Microsoft Office 365



Office 365
Transition Briefing

Learning Objectives

Gain a basic understanding of Office 365 and its benefits

Know what the Office 365 capabilities mean to you

Understand the 'ribbon' user interface

Know how to save and retrieve your documents on the OneDrive

Have sufficient knowledge of Office 365 to do your job effectively.

Be introduced to some collaboration concepts

Agenda

- Office 365 Services
- Office 365 Applications
- Ribbon Interface
- OneDrive
- Moving PST files
- Collaboration with Office 365
- Tools and Support

Additional Presentation Items

Bonus Items

Password Protect Files

Message encryption

Objectives Review

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The End

Office 365 Services

Office 365 Services

General Overview

The Office 365 offering is a set of cloud based capabilities which replace many locally hosted alternatives. The offering is divided into three major parts and can be provided as Online only or Online/Desktop

Applications

- Outlook
- Word
- Excel
- PowerPoint

Storage

- OneDrive cloud
- OneDrive for Business
- Team Sites

Collaboration Capabilities

- Collaboration Portals (SharePoint)
 - Intranets
 - Team Sites
- Skype for Business
- OneNote

Office 365 G3 Services

Big Picture

The Office 365 service offering is licensed in two levels:

- 1. Online only license which provides Outlook Web Access (OWA) 2013 and the suite of applications in Online only versions.
- 2. The Online and Desktop license provides all the online functions plus desktop versions of all Office 2016 applications for up to 5 desktops and offers additional data related capabilities **You now have this license**

Office 365 'G3' Capabilities	Desktop	Online	Notes	
(all 2013 versions)				
Outlook	Χ	(OWA)	Outlook Web Access (OWA) provides access to OneDrive	
Excel	Χ	X	Online version sets Print Area differently	
Word	Х	X	Online version does not track changes like the desktop version	
PowerPoint	X	X		
Skype for Business	X	X	Instant Messaging (IM), Video Conferencing, Scheduled online meetings / Webinars	
OneDrive	OneDrive for Business	X	1 TB of storage. Use to replace 'C', 'U' and other letter drives	
MS Access	X		Databases need upgrading before using MS Access 2013	
>> Special Data Features <<				
Archive	X	X	Unlimited file retention	
Encryption	Х		If G3 can encrypt emails	
Data Loss Protection	Χ	Χ	Ability to manage document distribution rules	

Office 365

Connectivity requirements

Because the Office 365 service is cloud based you need to be connected for certain capabilities. These are different between Online and Desktop levels of service.

DEP has the set of capabilities including Desktop and Online

Elements needing connectivity

Office 365 application type	Desktop	Online
Application Access	Available on computer	Requires Internet Connectivity
Access to data located on computer	Available on computer	Not accessible
Access to OneDrive based data	Uses OneDrive fo Business desktop agent	Requires Internet

Office 365 Applications

Office 365 Applications

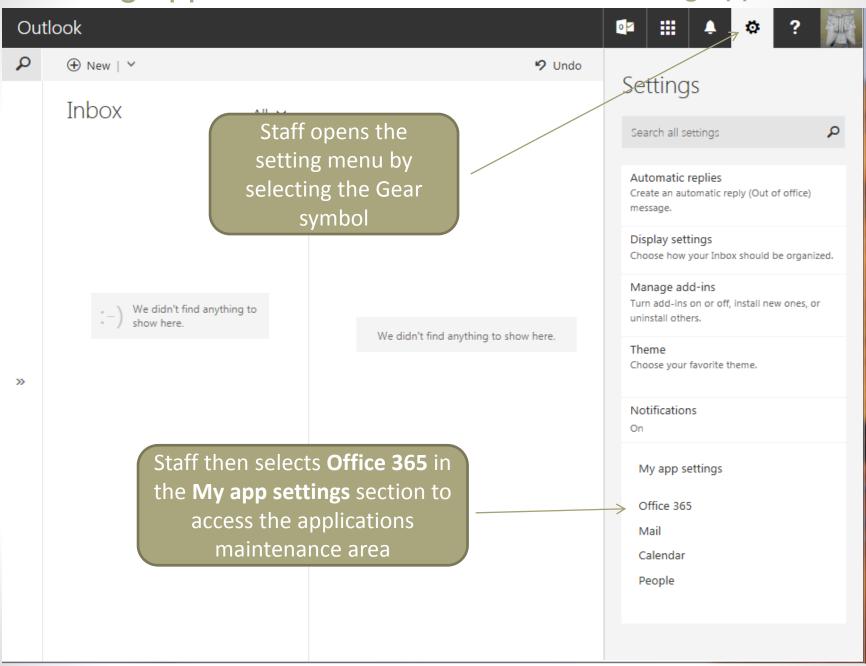
General Overview

General:

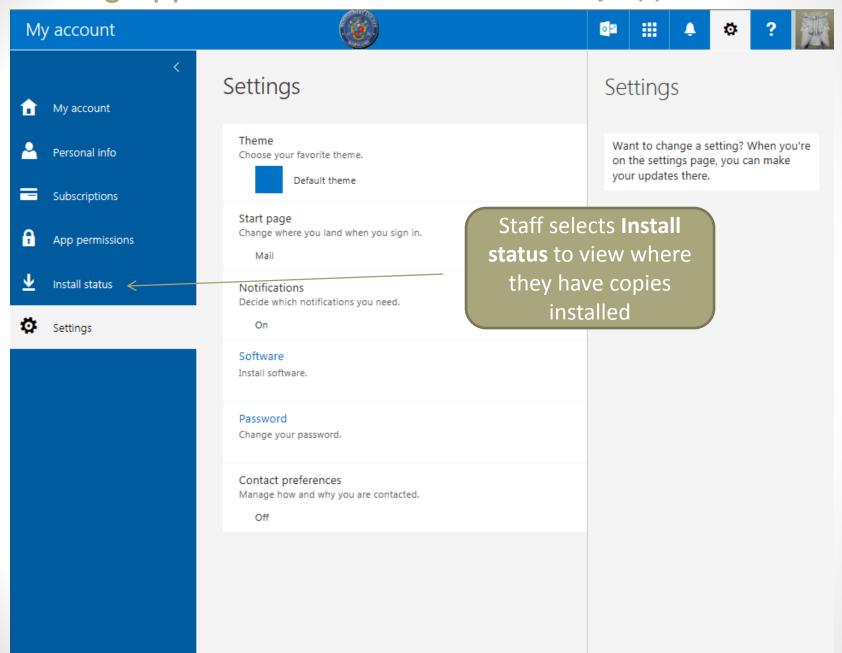
As part of Office 365, subscribers are offered the full suite of Office 365 computer based applications for up to five computers, five phones and five tablets. Although this has benefits, it is unwise to use applications you are not familiar with them unless you have business need to do so and have had training.

- Office General Applications / Tools
 - Includes: Excel, Outlook, PowerPoint, Word, OneDrive
 - All staff should use
- Office Specialized Applications
 - Includes: MS Access
 - Specialized needs use
- Collaboration Applications / Tools
 - Includes: Skype for Business, OneNote
 - Part of collaboration rollout activities

Downloading Applications



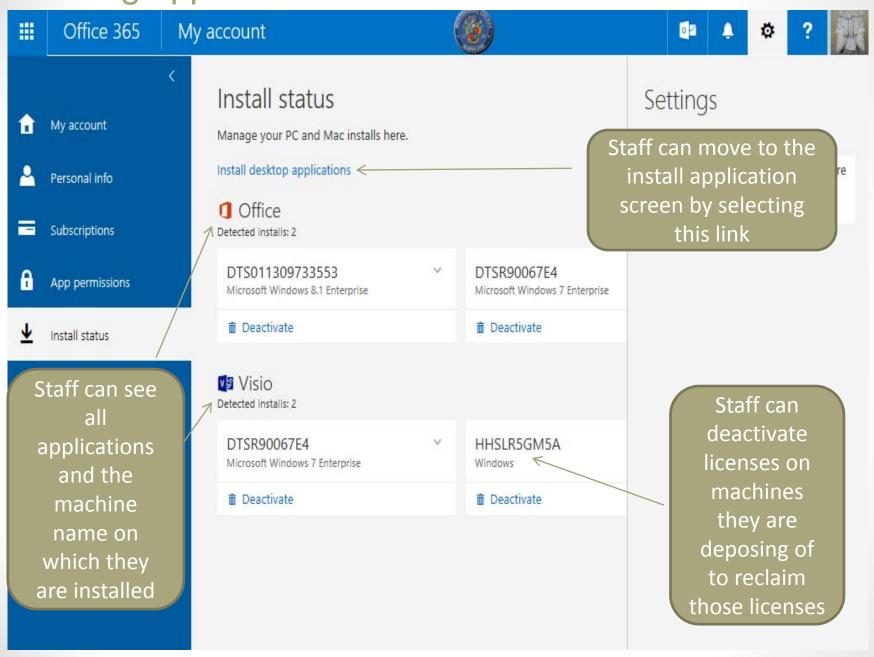
Verify Application Status



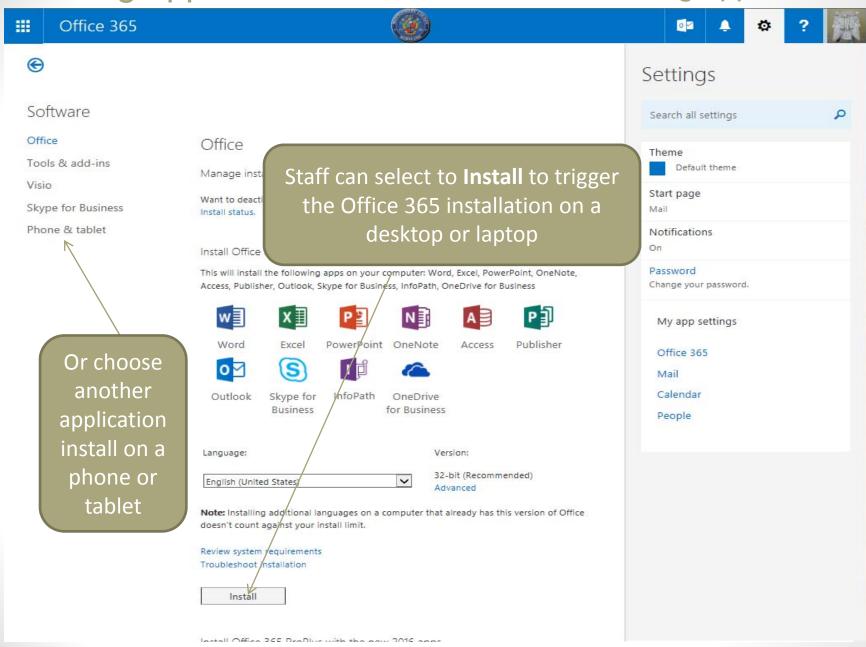
6

Installing Applications

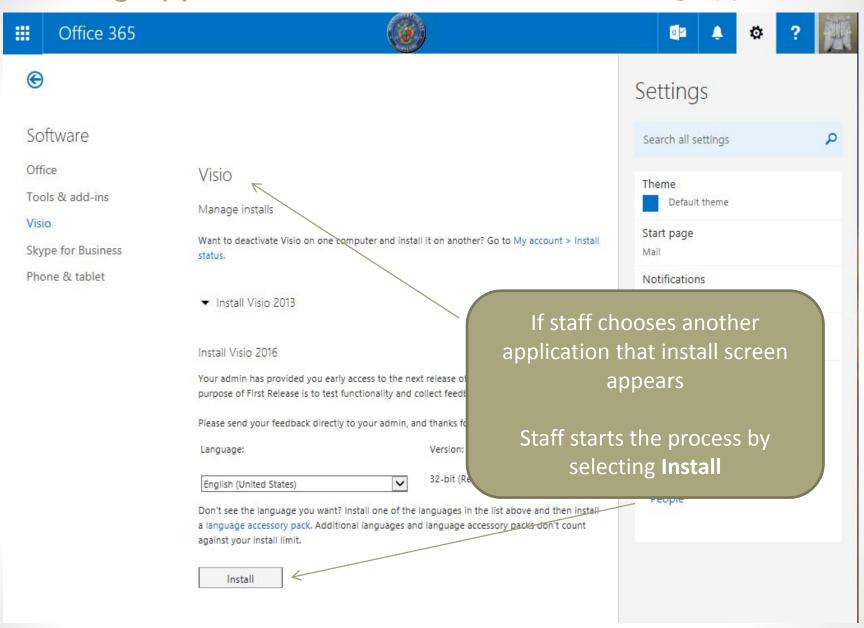
Confirm Install Status



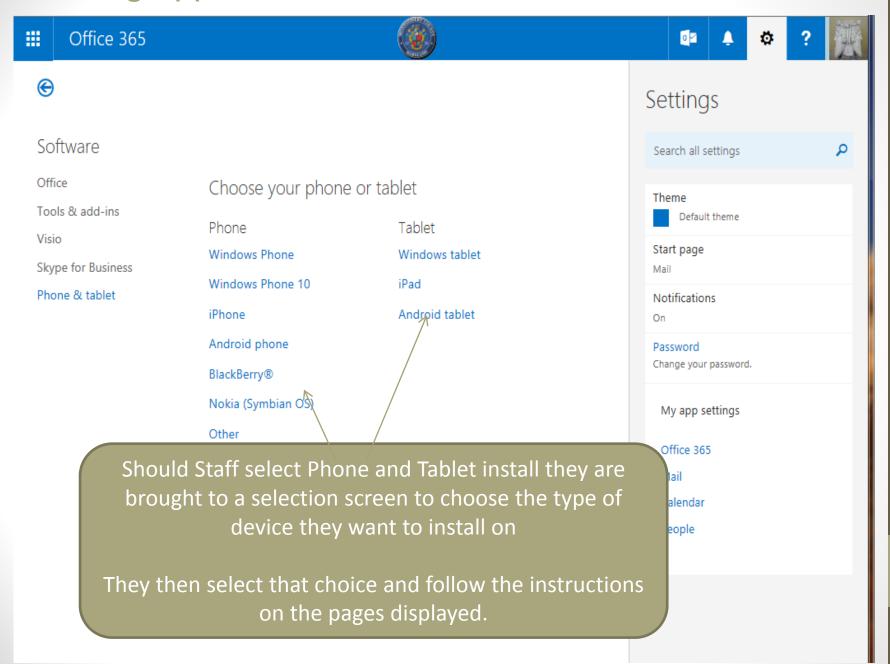
Installing Applications



Installing Applications



Phone & Tablet Installs

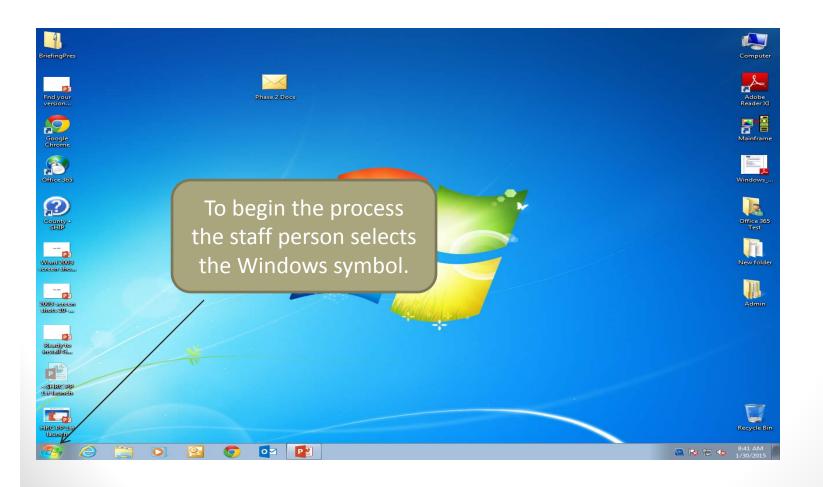


Activating applications

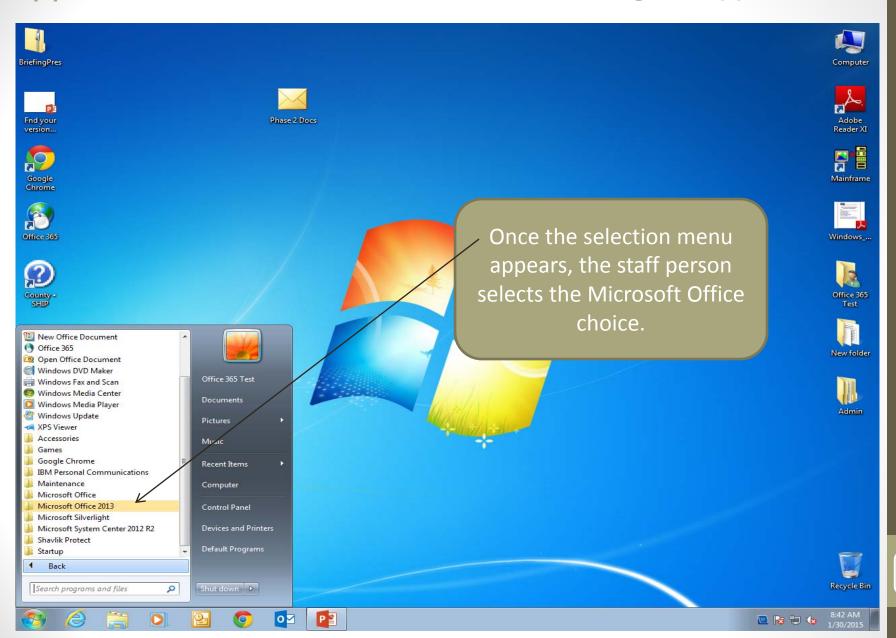
Activating the applications

The upgrade software will be downloaded and activated on your primary computer.

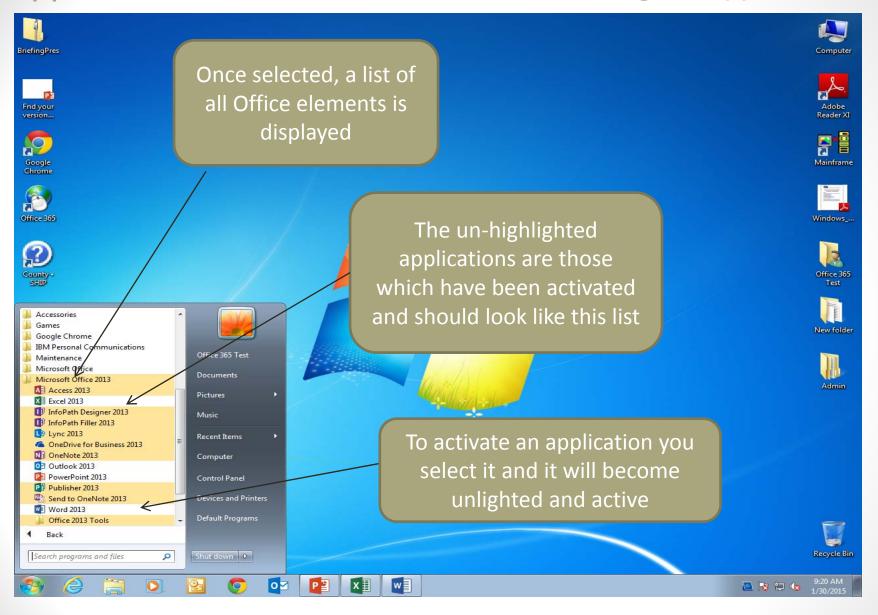
If you decide to load software on other machines you are able to do this. When you do the software will be loaded but needs to be activated before use.



Activating the applications



Activating the applications

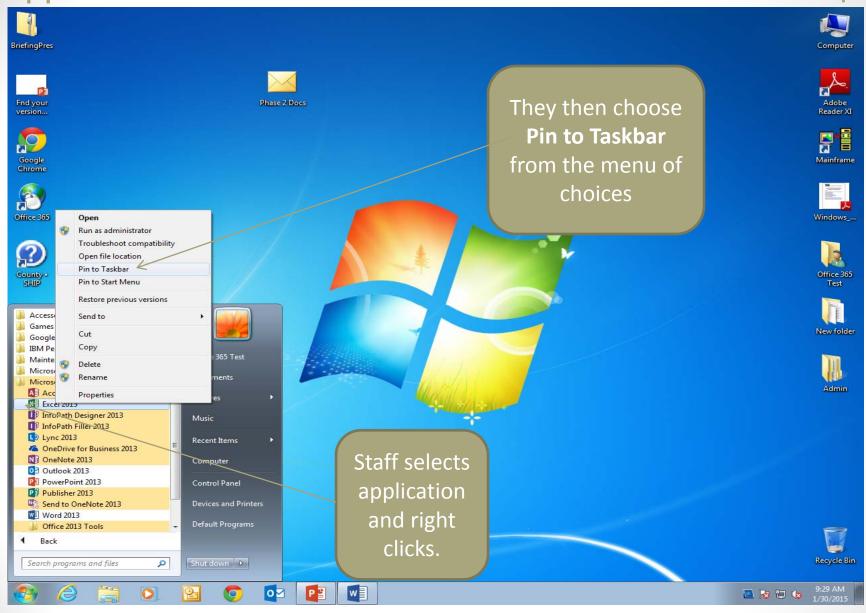


Note: Unless activated the applications will not operate

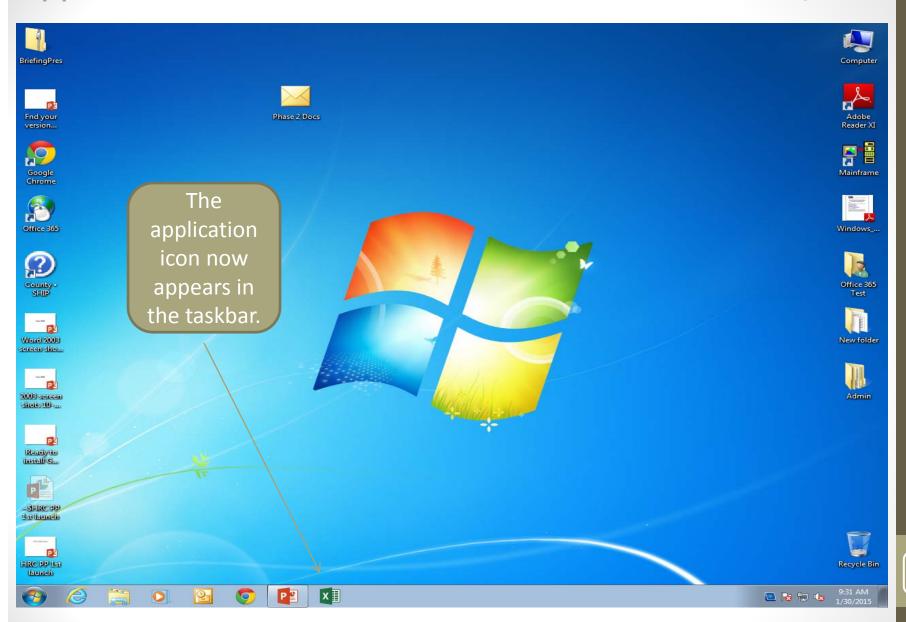
13

Pinning applications icons to the desktop

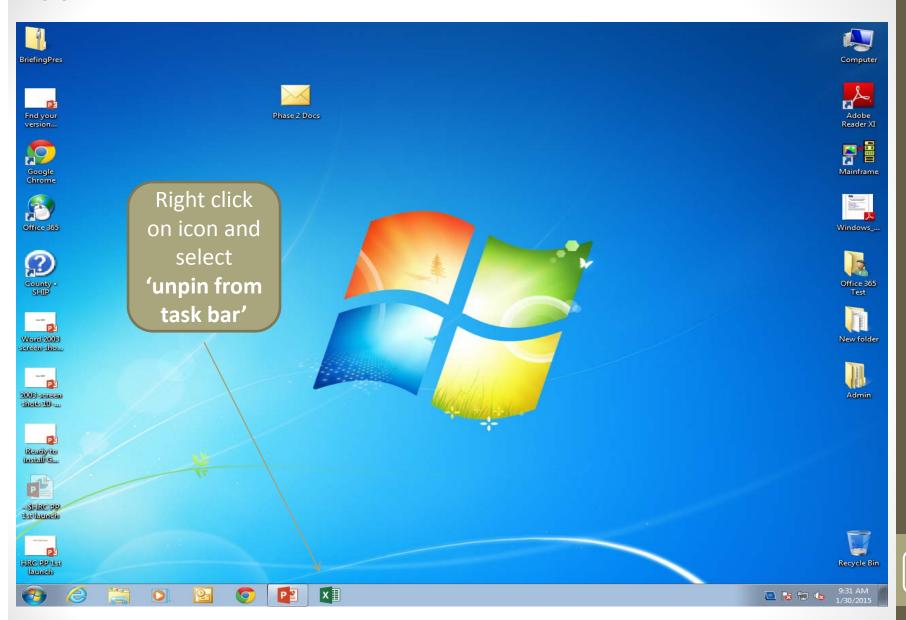
Pin Icon to desktop



Pin Icon to desktop



Remove Icon to desktop



Ribbon Interface

User Interface Changes

Ribbons and Tabs

Between Office 2003 and Office 2016 the Office application user interface changed dramatically. The concept of "ribbons" of functionality under each tab was introduced. Functionality was grouped and moved, and the interface became more consistent between applications

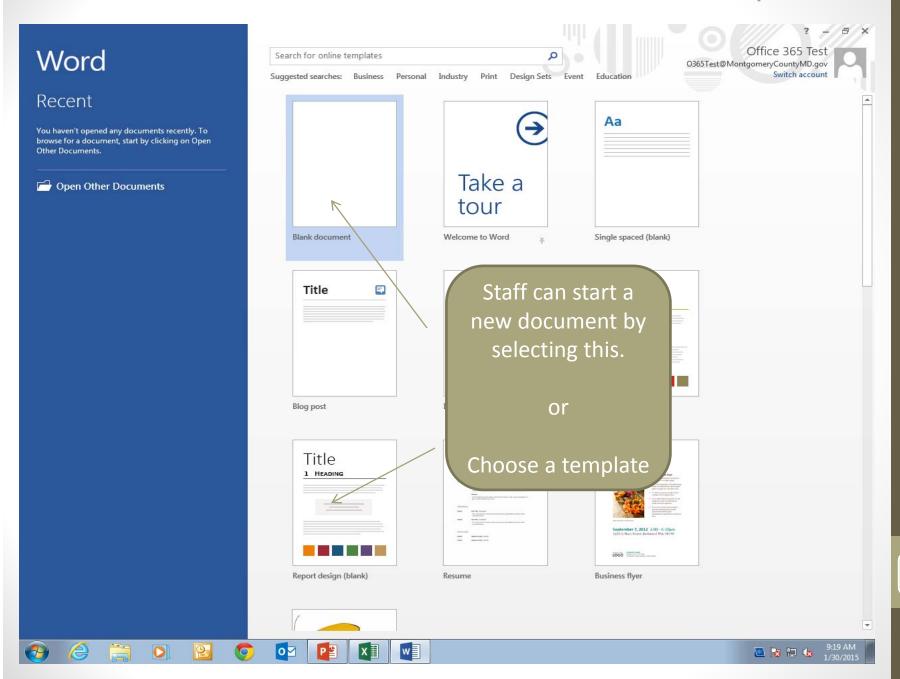
Ribbon Tab	General Purpose	Excel	Word	PowerPoint
File	Save, Open files on desktop or OneDrive	×	x	x
Home	General Document Formatting	x	х	Х
Insert	Things added into a document	x	х	х
Design	Template Design Themes	-	х	х
Page Layout	Margins, Fonts, Position	x	х	-
Formulas	Pre-defined math formulas	X	-	-
References	Index, Cross Ref, Table of Contents	-	x	-
Data	Inputting, Outputting Managing Data	x	-	-
Mailings	Mail merge, labels, mailing Lists	-	х	-
Transitions	Transitions between slides	-	-	х
Animations	Animation of text on a slide	-	-	x
Slide Show	View a PowerPoint slide show	-	-	х
Review	Spelling, track changes, translate	х	x	x
View	Print, edit, and other views	×	x	Х

NOTE: All the features are still there, just in different places

Desktop Word 2016 ribbon review

Word

Startup Screen



Word Ribbon Tabs



The HOME tab contains basic document editing and formatting features



The INSERT tab contains items that can be added to a document such as pictures, text, tables...



The DESIGN tab contains template design themes



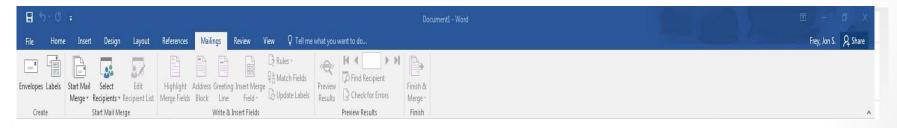
The PAGE LAYOUT tab contains document layout items such as margins, fonts, position

Word Ribbon Tabs



The REFERENCES tab contains functions for indexing, cross referencing and Table of Contents

MAILINGS

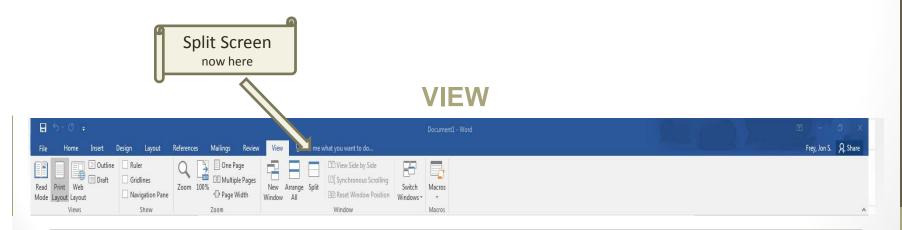


The MAILINGS tab contains functions for mail merge, labels, mailing lists. etc.

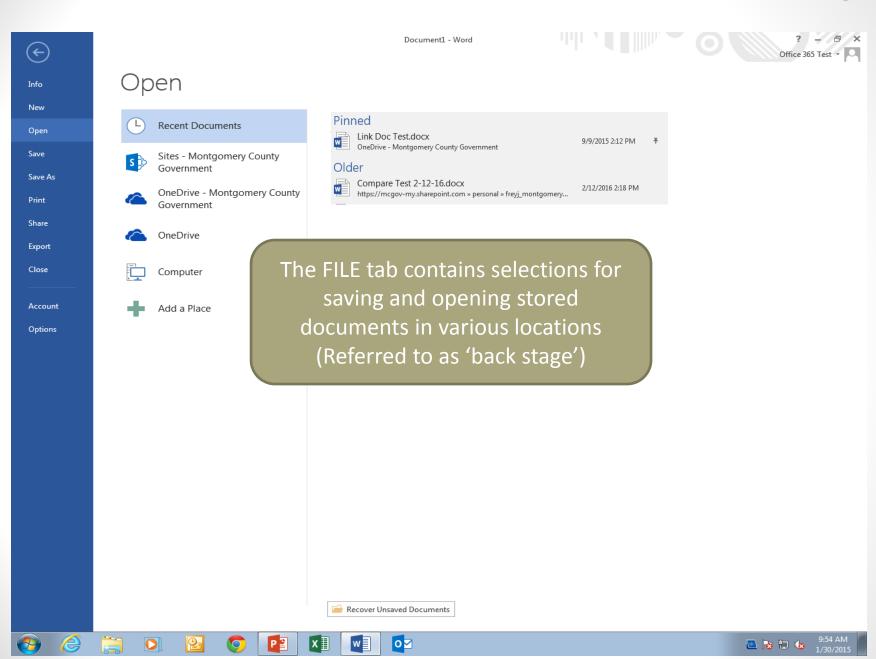
Word Ribbon Tabs



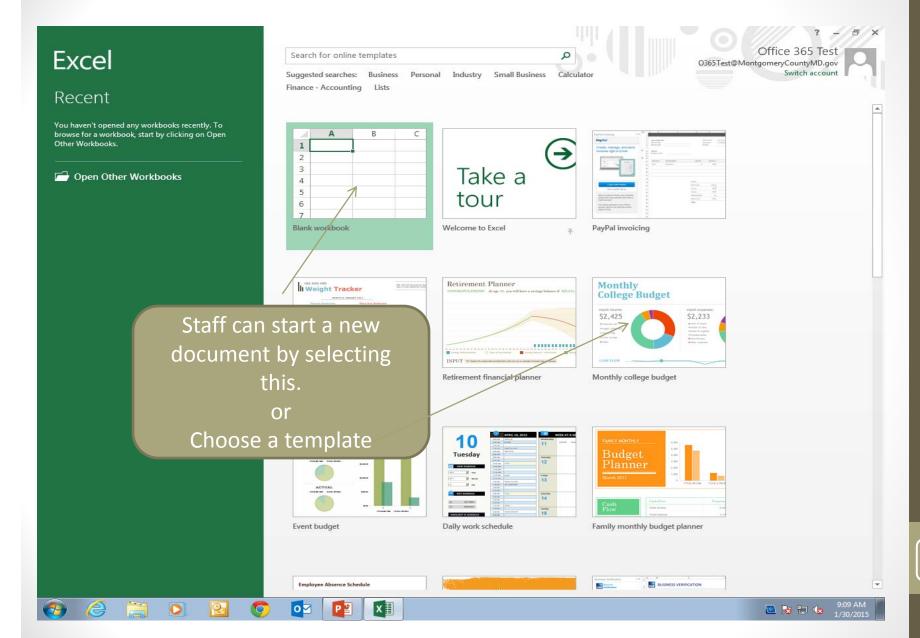
The REVIEW tab contains things that are used to review a document such as spell check, track changes, etc....

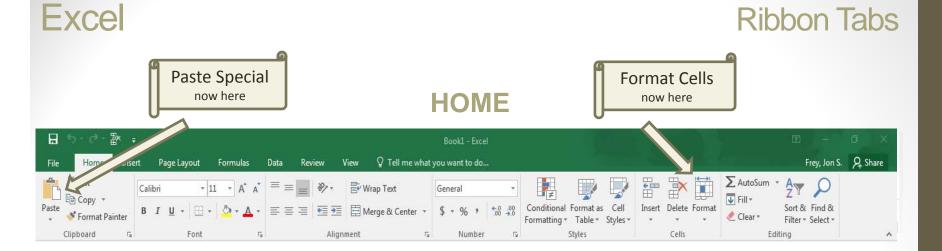


The VIEW tab contains functions for print, edit and other views

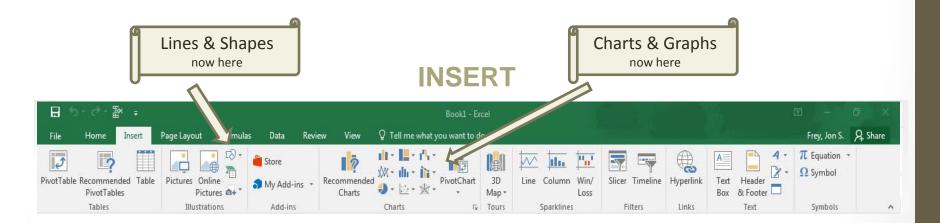


Desktop Excel 2016 ribbon review





The HOME tab contains basic document editing and formatting features



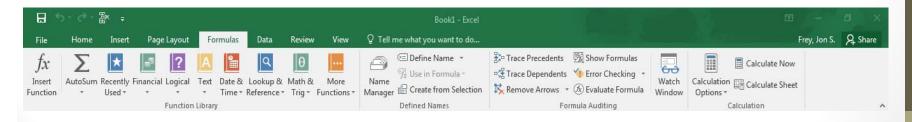
The INSERT tab contains items that can be added to a document such as pictures, text, tables...

Excel Ribbon Tabs

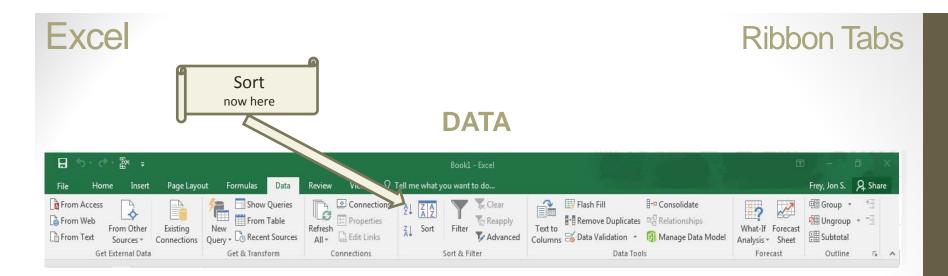


The PAGE LAYOUT tab contains document layout items such as margins, fonts, position

FORMULAS



The FORMULAS tab contains pre-defined math formulas

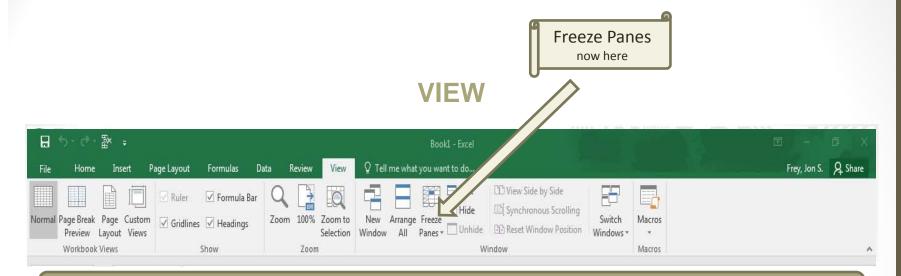


The DATA tab contains functions for inputting, outputting and managing data



The REVIEW tab contains things that are used to review a document such as spell check, track changes, etc....

Excel Ribbon Tabs



The VIEW tab contains functions for printing and other views

Excel - Tabs

 \bigcirc

Info

New

Save

Save As

Print

Share

Export

Close

Account

Options

File – (backstage)



Transition Briefing – Ribbon Interface

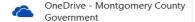
Office 365













Computer

Add a Place



Book1 - Excel

The FILE tab contains selections for saving and opening stored documents in various locations (Referred to as 'back stage')































Desktop PowerPoint 2016

ribbon review

PowerPoint

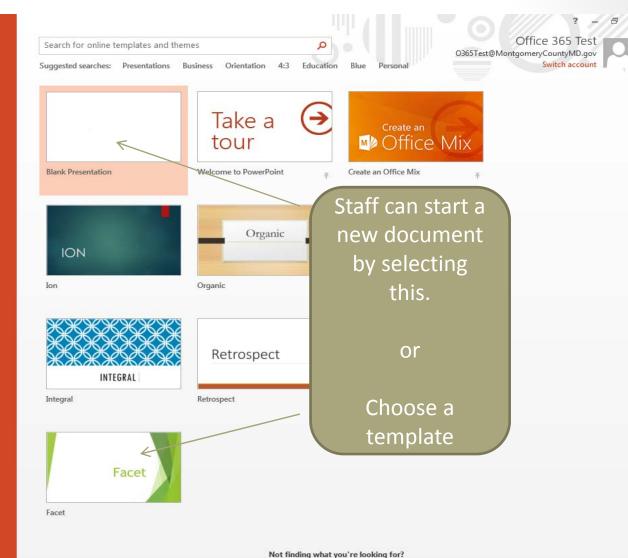
Startup



find your version My Documents

Open Other Presentations

Outlook 2003 Screens (7-2-14)





Use the search box at the top to find more templates and themes.

















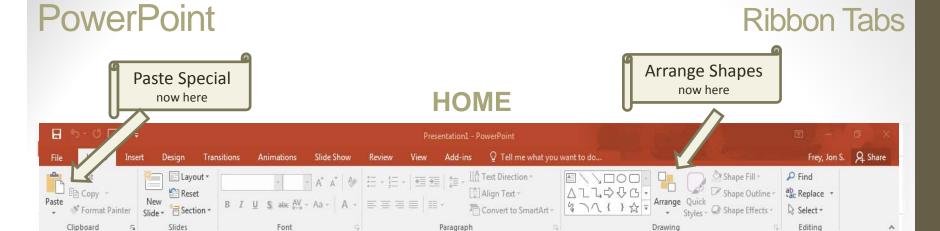










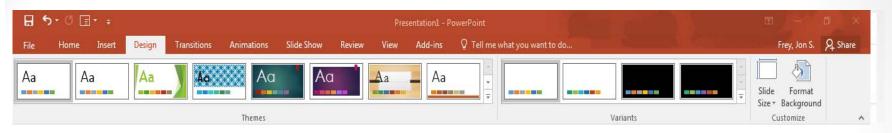


The HOME tab contains basic document editing and formatting features

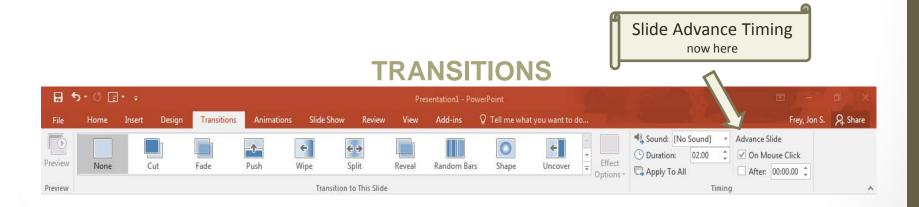


The INSERT tab contains items that can be added to a document such as pictures, text, tables...

DESIGN

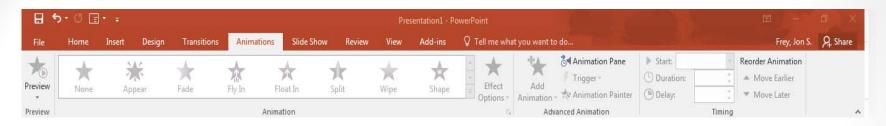


The DESIGN tab contains template design themes



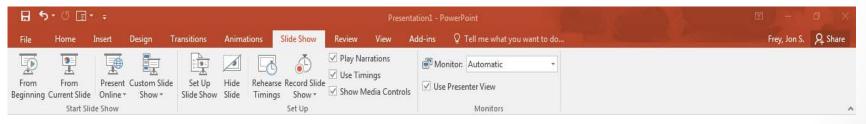
The TRANSITIONS tab contains selections for various transition animation between slides

ANIMATIONS



The ANIMATIONS tab contains selections for various animations of elements on the slide

SLIDE SHOW



The SLIDE SHOW tab contains selections for various ways to view the presentation

PowerPoint

Ribbon Tabs

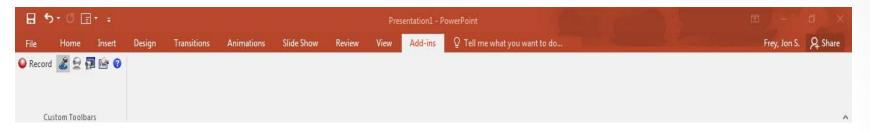


The REVIEW tab contains things that are used to review a document such as spell check, comments, etc....



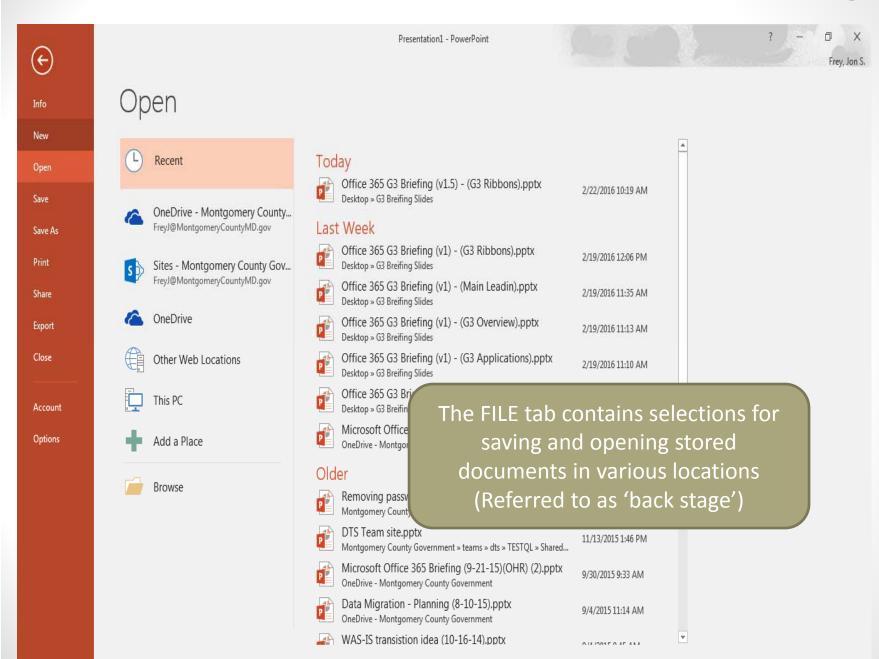
The VIEW tab contains functions for print, edit and other views

Add-ins



The Add-ins tab contains items that are part of other applications integrated with this product

24

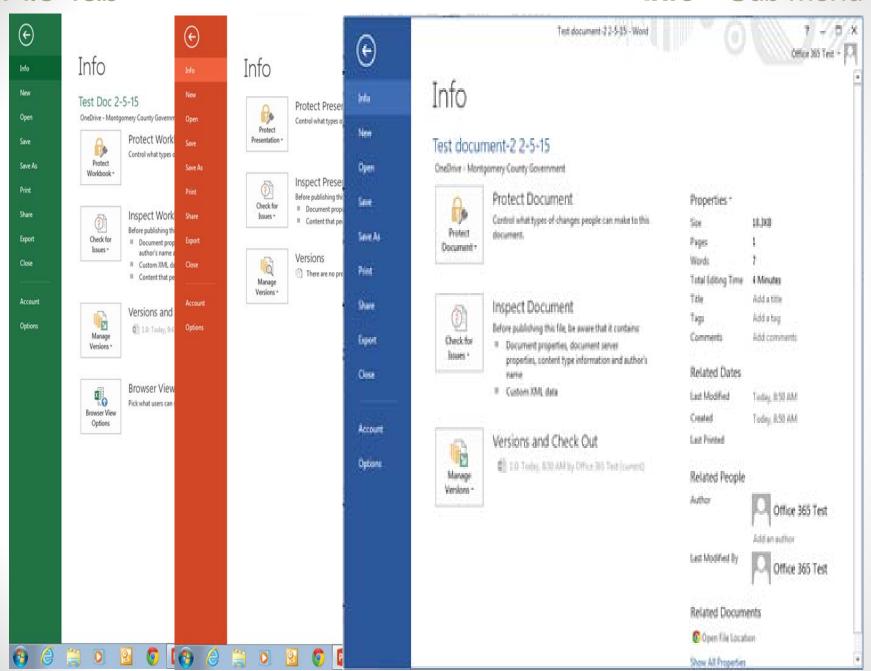


File Tab (backstage) Sub-Menus

26

File Tab

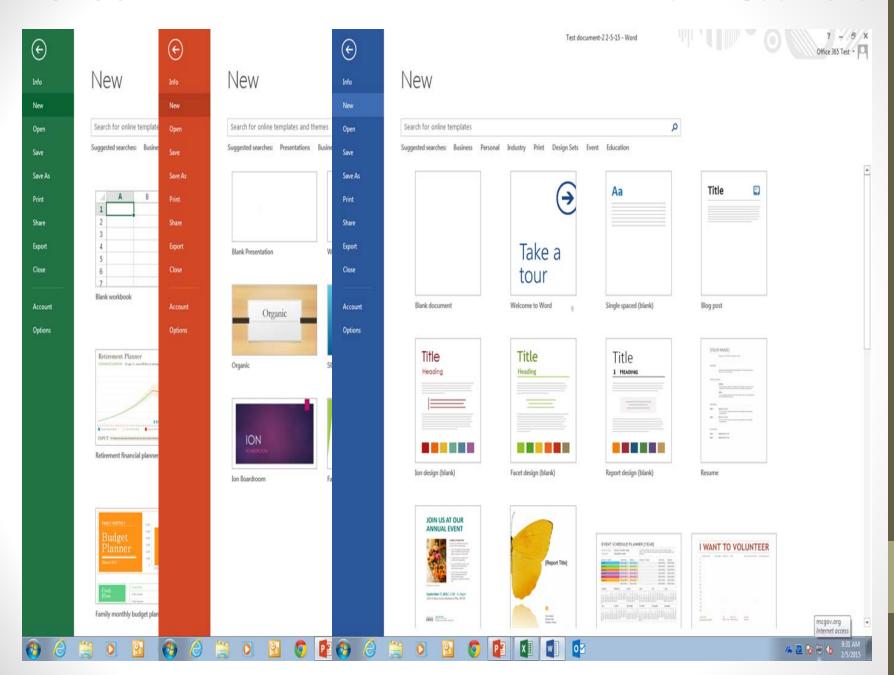
Info - Sub Menu



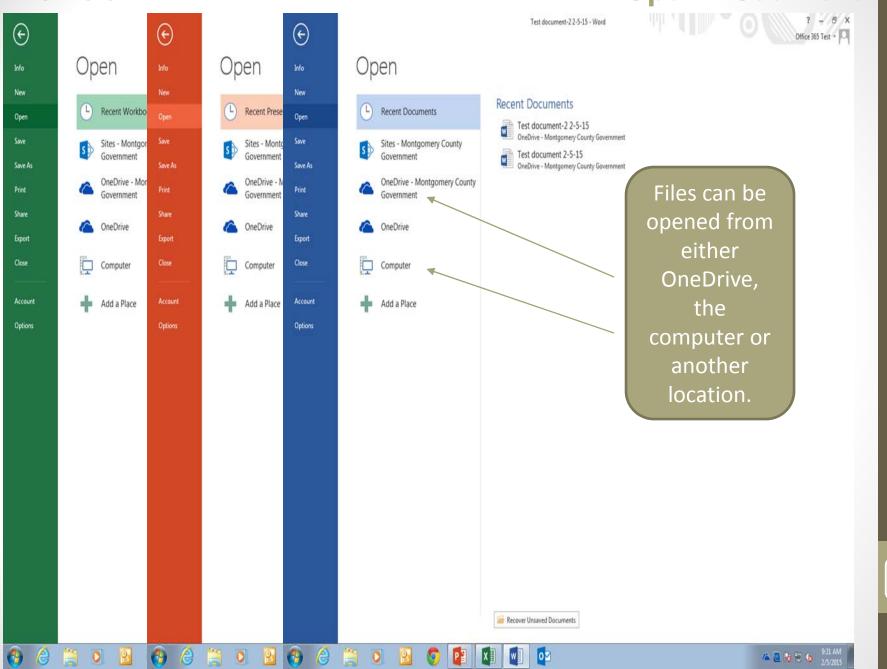
Office 365 – Transition Briefing – Ribbon Interface

File Tab

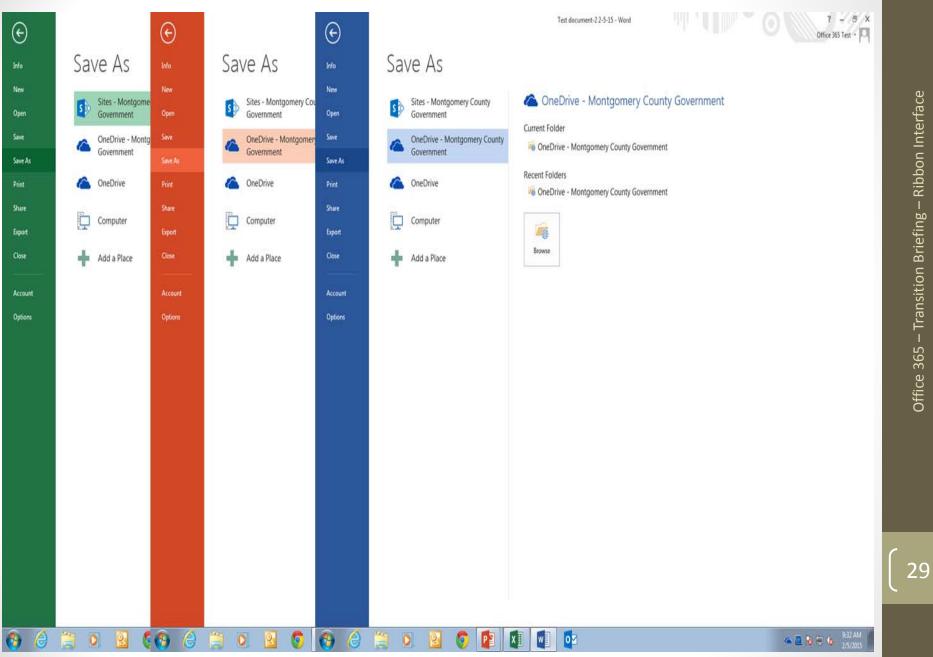
New - Sub Menu



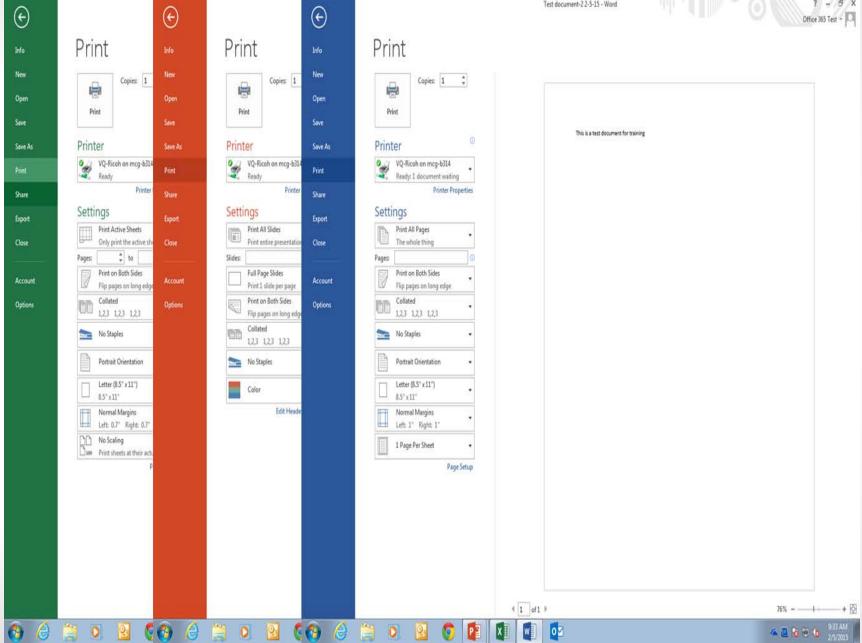
Open – Sub Menu

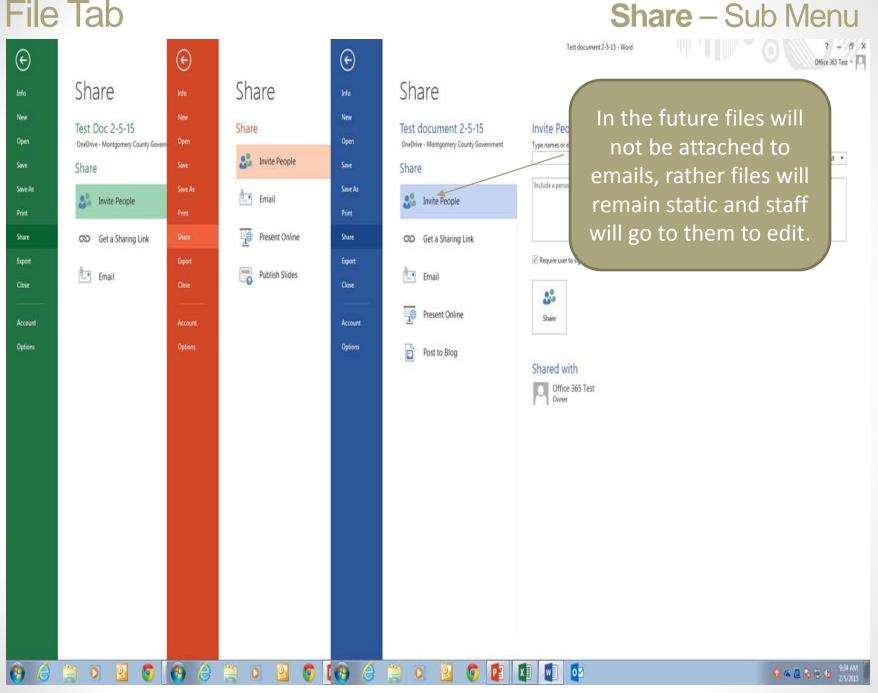


Save As – Sub Menu

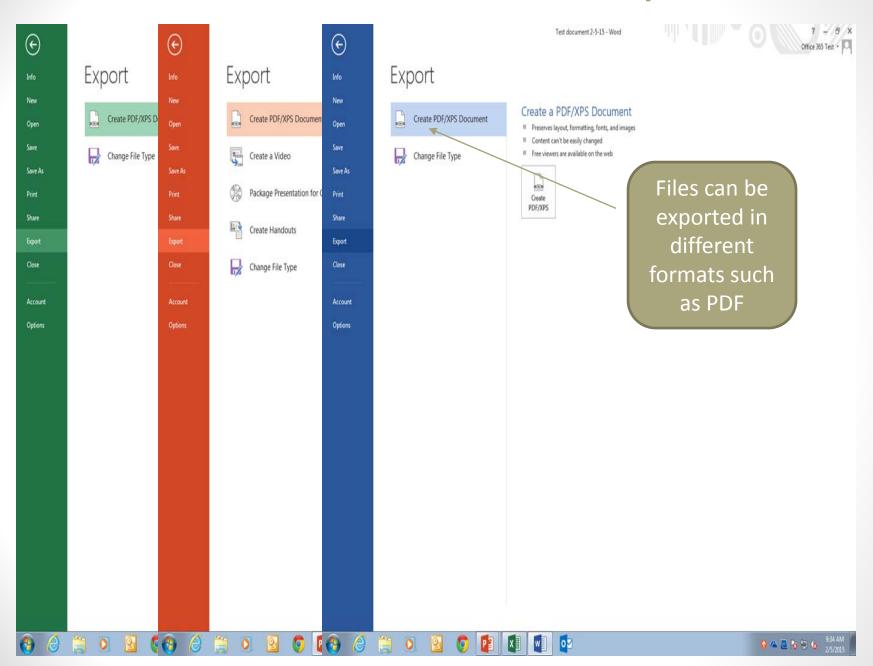


Print - Sub Menu Test document-22-5-15 - Word



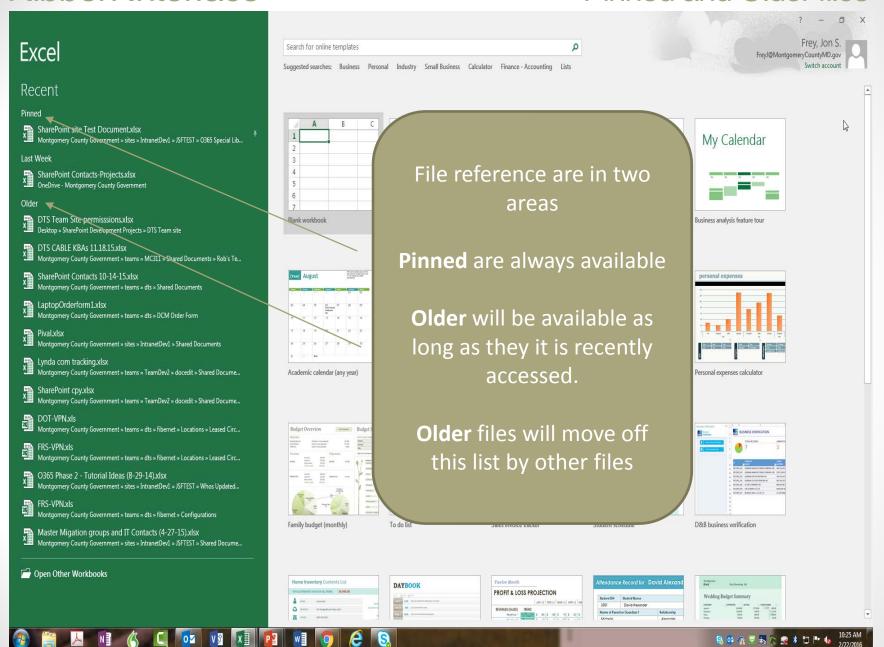


Export – Sub Menu

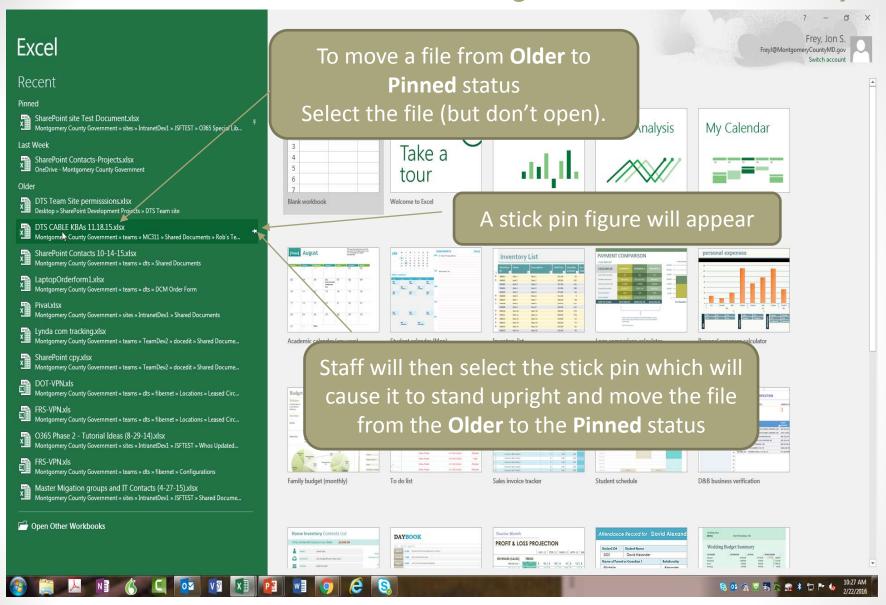


Pinning file references

Pinned and Older files

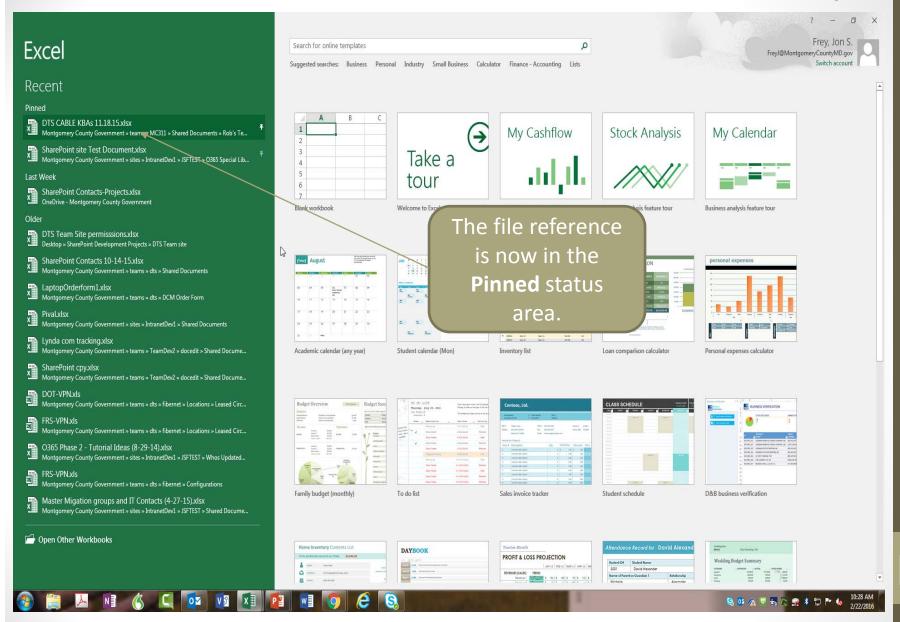


Moving file from Recent to Always



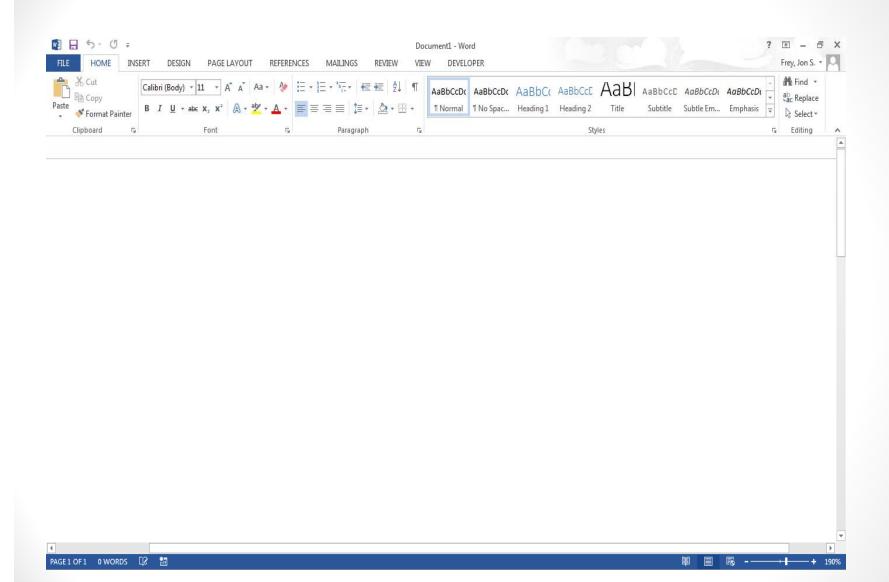
OneDrive

File is now Always

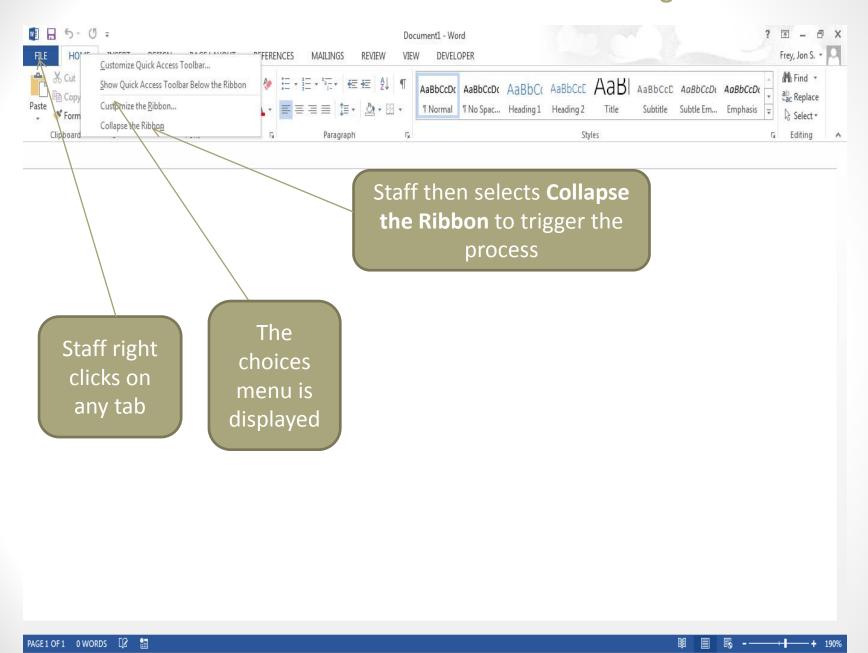


Display / Hide Ribbons

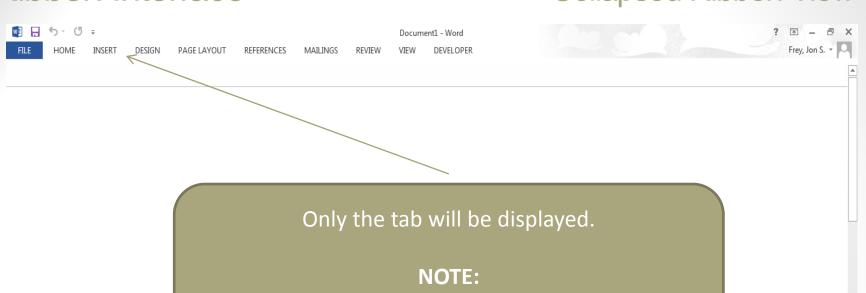
Expanded Ribbon View



Change Ribbon View



Collapsed Ribbon View

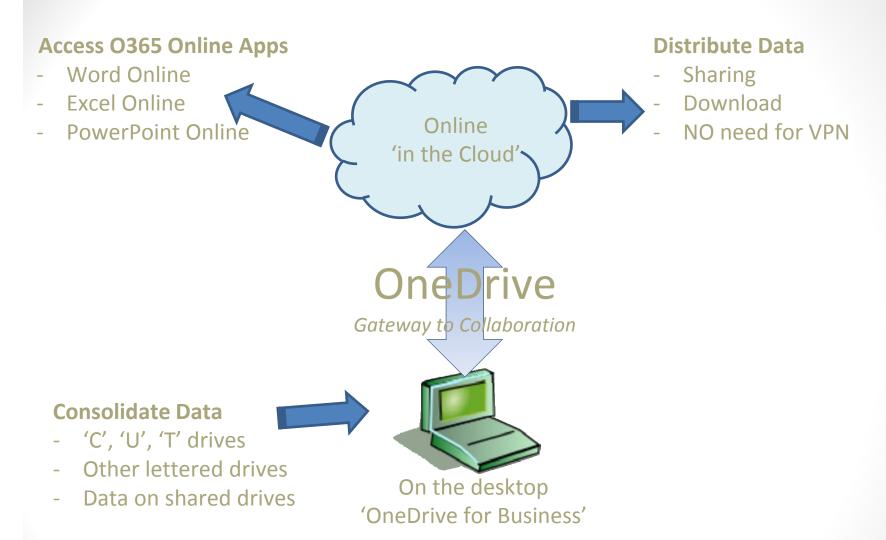


Every time you wish to perform a function the ribbon is displayed and then retracts after.

OneDrive Overview

OneDrive

Gateway to Collaboration



OneDrive is a cloud based mass storage facility for staff specific data. Items found in desktop 'C' and server based 'U' and 'T' drives are what should be placed in OneDrive

OneDrive

OneDrive cloud – OneDrive for Business

General:

OneDrive is actually two products, One element is in the cloud (OneDrive cloud), and the other element (OneDrive for Business), is on your desktop. They work with each other to help to manage the user experience while keeping all the data synchronized.

It provides a great deal of storage (1 TB) which can be shared and accessed from basically anywhere. (although OneDrive online is only accessible if one has Internet connectivity).

When you place or update a file in either OneDrive cloud or OneDrive for Business the data will be synchronized with the other automatically

Accessing OneDrive:

Online:



Use desktop Icon to launch Office 365
OneDrive online is accessible from there

Desktop: (OneDrive for Business)



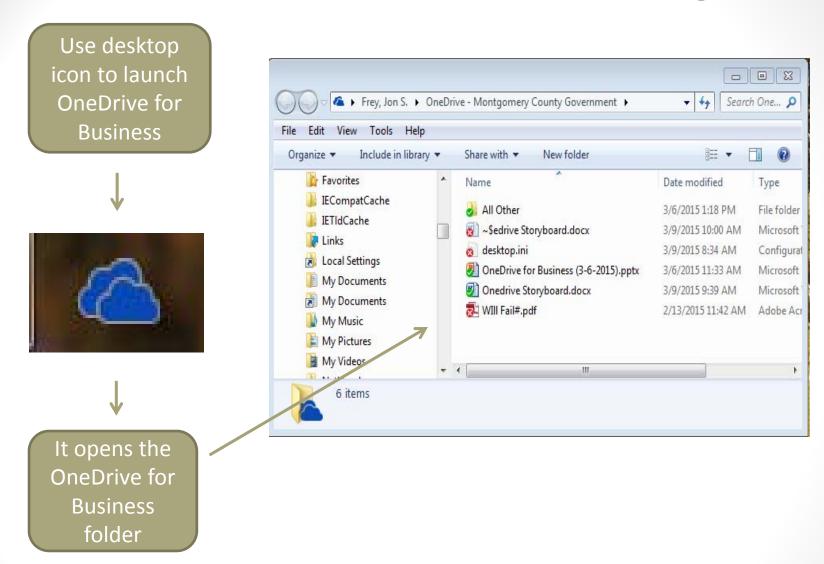
Accessed from the desktop like a file folder

3

OneDrive for Business

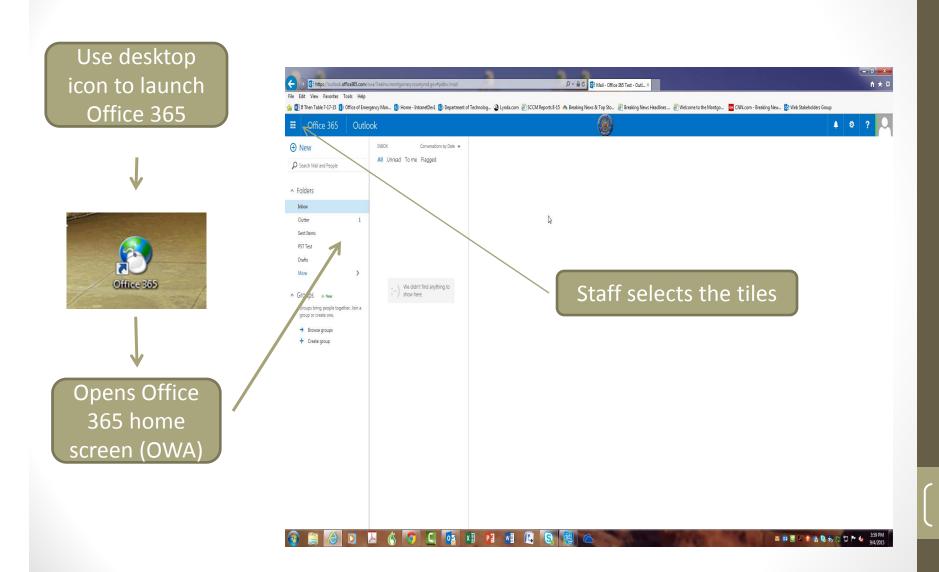
OneDrive for Business

Starting OneDrive

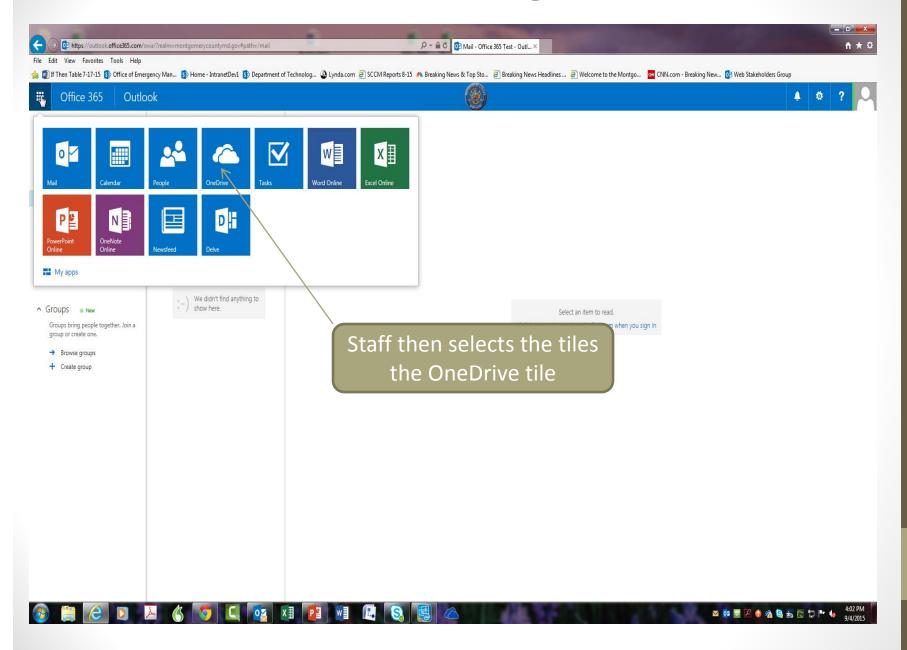


Note: When you drag files from the desktop into OneDrive for Business they are moved and not copied and synching will begin with OneDrive online

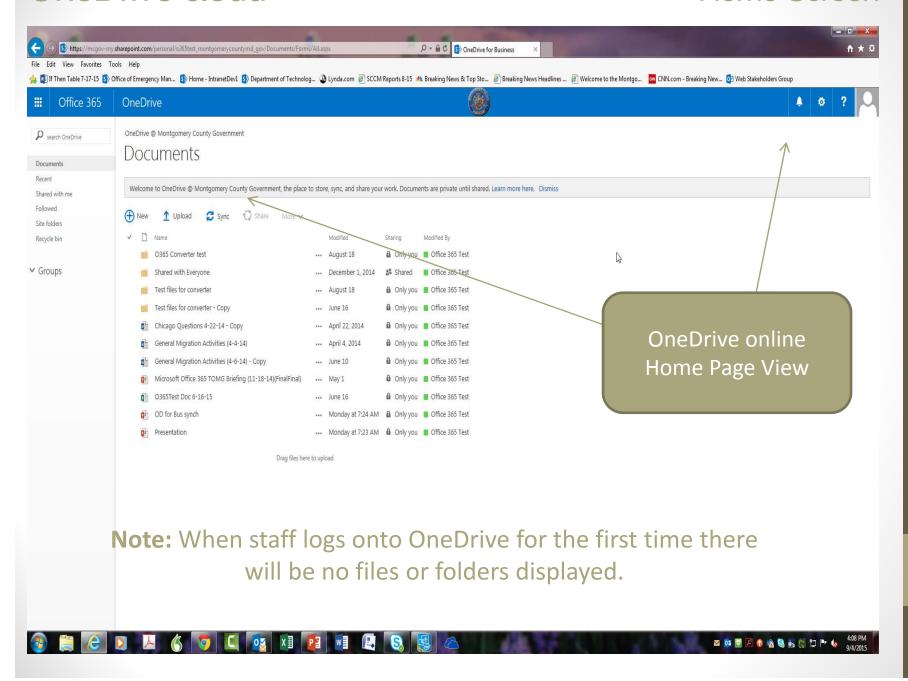
Starting OneDrive from Office 365



Selecting OneDrive from Office 365



Home Screen



Bad File Name Handling

OneDrive

Illegal Characters / File Types

Invalid file or folder name characters

If a file or folder you're trying to upload to OneDrive for Business contains any of the characters listed below, rename the file or folder to remove these characters. The list of invalid characters is different on Office 365 and SharePoint 2013.

INVALID FILE OR FOLDER NAME CHARACTERS IN ONEDRIVE FOR BUSINESS ON OFFICE 365

Invalid file or folder name characters in OneDrive for Business on SharePoint 2013

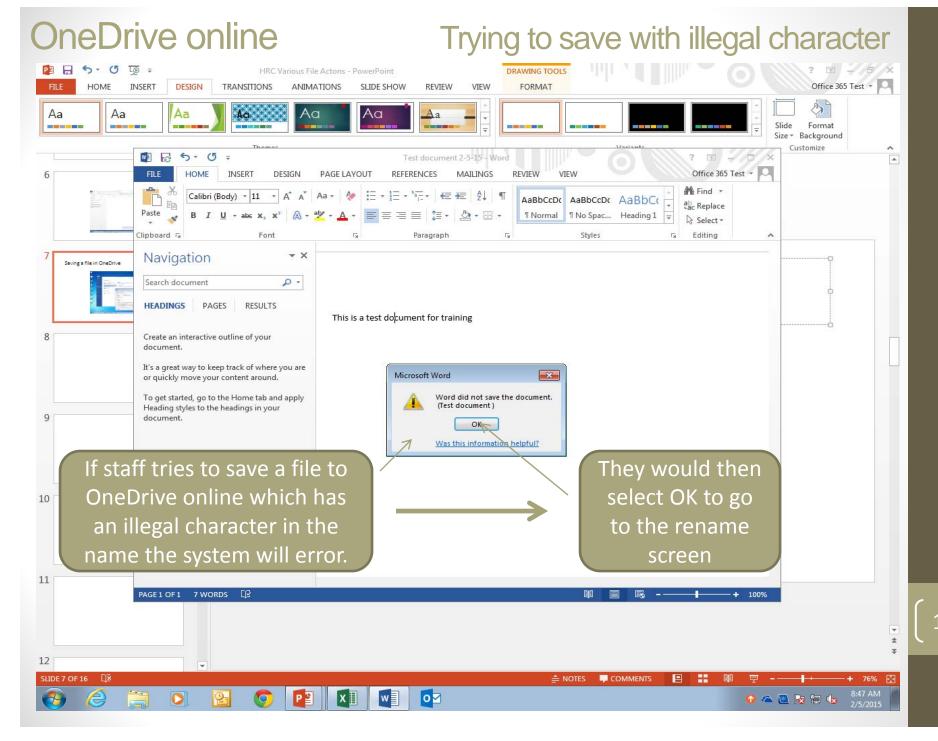
"#%*:<>?/\|

Invalid or blocked file types

You can't upload OneNote files, or files with a *.tmp or *.ds_store extension. Additionally, you can't upload desktop.ini, thumbs.db, or ehthumbs.db.

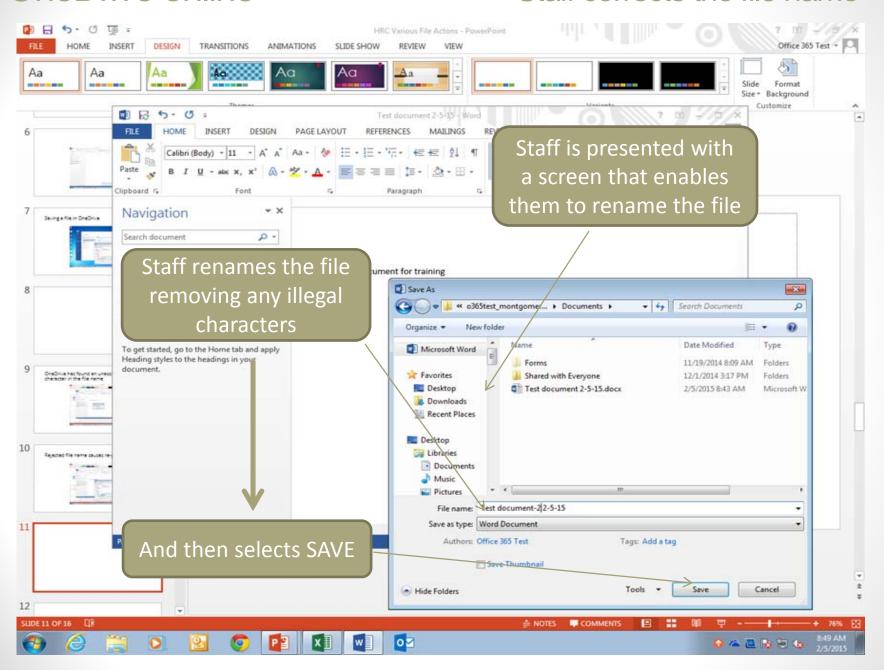
Additionally, you can't upload types of files that are blocked on the SharePoint site. If your organization is running SharePoint Server, the list of blocked files may vary depending on what your administrator sets up. If your organization is running SharePoint Online, the default list of blocked files is fixed and can't be changed. To see a list of the default blocked files, see Types of files that cannot be added to a list or library.

For more information about restrictions and limitations, like size limits for syncing files, and character limits for files and folders, see Restrictions and limitations when you sync SharePoint libraries to your computer through OneDrive for Business



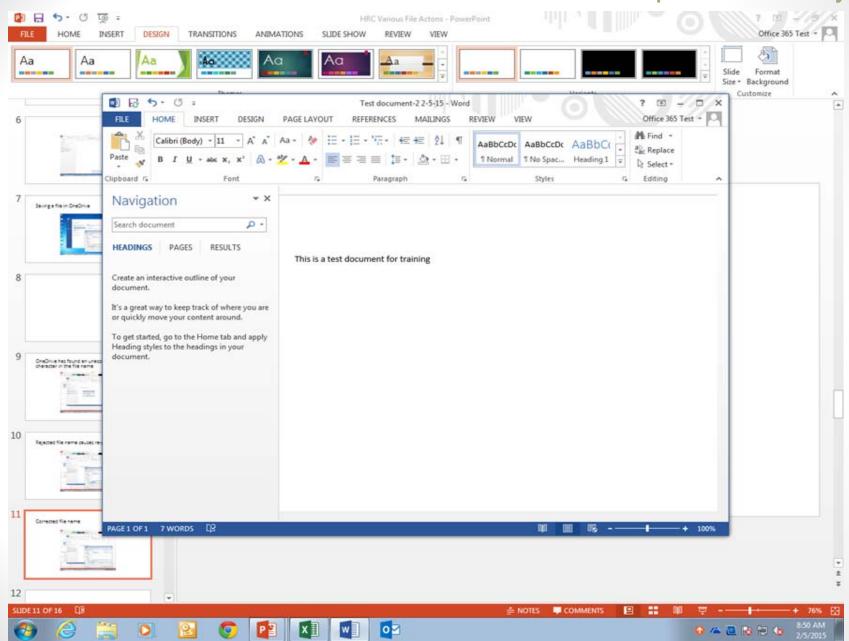
OneDrive online

Staff corrects the file name



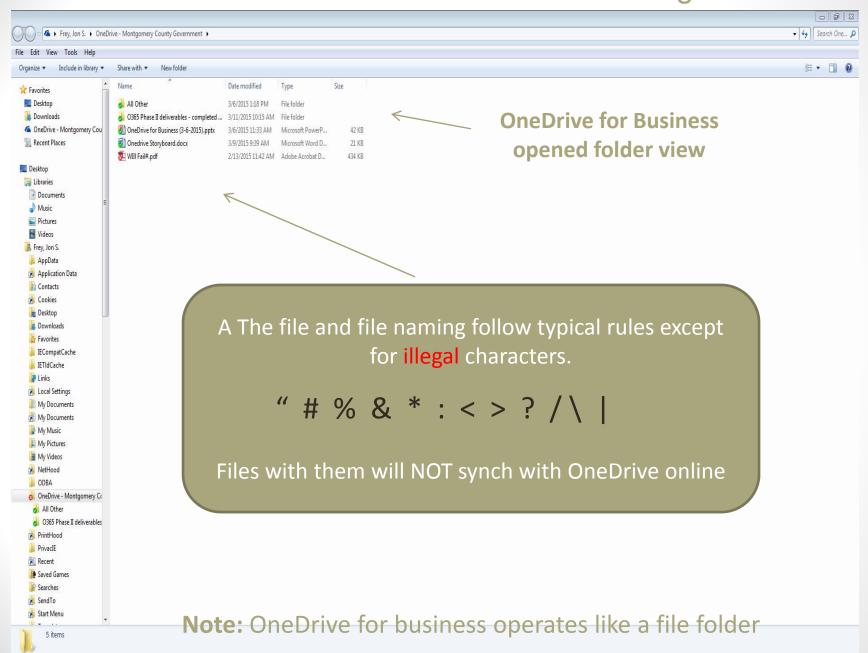
OneDrive online

Save Completes correctly

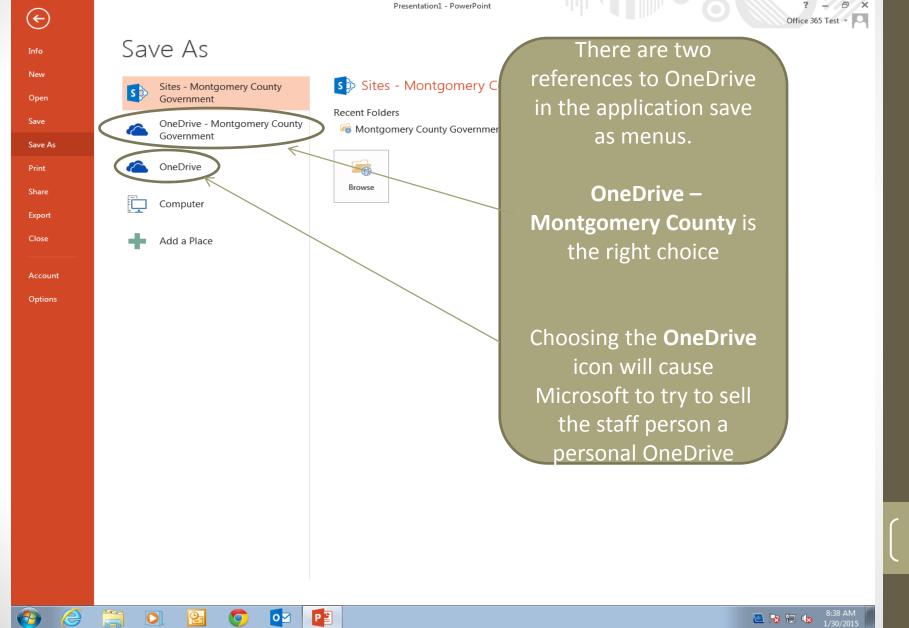


OneDrive

OneDrive illegal characters



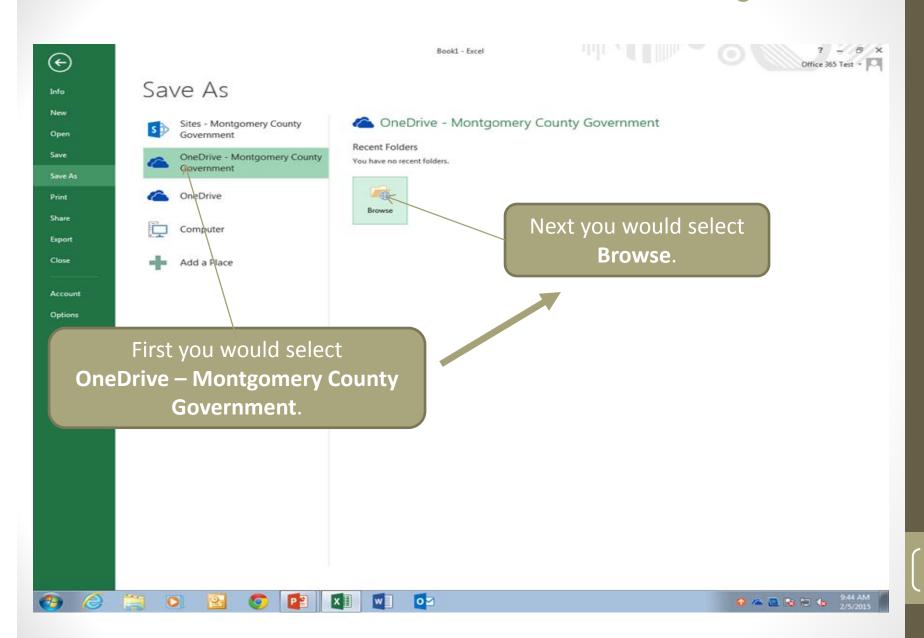
Saving data to OneDrive



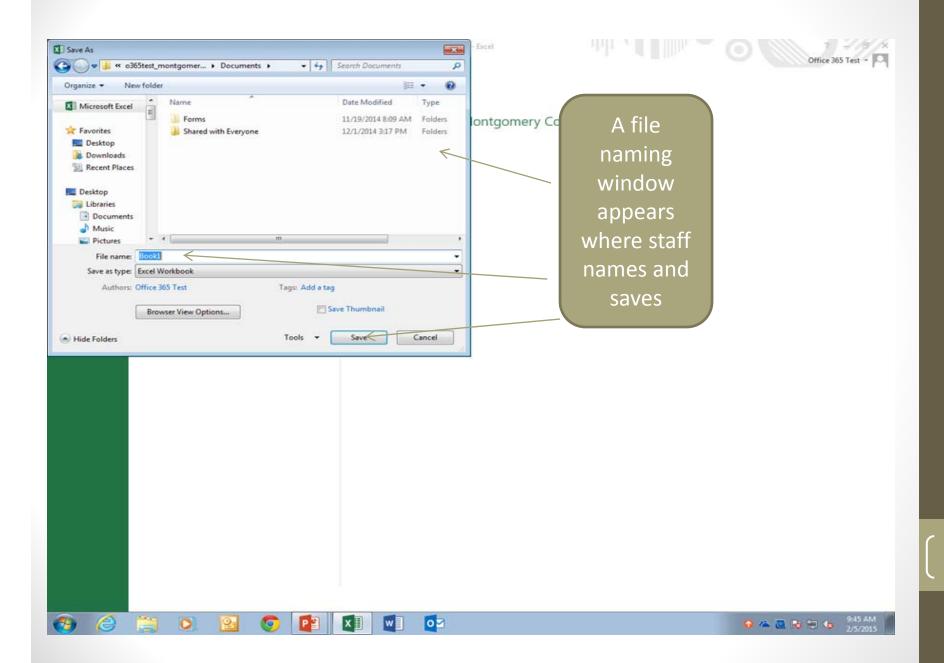
Save As - OneDrive online

Save As

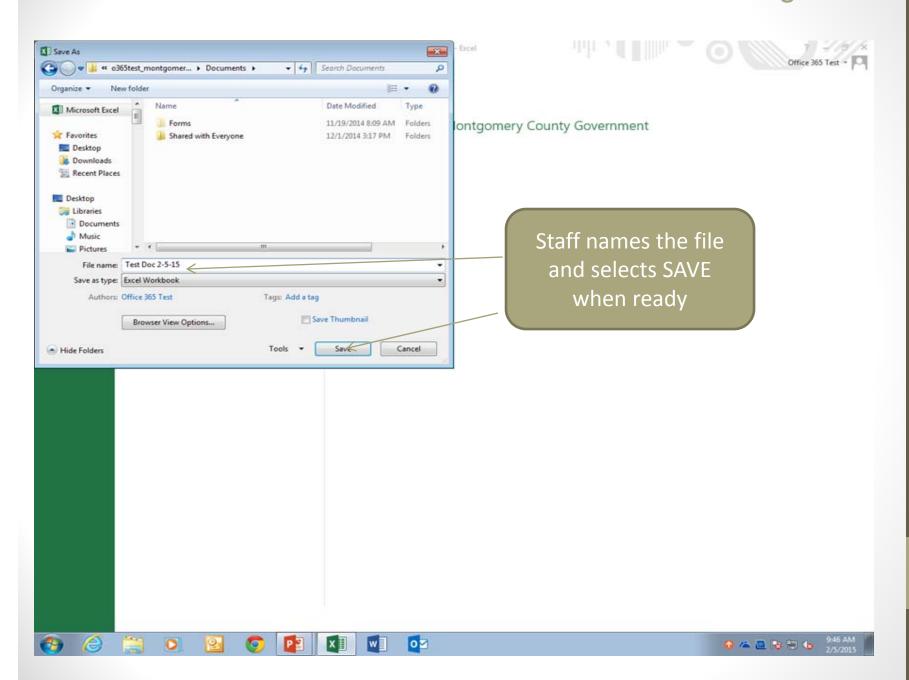
Selecting OneDrive



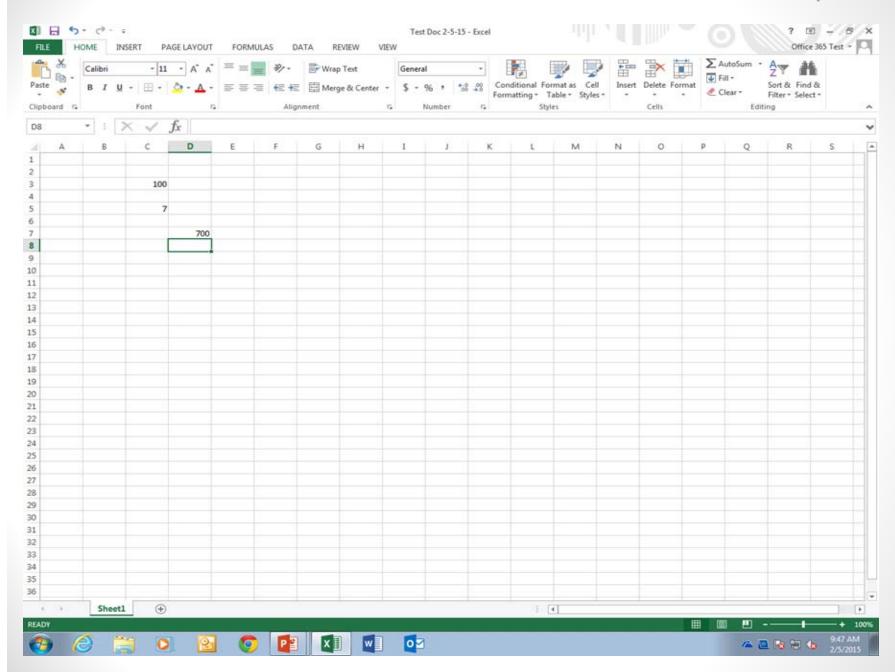
Save As - Naming of file



Save As – Saving the file

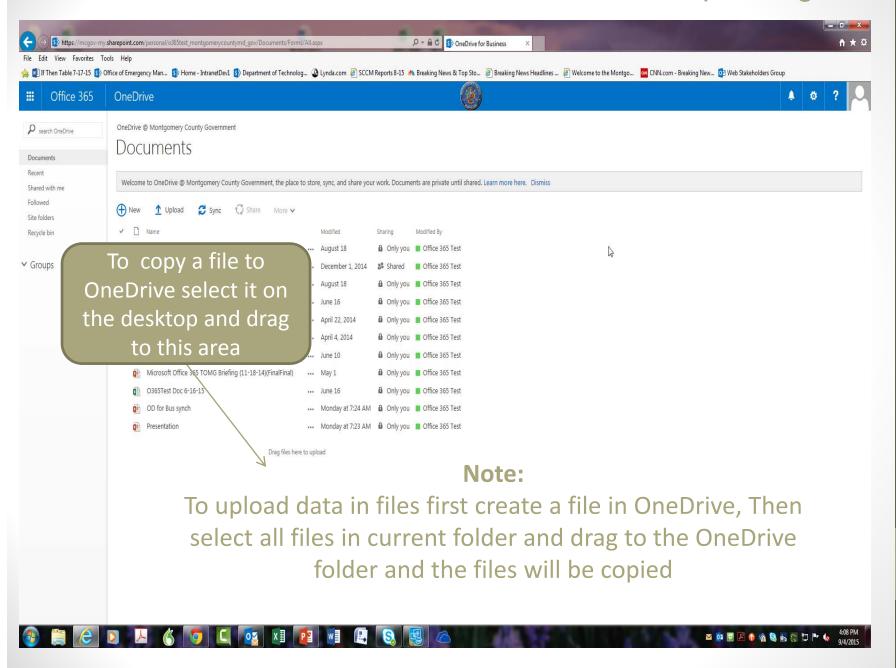


Save As – Save Complete



Uploading data to OneDrive

Uploading Data



Opening files from OneDrive

OneDrive

Opening Files

Moving PST Files

.pst stands for 'Personal Storage Table'

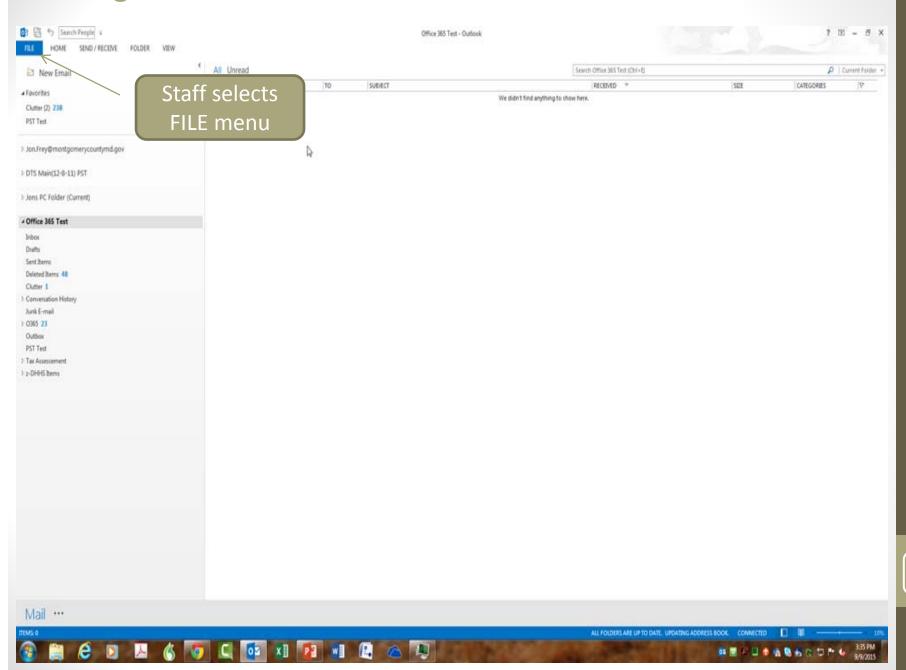
Most PST files were moved during mail migration

There is a best practice for moving PST files

PST files can take a long time to move

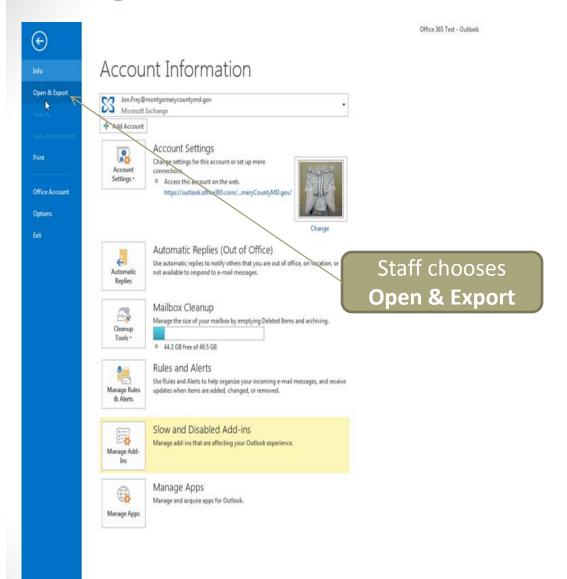
While moving PSTs desktop email will not be available

Use Outlook Web Access (OWA) during PST moves



? - 8 X

Moving PSTs



(S (G) C (D) X1 (E) W1

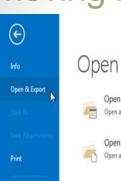
Select Open & Export

When the FILE tab opens the **Info** window is the default

03 ■ F □ 6 6 5 5 17 P 6 336 PM

Other User's Folder Open a folder shared by another user.

Select Import/Export



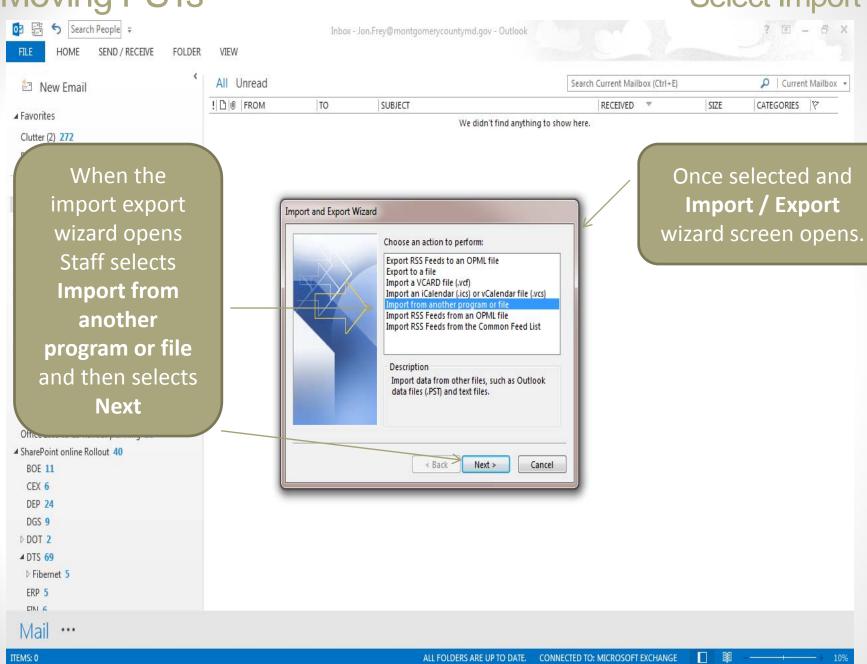
Office Account

Open Calendar Open a calendar file in Outlook (.ics, .vcs). Open Outlook Data File Open an Outlook data file (.pst). chooses Import/Export Import/Export
Import or export files and settings.

Once Open & Export menu is open, staff

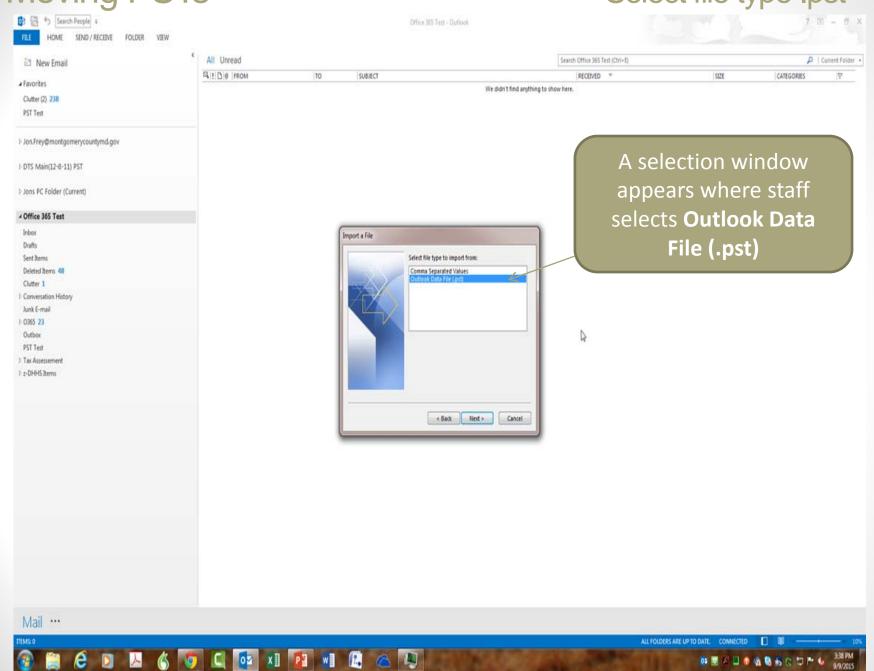
Office 365 Test - Outlook

Select Import

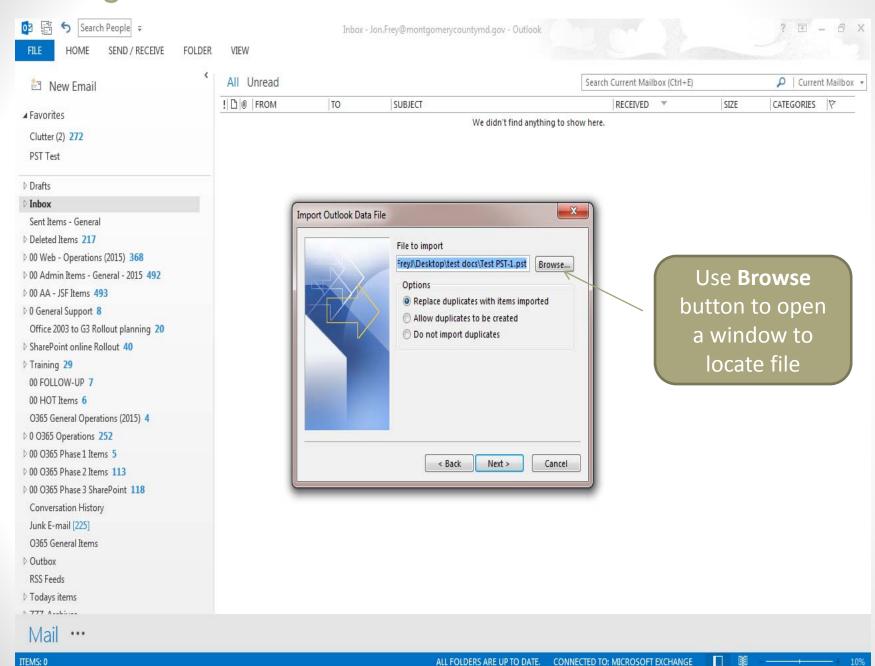




Select file type .pst

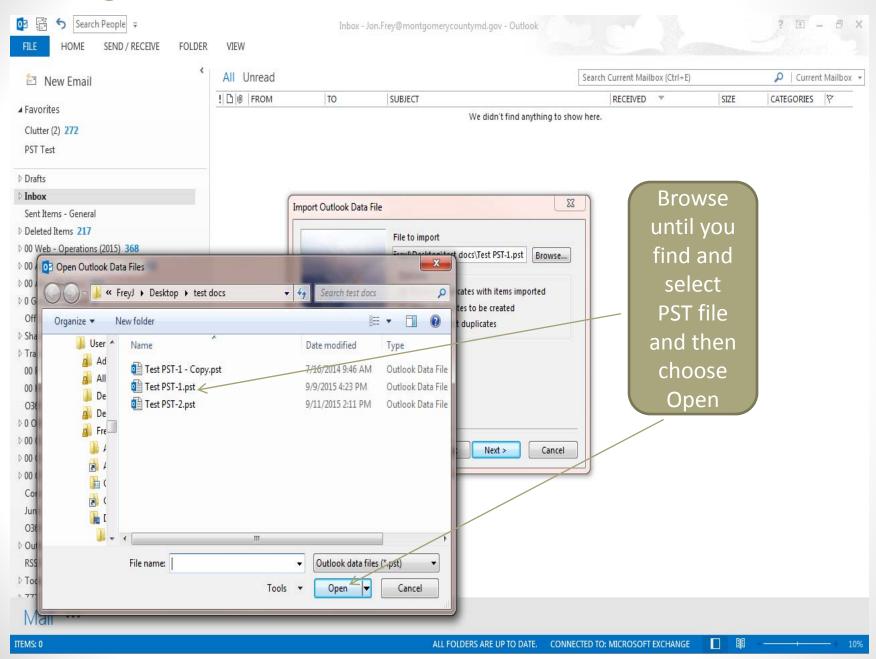


Choose Location of PST



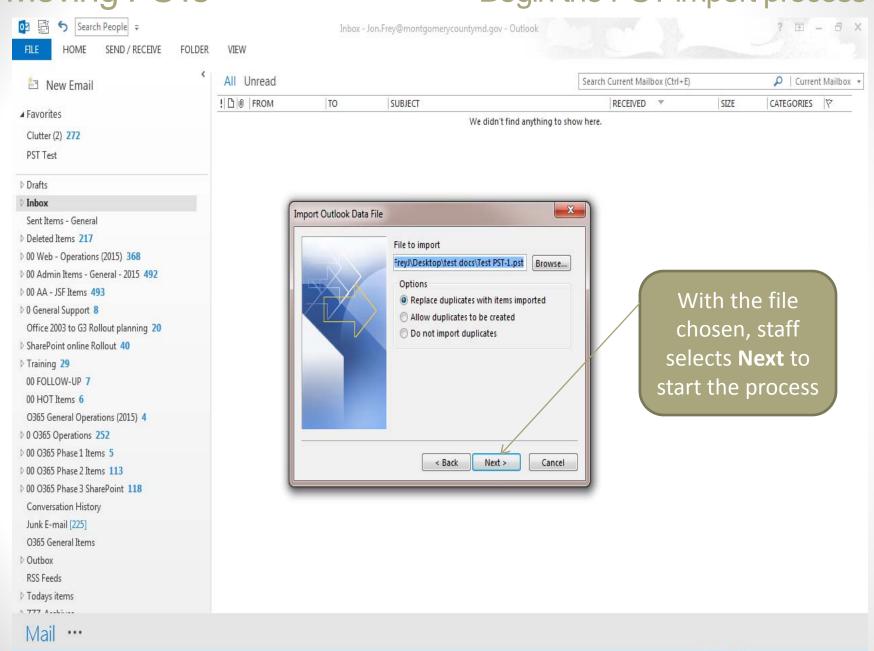
8

Select PST file



ITEMS: 0

Begin the PST import process

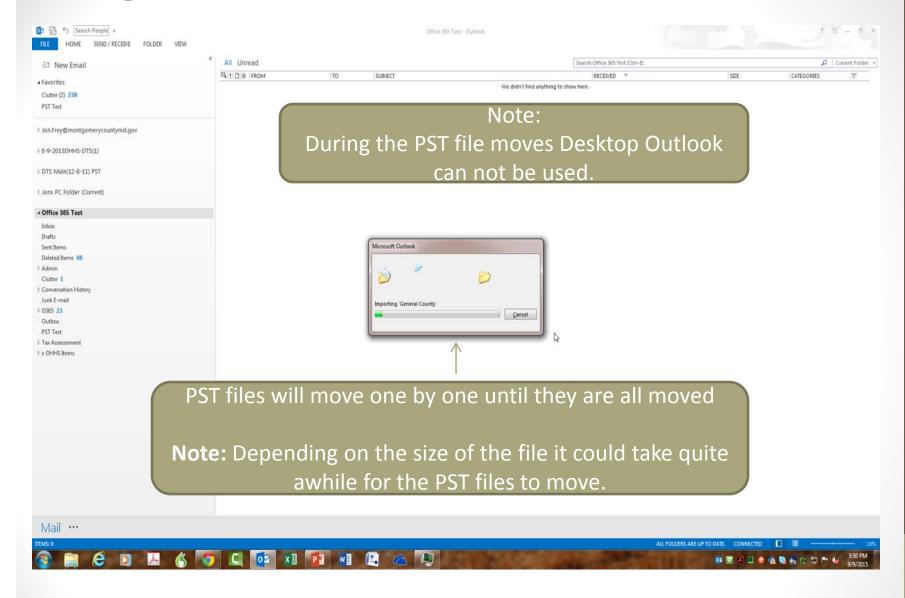


ALL FOLDERS ARE UP TO DATE.

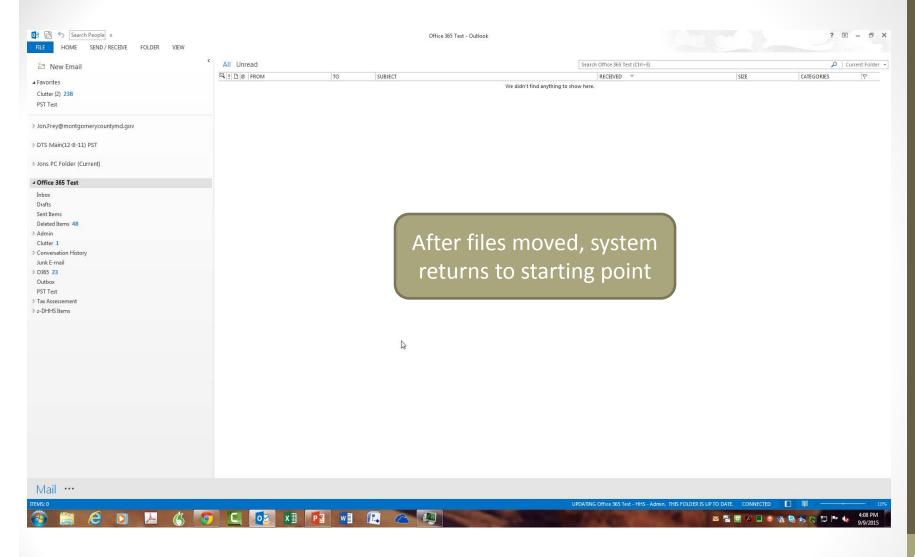
CONNECTED TO: MICROSOFT EXCHANGE

10

PST are moved



PST file move completes



Collaboration Concepts

Collaboration Concepts

Sharing vs Attaching files

"One Source of Truth"

Lynda.com

- Sharing replaces attaching files for collaboration
- Attaching files creates multiple sources of truth
 - You need to attach and send to multiple editors
 - Wait for edits while those editing need to make edits and email back
 - You need to then consolidate replies to restore the source of truth
- If you share
 - All editors have link to the one document
 - They can all edit at once in a single copy
 - All can see each others edits
 - You have no consolidation work as it is a single file
 - Any time you look at the document you see the current source of truth

- Versioning replaces having many copies of the file
- Using 'point versioning' (1.1, 1.2,...) allows for
 - Staff with 'view' rights see Major point versions (1, 2)
 - Editors work on point versions (2.1, 2.2,...)
 - When ready new major point version Published for all
- You can review all past versions and restore any you wish
- You can store notes for others for each version you produce

Collaboration Concepts

Searching

Current Search

- You look for files in folders (often looking in many folders)
- You search by file name (and hope they are named well)
- You need to remember the path to finally access and use the document
- It is time consuming and frustrating

SharePoint / OneDrive search

- You look at the entire site when you search (wherever permitted)
- You search by keyword in the contents of file.
- It brings up a preview and link directly back to the document
- It is quick and efficient

Tools and Support

Tools & Support

Web Site Resources

Scope:

There is a special Internet web site for Office 365 transition Included are storyboards, videos, links to a number of Microsoft reference tools and schedule of staff events.

Web site resources:

- Full web site
 - Many links to Microsoft support documents / tutorials
 - Various help support
 - Staff events schedule
- Link to Phase I reference material

http://montgomerycountymd.gov/office365/



Montgomery County, Maryland

Office 365 - Information Site

Using Office 365

Excel, Word, PowerPoint Online, OneDrive

SharePoint Online, Skype for Business

Overview

Montgomery County continues its move to universal use of the Microsoft Office 365 cloud based software and services suite. This is a major change in both the software used and the way it will be used going forward. Due to the size, scope, and the impact to the staff, the project Phase I (Outlook migration) took roughly six months. The rest will be rolled out in over the next 18-24 months. Staff currently using only Office 2003 will need to completely move to the new cloud-based online applications which include Microsoft Office 365 Outlook, Word online, Excel online and PowerPoint online as the Office 2003 products will be removed.

Click here for: Office 365 - A new way of doing business (the story continues)

The move to Office 365 represents a paradigm shift in the way business will be conducted going forward. Over the next months other services will be introduced for general use by staff. You may experience some of the new features and notice differences that accompany the online versions of the Office 365 Products, (Outlook, OneDrive, Word Online, Excel Online, Skype for Business). Now it is the time to focus on learning these Office 365 products and how to best use them in our work activities.

This Site

This site is designed to provide staff with useful information to help them through the Phase II and III transitions.

The general layout is:

- · Staff Briefing / Events Schedule
- Support Material
- Phase Descriptions
- · Announcements / Tips & Updates
- Take me to OWA 2013
- · Go to the Office 365 Phase I Web Site
- Feedback

Staff Briefings / Events Schedule

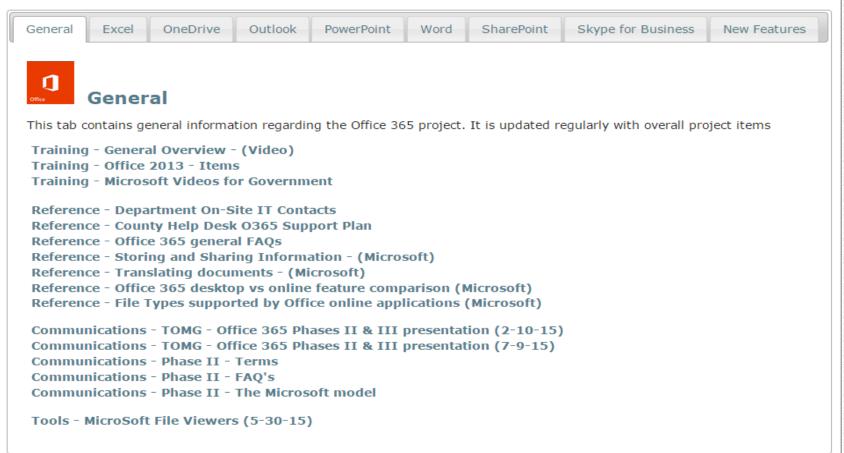
This display provides key information regarding the training and briefing sessions available for staff This will be updated on a regular basis..

■ Subscribe I My Event						
☐ All				Add to my Calendar	Email Reminder	More Event Actions
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30 9a Office 2003 to Office 365 Transition Briefing	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5
□ AII	· · · · · · · · · · · · · · · · · · ·		·	Add to my Calendar	Email Reminder	More Event Actions

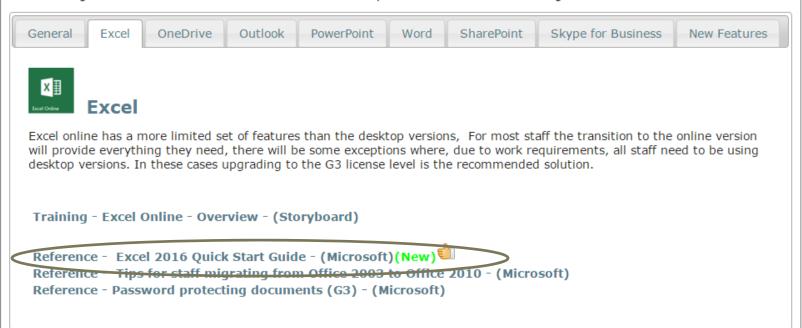
Tools & Support http://montgomerycountymd.gov/office365

Support Material

Many Office 365 transition support documents have been collected to provide staff with useful information to help them get the most from this site. There are two major groups of staff in the County that are transitioning. One is those who use the Office 2003 (40%) the others who are using Office 2007, 2010 or 2013 (60%). Those who are currently using Office 2003 desktop based applications will need to move the the Office 365 online equivalents as their desktop applications will be removed. All others will continue to use their existing desktop versions.



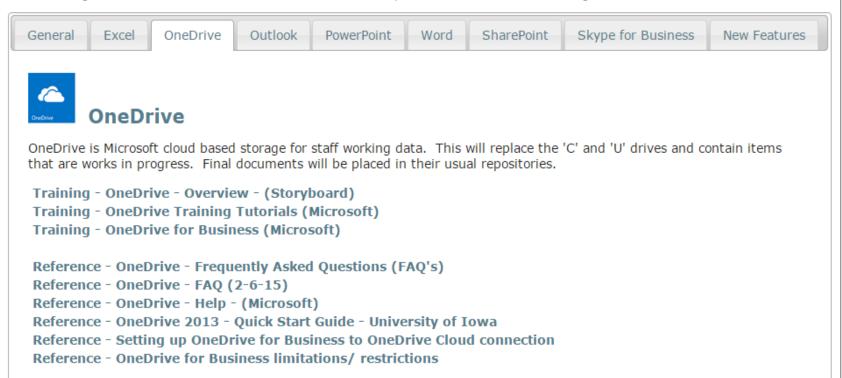
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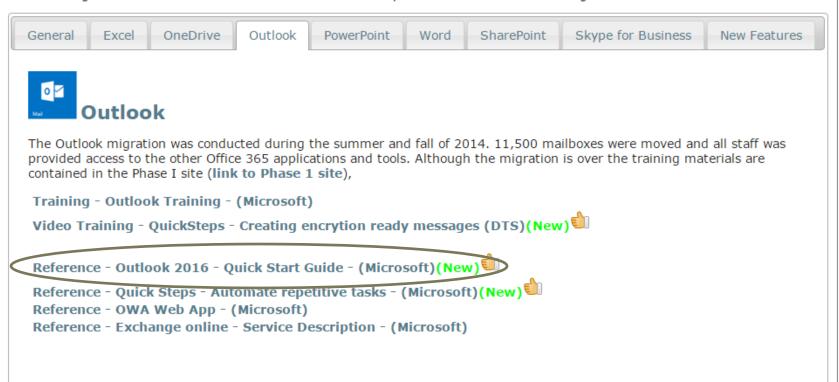
Tools & Support

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The following tabbed interface allows us to focus materials in specific areas to ease the finding of answers.

Reference - Password protecting documents (G3) (Microsoft)

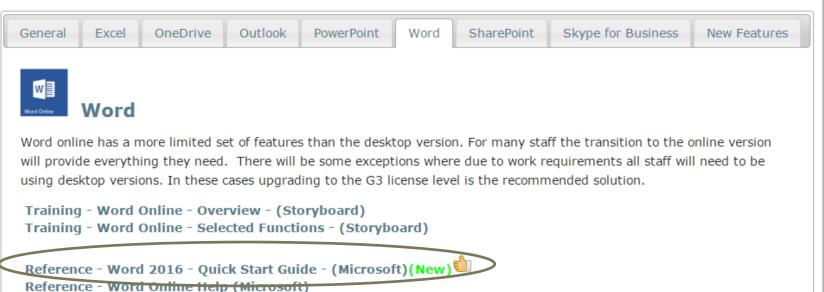


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The following tabbed interface allows us to focus materials in specific areas to ease the finding of answers.

Reference - Tips for staff migrating from Office 2003 to Office 2010 (Microsoft)

Reference - Password protecting documents (G3) (Microsoft)



Take me to OWA 2013

This is link to the new OWA 2013 should be bookmarked. It should replace all other references or favorites pointing to the old OWA.

Office365.MontgomeryCountyMD.gov

Feedback

Please send feedback to the O365 project team

To request an accommodation for employees with disabilities, please contact Change Management at Change.Management@montgomerycountymd.gov or 240-773-3337

Go to the Office 365 Phase I Web Site

This is link to the Office 365 Phase I web site is provided as that location continues to have useful reference material.

Office365 Phase I Web Site

0365



























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