Other</b>.</p> <p>Focused Inbox works across all of your email accounts, personal and professional.</p> <p>To create an inbox that "feels right" to you, the system takes into account emails and contacts with whom you interact, and filters out noisy sources like automatically generated or bulk email. The more you use it, the better it gets. You can easily reclassify emails between Focused and Other. Just open an email, then select "Move to Focused/Non-Focused" from the overflow menu.</p> <p>During setup, Sally created a <b>signature</b> which is automatically added below each new message. She also has rich formatting options, including inserting images, and using add-ins.</p> <p>To explore what her new message options are, Sally sends a test message to herself.</p>	<ol style="list-style-type: none"> <li>1. At the top of the Inbox, point to <b>Focused</b>.  </li> <li>2. Next to Focused, click on <b>Other</b>.</li> <li>3. Above Focused, click <b>New</b> to open a new message. <ol style="list-style-type: none"> <li>a. Point to the <b>Signature</b>.</li> <li>b. At the bottom of the message, point to the rich <b>formatting options</b>.</li> </ol> </li> <li>4. Click the <b>To</b> field, and type Sally's email address created in the Post-Install steps.</li> <li>5. Click <b>Add a subject</b> and type <b>Test</b>.</li> <li>6. Click <b>Send</b>.</li> </ol>

Speaker Script	Click Steps
<p><b>Optimized Actions</b></p> <p>Once the message arrives, Sally sees that she has some immediate options available to her as she hovers on the message. A single click is all it takes to delete, mark unread, flag, or pin to the top, without even needing to select the message first.</p>	<p>7. Pause over the new message to display.</p>

### More than just email

Speaker Script	Click Steps
<p>Outlook.com automatically connects you to a host of Microsoft apps and services including OneDrive, Skype, OneNote, Office Online applications, and more.</p> <p>With your Outlook.com address you can sign in to Skype, find your contacts, view your Calendar, and work in Word Online.</p> <p>In this case, Sally is going to choose the <b>Event flyer template</b> and get started on a flyer for her <b>neighborhood potluck</b>.</p> <p>She <b>saves</b> the file directly to her OneDrive. Her Outlook.com inbox comes with 5 GB of free online storage on OneDrive for files and photos. Once files are in OneDrive, she can get to them from the OneDrive website or from the OneDrive app on her any of her mobile devices.</p>	<ol style="list-style-type: none"> <li>1. In the upper left, click the <b>App Launcher</b>. <ol style="list-style-type: none"> <li>a. Pause to display the various options as you list them.</li> </ol> </li> <li>2. Click <b>Word</b>.</li> <li>3. In the templates displayed, click <b>Event flyer</b>.</li> <li>4. Click to the left of <b>[Event Name]</b>, then drag to highlight.</li> <li>5. Type <b>Neighborhood Potluck</b>.</li> </ol> <ol style="list-style-type: none"> <li>1. Click <b>File</b>.</li> <li>2. Click <b>Save As</b>.</li> <li>3. Click <b>Documents</b>.</li> <li>4. Click <b>Save</b>.</li> <li>5. When prompted to enter a name, delete Documents and type <b>Potluck Flyer</b>.</li> </ol>

Speaker Script	Click Steps
<p>After saving, she decides to <b>Share</b> the file with her fellow event coordinators. Since OneDrive is built in to Outlook.com, it's easy to save and share received attachments, documents, photos, or videos.</p> <p>She can even assign permissions, right from within the document! Here she can send an invitation, with the permissions below set to <b>Recipients can edit</b>. Clicking for more options, she can change this to view only. Below this, she can see that <b>Recipients don't need a Microsoft account</b>. If she wanted to restrict sharing further, she could change this to require sign-in.</p> <p>Instead, she is going to choose <b>Get a link</b>, and send a personalized message from her inbox.</p> <p>She has the same option to make this link editable or view only. Once created, she can just copy and paste it into a message, a Skype chat window, or where ever she needs to share it.</p> <p>Navigating over to her <b>OneDrive</b>, Sally reviews the settings she just applied from within the document.</p> <p>Here, she can clearly see the <b>sharing icon</b> on the Potluck Flyer file, where it does not appear on the file next to it. By <b>selecting the file</b> and displaying the <b>Information pane</b>, she can review who has access, and see any sharing links she has created. She</p>	<ol style="list-style-type: none"> <li>6. Click <b>Save</b>.</li> <li>7. In the upper right, click <b>Share</b>.</li> <li>8. On the Invite people tab, below the quick note field, point to Recipients can edit.</li> <li>9. Click <b>Recipients can edit</b> to display more options.</li> <li>10. To the right of <b>Recipients can edit</b>, click the <b>drop-down arrow</b>.</li> <li>11. Click <b>Recipients can only view</b>.</li> <li>12. Point to <b>Recipients don't need a Microsoft account</b>.</li> <li>13. To the left, click <b>Get a link</b>.</li> <li>14. On the right, to the right of <b>Edit</b>, click the <b>drop-down arrow</b>.</li> <li>15. Pause to display <b>View only</b>.</li> <li>16. Click the <b>drop-down arrow</b> again to close.</li> <li>17. Click <b>Create link</b>.</li> <li>18. Click <b>Close</b>.</li> <li>19. Click the <b>App Launcher</b>.</li> <li>20. Click <b>OneDrive</b>.</li> <li>21. Click the <b>Documents folder</b>.</li> <li>22. On the file <b>Potluck Flyer.docx</b>, point to the <b>Sharing</b> icon.</li> <li>23. Select the file by hovering on it, and clicking the <b>check mark</b> that appears in the upper right.</li> </ol>

Speaker Script	Click Steps
<p>can easily remove the link and remove access simply by clicking the <b>X</b> to the right.</p> <p>Do more wherever you go with a Microsoft account! Stay organized with efficiency tools in Outlook, get to and share your documents, photos, and other files from any device you use. Use the Office mobile apps to stay productive and work together, no matter where you are. A Microsoft account helps you take control and do more!</p>	<p>24. In the upper right of the browser window, click the <b>Information pane icon</b> () .</p> <p>25. Under <b>Has Access</b>, hover on the link icon to display tooltip.</p> <p>26. Click the <b>link icon</b>.</p> <p>27. To the right of the link, click the <b>X</b>.</p> <p>28. On the Remove link dialog box that appears, click <b>Remove link</b>.</p>

## Reset Instructions

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Follow these steps to reset the demo after each presentation:

1. If you do not already have it open, start a browser session and go to <http://www.outlook.com>.
  - a. Sign in using Sally Smith's credentials created in the Post-Install Steps, and begin in the **Inbox**.
  - b. Select the **Test message** created during the demo, and click **Delete**.
2. In the upper left, click the **App Launcher** () , then click **OneDrive**.
  - a. In the Files list, click the **Documents folder**.
  - b. On the file point to the **Sharing** icon.
  - c. Select the **Potluck Flyer.docx** file by hovering on it, and clicking the **check mark** that appears in the upper right.
  - d. On the actions menu at the top, click **Delete**.

## Post-Install Steps

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Complete the following post-install steps once for your demo environment:

1. Start a browser session and go to <http://www.outlook.com>.
2. In the upper right, click **Create account**.
3. Complete the required fields, noting your new **User name** and **Password**.
4. At the bottom of the page, click **Create account**.
5. On the welcome dialog box that appears on screen, click the **right arrow** > on screen.
  - a. Select your **time zone**, then click the **right arrow** > to proceed.
  - b. Select your **time zone**, then click the **right arrow** > to proceed.
  - c. Select a **theme**, then click the **right arrow** > to proceed.
  - d. In the Add your signature options, on the right, click Custom.
    - In the signature box, type **Sally Smith**, then click the **right arrow** > to proceed.
  - e. In the Add an interesting calendar options, click the **right arrow** > to proceed.
6. After Outlook completes setup, click **Let's go**.
7. In your new Inbox, read the introductory pop-up, and click **Got it**.
8. In the upper left, click the **App Launcher** () , then click **OneDrive**.
  - a. On the onscreen introductory pop-ups, in the upper right corner, click the **X** to close each of them.
9. In the upper left, click the **App Launcher** again, then click **Word**.
  - a. On the introductory pop-up that appears, click **Got it**.
10. Close the **Word** browser tab, and the **OneDrive** browser tab leaving the **Mail tab** open to begin the demo.