

# 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 in the OneDrive

Be introduced to some collaboration concepts

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

# Agenda

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

# Objectives Review

Gain a basic understanding of Office 365 and its benefits

Know what the Office 365 capabilities mean to you

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Be introduced to some collaboration concepts

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



The End

# Office 365 Services

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

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 or will have this Online/Desktop license**

Office 365 'G3' Capabilities	Desktop	Online	Notes
(all 2013 versions)			
Outlook	X	(OWA)	Outlook Web Access (OWA) provides access to OneDrive
Excel	X	X	Online version sets Print Area differently
Word	X	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	OneDrive online	1 TB of storage. Use to replace 'C', 'U' and other letter drives
MS Access	X		Databases need upgrading before using MS Access 2016
>> Special Data Features <<			
Archive	X	X	Unlimited file retention
Encryption	X		If G3 can encrypt emails
Data Loss Protection	X	X	Ability to manage document distribution rules

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.

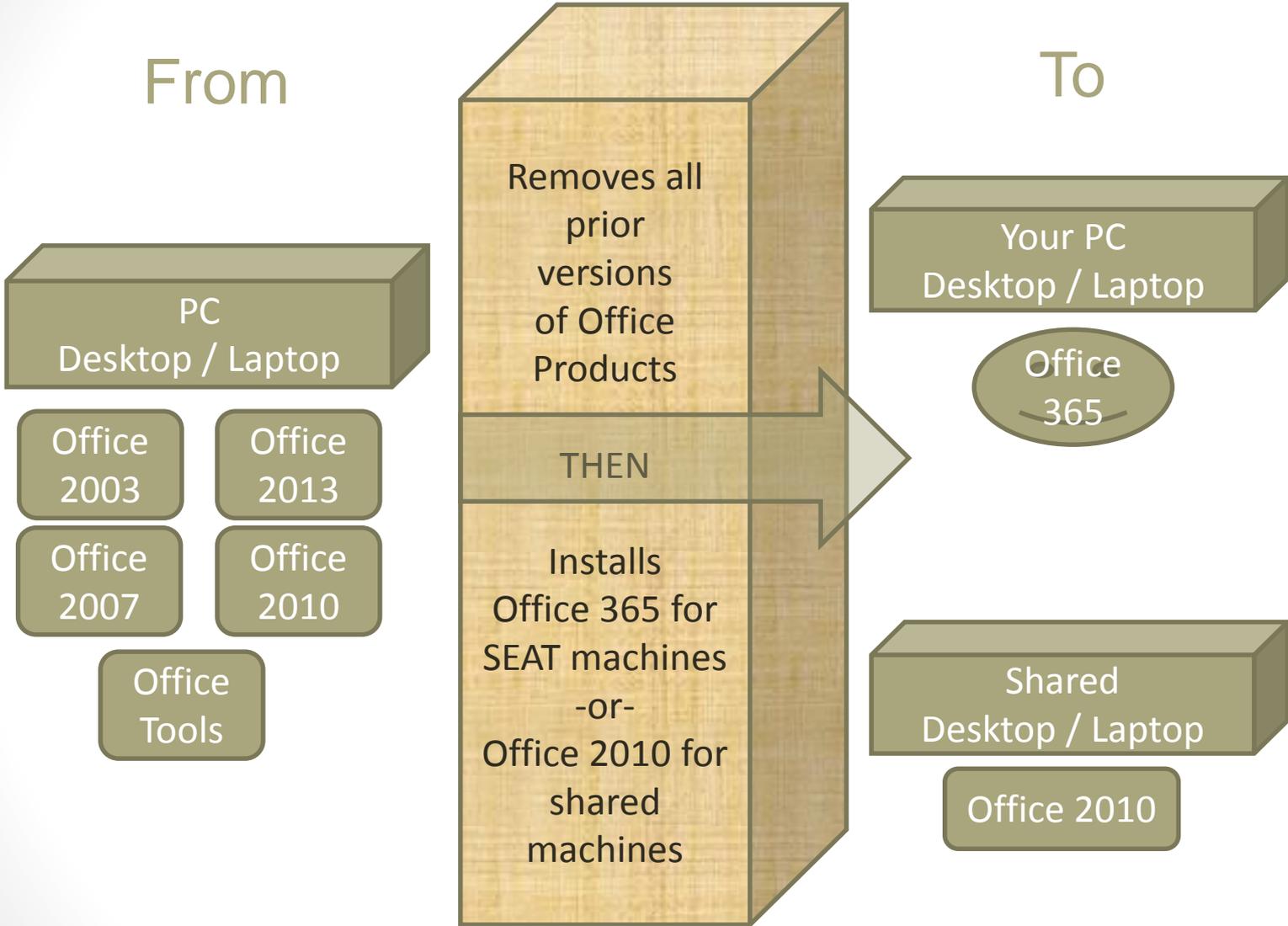
You have or will have this set of capabilities including both Desktop and Online

## 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 for Business desktop agent	Requires Internet Connectivity

# What is the transition?

(and why do we need to do this)



The Office 365 transition process removes all prior versions of Office software before installing the target version of Office.

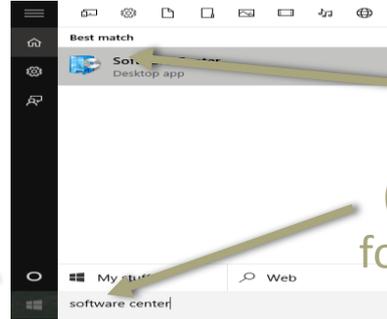
The processing takes 60-90 minutes (during which time the staff member must not interact with the machine). It will power off the machine when complete.

- **Nightly Batches**
  - Sunday & Wed Evening
  - All types of transitions
  - Office 365 licenses assigned
  - Self Service for staff not transitioned in prior batch
- **Self Service**
  - Can be triggered any time
  - Staff can trigger this themselves
  - Runs same scripts as overnight batches

# Office 365 Services

# Self Service Processing

(1) Click the Windows start tab

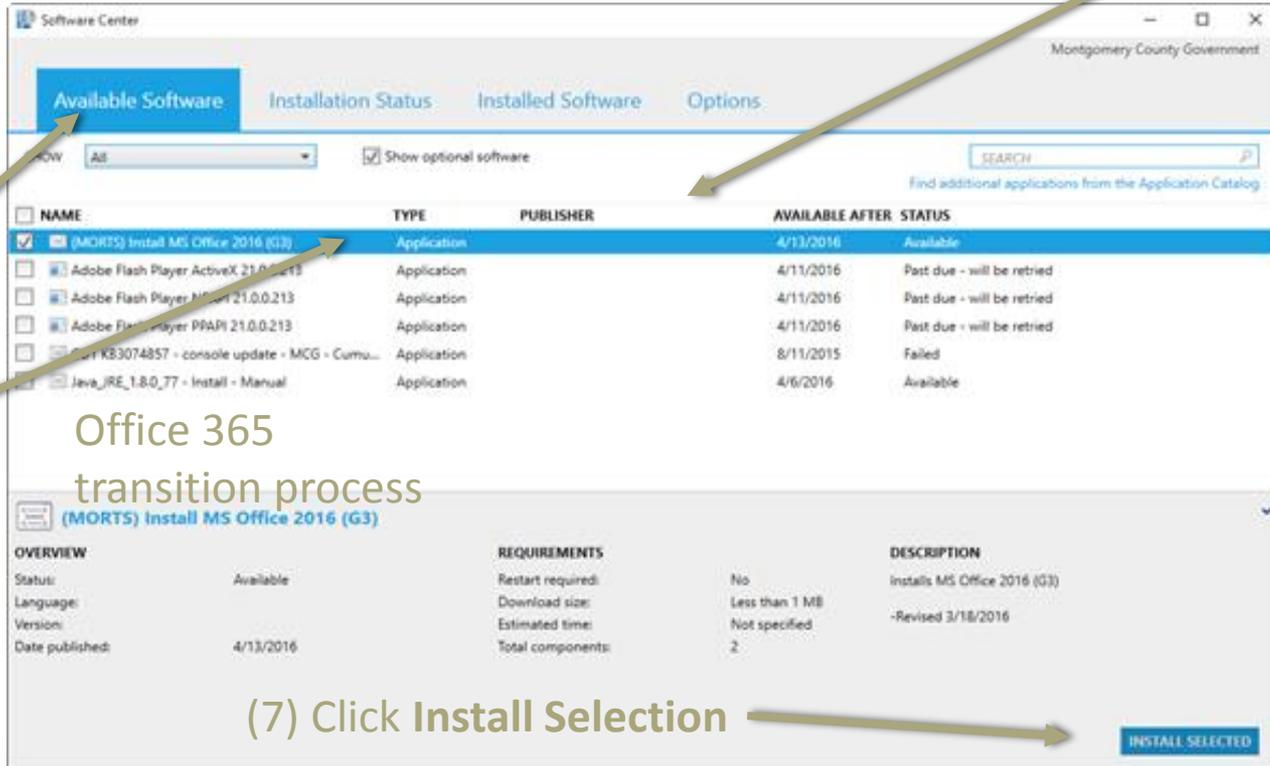


(3) Once found click it

(2) Search for Software Center.

(4) It opens software center

(5) Select Available Software



Office 365 transition process

(7) Click Install Selection

(8) WALK AWAY

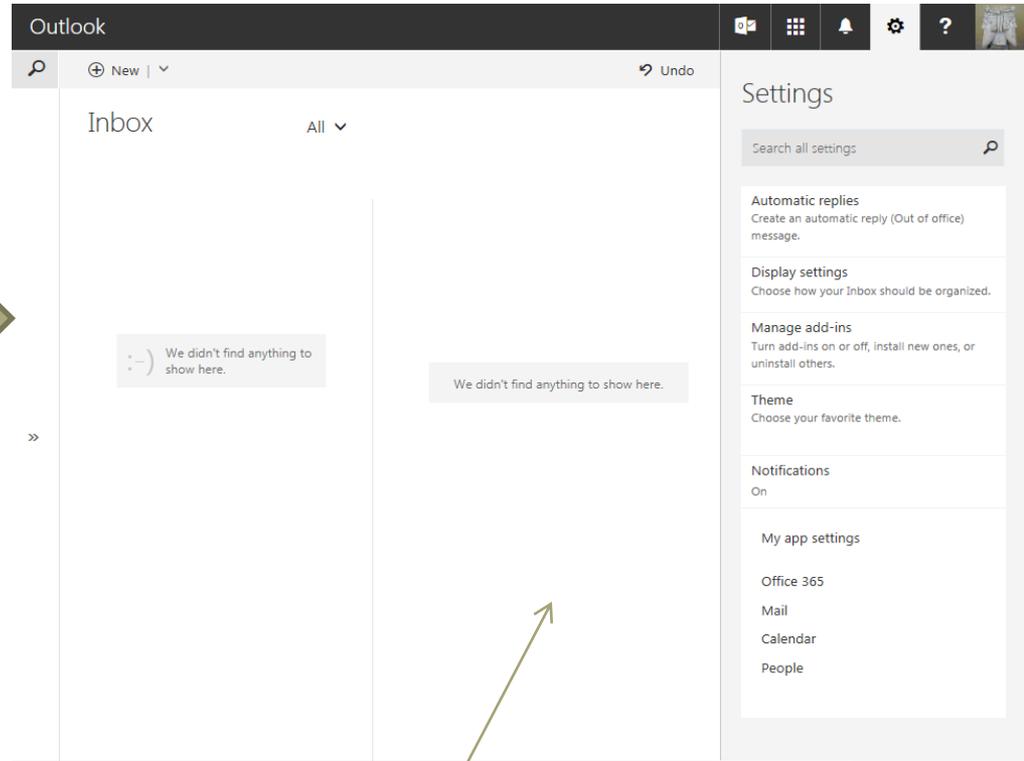
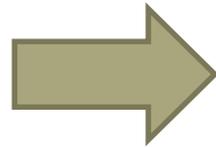
# Office 365 Applications

### 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, SharePoint Online
  - **Part of collaboration rollout activities**

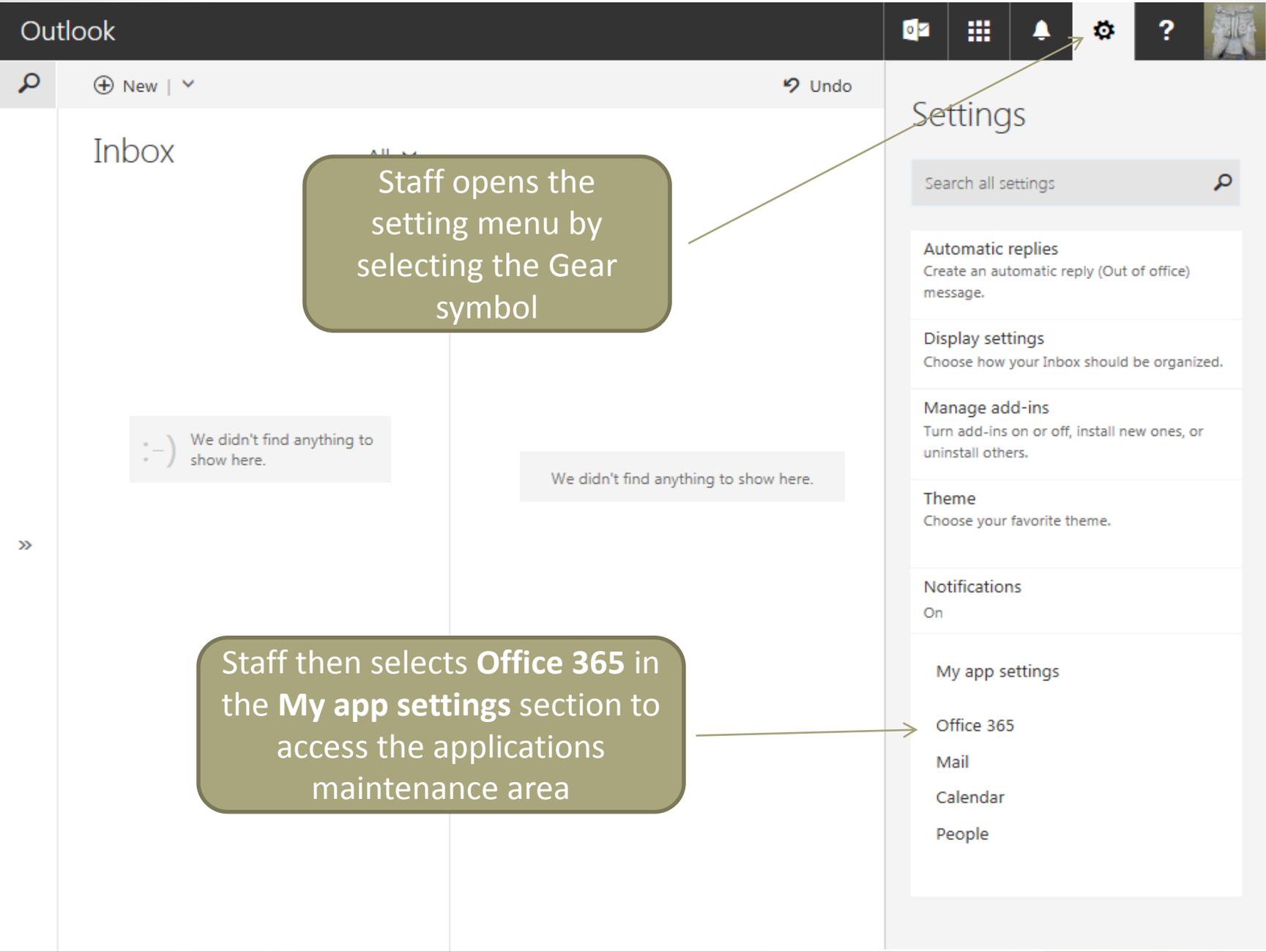
# Installing Applications



Staff selects **Office 365** icon from the desktop and it launches Office 365 online. It opens in outlook as default.

# Installing Applications

# Downloading Applications



Staff opens the setting menu by selecting the Gear symbol

Staff then selects **Office 365** in the **My app settings** section to access the applications maintenance area

The screenshot shows the Office 365 Settings interface. On the left is a blue navigation pane with the following items: My account, Personal info, Subscriptions, App permissions, Install status (highlighted with a white arrow), and Settings. The main content area is titled 'Settings' and contains several sections: Theme (Default theme), Start page (Mail), Notifications (On), Software (Install software), Password (Change your password), and Contact preferences (Off). On the right side, there is a secondary 'Settings' section with a text box that reads: 'Want to change a setting? When you're on the settings page, you can make your updates there.' A callout box with a dark green background and white text is positioned over the 'Install status' menu item, containing the text: 'Staff selects Install status to view where they have copies installed'. The callout box has rounded corners and a thin white border.

Office 365 My account

Install status

## Install status

Manage your PC and Mac installs here.

[Install desktop applications](#)

### Office

Detected installs: 2

DTS011309733553 Microsoft Windows 8.1 Enterprise	DTSR90067E4 Microsoft Windows 7 Enterprise
<a href="#">Deactivate</a>	<a href="#">Deactivate</a>

### Visio

Detected installs: 2

DTSR90067E4 Microsoft Windows 7 Enterprise	HHSLR5GM5A Windows
<a href="#">Deactivate</a>	<a href="#">Deactivate</a>

Settings

Staff can move to the install application screen by selecting this link

Staff can see all applications and the machine name on which they are installed

Staff can deactivate licenses on machines they are deposing of to reclaim those licenses

# Installing Applications

# Installing Applications

The screenshot shows the Office 365 installation page. On the left, a navigation menu lists 'Software', 'Office', 'Tools & add-ins', 'Visio', 'Skype for Business', and 'Phone & tablet'. The main content area is titled 'Office' and includes options to 'Manage installed apps', 'Want to deactivate an app? Install status.', and 'Install Office'. A list of application icons is displayed, including Word, Excel, PowerPoint, OneNote, Access, Publisher, Outlook, Skype for Business, InfoPath, and OneDrive for Business. Below the icons, there are dropdown menus for 'Language' (set to English (United States)) and 'Version' (set to 32-bit (Recommended) Advanced). A note states: 'Note: Installing additional languages on a computer that already has this version of Office doesn't count against your install limit.' At the bottom, there are links for 'Review system requirements' and 'Troubleshoot installation', and a prominent 'Install' button.

**Staff can select to **Install** to trigger the Office 365 installation on a desktop or laptop**

**Or choose another application install on a phone or tablet**

## Settings

Search all settings

**Theme**  
Default theme

**Start page**  
Mail

**Notifications**  
On

**Password**  
Change your password.

**My app settings**

- Office 365
- Mail
- Calendar
- People

The screenshot shows the Office 365 settings interface. On the left, a navigation pane lists 'Software', 'Office', 'Tools & add-ins', 'Visio', 'Skype for Business', and 'Phone & tablet'. The 'Visio' section is expanded, showing 'Manage installs'. Below this, there is a link to deactivate and reinstall Visio. A dropdown menu is open for 'Install Visio 2013', showing 'Install Visio 2016'. The 'Install Visio 2016' section contains a message about early access, a feedback link, and a language selection dropdown set to 'English (United States)'. A version dropdown is set to '32-bit (R...'. At the bottom of this section is an 'Install' button. On the right, the 'Settings' pane is visible, showing a search bar and sections for 'Theme', 'Start page', and 'Notifications'. A large, semi-transparent callout box is overlaid on the right side of the screen, containing two lines of text: 'If staff chooses another application that install screen appears' and 'Staff starts the process by selecting **Install**'. Two arrows originate from this callout: one points to the 'Install Visio 2016' section, and the other points to the 'Install' button.

Office 365

Software

Office

Tools & add-ins

Visio

Skype for Business

Phone & tablet

### Choose your phone or tablet

Phone	Tablet
Windows Phone	Windows tablet
Windows Phone 10	iPad
iPhone	Android tablet
Android phone	
BlackBerry®	
Nokia (Symbian OS)	
Other	

Should Staff select Phone and Tablet install they are brought to a selection screen to choose the type of device they want to install on

They then select that choice and follow the instructions on the pages displayed.

### Settings

Search all settings

Theme

Default theme

Start page

Mail

Notifications

On

Password

Change your password.

My app settings

Office 365

Mail

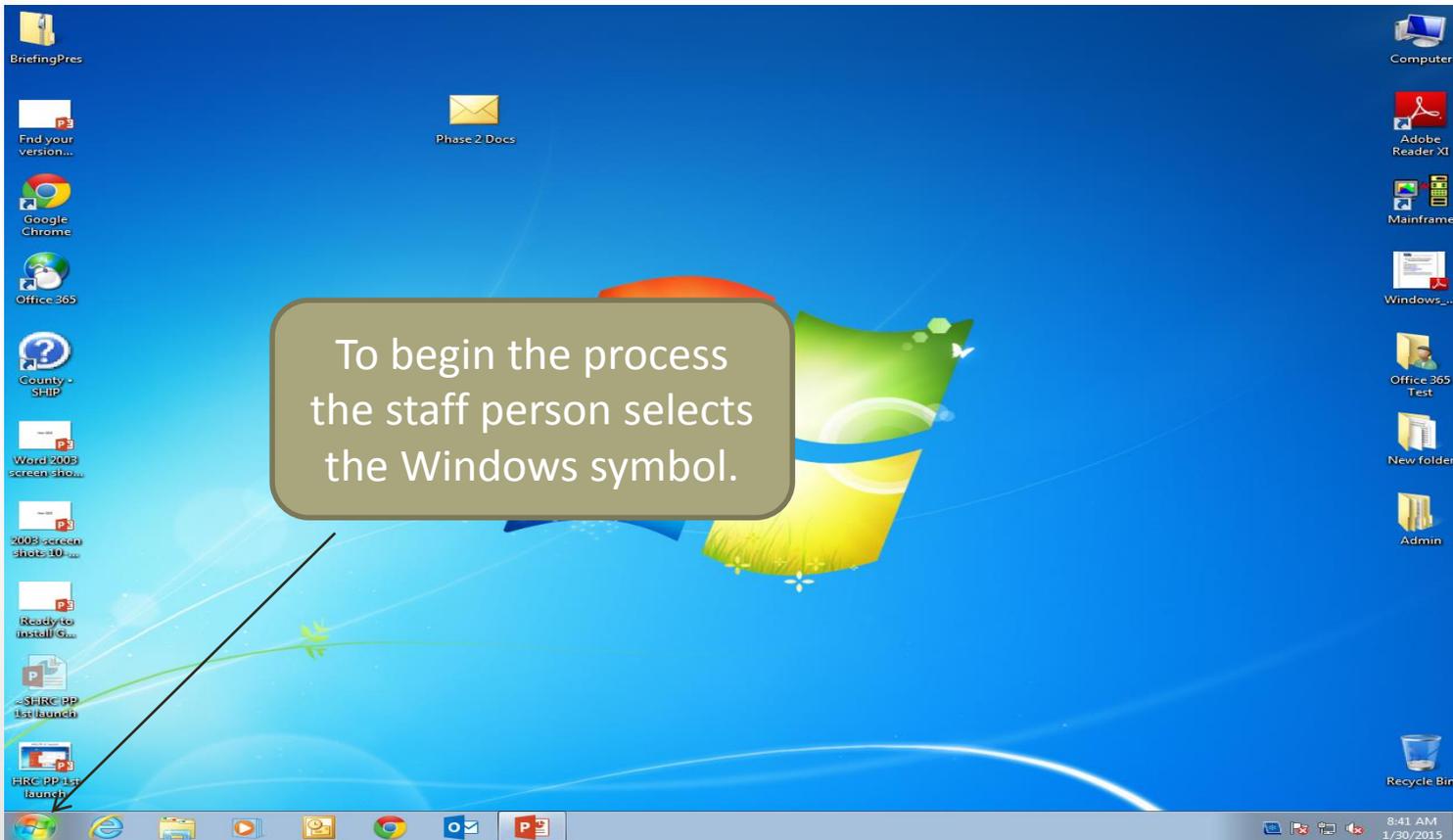
Calendar

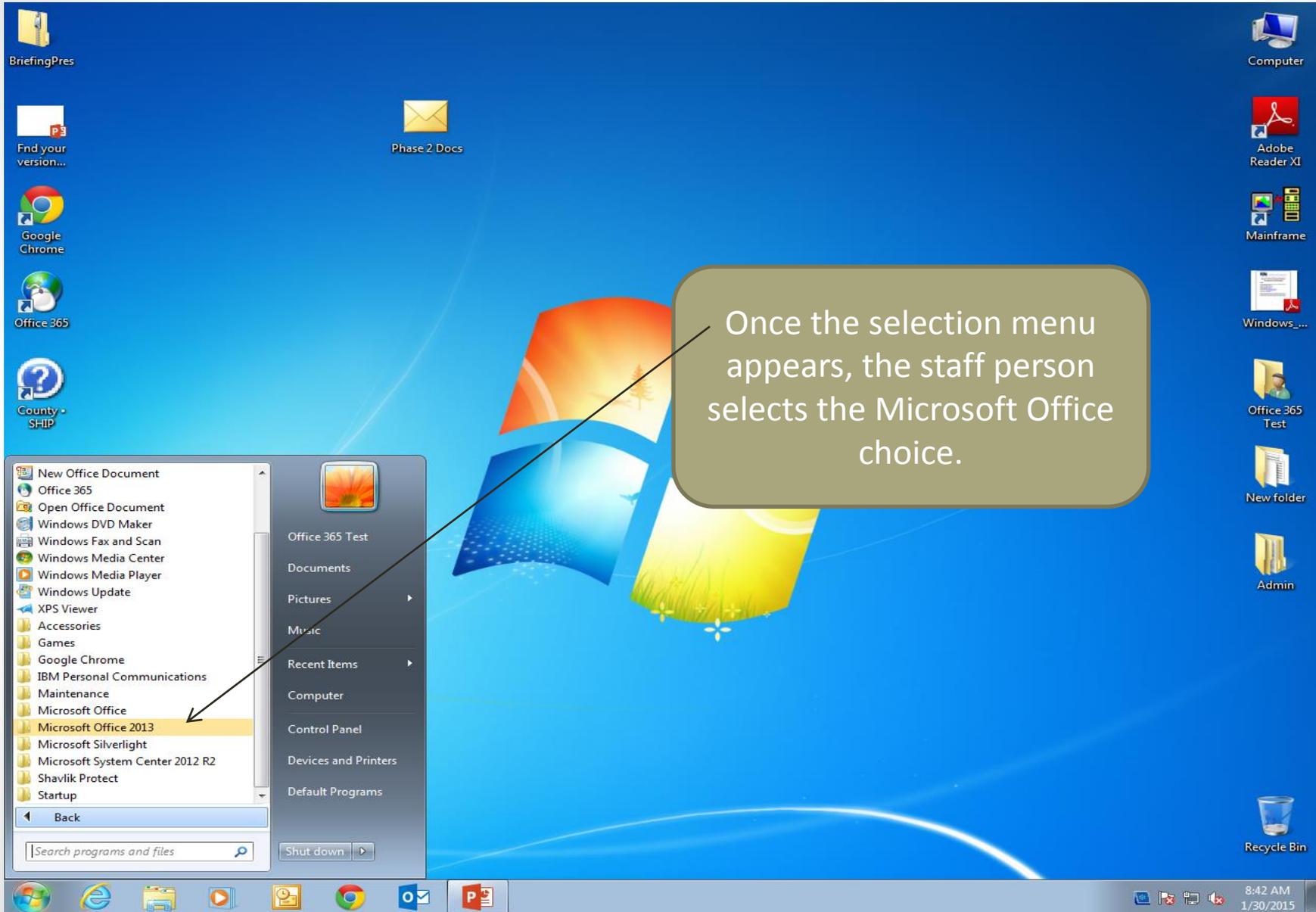
People

# Activating 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.





The screenshot shows a Windows 7 desktop with a blue background. The Start menu is open, displaying a list of applications. The applications are categorized into folders: Accessories, Games, Google Chrome, IBM Personal Communications, Maintenance, Microsoft Office, Microsoft Office 2013, and Office 2013 Tools. The Office 2013 Tools folder is expanded, showing a list of applications: Access 2013, Excel 2013, InfoPath Designer 2013, InfoPath Filler 2013, Lync 2013, OneDrive for Business 2013, OneNote 2013, Outlook 2013, PowerPoint 2013, Publisher 2013, Send to OneNote 2013, and Word 2013. The Start menu also shows other categories like Office 365 Test, Documents, Pictures, Music, Recent Items, Computer, Control Panel, Devices and Printers, and Default Programs. The taskbar at the bottom shows icons for Internet Explorer, File Explorer, Windows Media Center, Google Chrome, Outlook, PowerPoint, Excel, and Word. The system tray in the bottom right corner shows the date and time: 9:20 AM, 1/30/2015.

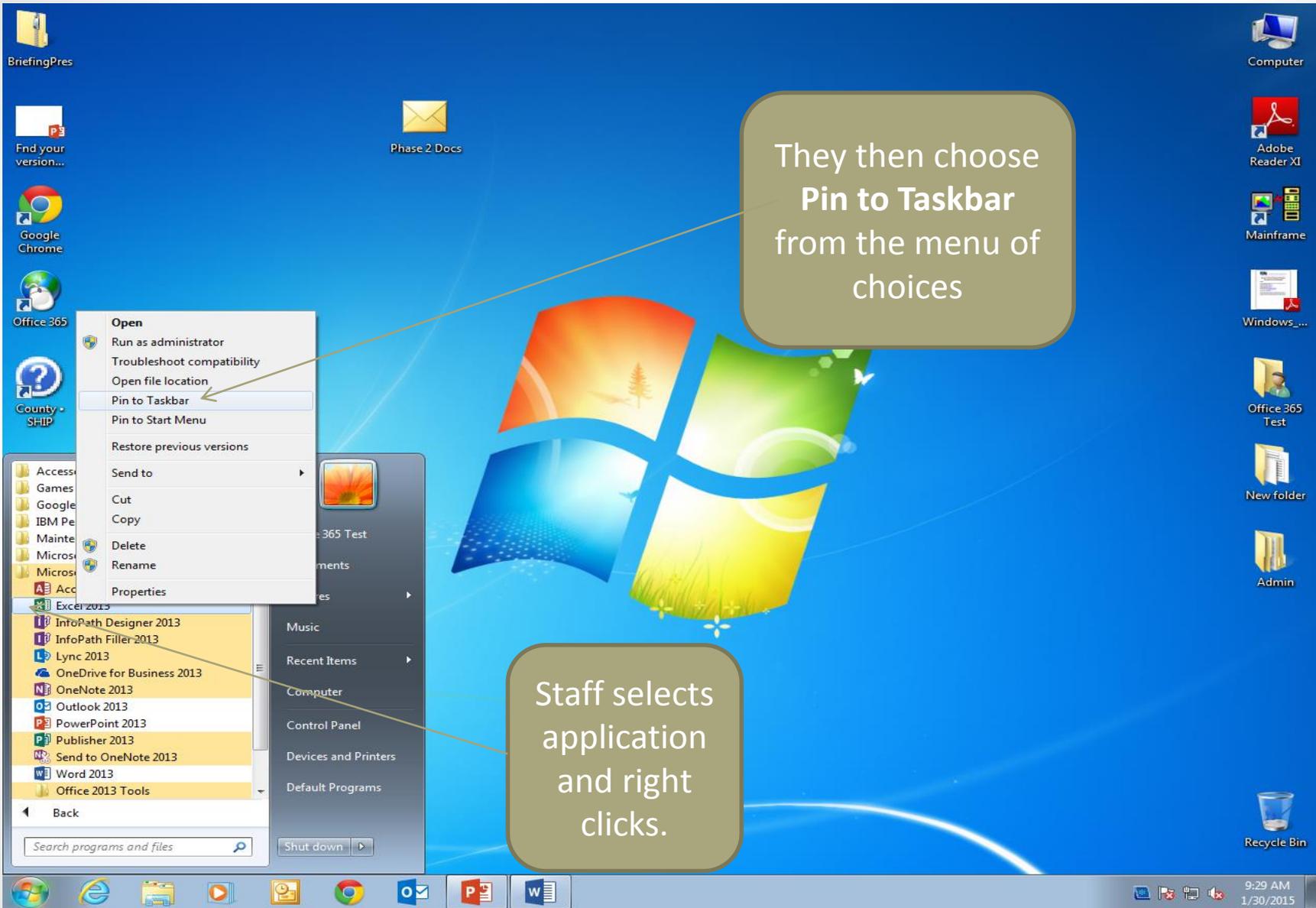
Once selected, a list of all Office elements is displayed

The un-highlighted applications are those which have been activated and should look like this list

To activate an application you select it and it will become unlighted and active

**Note:** Unless activated the applications will not operate

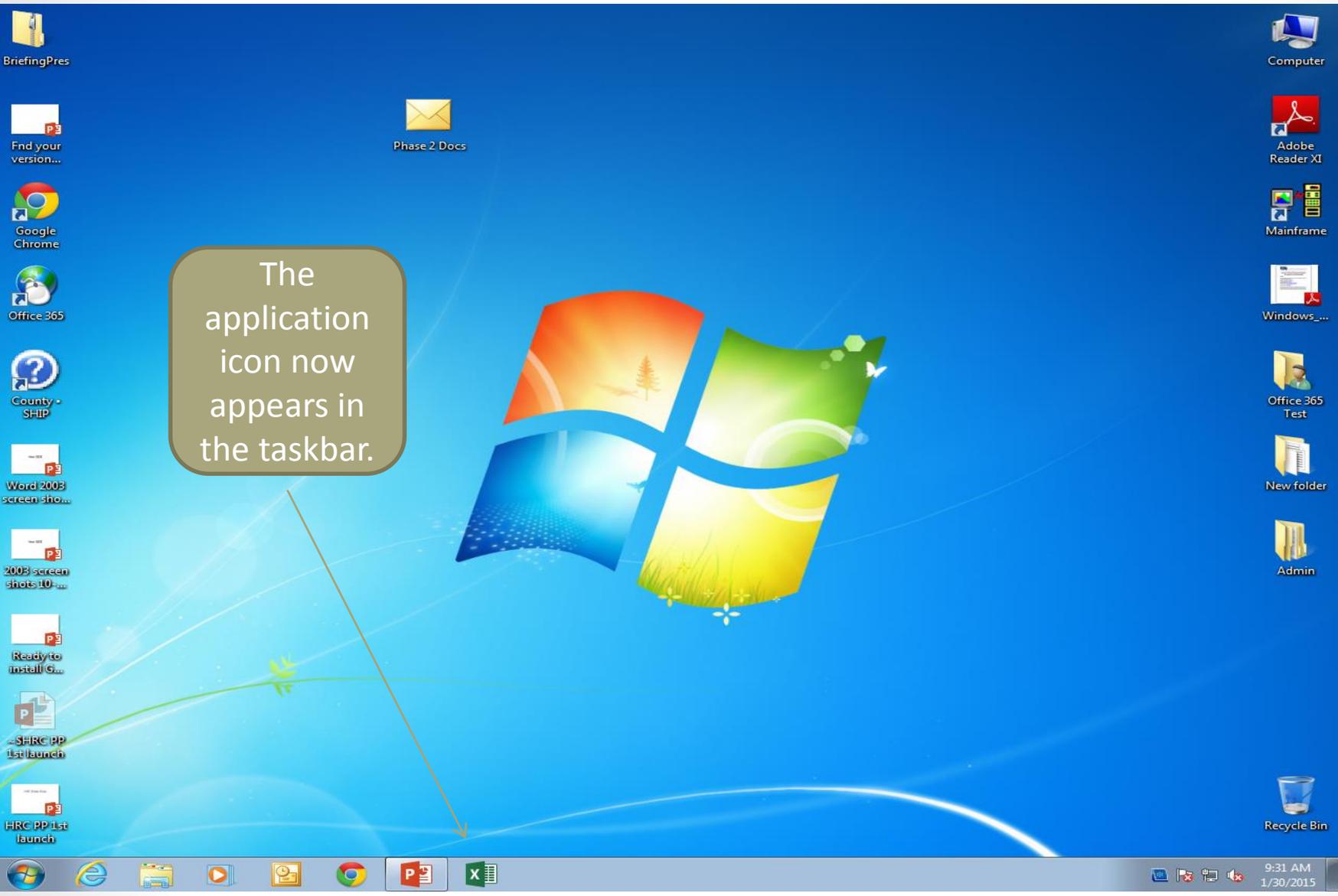
# Pinning applications icons to the desktop



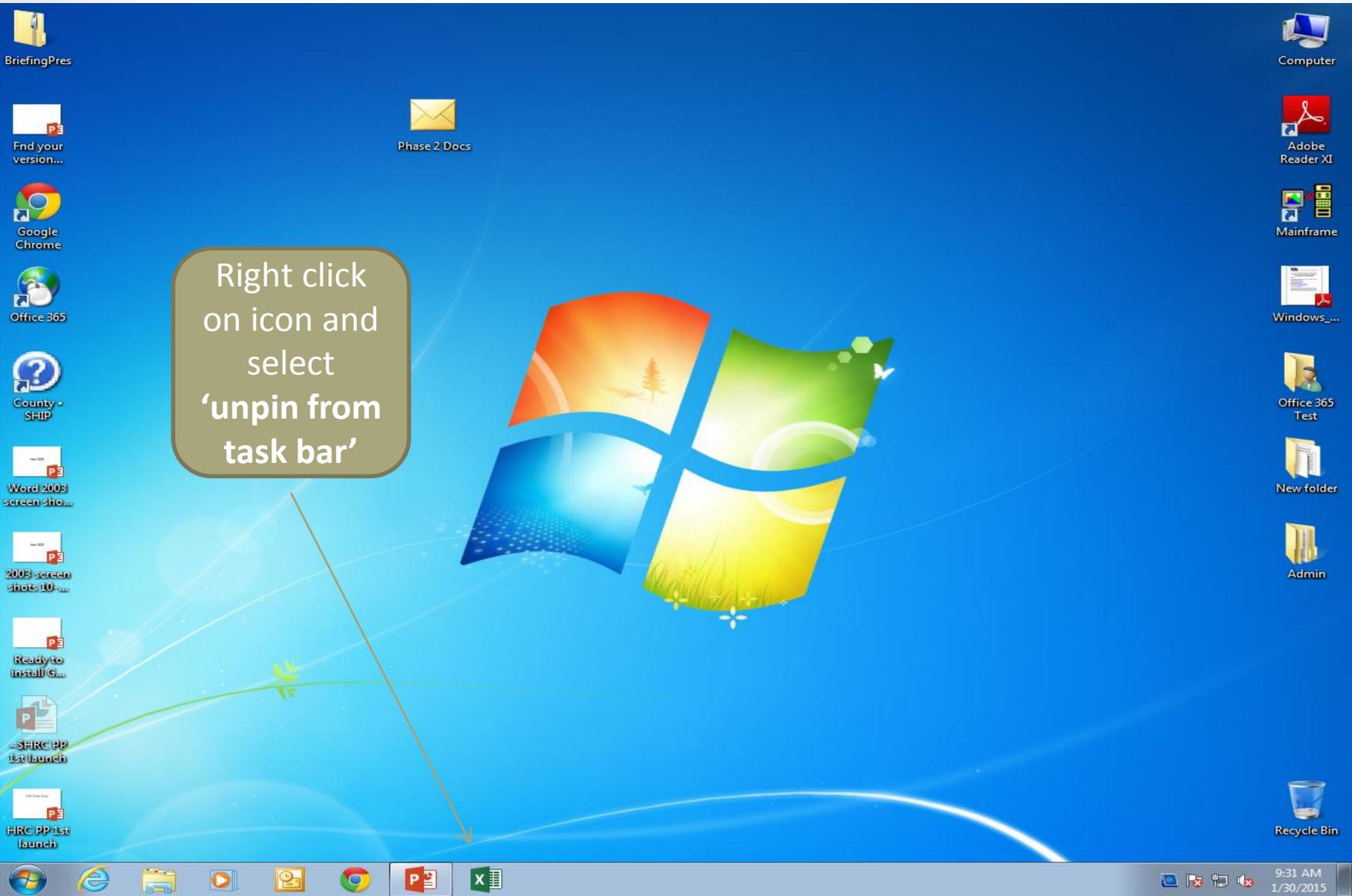
They then choose  
**Pin to Taskbar**  
from the menu of  
choices

Staff selects  
application  
and right  
clicks.

The application icon now appears in the taskbar.



Right click  
on icon and  
select  
'unpin from  
task bar'



# 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	X
Home	General Document Formatting	X	X	X
Insert	Things added into a document	X	X	X
Design	Template Design Themes	-	X	X
Page Layout	Margins, Fonts, Position	X	X	-
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	-	X	-
Transitions	Transitions between slides	-	-	X
Animations	Animation of text on a slide	-	-	X
Slide Show	View a PowerPoint slide show	-	-	X
Review	Spelling, track changes, translate	X	X	X
View	Print, edit, and other views	X	X	X

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

# Desktop Word 2016 ribbon review

## Word

### Recent

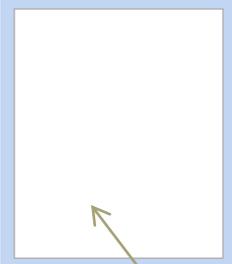
You haven't opened any documents recently. To browse for a document, start by clicking on Open Other Documents.

Open Other Documents

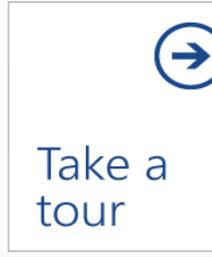
Search for online templates

Suggested searches: Business Personal Industry Print Design Sets Event Education

Office 365 Test  
O365Test@MontgomeryCountyMD.gov  
Switch account



Blank document



Welcome to Word



Single spaced (blank)



Blog post



Report design (blank)



Resume



Business flyer

Staff can start a new document by selecting this.

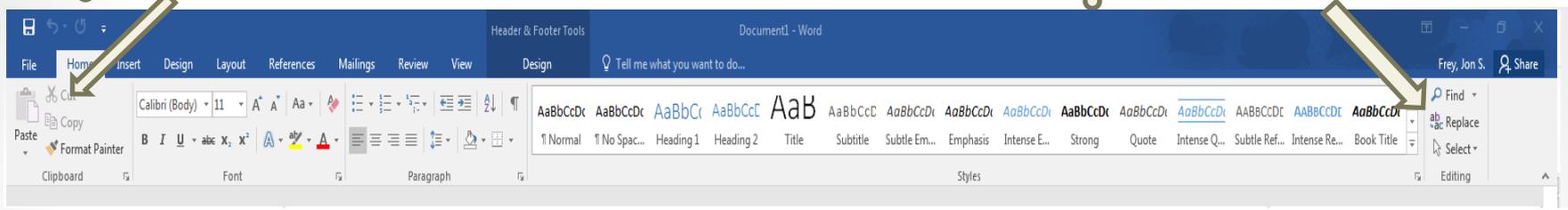
or

Choose a template

# HOME

Paste Special  
now here

Find, Replace  
now here

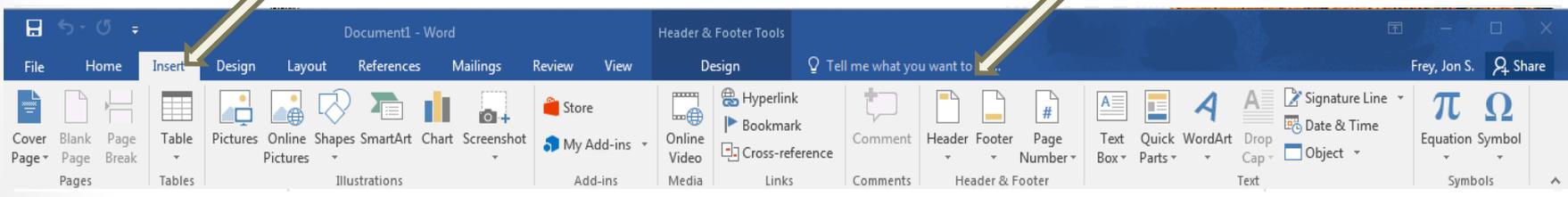


The HOME tab contains basic document editing and formatting features

# INSERT

Insert Table  
now here

Header, Footer  
now here



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

# DESIGN

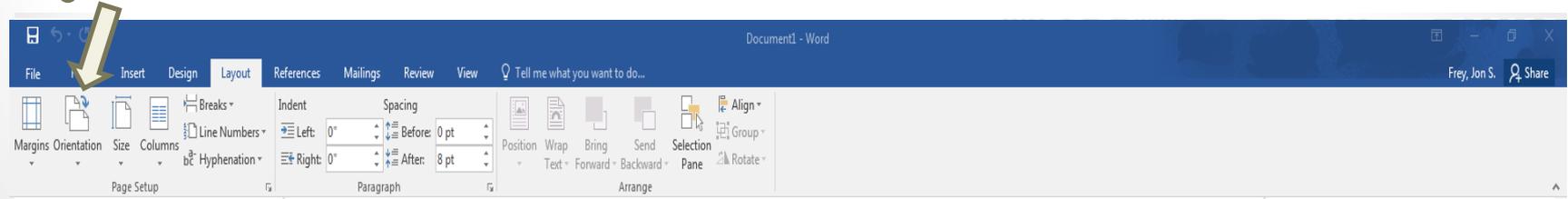
Watermark  
now here



The DESIGN tab contains template design themes

Portrait or Landscape  
now here

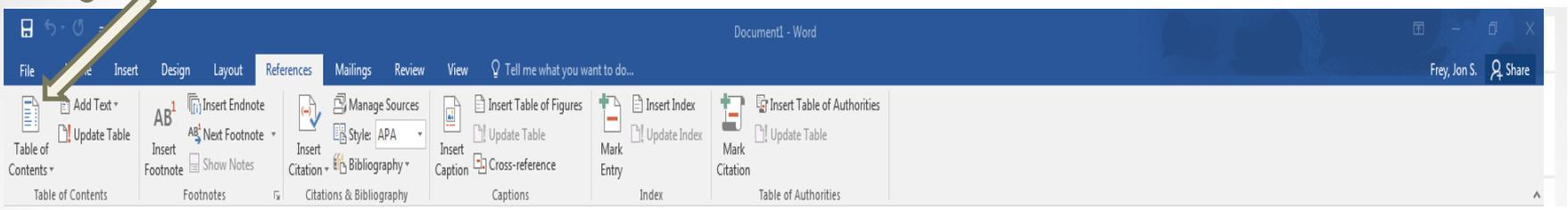
# LAYOUT



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

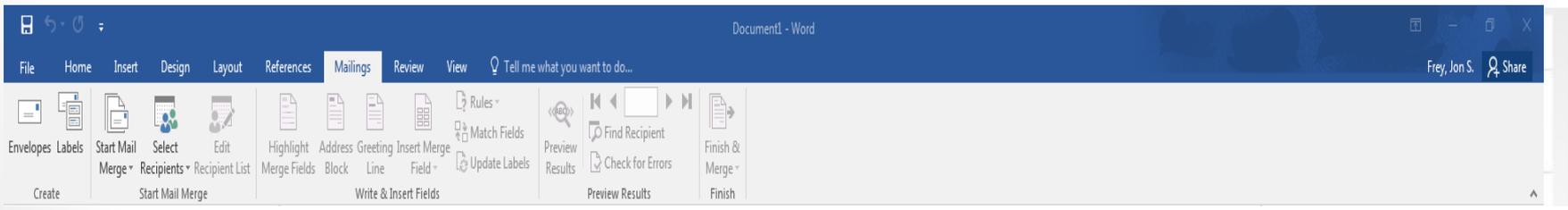
Table of Contents  
now here

## REFERENCES



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

## MAILINGS

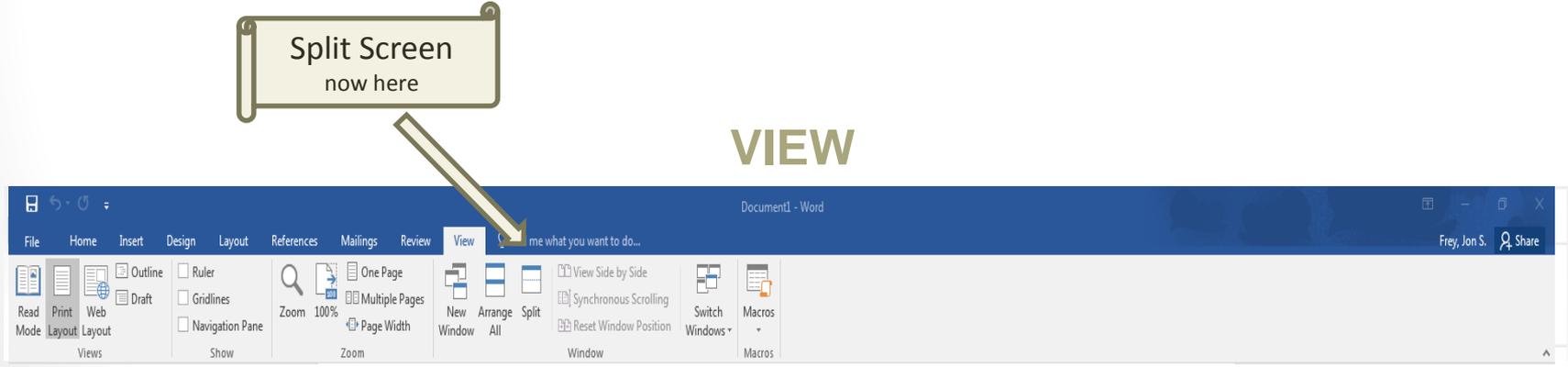


The MAILINGS tab contains functions for mail merge, labels, mailing lists. etc.



## REVIEW

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



## VIEW

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

The screenshot displays the Microsoft Word File Backstage view. On the left is a blue navigation pane with options: Info, New, Open (highlighted), Save, Save As, Print, Share, Export, Close, Account, and Options. The main area is titled 'Open' and shows a list of locations to open documents: Recent Documents, Sites - Montgomery County Government, OneDrive - Montgomery County Government, OneDrive, Computer, and Add a Place. Below this list are sections for 'Pinned' and 'Older' documents. The 'Pinned' section shows 'Link Doc Test.docx' from OneDrive - Montgomery County Government, dated 9/9/2015 2:12 PM. The 'Older' section shows 'Compare Test 2-12-16.docx' from a SharePoint site, dated 2/12/2016 2:18 PM. At the bottom of the main area is a 'Recover Unsaved Documents' button. The Windows taskbar at the bottom shows icons for various applications and the system clock indicating 9:54 AM on 1/30/2015.

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

Desktop  
Excel 2016  
ribbon review

**Excel**

Recent

You haven't opened any workbooks recently. To browse for a workbook, start by clicking on Open Other Workbooks.

Open Other Workbooks

Search for online templates

Suggested searches: Business Personal Industry Small Business Calculator  
Finance - Accounting Lists

Office 365 Test  
O365Test@MontgomeryCountyMD.gov  
Switch account

**Blank workbook**

**Take a tour**

**PayPal invoicing**

**Weight Tracker**

**Retirement Planner**  
CONGRATULATIONS! At age 65, you will have a savings balance of \$20,913.

**Monthly College Budget**  
March Income: \$2,425  
March Expenses: \$2,233

**Event budget**

**Daily work schedule**

**Family monthly budget planner**

**Employee Absence Schedule**

Staff can start a new document by selecting this.

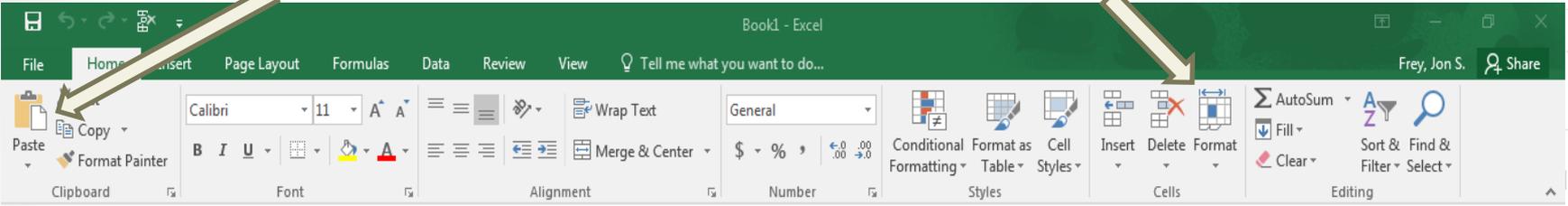
or

Choose a template

Paste Special  
now here

Format Cells  
now here

# HOME

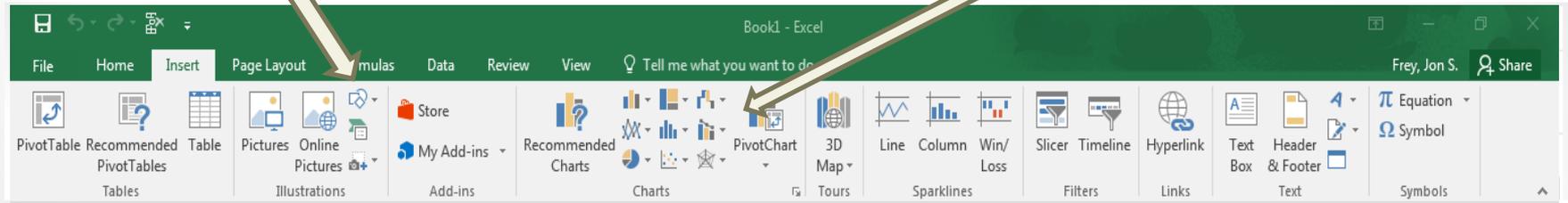


The HOME tab contains basic document editing and formatting features

Lines & Shapes  
now here

Charts & Graphs  
now here

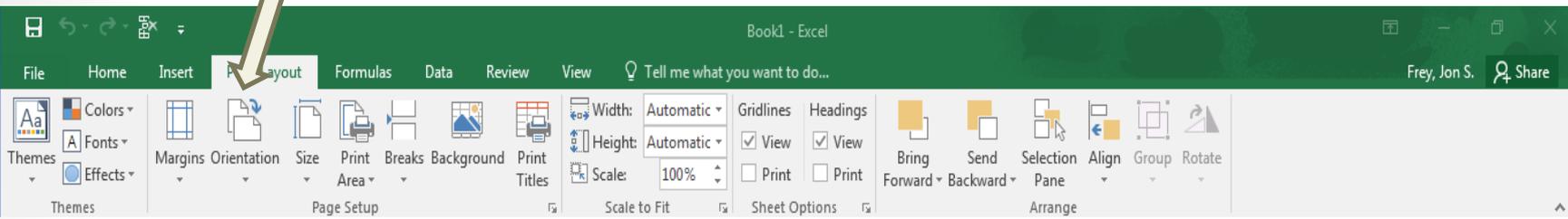
# INSERT



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

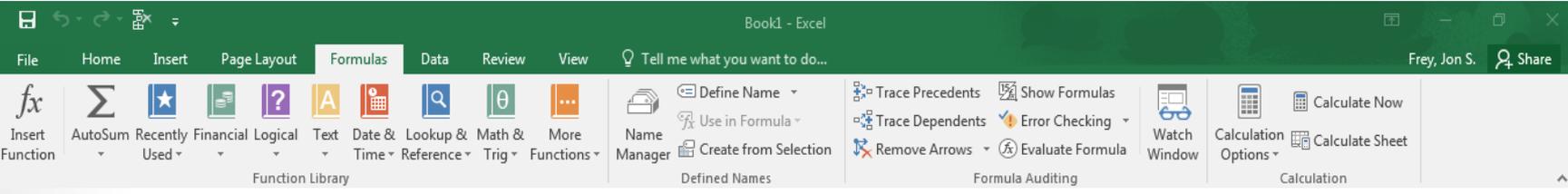
Portrait or Landscape  
now here

# PAGE LAYOUT



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

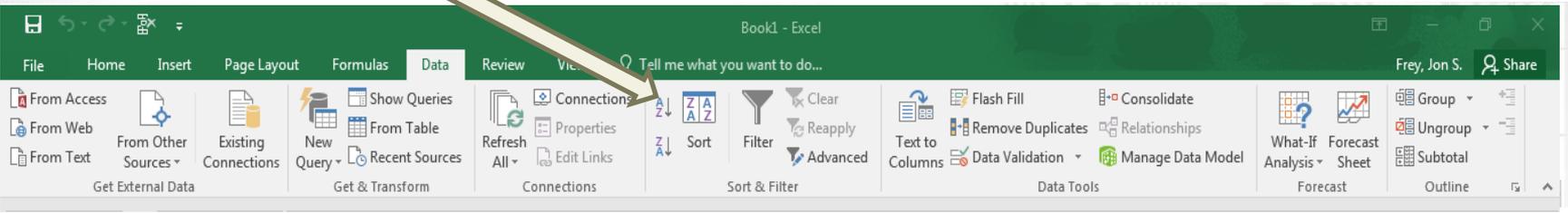
# FORMULAS



The FORMULAS tab contains pre-defined math formulas

Sort  
now here

## DATA

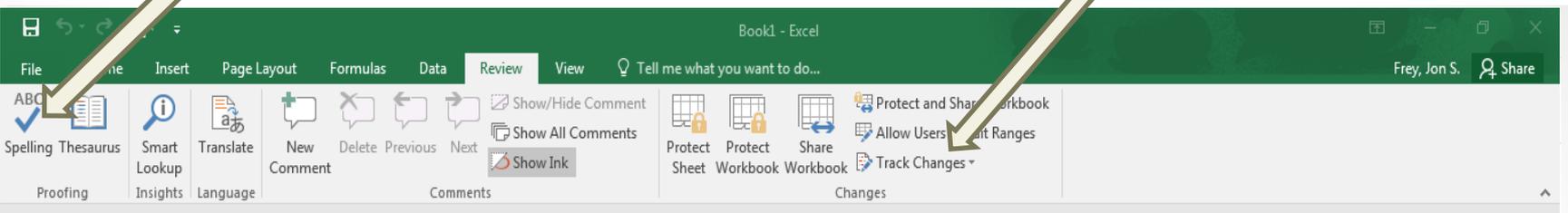


The DATA tab contains functions for inputting, outputting and managing data

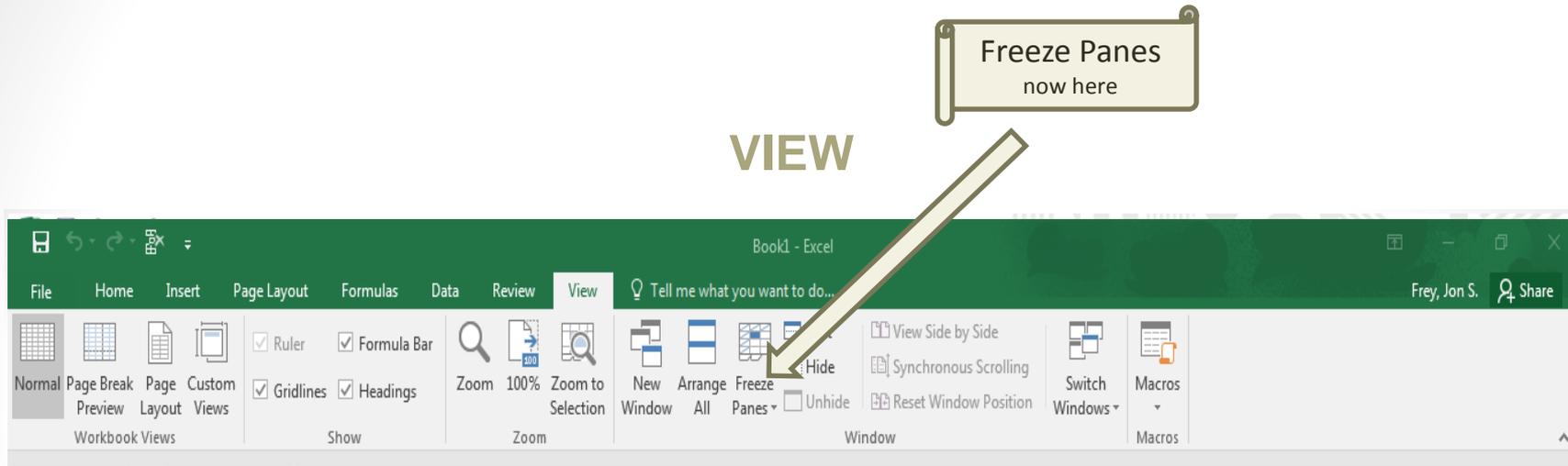
Spell Check  
now here

## REVIEW

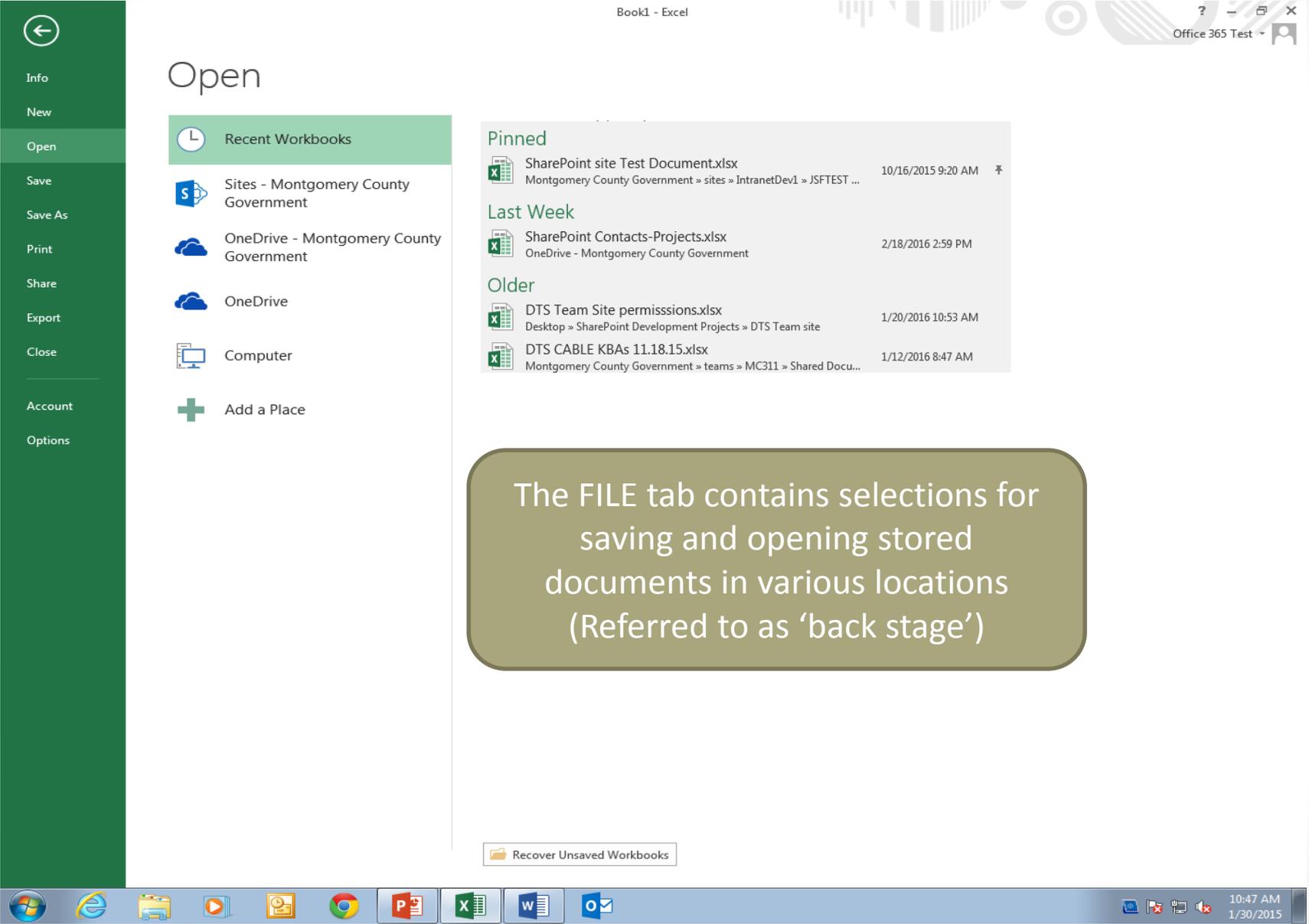
Track Changes  
now here



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 printing and other views



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

Recent

- HRC PP 1st launch Desktop
- Ready to install G3 - 2013 Desktop
- 2003 screen shots 10-15-14 Desktop
- Word 2003 screen shots 10-15... Desktop
- Fnd your version (2003) 7-17-14 Desktop
- find your version Desktop
- find your version My Documents
- Outlook 2003 Screens (7-2-14) Desktop

Open Other Presentations

Search for online templates and themes

Suggested searches: Presentations Business Orientation 4:3 Education Blue Personal

Office 365 Test  
Q365Test@MontgomeryCountyMD.gov  
Switch account

Blank Presentation

Welcome to PowerPoint

Create an Office Mix

ION

Organic

Integral

Retrospect

Facet

Staff can start a new document by selecting this.

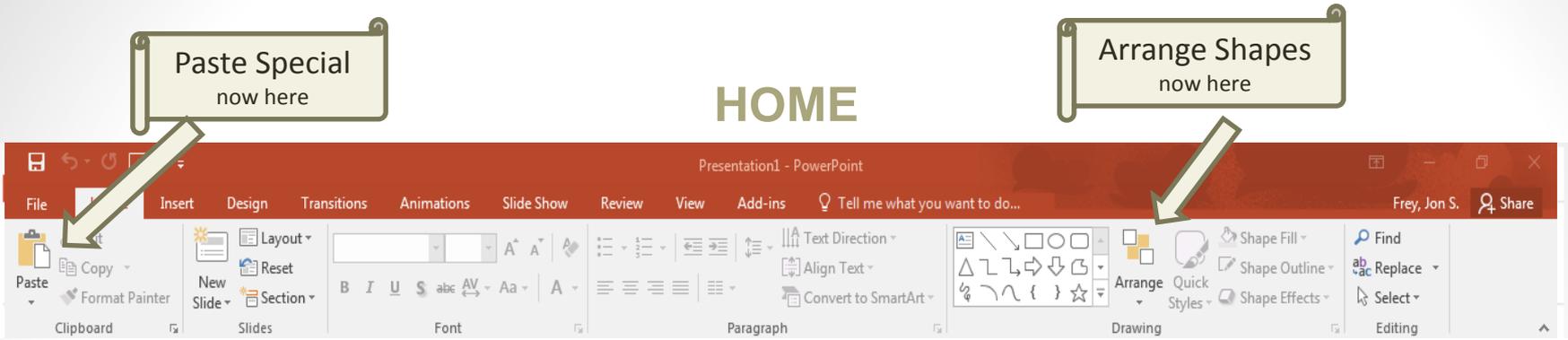
or

Choose a template

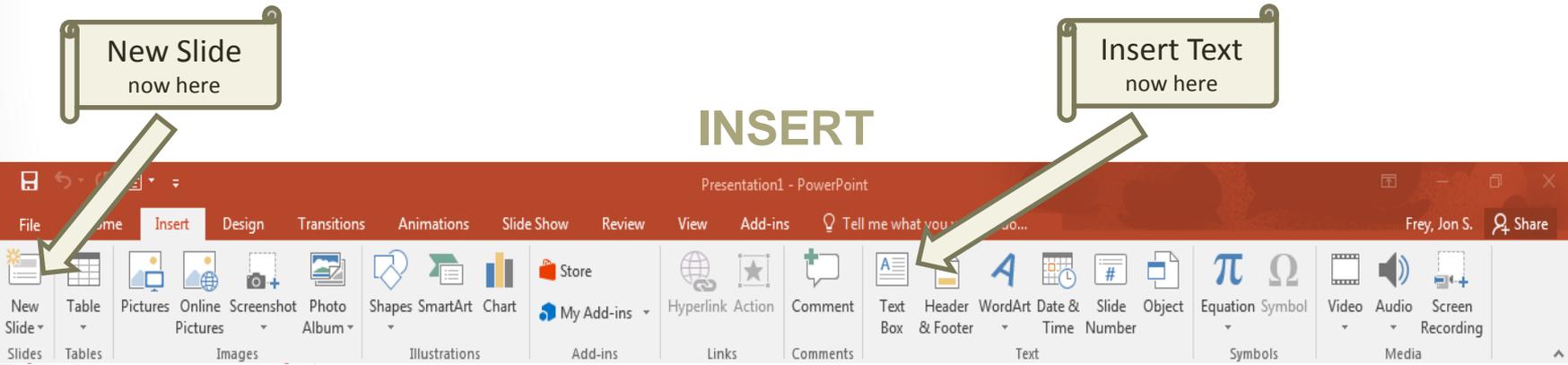
**Not finding what you're looking for?**  
Use the search box at the top to find more templates and themes.

# PowerPoint

# Ribbon Tabs

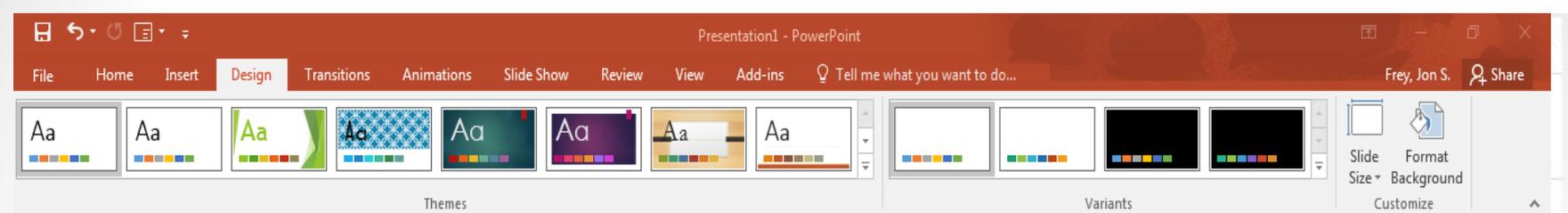


The HOME tab contains basic document editing and formatting features



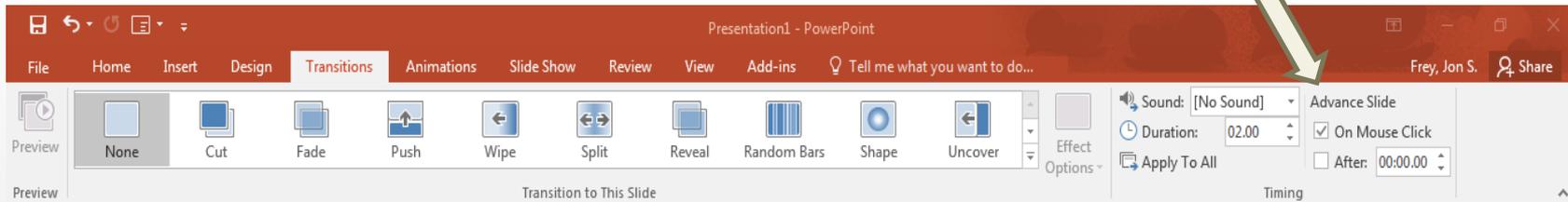
The INSERT tab contains items that can be added to a document such as pictures, text, tables...

## DESIGN



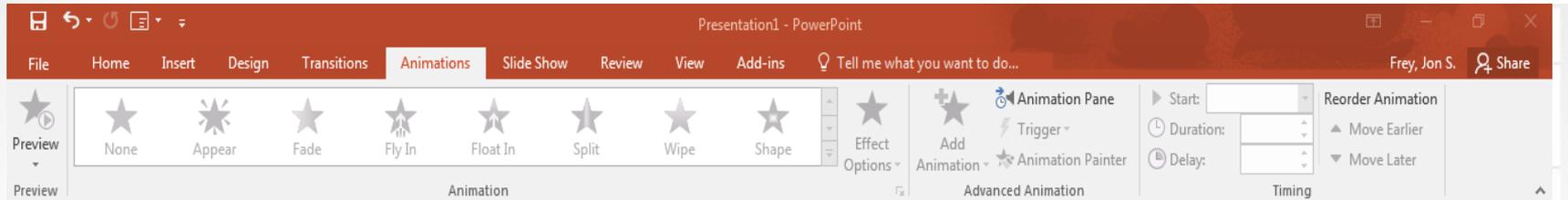
The DESIGN tab contains template design themes

## TRANSITIONS



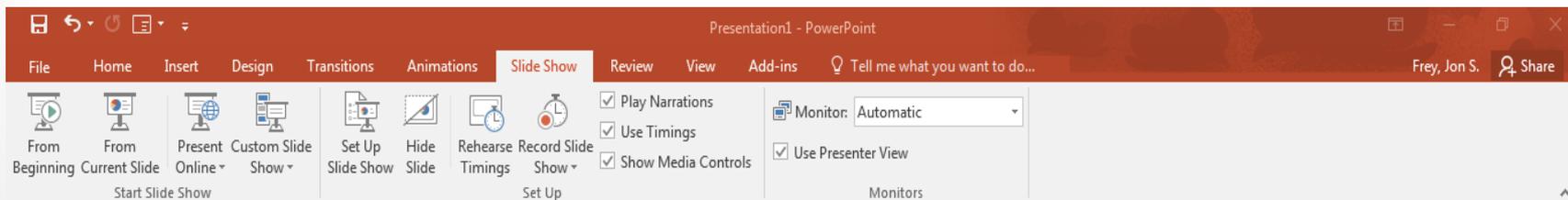
The TRANSITIONS tab contains selections for various transition animation between slides

## 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

Spell Check  
now here

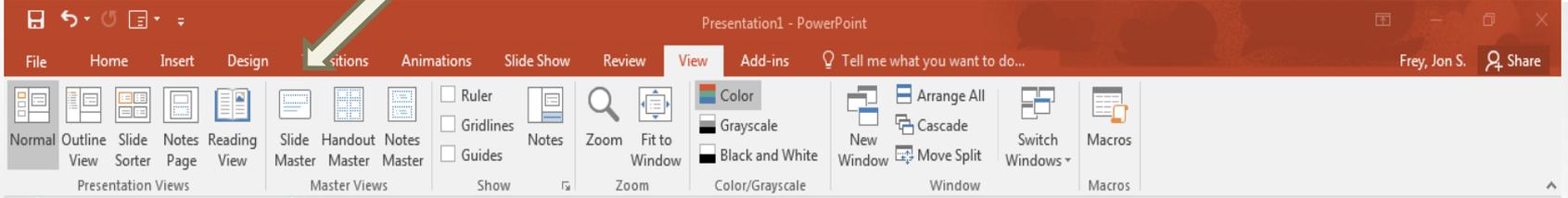
## REVIEW



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

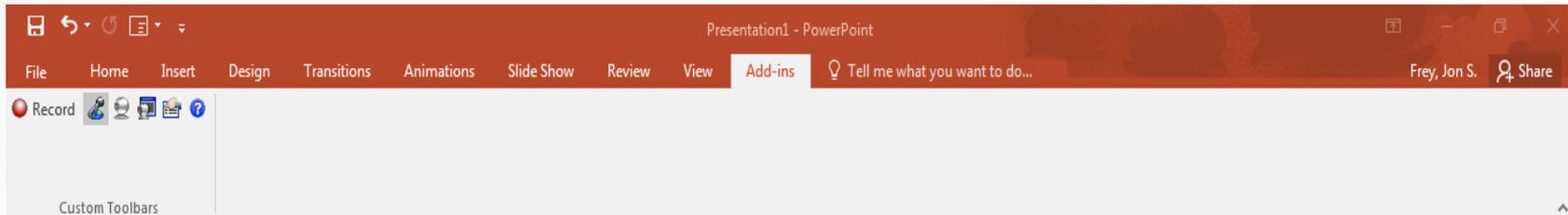
Slide Master  
now here

## VIEW



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

The screenshot shows the PowerPoint application window with the File tab selected. The 'Open' section is active, displaying a list of recent files. The left sidebar contains navigation options: Info, New, Open, Save, Save As, Print, Share, Export, Close, Account, and Options. The main area is divided into sections: Recent, Today, Last Week, and Older. A callout box highlights the text: 'The FILE tab contains selections for saving and opening stored documents in various locations (Referred to as 'back stage')'. The window title is 'Presentation1 - PowerPoint' and the user name 'Frey, Jon S.' is visible in the top right corner.

File Name	Location	Date/Time
Office 365 G3 Briefing (v1.5) - (G3 Ribbons).pptx	Desktop » G3 Breifing Slides	2/22/2016 10:19 AM
Office 365 G3 Briefing (v1) - (G3 Ribbons).pptx	Desktop » G3 Breifing Slides	2/19/2016 12:06 PM
Office 365 G3 Briefing (v1) - (Main Leadin).pptx	Desktop » G3 Breifing Slides	2/19/2016 11:35 AM
Office 365 G3 Briefing (v1) - (G3 Overview).pptx	Desktop » G3 Breifing Slides	2/19/2016 11:13 AM
Office 365 G3 Briefing (v1) - (G3 Applications).pptx	Desktop » G3 Breifing Slides	2/19/2016 11:10 AM
Office 365 G3 Briefing (v1) - (G3 Applications).pptx	Desktop » G3 Breifing Slides	2/19/2016 11:10 AM
Office 365 G3 Briefing (v1) - (G3 Applications).pptx	Desktop » G3 Breifing Slides	2/19/2016 11:10 AM
Microsoft Office 365 Briefing (9-21-15)(OHR) (2).pptx	OneDrive - Montgomery County Government	9/30/2015 9:33 AM
Data Migration - Planning (8-10-15).pptx	OneDrive - Montgomery County Government	9/4/2015 11:14 AM
WAS-IS transition idea (10-16-14).pptx	OneDrive - Montgomery County Government	10/16/2014 11:14 AM

# File Tab (backstage) Sub-Menus

The image displays three variations of the Microsoft Office ribbon's 'Info' sub-menu, each with a different color theme: green, red, and blue. The ribbon is divided into sections for 'Protect Presentation', 'Inspect Presentation', 'Versions and Check Out', and 'Browser View Options'. Each section contains an icon and a brief description of the feature. The 'Protect Presentation' section includes 'Protect Presentation', 'Protect Document', and 'Protect Workbook'. The 'Inspect Presentation' section includes 'Check for Issues'. The 'Versions and Check Out' section includes 'Manage Versions'. The 'Browser View Options' section includes 'Browser View Options'. The ribbon is shown in a window titled 'Test document-2 2-5-15 - Word' with a taskbar at the bottom.

# File Tab

# New – Sub Menu

The screenshot displays the Microsoft Office 365 ribbon interface. The File tab is active, and the 'New' sub-menu is open. The ribbon is divided into three vertical sections: a green section on the left, a red section in the middle, and a blue section on the right. Each section contains a vertical list of options: Info, New, Open, Save, Save As, Print, Share, Export, Close, Account, and Options. The 'New' sub-menu is currently selected in the red section. The main workspace shows a 'New' screen with a search bar and suggested searches. Below the search bar, there are several template thumbnails, including 'Blank Presentation', 'Organic', 'Ion Boardroom', 'Blank document', 'Welcome to Word', 'Single spaced (blank)', 'Blog post', 'Ion design (blank)', 'Facet design (blank)', 'Report design (blank)', 'Resume', 'JOIN US AT OUR ANNUAL EVENT', and 'I WANT TO VOLUNTEER'. The top right corner shows the document title 'Test document-22-5-15 - Word' and the Office 365 Test logo. The bottom of the screen shows the Windows taskbar with various application icons and the system clock displaying 9:31 AM on 2/5/2015.

# File Tab

# Open – Sub Menu

Info  
New  
Open  
Save  
Save As  
Print  
Share  
Export  
Close  
Account  
Options

Open

Recent Workbooks

Sites - Montgomery County Government

OneDrive - Montgomery County Government

OneDrive

Computer

Add a Place

Info  
New  
Open  
Save  
Save As  
Print  
Share  
Export  
Close  
Account  
Options

Open

Recent Presentations

Sites - Montgomery County Government

OneDrive - Montgomery County Government

OneDrive

Computer

Add a Place

Info  
New  
Open  
Save  
Save As  
Print  
Share  
Export  
Close  
Account  
Options

Open

Recent Documents

Sites - Montgomery County Government

OneDrive - Montgomery County Government

OneDrive

Computer

Add a Place

Recent Documents

- Test document-2 2-5-15  
OneDrive - Montgomery County Government
- Test document 2-5-15  
OneDrive - Montgomery County Government

Recover Unsaved Documents

Files can be opened from either OneDrive, the computer or another location.

# File Tab

# Save As – Sub Menu

This screenshot shows the 'Save As' ribbon tab in Office 365. The left sidebar is green and contains the following options: Info, New, Open, Save, Save As (highlighted), Print, Share, Export, Close, Account, and Options. The main area is white and displays the 'Save As' sub-menu with the following options: Sites - Montgomery County Government (highlighted), OneDrive - Montgomery County Government, OneDrive, Computer, Add a Place, Print, Share, Export, Close, Account, and Options.

This screenshot shows the 'Save As' ribbon tab in Office 365. The left sidebar is orange and contains the following options: Info, New, Open, Save, Save As (highlighted), Print, Share, Export, Close, Account, and Options. The main area is white and displays the 'Save As' sub-menu with the following options: Sites - Montgomery County Government, OneDrive - Montgomery County Government (highlighted), OneDrive, Computer, Add a Place, Print, Share, Export, Close, Account, and Options.

This screenshot shows the 'Save As' ribbon tab in Office 365. The left sidebar is blue and contains the following options: Info, New, Open, Save, Save As (highlighted), Print, Share, Export, Close, Account, and Options. The main area is white and displays the 'Save As' sub-menu with the following options: Sites - Montgomery County Government, OneDrive - Montgomery County Government (highlighted), OneDrive, Computer, Add a Place, Print, Share, Export, Close, Account, and Options. To the right of the sub-menu, there is a 'Browse' button and a list of folders under 'Current Folder' and 'Recent Folders', both containing 'OneDrive - Montgomery County Government'.

# File Tab

# Print – Sub Menu

The image displays three panels of the Microsoft Office ribbon's 'Print' sub-menu, each with a different color theme: green, red, and blue. Each panel shows the 'Print' button, a 'Copies' spinner set to 1, a 'Printer' section with a dropdown menu showing 'VQ-Ricoh on mcg-b314 Ready', and a 'Settings' section. The 'Settings' section includes options for 'Print All Slides', 'Print on Both Sides', 'Collated', 'No Staples', 'Portrait Orientation', 'Letter (8.5" x 11")', 'Normal Margins', and 'No Scaling'. The panels are arranged side-by-side to show the visual consistency of the interface across different themes.

This screenshot shows a Microsoft Word window titled 'Test document-2.2-5-15 - Word'. The ribbon is set to the 'Print' sub-menu, which is highlighted in blue. The document content area is mostly blank, with the text 'This is a test document for training' centered. The status bar at the bottom indicates '1 of 1' pages and a zoom level of 76%. The Windows taskbar is visible at the bottom of the screen, showing various application icons and the system clock.

# File Tab

# Share – Sub Menu

The image displays three variations of the Office 365 'Share' sub-menu, illustrating a transition in design. Each variation shows the 'Share' menu open for a document titled 'Test Doc 2-5-15' located in 'OneDrive - Montgomery County Government'.

- Green Theme:** The 'Share' menu is highlighted in green. The 'Invite People' option is also highlighted in green.
- Orange Theme:** The 'Share' menu is highlighted in orange. The 'Invite People' option is also highlighted in orange.
- Blue Theme:** The 'Share' menu is highlighted in blue. The 'Invite People' option is also highlighted in blue. A callout box points to this option with the text: "In the future files will not be attached to emails, rather files will remain static and staff will go to them to edit."

The 'Share' sub-menu options include: Invite People, Get a Sharing Link, Email, Present Online, and Publish Slides. The 'Invite People' dialog box is partially visible in the blue theme screenshot, showing fields for 'Type names or email addresses', 'Include a person', and a 'Share' button. Below the dialog, it shows 'Shared with Office 365 Test Owner'.

The image displays three sequential screenshots of the Office 365 ribbon interface, specifically the 'Export' sub-menu. The first screenshot (green background) shows the 'Export' sub-menu with options: 'Create PDF/XPS Document', 'Change File Type', 'Info', 'New', 'Open', 'Save', 'Save As', 'Print', 'Share', 'Close', 'Account', and 'Options'. The second screenshot (red background) shows the same sub-menu with the 'Create PDF/XPS Document' option highlighted in orange. The third screenshot (blue background) shows the 'Export' sub-menu with the 'Create PDF/XPS Document' option highlighted in blue. A tooltip is visible over this option, containing the text 'Create a PDF/XPS Document' and a list of features: 'Preserves layout, formatting, fonts, and images', 'Content can't be easily changed', and 'Free viewers are available on the web'. A callout box with a white background and a dark border points to the 'Create PDF/XPS Document' option in the tooltip. The callout box contains the text: 'Files can be exported in different formats such as PDF'. The top of the screenshots shows the title bar 'Test document 2-5-15 - Word' and the Office 365 logo. The bottom of the screenshots shows the Windows taskbar with various application icons and the system tray showing the time '9:34 AM' and date '2/5/2015'.

Files can be exported in different formats such as PDF

# Pinning file references

# Ribbon Interface

# Pinned and Older files

**Excel**

**Recent**

**Pinned**

- SharePoint site Test Document.xlsx  
Montgomery County Government » sites » IntranetDev1 » JSFTEST » 0365 Special Lib...

**Last Week**

- SharePoint Contacts-Projects.xlsx  
OneDrive - Montgomery County Government

**Older**

- DTS Team Site permissions.xlsx  
Desktop » SharePoint Development Projects » DTS Team site
- DTS CABLE KBAs 11.18.15.xlsx  
Montgomery County Government » teams » MC311 » Shared Documents » Rob's Te...
- SharePoint Contacts 10-14-15.xlsx  
Montgomery County Government » teams » dts » Shared Documents
- LaptopOrderform1.xlsx  
Montgomery County Government » teams » dts » DCM Order Form
- Pival.xlsx  
Montgomery County Government » sites » IntranetDev1 » Shared Documents
- Lynda com tracking.xlsx  
Montgomery County Government » teams » TeamDev2 » docedit » Shared Docume...
- SharePoint cpy.xlsx  
Montgomery County Government » teams » TeamDev2 » docedit » Shared Docume...
- DOT-VPN.xls  
Montgomery County Government » teams » dts » fibernet » Locations » Leased Circ...
- FRS-VPN.xls  
Montgomery County Government » teams » dts » fibernet » Locations » Leased Circ...
- 0365 Phase 2 - Tutorial Ideas (8-29-14).xlsx  
Montgomery County Government » sites » IntranetDev1 » JSFTEST » Whos Updated...
- FRS-VPN.xls  
Montgomery County Government » teams » dts » fibernet » Configurations
- Master Migation groups and IT Contacts (4-27-15).xlsx  
Montgomery County Government » sites » IntranetDev1 » JSFTEST » Shared Docume...

**Open Other Workbooks**

Search for online templates

Suggested searches: Business Personal Industry Small Business Calculator Finance - Accounting Lists

Freya, Jon S.  
FreyJ@MontgomeryCountyMD.gov  
Switch account

**My Calendar**

Business analysis feature tour

personal expenses

Personal expenses calculator

Budget Overview

Family budget (monthly)

To do list

Sales invoice tracker

Student schedule

D&B business verification

Home Inventory Contents List

DAYBOOK

Timeline Month

PROFIT & LOSS PROJECTION

Attendance Record for David Alexander

Wedding Budget Summary

File reference are in two areas

**Pinned** are always available

**Older** will be available as long as they it is recently accessed.

**Older** files will move off this list by other files

# Ribbon Interface

# Moving file from Recent to Always

Excel

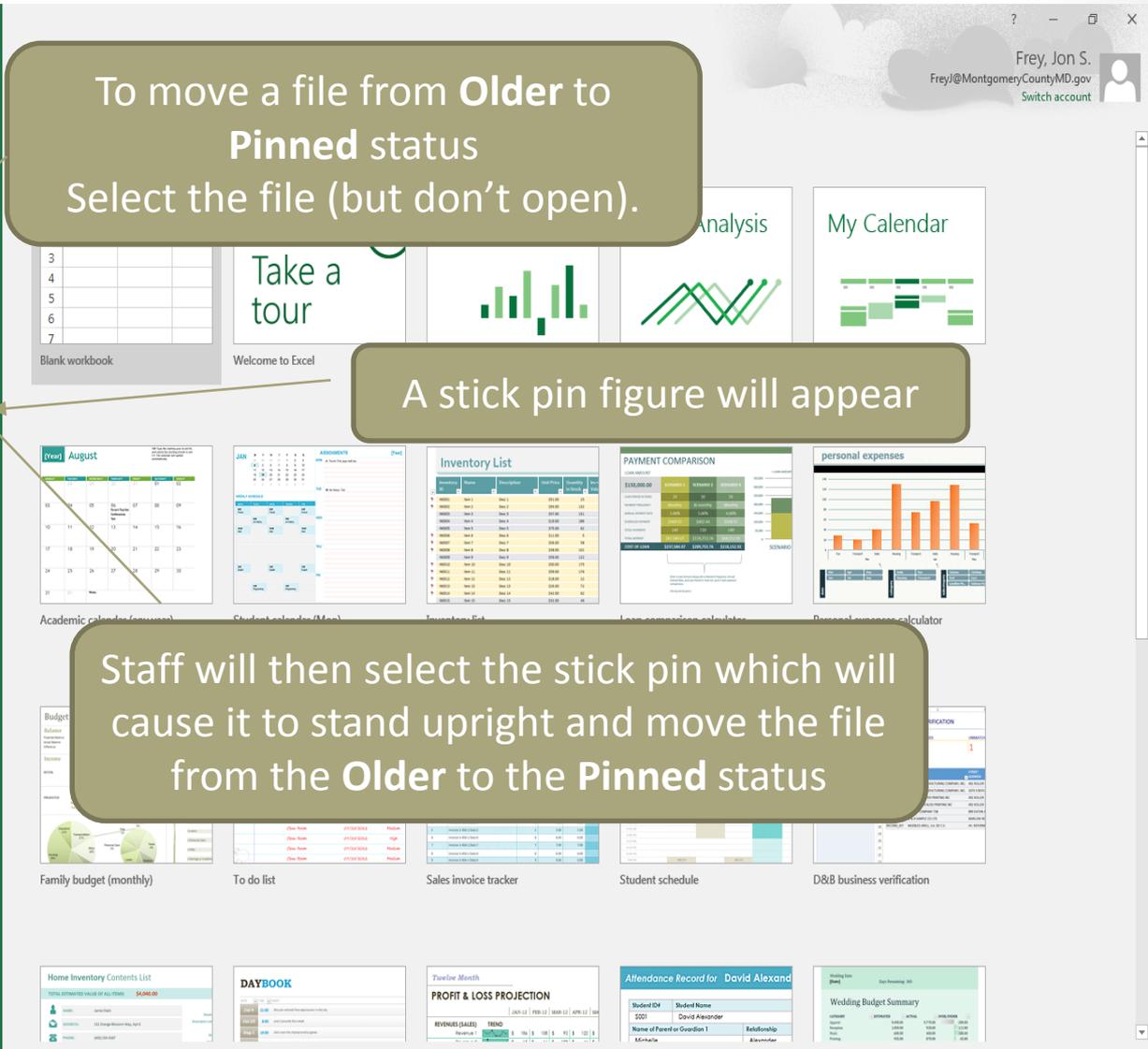
Recent

- Pinned
- SharePoint site Test Document.xlsx  
Montgomery County Government > sites > IntranetDev1 > JSFTTEST > O365 Special Lib...
- Last Week
- SharePoint Contacts-Projects.xlsx  
OneDrive - Montgomery County Government
- Older
- DTS Team Site permissions.xlsx  
Desktop > SharePoint Development Projects > DTS Team site
- DTS CABLE KBAs 11.18.15.xlsx**  
Montgomery County Government > teams > MC311 > Shared Documents > Rob's Te...
- SharePoint Contacts 10-14-15.xlsx  
Montgomery County Government > teams > dts > Shared Documents
- LaptopOrderForm.xlsx  
Montgomery County Government > teams > dts > DCM Order Form
- Pival.xlsx  
Montgomery County Government > sites > IntranetDev1 > Shared Documents
- Lynda com tracking.xlsx  
Montgomery County Government > teams > TeamDev2 > docedit > Shared Docume...
- SharePoint cpy.xlsx  
Montgomery County Government > teams > TeamDev2 > docedit > Shared Docume...
- DOT-VPN.xls  
Montgomery County Government > teams > dts > fibernet > Locations > Leased Circ...
- FRS-VPN.xls  
Montgomery County Government > teams > dts > fibernet > Locations > Leased Circ...
- O365 Phase 2 - Tutorial Ideas (8-29-14).xlsx  
Montgomery County Government > sites > IntranetDev1 > JSFTTEST > Whos Updated...
- FRS-VPN.xls  
Montgomery County Government > teams > dts > fibernet > Configurations
- Master Migration groups and IT Contacts (4-27-15).xlsx  
Montgomery County Government > sites > IntranetDev1 > JSFTTEST > Shared Docume...

To move a file from **Older** to **Pinned** status  
Select the file (but don't open).

A stick pin figure will appear

Staff will then select the stick pin which will cause it to stand upright and move the file from the **Older** to the **Pinned** status



## Excel

### Recent

- Pinned
- DTS CABLE KBAs 11.18.15.xlsx  
Montgomery County Government > teams > MC311 > Shared Documents > Rob's Te...
  - SharePoint site Test Document.xlsx  
Montgomery County Government > sites > IntranetDev1 > JSFTEST > O365 Special Lib...
- Last Week
- SharePoint Contacts-Projects.xlsx  
OneDrive - Montgomery County Government
- Older
- DTS Team Site permissions.xlsx  
Desktop > SharePoint Development Projects > DTS Team site
  - SharePoint Contacts 10-14-15.xlsx  
Montgomery County Government > teams > dts > Shared Documents
  - LaptopOrderform1.xlsx  
Montgomery County Government > teams > dts > DCM Order Form
  - Pival.xlsx  
Montgomery County Government > sites > IntranetDev1 > Shared Documents
  - Lynda com tracking.xlsx  
Montgomery County Government > teams > TeamDev2 > docedit > Shared Docume...
  - SharePoint cpy.xlsx  
Montgomery County Government > teams > TeamDev2 > docedit > Shared Docume...
  - DOT-VPN.xls  
Montgomery County Government > teams > dts > fibernet > Locations > Leased Circ...
  - FRS-VPN.xls  
Montgomery County Government > teams > dts > fibernet > Locations > Leased Circ...
  - O365 Phase 2 - Tutorial Ideas (8-29-14).xlsx  
Montgomery County Government > sites > IntranetDev1 > JSFTEST > Whos Updated...
  - FRS-VPN.xls  
Montgomery County Government > teams > dts > fibernet > Configurations
  - Master Migation groups and IT Contacts (4-27-15).xlsx  
Montgomery County Government > sites > IntranetDev1 > JSFTEST > Shared Docume...

Open Other Workbooks

Search for online templates

Suggested searches: Business Personal Industry Small Business Calculator Finance - Accounting Lists

Frey, Jon S.  
FreyJ@MontgomeryCountyMD.gov  
Switch account

The file reference is now in the Pinned status area.

Blank workbook

Welcome to Excel

My Cashflow

Stock Analysis

My Calendar

Business analysis feature tour

Academic calendar (any year)

Student calendar (Mon)

Inventory list

Loan comparison calculator

Personal expenses calculator

Family budget (monthly)

To do list

Sales invoice tracker

Student schedule

D&B business verification

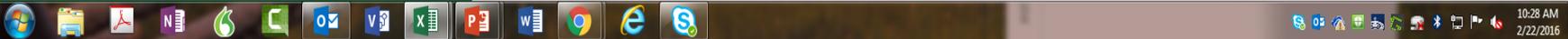
Home Inventory Contents List

DAYBOOK

Profit & Loss Projection

Attendance Record for David Alexander

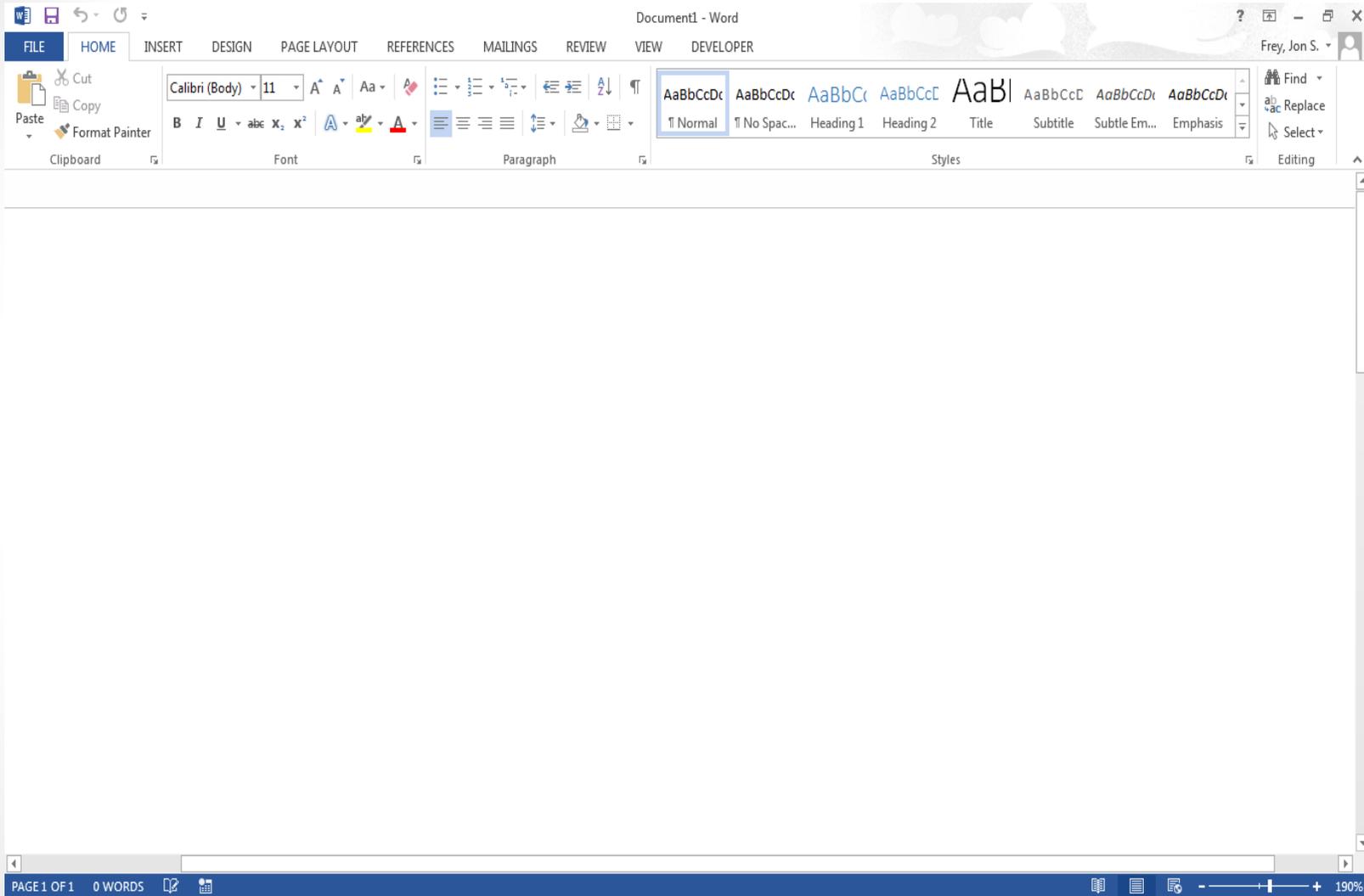
Wedding Budget Summary

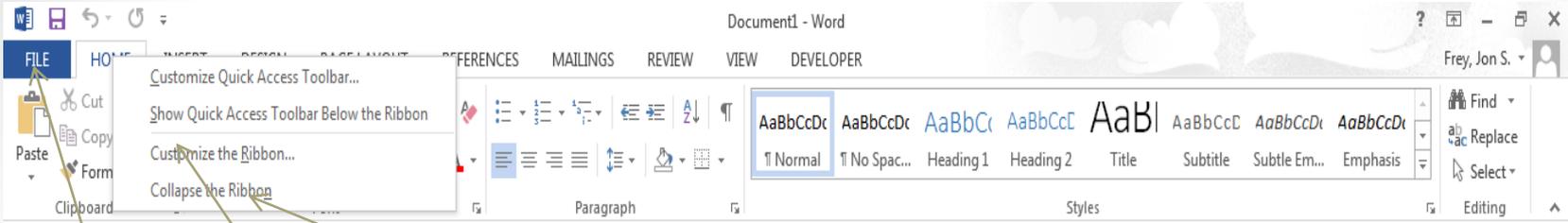


# Display / Hide Ribbons

# Ribbon Interface

# Expanded Ribbon View





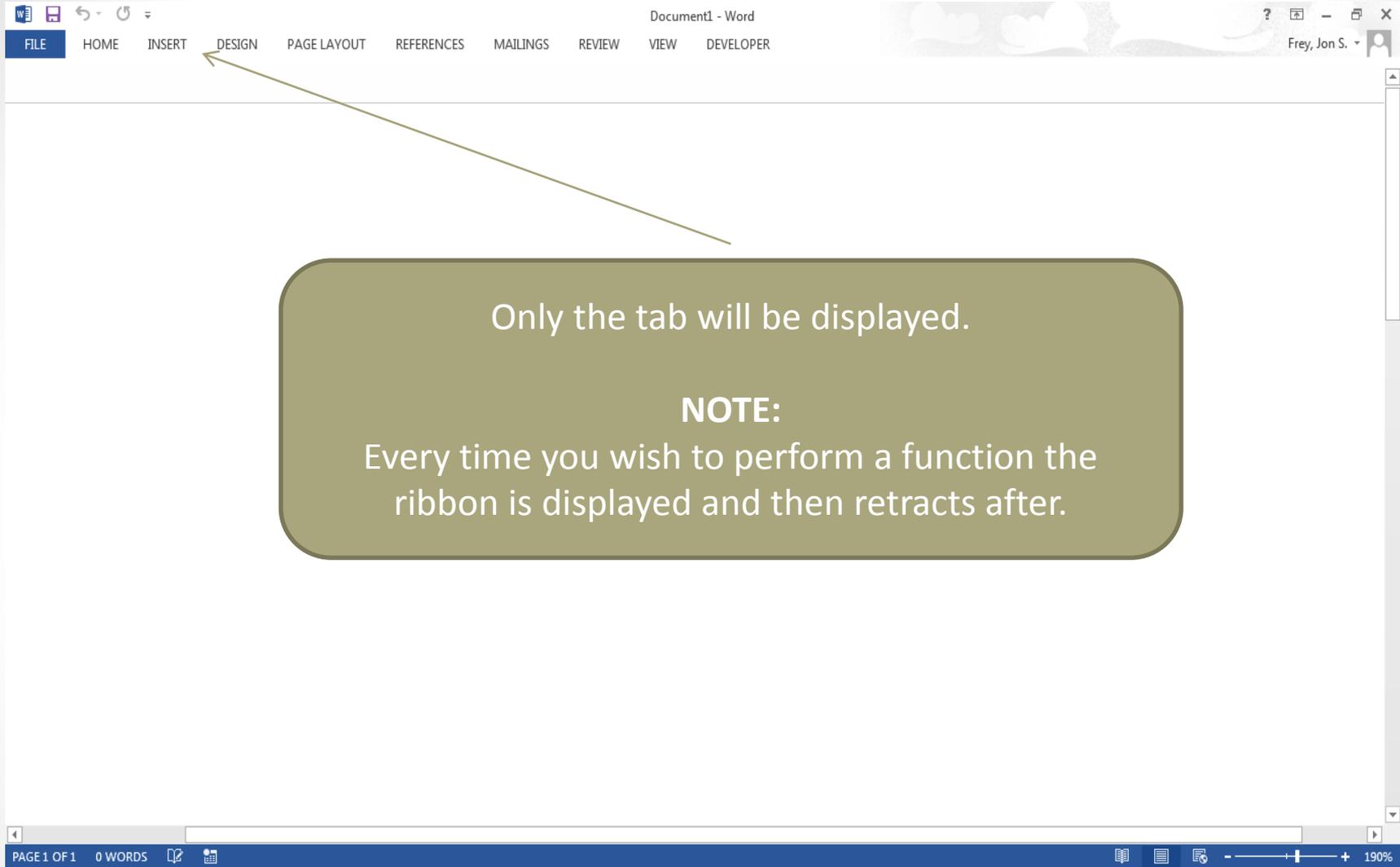
Staff then selects **Collapse the Ribbon** to trigger the process

Staff right clicks on any tab

The choices menu is displayed

# Ribbon Interface

# Collapsed Ribbon View



# OneDrive Overview

## Access O365 Online Apps

- Word Online
- Excel Online
- PowerPoint Online

## Distribute Data

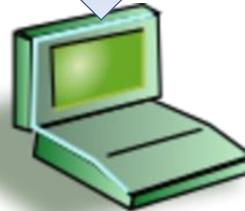
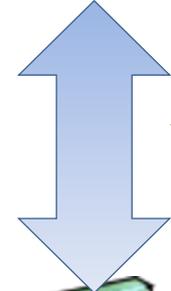
- Sharing
- Download
- NO need for VPN

## OneDrive

*Gateway to Collaboration*

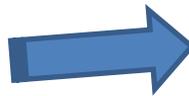
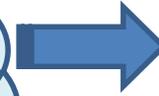
## Consolidate Data

- 'C', 'U', 'T' drives
- Other lettered drives
- Data on shared drives



On the desktop  
'OneDrive for Business'

OneDrive Cloud and OneDrive for Business are regularly synchronizing



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

## 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)



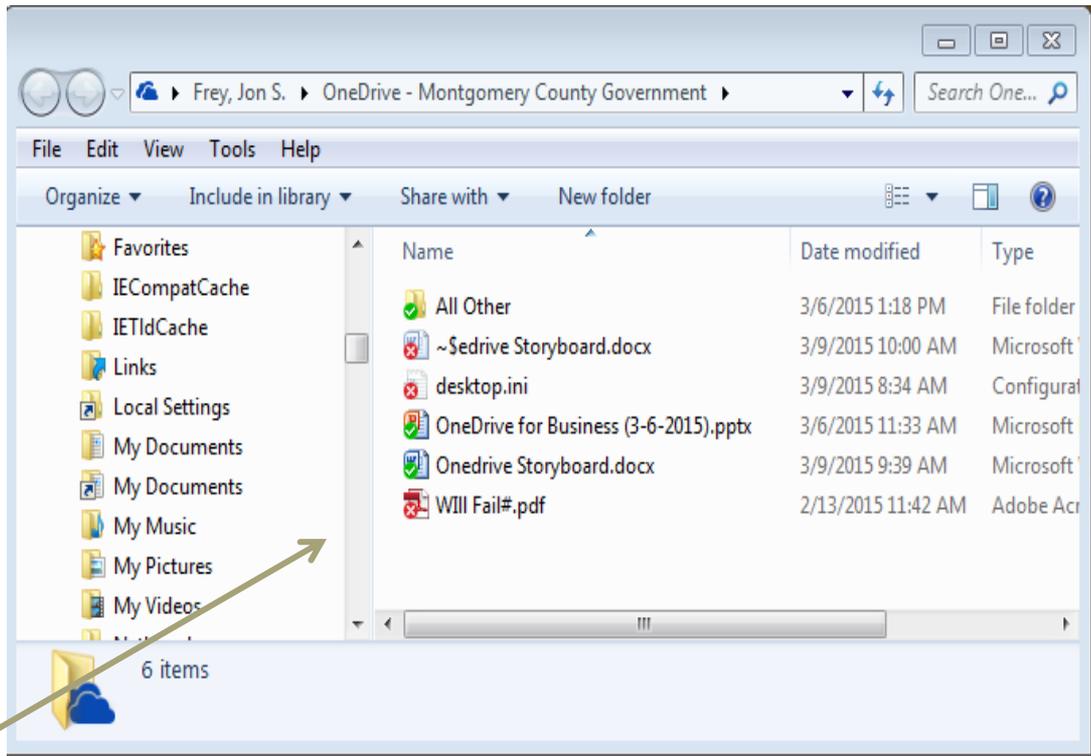
Accessed from the desktop  
like a file folder

# OneDrive for Business

Use desktop icon to launch OneDrive for Business



It opens the OneDrive for Business folder



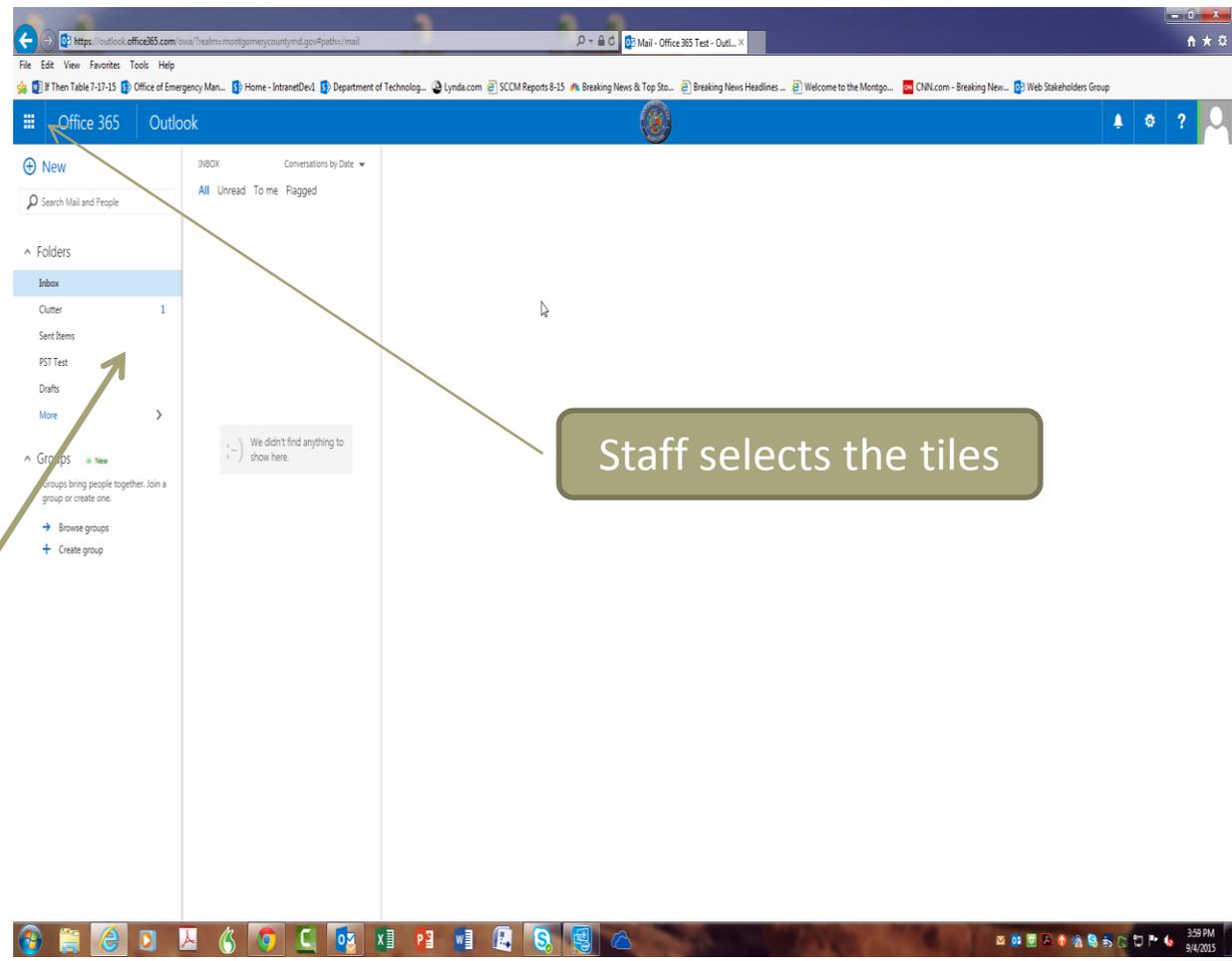
**Note:** When you drag files from the desktop into OneDrive for Business they are moved and not copied and syncing will begin with OneDrive online

# OneDrive Cloud

Use desktop icon to launch Office 365

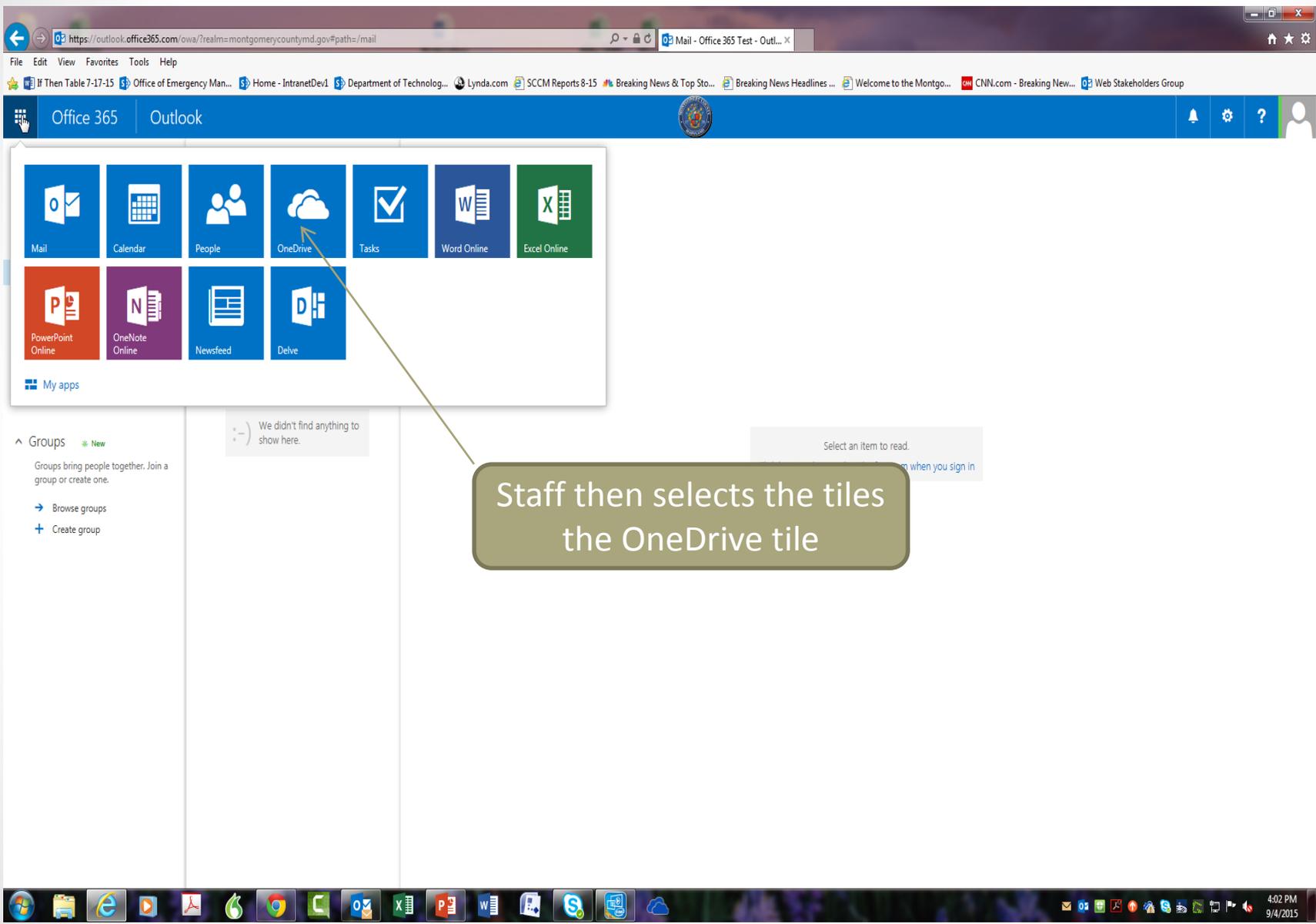


Opens Office 365 home screen (OWA)

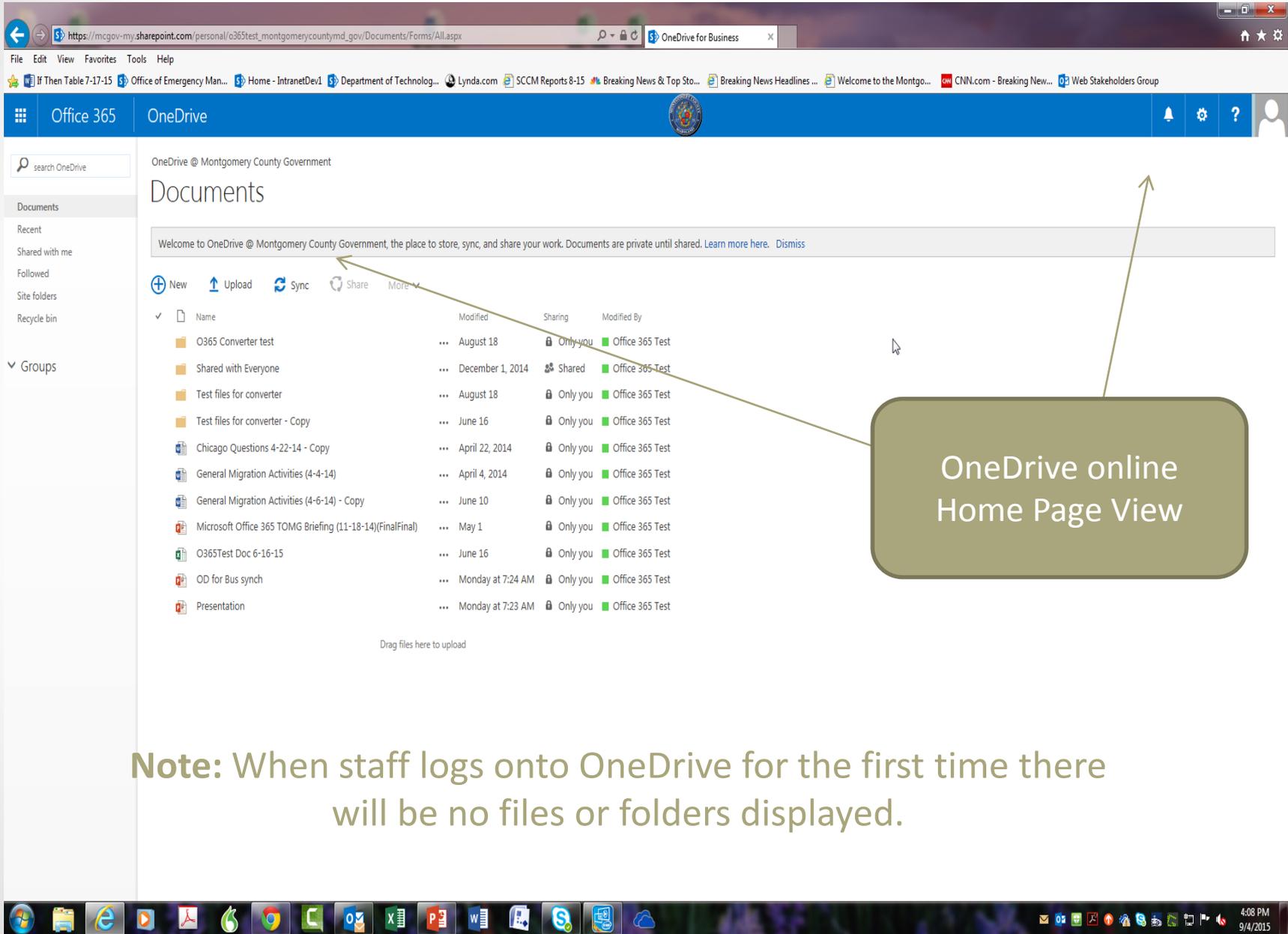


# OneDrive cloud

# Selecting OneDrive from Office 365



Staff then selects the tiles the OneDrive tile



**Note:** When staff logs onto OneDrive for the first time there will be no files or folders displayed.

# Bad File Name Handling

## 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

# Trying to save with illegal character

If staff tries to save a file to OneDrive online which has an illegal character in the name the system will error.

They would then select OK to go to the rename screen

# OneDrive online

# Staff corrects the file name

The screenshot displays the Microsoft Office 365 environment. In the background, a PowerPoint window titled 'HRC Various File Actions - PowerPoint' is visible. Overlaid on this is a Word document window titled 'Test document 2-5-15 - Word'. The Word ribbon shows the 'FILE' tab selected. A 'Save As' dialog box is open, showing the file path 'o365test\_montgome... Documents' and a list of files including 'Test document 2-5-15.docx'. The 'File name' field contains 'Test document-2|2-5-15'. The 'Save as type' is set to 'Word Document'. The 'Save' button is highlighted. Three callout boxes provide instructions: one points to the 'Save As' dialog, another points to the 'File name' field, and a third points to the 'Save' button. A vertical navigation bar on the left shows slide numbers 6 through 12.

Staff is presented with a screen that enables them to rename the file

Staff renames the file removing any illegal characters

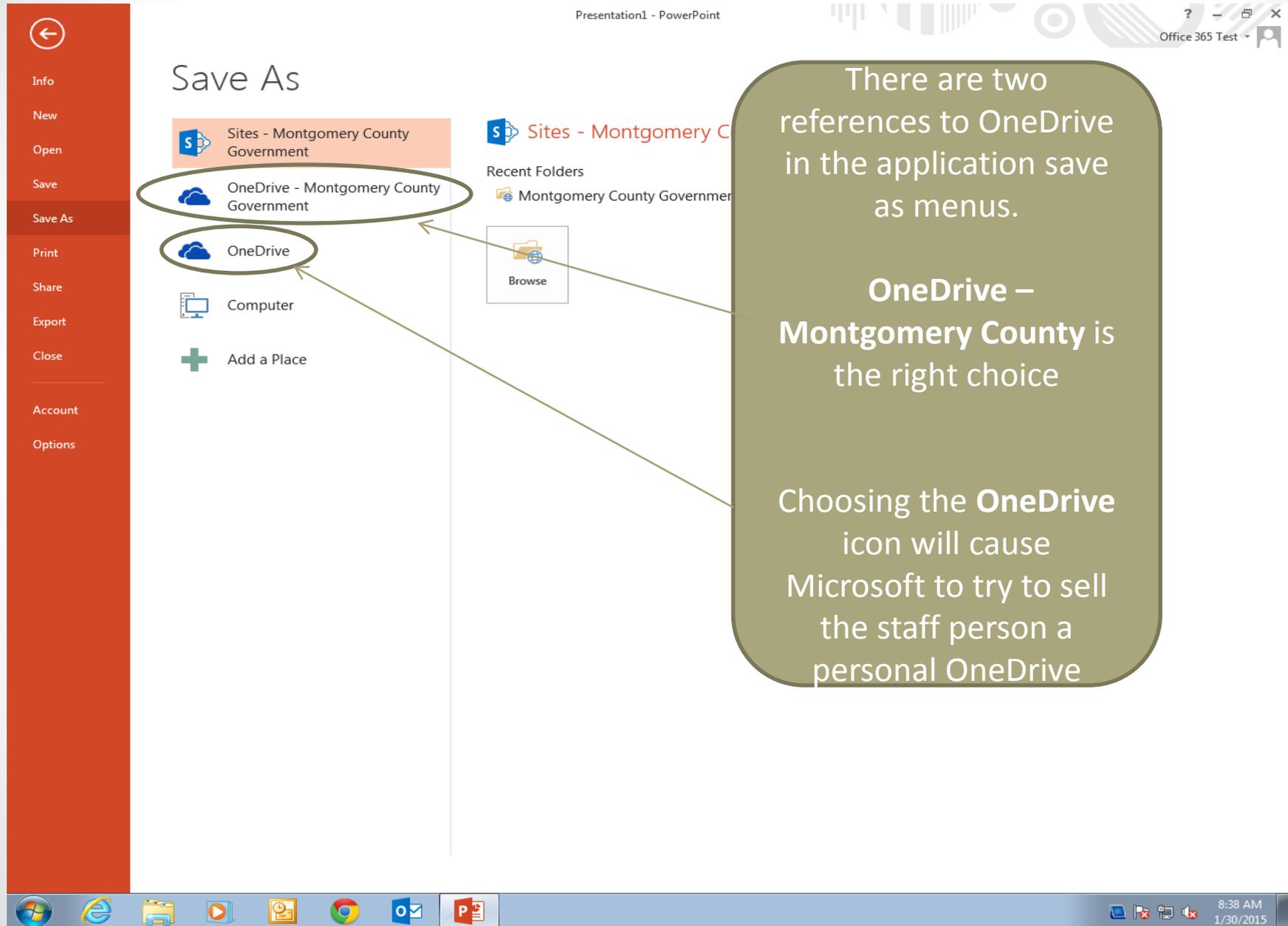
And then selects SAVE

# OneDrive online

# Save Completes correctly

The screenshot displays the Microsoft Office 365 interface. In the background, a PowerPoint window titled 'HRC Various File Actions - PowerPoint' is visible, showing a slide with a blue and white pattern. In the foreground, a Word window titled 'Test document-2 2-5-15 - Word' is open. The Word ribbon is set to the 'HOME' tab, showing options for Font, Paragraph, and Styles. The main text area of the Word document contains the sentence: 'This is a test document for training'. A 'Navigation' pane is open on the left side of the Word window, showing a search bar and tabs for 'HEADINGS', 'PAGES', and 'RESULTS'. The status bar at the bottom of the Word window indicates 'PAGE 1 OF 1' and '7 WORDS'. The Windows taskbar at the bottom shows the Start button, task view, and several application icons including Internet Explorer, File Explorer, and Office 365 apps. The system tray shows the time as 8:50 AM on 2/5/2015.

# Saving data to OneDrive



There are two references to OneDrive in the application save as menus.

**OneDrive – Montgomery County is the right choice**

Choosing the **OneDrive** icon will cause Microsoft to try to sell the staff person a personal OneDrive

# Save As – OneDrive online

Book1 - Excel

Office 365 Test

## Save As

- Sites - Montgomery County Government
- OneDrive - Montgomery County Government**
- OneDrive
- Computer
- + Add a Place

### OneDrive - Montgomery County Government

Recent Folders

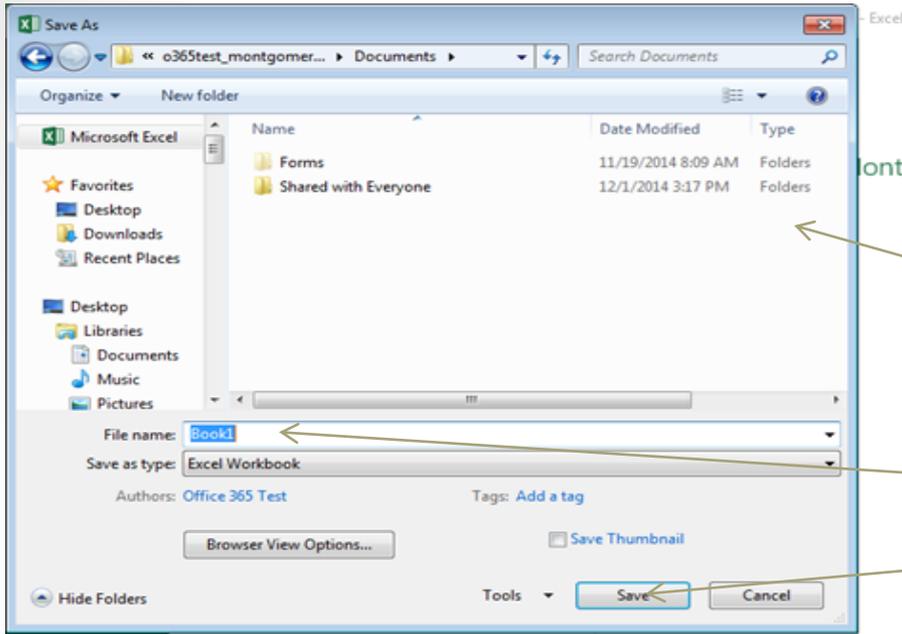
You have no recent folders.

Browse

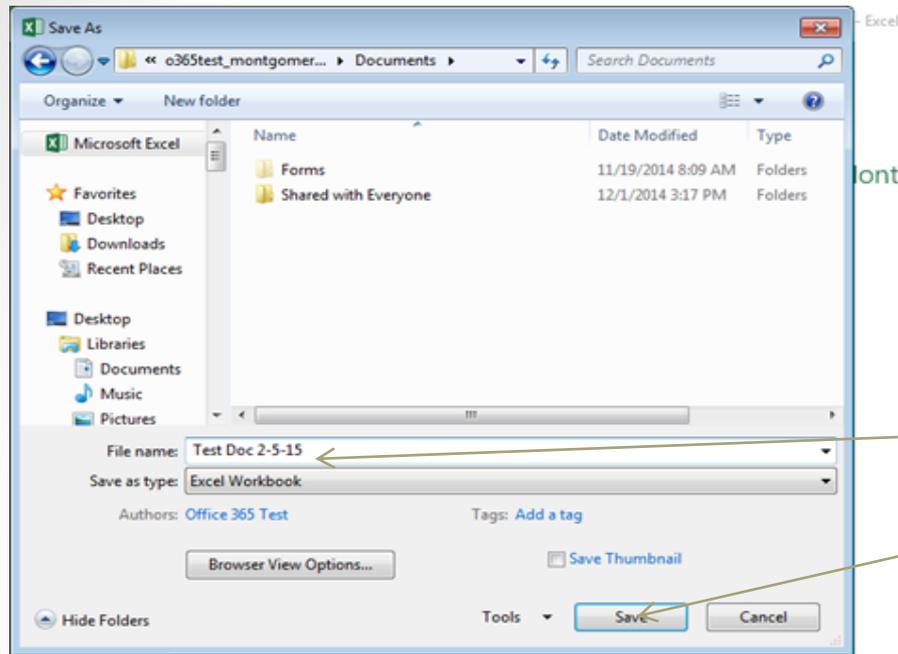
Next you would select **Browse.**

First you would select **OneDrive - Montgomery County Government.**

9:44 AM  
2/5/2015



A file naming window appears where staff names and saves



Montgomery County Government

Staff names the file and selects SAVE when ready

The screenshot shows the Microsoft Excel interface. The title bar reads "Test Doc 2-5-15 - Excel". The ribbon is set to "HOME" and includes tabs for FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, and VIEW. The ribbon contains various toolbars for Font, Alignment, Number, Styles, Cells, and Editing. The spreadsheet grid shows columns A through S and rows 1 through 36. The following table represents the data in the spreadsheet:

Row	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1																			
2																			
3				100															
4																			
5				7															
6																			
7				700															
8																			
9																			
10																			
11																			
12																			
13																			
14																			
15																			
16																			
17																			
18																			
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25																			
26																			
27																			
28																			
29																			
30																			
31																			
32																			
33																			
34																			
35																			
36																			

# Uploading data to OneDrive

The screenshot shows the OneDrive web interface for a user at Montgomery County Government. The interface includes a navigation bar with 'Office 365' and 'OneDrive' options, a search bar, and a list of documents. A callout box with a green background and white text provides instructions on how to upload files from a desktop. An arrow points from the callout box to the 'Drag files here to upload' area at the bottom of the document list.

**To copy a file to OneDrive select it on the desktop and drag to this area**

Name	Modified	Sharing	Modified By
...	August 18	Only you	Office 365 Test
...	December 1, 2014	Shared	Office 365 Test
...	August 18	Only you	Office 365 Test
...	June 16	Only you	Office 365 Test
...	April 22, 2014	Only you	Office 365 Test
...	April 4, 2014	Only you	Office 365 Test
...	June 10	Only you	Office 365 Test
Microsoft Office 365 TOMG Briefing (11-18-14)(FinalFinal)	May 1	Only you	Office 365 Test
O365Test Doc 6-16-15	June 16	Only you	Office 365 Test
OD for Bus synch	Monday at 7:24 AM	Only you	Office 365 Test
Presentation	Monday at 7:23 AM	Only you	Office 365 Test

Drag files here to upload

**Note:**  
To upload data in files first create a file in OneDrive, Then select all files in current folder and drag to the OneDrive folder and the files will be copied

# Opening files from OneDrive

The image displays three sequential screenshots of the Microsoft Word 'Open' dialog box, illustrating different visual themes and the file selection process. The top of the window shows the title bar 'Test document-2-2-5-15 - Word' and standard window controls. The 'Open' dialog features a left-hand navigation pane with options like 'Recent Workbooks', 'Recent Presentations', 'OneDrive - Montgomery County Government', and 'Computer'. The main area shows 'Recent Documents' with two files: 'Test document-2-2-5-15' and 'Test document 2-5-15', both located on 'OneDrive - Montgomery County Government'. A callout box with a dark green background and white text states: 'Files can be opened from either OneDrive, the computer or another location.' Two arrows point from this box to the 'OneDrive - Montgomery County Government' and 'Computer' entries in the file list. The Windows taskbar at the bottom shows various application icons and the system clock indicating 9:31 AM on 2/5/2015.

# Version Control

The screenshot shows the OneDrive web interface. The top navigation bar includes 'Open', 'Share', 'Download', 'Get a link', 'Delete', 'Copy to', 'Move to', and 'Rename'. The file list is as follows:

Name	Modified	Modified By	File Size	Sharing
All Other				
G3 Briefing Slides				
Gen WIP 1-16				
Gen WIP 12-15				
Notebooks				
Quick Steps Videos - Copy	December 16, 2015	Frey, Jon S.		Shared
SharePoint - Base rollout docs	January 21	Frey, Jon S.		Shared
SharePoint Development Projects	January 21	Frey, Jon S.		Shared
WIP 11-12-15	January 21	Frey, Jon S.		Shared
SharePoint Contacts-Projects.xlsx	February 9	Frey, Jon S.	15.94 KB	Shared

Annotations:

- A callout box points to the '...' symbol next to the file 'SharePoint Contacts-Projects.xlsx' with the text: "First staff would select the file that they wanted to view versions for."
- Another callout box points to the '...' symbol next to the same file with the text: "Next they would right click on the '...' symbol"

The screenshot shows the OneDrive web interface. The browser address bar displays the URL: [https://mcgov-my.sharepoint.com/personal/frej\\_montgomerycountymd\\_gov/\\_layouts/15/onedrive.aspx](https://mcgov-my.sharepoint.com/personal/frej_montgomerycountymd_gov/_layouts/15/onedrive.aspx). The page title is "OneDrive". The navigation bar includes "Open", "Share", "Download", "Get a link", "Delete", "Copy to", "Move to", "Rename", and "1 Selected".

The "Files" section contains a table with the following columns: Name, Modified, Modified By, File Size, and Sharing. The table lists several folders and files, with the file "SharePoint C..." selected. A context menu is open over this file, showing options: Download, Open in Excel Online, Open In Excel, Share, Get a link, Rename, Delete, Copy to, Move to, Details, and Version History. An arrow points from a callout box to the "Version History" option.

Name	Modified	Modified By	File Size	Sharing
All Other	September 4, 2015	Frey, Jon S.		Shared
G3 Briefing Slides	Yesterday at 12:32 PM	Frey, Jon S.		Shared
Gen WIP 1-16	January 21	Frey, Jon S.		Shared
Gen WIP 12-15	January 21	Frey, Jon S.		Shared
Notebooks	December 30, 2015	Frey, Jon S.		Shared
Quick Steps Video - Copy	December 16, 2015	Frey, Jon S.		Shared
SharePoint - Base rollout docs	January 21	Frey, Jon S.		Shared
SharePoint Development Projects	January 21	Frey, Jon S.		Shared
WIP 11-12-15	January 21	Frey, Jon S.		Shared
SharePoint C...	February 9	Frey, Jon S.	15.94 KB	Shared

Next they would select  
**Version History**

The version history is displayed

No.	Modified	Modified By	Size	Comments
20.0	2/9/2016 4:19 AM	Frey, Jon S.	15.9 KB	
19.0	2/9/2016 4:04 AM	Frey, Jon S.	15.9 KB	
18.0	2/2/2016 10:49 AM	Frey, Jon S.	16 KB	
17.0	1/14/2016 6:43 AM	Frey, Jon S.	16 KB	
16.0	1/14/2016 6:30 AM	Frey, Jon S.	16 KB	
15.0	1/14/2016 6:19 AM	Frey, Jon S.	16 KB	
14.0	1/8/2016 8:41 AM	Frey, Jon S.	15.6 KB	
13.0	1/8/2016 7:18 AM	Frey, Jon S.	15.7 KB	
12.0	12/16/2015 8:56 AM	Frey, Jon S.	15.7 KB	
11.0	12/16/2015 8:40 AM	Frey, Jon S.	15.4 KB	
10.0	12/10/2015 9:39 AM	Frey, Jon S.	15.5 KB	
9.0	11/17/2015 5:46 AM	Frey, Jon S.	15.1 KB	

Each entry has the version number, date/time modified and author

The screenshot shows the OneDrive interface in a browser. A file named 'SharePoint Contacts-Project' is selected. A 'Version History' dialog is open, displaying a table of versions. A callout box points to the 'View' button in the version history table. Another callout box explains that hovering over a version shows a menu with 'View' and 'Restore' options.

No.	Modified	Modified By	Size
20.0		<input type="checkbox"/> Frey, Jon S.	15.9 KB
19.0		<input type="checkbox"/> Frey, Jon S.	15.9 KB
18.0		<input type="checkbox"/> Frey, Jon S.	16 KB
17.0	1/14/2016 6:43 AM	<input type="checkbox"/> Frey, Jon S.	16 KB
16.0	1/14/2016 6:30 AM	<input type="checkbox"/> Frey, Jon S.	16 KB
15.0	1/14/2016 6:19 AM	<input type="checkbox"/> Frey, Jon S.	16 KB
14.0	1/8/2016 8:01 AM	<input type="checkbox"/> Frey, Jon S.	15.6 KB
13.0	1/8/2016 7:18 AM	<input type="checkbox"/> Frey, Jon S.	15.7 KB
12.0	12/16/2015 8:56 AM	<input type="checkbox"/> Frey, Jon S.	15.7 KB
11.0	12/16/2015 8:40 AM	<input type="checkbox"/> Frey, Jon S.	15.4 KB
10.0	12/10/2015 9:39 AM	<input type="checkbox"/> Frey, Jon S.	15.5 KB
6.0	10/29/2015 10:54 AM	<input type="checkbox"/> Frey, Jon S.	15.1 KB
5.0	10/26/2015 8:25 AM	<input type="checkbox"/> Frey, Jon S.	15 KB
4.0	10/26/2015 6:44 AM	<input type="checkbox"/> Frey, Jon S.	14.8 KB

In this case **View** is chosen

When staff hovers their mouse over a version they get a small menu where they can **View** the version or **Restore** this copy to be the current version



# Comparing Versions

The screenshot shows the Office 365 SharePoint interface. At the top, there is a blue header with the Office 365 logo, 'Office 365', and 'SharePoint' text. A circular logo is visible in the top right corner of the header. Below the header is a navigation bar with 'BROWSE', 'FILES', and 'LIBRARY' tabs. The main content area has a blue bar with the 'S' logo and 'Documents' and 'Communications' text. Below this, there are options for 'G3 Transition', 'DTS Home', and 'EDIT LINKS'. A secondary navigation bar includes 'Home', 'Batch Management', 'Reference', 'Notebook', 'Recent', 'Archives', 'Other Docs', and 'Recycle Bin'. The main area features a 'New' button, 'Upload', 'Sync', 'Share', and 'More' options. A search box labeled 'Find a file' is present. Below the search box is a table of documents:

✓	Name	Modified	Modified By
	DTS Staff announcement	April 20	Klinger, Dieter
	G3 Engagement Status	Wednesday at 1:52 PM	Frey, Jon S.
	G3 Transition Plan (3-17-16)	April 25	Frey, Jon S.
	Office 365 G3 Transition Update 1 (6-3-16)	Yesterday at 4:08 PM	Klinger, Dieter

At the bottom of the main area, there is an 'EDIT LINKS' button and a 'Drag files here to upload' instruction.

Word Online

G3 Transition Office 365 G3 Transition Update 1 (6-3-16) Edit Document P

Office 365  
Office 365 G3 transition  
Update #1 (6-3-2016)

Introduction

Since the Office 365 G3 transition project announcement on March 4, 2016 a number of things have been happening to get the project moving into a production state and to operate a regular schedule for processing groups of machines through the transition activities.

- We released the transition plan and began the process of engaging individual department IT into the transition activities. We have processed 24 batches so far.
- We gained an understanding of key factors we need to work on to ensure the transitions take place, primarily:
  - Machine must be available (i.e. laptops need to be docked)
  - Machine must be ON
  - Machine MUST NOT be sleeping
- We have developed support documents and instructions for those staff that experience small transition confusion (such as requesting validation). And a process for addressing larger remediation's (should a script fail part way through)
- We have completed roughly 25% of what we set out to do.

PAGE 1 OF 6

Office 365 G3 Transition Update 1 (6-3-16).docx - Word

File Home Insert Design Layout References Mailings Review View Tell me what you want to do

Clipboard Font Paragraph Styles Editing

Office 365  
Office 365 G3 transition  
Update #1 (6-3-2016)

Introduction

Since the Office 365 G3 transition project announcement on March 4, 2016 a number of things have been happening to get the project moving into a production state and to operate a regular schedule for processing groups of machines through the transition activities.

- We released the transition plan and began the process of engaging individual department IT into the transition activities. We have processed 24 batches so far.

Page 1 of 6 1681 words

Updates Available 8:48 AM 6/3/2016

The image shows the Microsoft Word Review tab interface. A callout box with a dark green background and rounded corners contains the text "Review Tab" and "Compare". An arrow points from the "Compare" text in the callout box to the "Compare" button in the Review tab ribbon. Another arrow points from the "Compare" button in the ribbon to the "Compare" dropdown menu, which is open and shows several options: "Major Version", "Last Version", "Specific Version...", "Compare...", and "Combine...". Below the ribbon, the text "Office 365", "Office 365 G3 transition", and "Update #1 (6-3-2016)" is displayed.

Review Tab

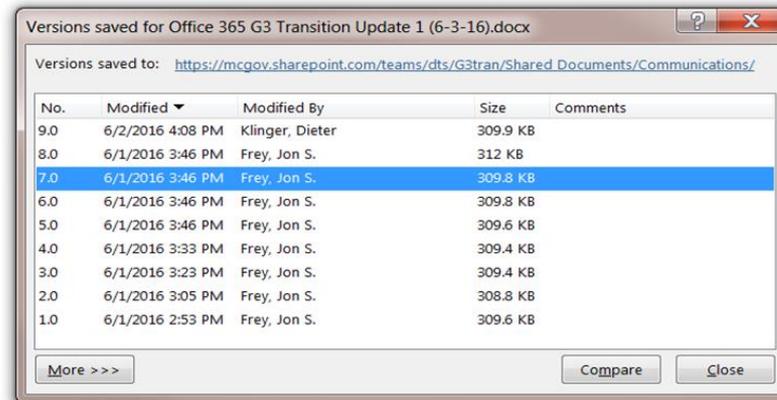
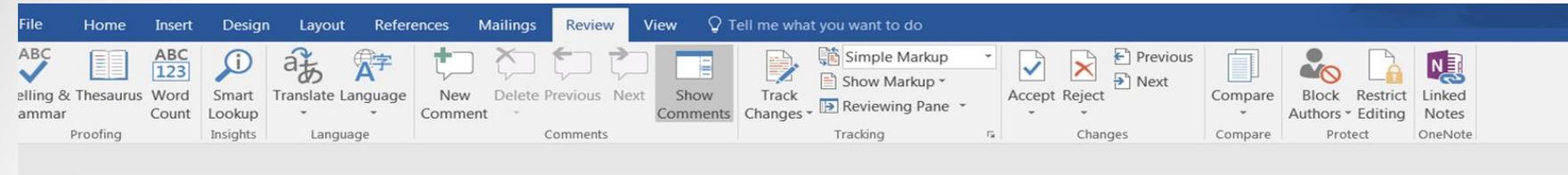
Compare

Office 365  
Office 365 G3 transition  
Update #1 (6-3-2016)

## Introduction

Since the Office 365 G3 transition project announcement on March 4, 2016 a number of things have been happening to get the project moving into a production state and to operate a regular scheduled processing groups of machines through the transition activities.

- We released the transition plan and began the process of engaging individual department I the transition activities. We have processed 24 batches so far.



## Introduction

Since the Office 365 G3 transition project announcement on March 4, 2016 a number of things have been happening to get the project moving into a production state and to operate a regular scheduled processing groups of machines through the transition activities.

- We released the transition plan and began the process of engaging individual department in the transition activities. We have processed 24 batches so far.

The screenshot displays the Microsoft Word interface with the 'Review' tab selected. The title bar reads 'Compare Result 1 - Word'. The ribbon includes 'File', 'Home', 'Insert', 'Design', 'Layout', 'References', 'Mailings', 'Review', and 'View'. The 'Review' ribbon shows options for 'Show Comments', 'Track Changes', 'Accept', 'Reject', 'Compare', 'Block Authors', 'Restrict Editing', and 'Linked Notes'. The 'Track Changes' group is active, showing 'Simple Markup' and 'Show Markup' options.

The main window is split into three panes:

- Revisions Pane (Left):** Shows 40 revisions with a summary: Insertions: 19, Deletions: 18, Moves: 0, Formatting: 3, Comments: 0. A list of changes is provided, including 'Changes since 7.0 Deleted activities.', 'Changes since 7.0 Deleted process..', 'Changes since 7.0 Formatted Normal', 'Changes since 7.0 Deleted We have been performing Cross Sectional testing with a number of departments and from it are able to increase the rate that groups move based on no issues with that particular configuration (i.e. Office 2007).', 'Changes since 7.0 Formatted Font: 14 pt. Underline', and 'Changes since 7.0 Deleted'.
- Compared Document (Middle):** Contains the following text:

We reduced the transition plan and began the process of engaging individual department into the transition activities. We have processed 24 batches so far.

  - We gained an understanding of key factors we need to work on to ensure the transitions take place, primarily:
    - Machine must be available (i.e. laptops need to be docked)
    - Machine must be ON
    - Machine MUST NOT be sleeping
  - We have developed support documents and instructions for those staff that experience small transition confusion (such as requesting validation). And a process for addressing larger remediation's (should a script fail part way through)
  - We have completed roughly 25% of what we set out to do.
  - We are processing two batches a week with hundreds of machines in each batch. We have transitioned thousands of machines and experienced few failures and little surge to the help desk.
  - The web site and transition briefings are easing the staff movement to the Office 365 G3 environment and the counts of Office 2003 identified elements is reducing.

Even though we have reduced the risk from 3,200 instances or traces of Office 2003 to 2,500 there is still quite a way to go!

**But we need to pick up the pace!**

Don't wait to transition shared machines

With recent communications regarding the risk related to Office 2003 and the 1 September date for action related to it, we need to redouble our efforts to move those machines as early as possible in the cycle. We've also noticed that there are many cases of Office 2003 on shared machines. The shared machines need to be transition so their
- Original Document (Office 365 G3 Transition Update 1 (6-3-16).docx, version 7.0: 6/1/2016) (Right):** Contains the following text:

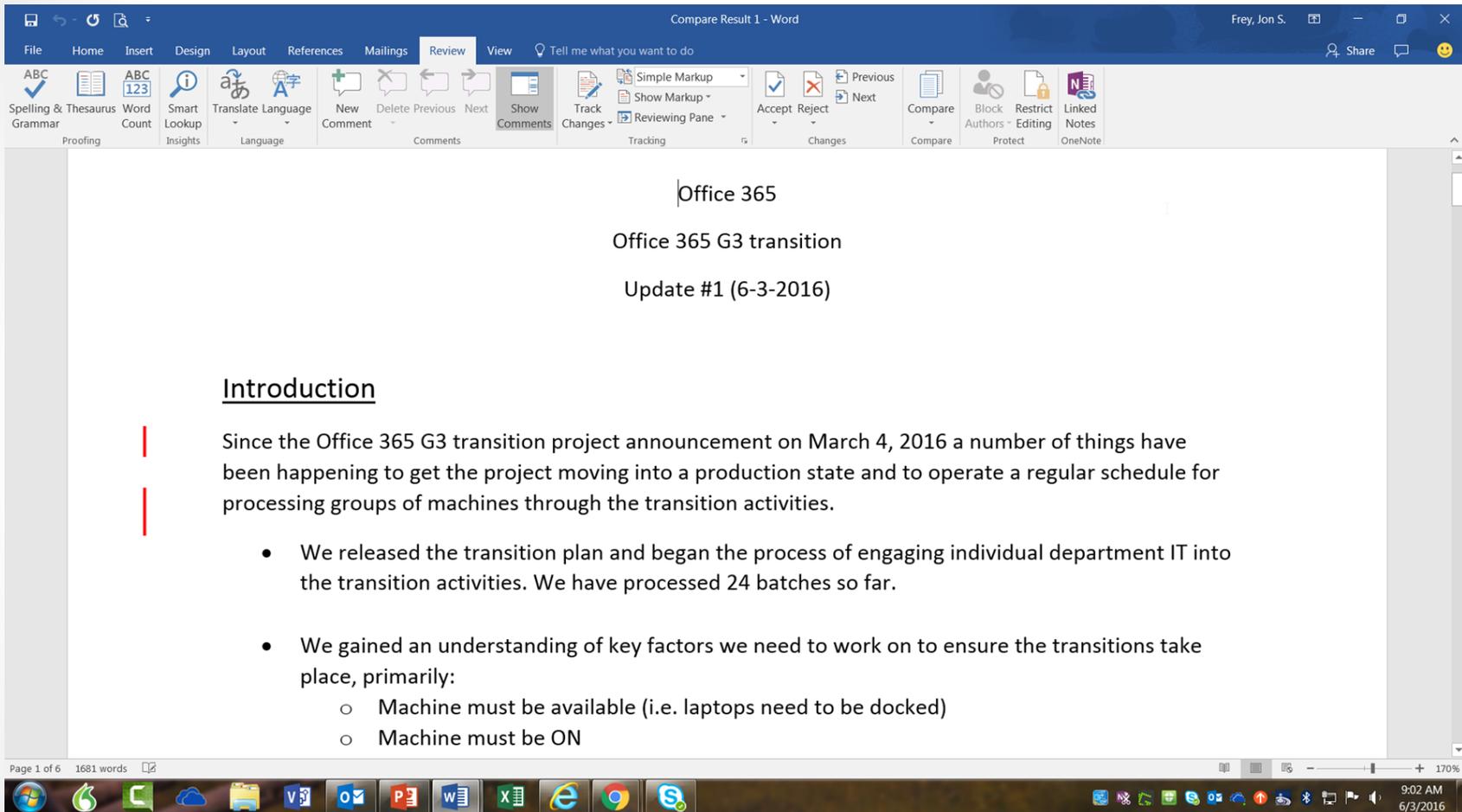
engaging individual department IT into the transition activities. We have processed 24 batches so far.

  - We gained an understanding of key factors we need to work on to ensure the transitions take place, primarily:
    - Machine must be available (i.e. laptops need to be docked)
    - Machine must be ON
    - Machine MUST NOT be sleeping
  - We have been performing **Cross Sectional testing** with a number of departments and from it are able to increase the rate that groups move based on no issues with that particular configuration (i.e. Office 2007).
- Revised Document (Office 365 G3 Transition Update 1 (6-3-16).docx) (Bottom):** Contains the following text:

engaging individual department IT into the transition activities. We have processed 24 batches so far.

  - We gained an understanding of key factors we need to work on to ensure the transitions take place, primarily:
    - Machine must be available (i.e. laptops need to be docked)
    - Machine must be ON
    - Machine MUST NOT be sleeping
  - We have developed support documents and instructions for those staff that experience small transition confusion (such as requesting validation). And a process for addressing larger remediation's (should a script fail part way through)

The status bar at the bottom shows '1681 words' and '8:58 AM 6/3/2016'.



The screenshot shows the Microsoft Word interface with the 'Review' tab selected. The document content is centered and reads:

Office 365  
Office 365 G3 transition  
Update #1 (6-3-2016)

Introduction

Since the Office 365 G3 transition project announcement on March 4, 2016 a number of things have been happening to get the project moving into a production state and to operate a regular schedule for processing groups of machines through the transition activities.

- We released the transition plan and began the process of engaging individual department IT into the transition activities. We have processed 24 batches so far.
- We gained an understanding of key factors we need to work on to ensure the transitions take place, primarily:
  - Machine must be available (i.e. laptops need to be docked)
  - Machine must be ON

The status bar at the bottom indicates 'Page 1 of 6', '1681 words', and the date '9:02 AM 6/3/2016'.

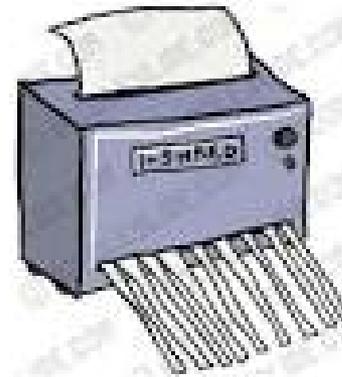
# Data Recycling Process

When files / emails are deleted they are placed into the recycle bin in Office 365.

The first stop is the phase 1 recycle bin which the user can access and remove them from. The file / emails reside in that recycle bin for 30 days

After the first 30 days recycled files are moved into the phase 2 recycle bin where they will reside for 62 more days. During that timeframe the files / emails are still retrievable but only by DTS IT staff.

After the full 92 day recycle period the files become unavailable forever as the space in which they were stored is erased and over written with other data



# Moving PSTs

# Moving PST Files

**.pst** stands for 'Personal Storage Table'

Most PST files were moved during mail migration

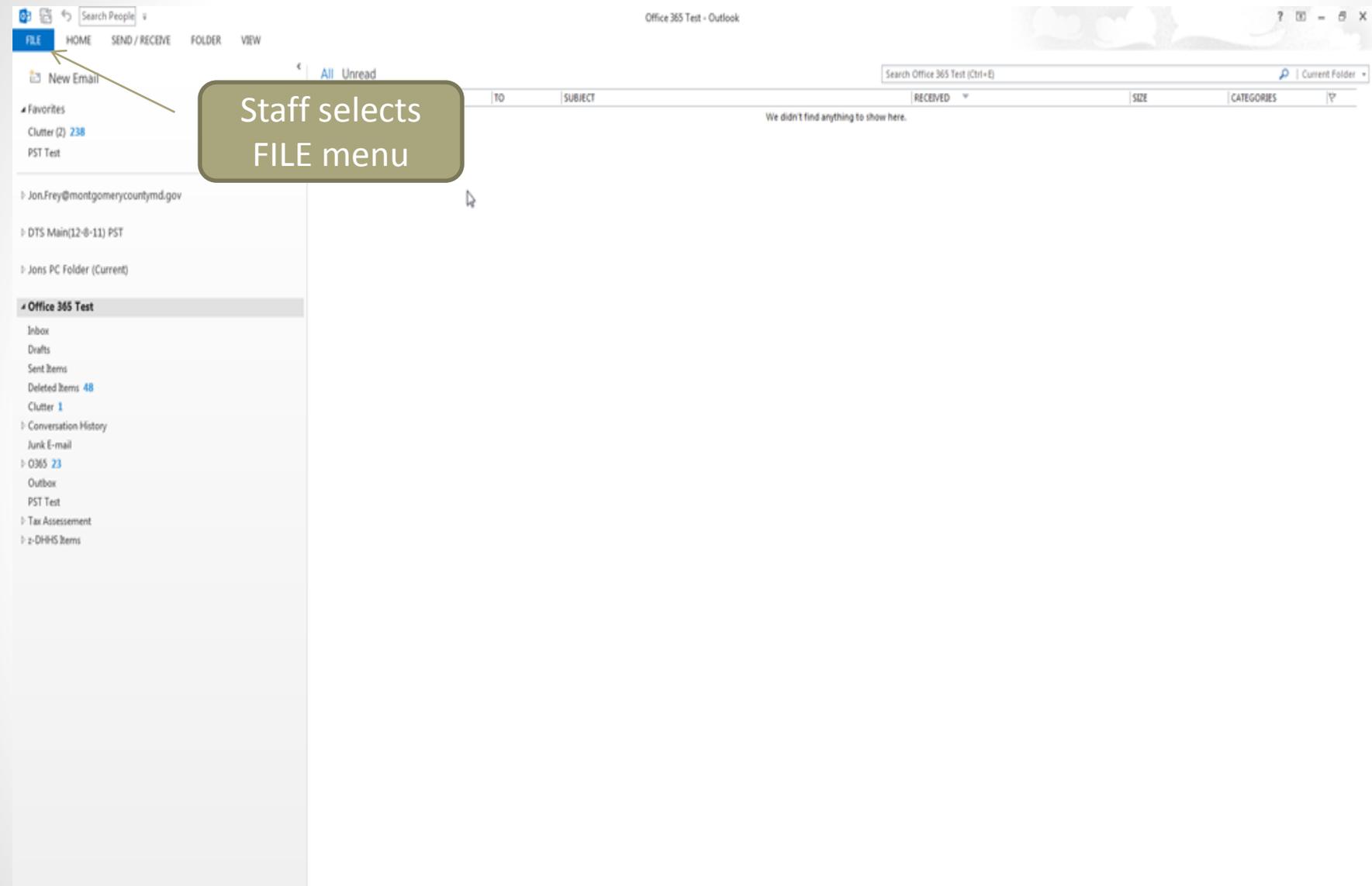
There is a best practice for moving PST files

PST files can take a long time to move

While moving PSTs desktop email will not be available

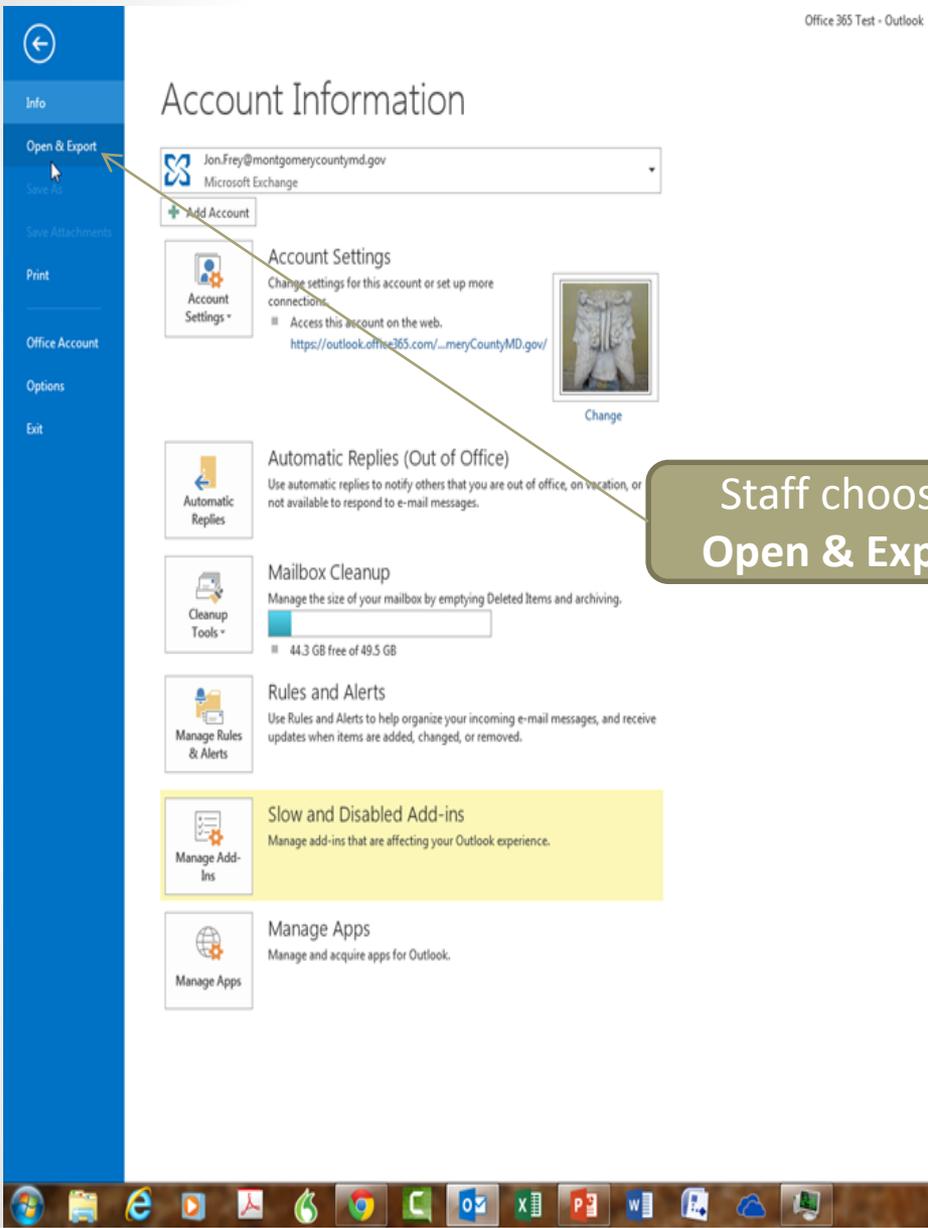
Use Outlook Web Access (OWA) during PST moves

# Moving PSTs



# Moving PSTs

# Select Open & Export



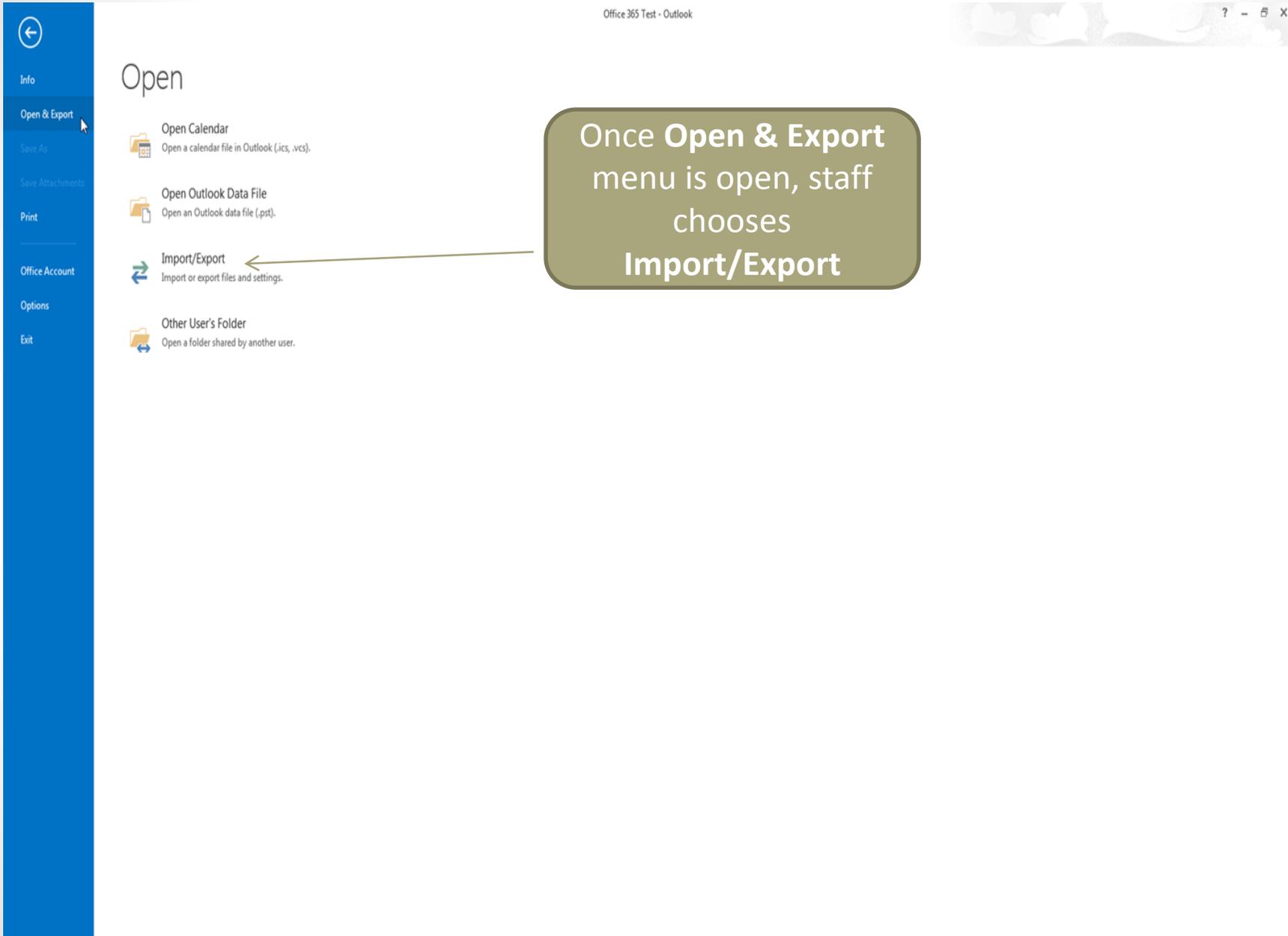
When the FILE tab opens the **Info** window is the default

Staff chooses **Open & Export**



# Moving PSTs

# Select Import/Export

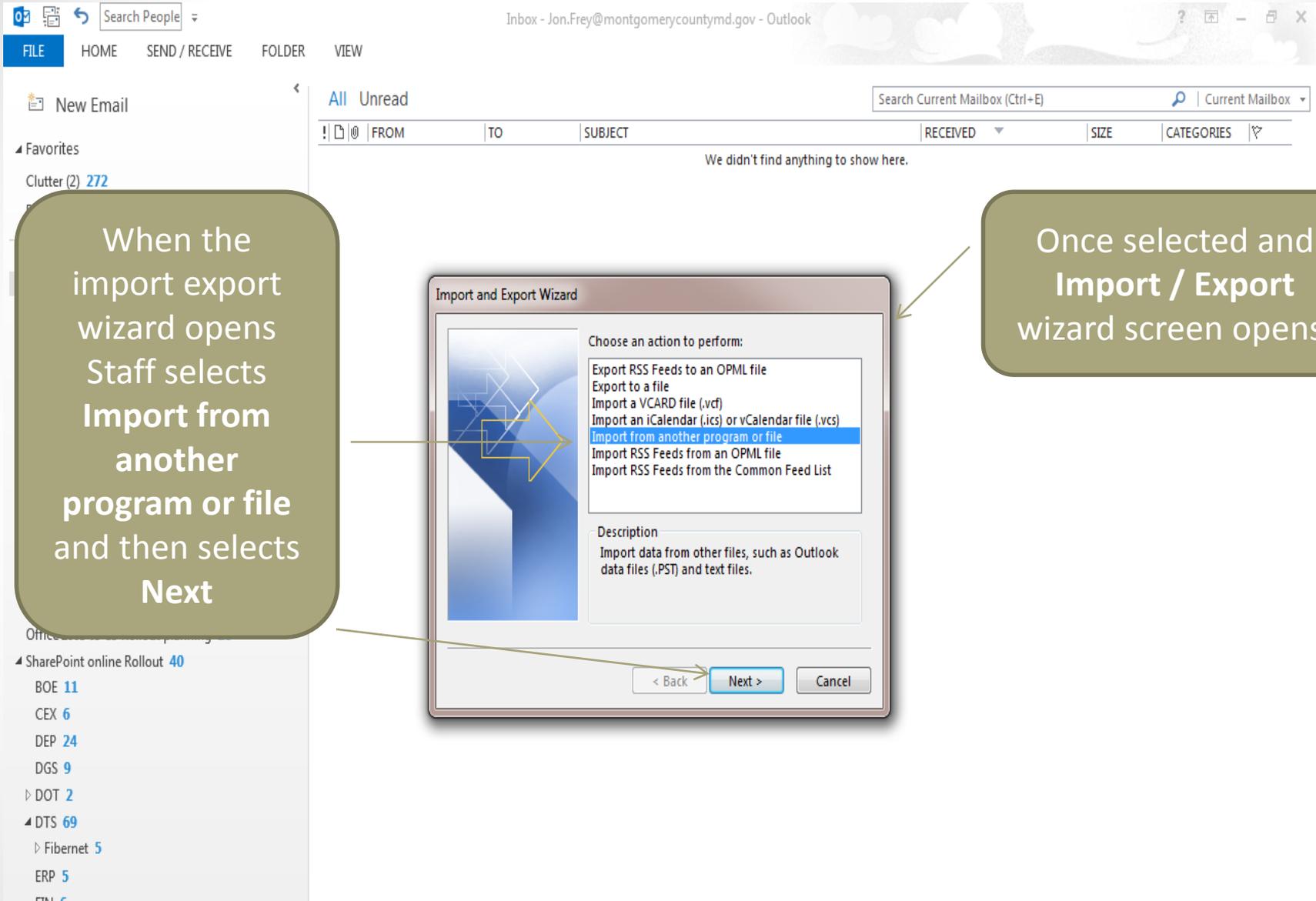


Once **Open & Export** menu is open, staff chooses **Import/Export**



# Moving PSTs

# Select Import



When the import export wizard opens Staff selects **Import from another program or file** and then selects **Next**

Once selected and **Import / Export** wizard screen opens.

# Moving PSTs

## Select file type .pst

Office 365 Test - Outlook

Search Office 365 Test (Ctrl+E) | Current Folder

FROM	TO	SUBJECT	RECEIVED	SIZE	CATEGORIES
We didn't find anything to show here.					

Import a File

Select file type to import from:

- Comma Separated Values
- Outlook Data File (.pst)**

< Back Next > Cancel

Mail ...

ITEMS: 0 ALL FOLDERS ARE UP TO DATE. CONNECTED 10%

3:38 PM 9/9/2015

A selection window appears where staff selects **Outlook Data File (.pst)**

# Moving PSTs

# Choose Location of PST

The screenshot shows the Outlook interface with an empty mailbox. The left sidebar lists folders like 'Clutter (2) 272', 'PST Test', 'Drafts', and 'Inbox'. The main pane shows 'All Unread' and a search bar. A dialog box titled 'Import Outlook Data File' is open, showing the file path 'Frey\Desktop\test docs\Test PST-1.pst' and options for handling duplicates. A callout box points to the 'Browse...' button.

Use **Browse** button to open a window to locate file

# Moving PSTs

# Select PST file

The screenshot shows the Outlook interface with the 'Open Outlook Data Files' dialog box open. The dialog box displays a file list with the following columns: Name, Date modified, and Type. The files listed are:

Name	Date modified	Type
Test PST-1 - Copy.pst	7/16/2014 9:46 AM	Outlook Data File
Test PST-1.pst	9/9/2015 4:23 PM	Outlook Data File
Test PST-2.pst	9/11/2015 2:11 PM	Outlook Data File

The 'Test PST-1.pst' file is selected, and the 'Open' button is highlighted. A callout box points to the 'Open' button with the text: 'Browse until you find and select PST file and then choose Open'.

# Moving PSTs

# Begin the PST import process

Search People

FILE HOME SEND / RECEIVE FOLDER VIEW

New Email

▲ Favorites

- Clutter (2) 272
- PST Test

▶ Drafts

▶ **Inbox**

- Sent Items - General
- ▶ Deleted Items 217
- ▶ 00 Web - Operations (2015) 368
- ▶ 00 Admin Items - General - 2015 492
- ▶ 00 AA - JSF Items 493
- ▶ 0 General Support 8
  - Office 2003 to G3 Rollout planning 20
- ▶ SharePoint online Rollout 40
- ▶ Training 29
  - 00 FOLLOW-UP 7
  - 00 HOT Items 6
  - O365 General Operations (2015) 4
- ▶ 0 O365 Operations 252
  - 00 O365 Phase 1 Items 5
  - 00 O365 Phase 2 Items 113
  - 00 O365 Phase 3 SharePoint 118
- Conversation History
- Junk E-mail [225]
- O365 General Items

▶ Outbox

- RSS Feeds
- ▶ Todays items
- ▶ 777

Inbox - Jon.Frey@montgomerycountymd.gov - Outlook

Search Current Mailbox (Ctrl+E) Current Mailbox

FROM	TO	SUBJECT	RECEIVED	SIZE	CATEGORIES
------	----	---------	----------	------	------------

We didn't find anything to show here.

Import Outlook Data File

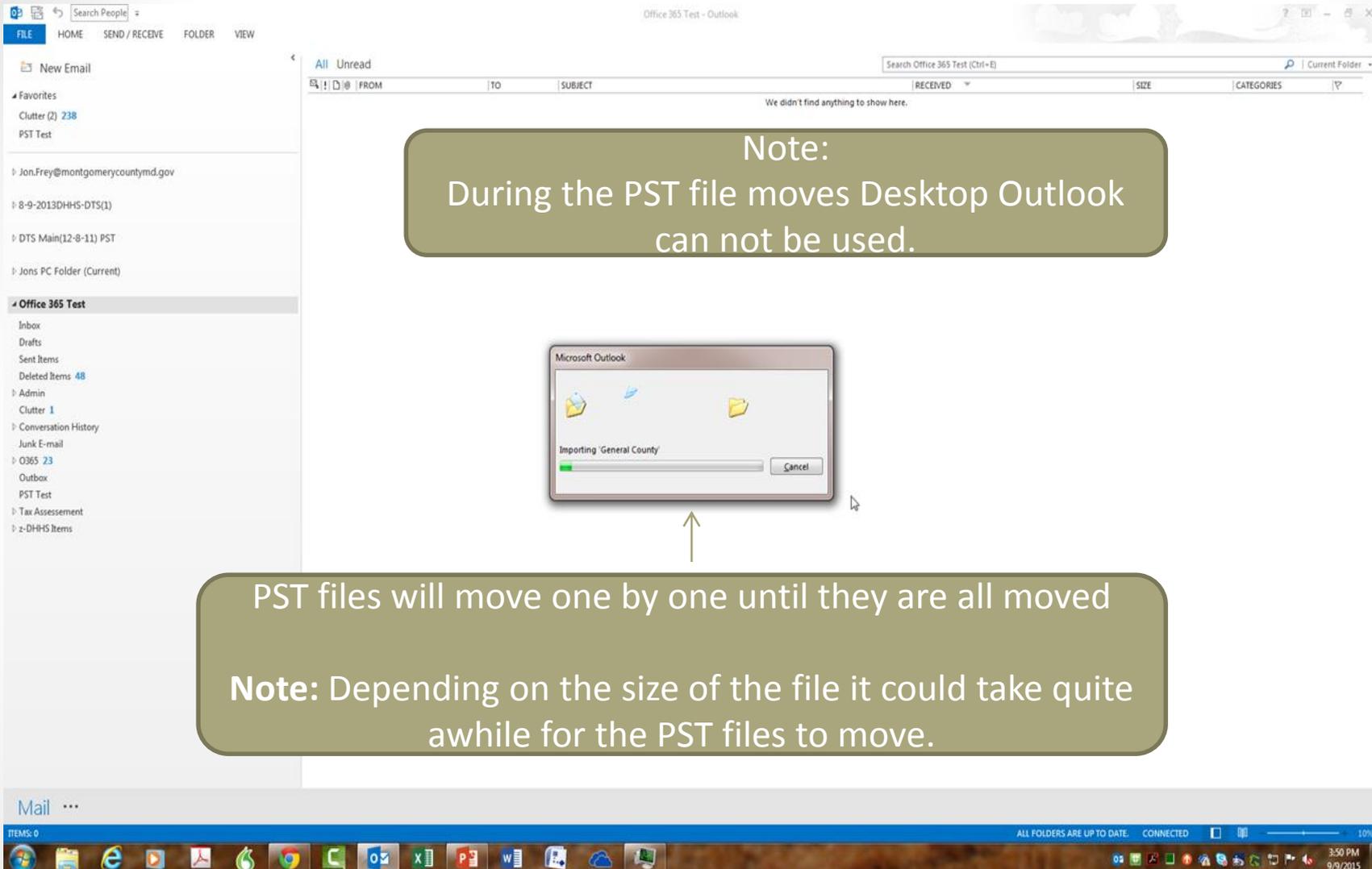
File to import  
Frey\Desktop\test docs\Test PST-1.pst

Options

- Replace duplicates with items imported
- Allow duplicates to be created
- Do not import duplicates

< Back Next > Cancel

With the file chosen, staff selects **Next** to start the process



Note:  
During the PST file moves Desktop Outlook  
can not be used.

PST files will move one by one until they are all moved  
Note: Depending on the size of the file it could take quite  
awhile for the PST files to move.

# Moving PSTs

# PST file move completes

Office 365 Test - Outlook

Search Office 365 Test (Ctrl+E) | Current Folder

FROM TO SUBJECT RECEIVED SIZE CATEGORIES

We didn't find anything to show here.

Office 365 Test

- Inbox
- Drafts
- Sent Items
- Deleted Items 48
- Admin
- Clutter 1
- Conversation History
- Junk E-mail
- O365 23
- Outbox
- PST Test
- Tax Assessment
- z-DHHS Items

Mail ...

ITEMS: 0

UPDATING Office 365 Test - HHS - Admin. THIS FOLDER IS UP TO DATE. CONNECTED 10%

4:08 PM 9/9/2015

After files moved, system returns to starting point

# Collaboration Concepts

### “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

- 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

You can search as far as you can 'see'

# Tools and Support

## 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/>

Home Alerts Translate [A- | A | A+] Search

MONTGOMERY COUNTY Maryland



Residents ▾ Businesses ▾ Government ▾ Departments ▾ Online Services ▾ MC311 ▾

## Montgomery County, Maryland

### Office 365 - Information Site

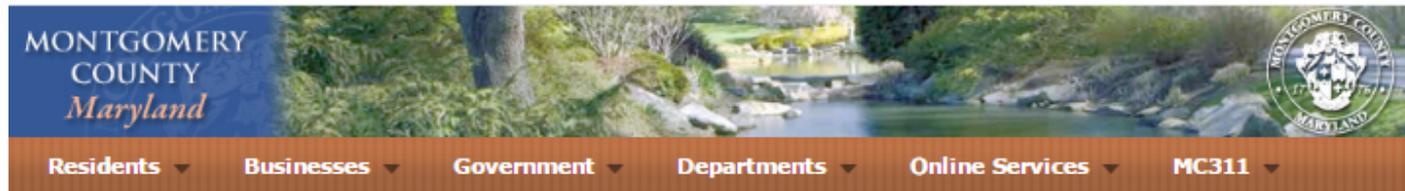
### G3 Transition Information Center

<u>Transition Briefing</u>	<u>Reference</u>	<u>Communications</u>	<u>FAQs</u>
Introduction	Quick Start Guide - Excel 2016	G3 Program Launch	FAQs from briefing sessions
G3 Services	Quick Start Guide - Outlook 2016	G3 Transition Plan (3-17-2016)	How are renewals handled?
G3 Applications	Quick Start Guide - Powerpoint 2016	Transition Batch Schedule / Notes	What about Viso & Project?
Ribbon Interface	Quick Start Guide - Word 2016		Who Gets G3?
OneDrive			
Moving PSTs			
Support/Website			
Full Transition Briefing			

[Link to Main Office 365 support site](#)

0365





## Montgomery County, Maryland

### Office 365 - Information Site

Using Office 365

Excel, Word, PowerPoint Online, OneDrive

SharePoint Online, Skype for Business

### Office 365 G3 Upgrade Under Way (Go to that Web Site)

#### 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 being 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. Once those moves are completed 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 is link to the new OWA 2013. [Office365.MontgomeryCountyMD.gov](http://Office365.MontgomeryCountyMD.gov) It should replace all other references or favorites to OWA

#### This Site

This site is designed to provide staff with useful information to help them through the Phase II and III transitions and to provide various training and reference documents to help them use the Office 365 capabilities most effectively.

## 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..

📅 **AUGUST 2015**

📄 📅 [Subscribe](#) 📋 [My Events](#)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30 <input type="checkbox"/> 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

All

Add to my Calendar

Email Reminder

More Event Actions ▼

All

Add to my Calendar

Email Reminder

More Event Actions ▼

Events calendar powered by Trumba

## 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 to the Office 365 online equivalents as their desktop applications will be removed. All others will continue to use their existing desktop versions.

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

General Excel OneDrive Outlook PowerPoint Word SharePoint Skype for Business New Features



### General

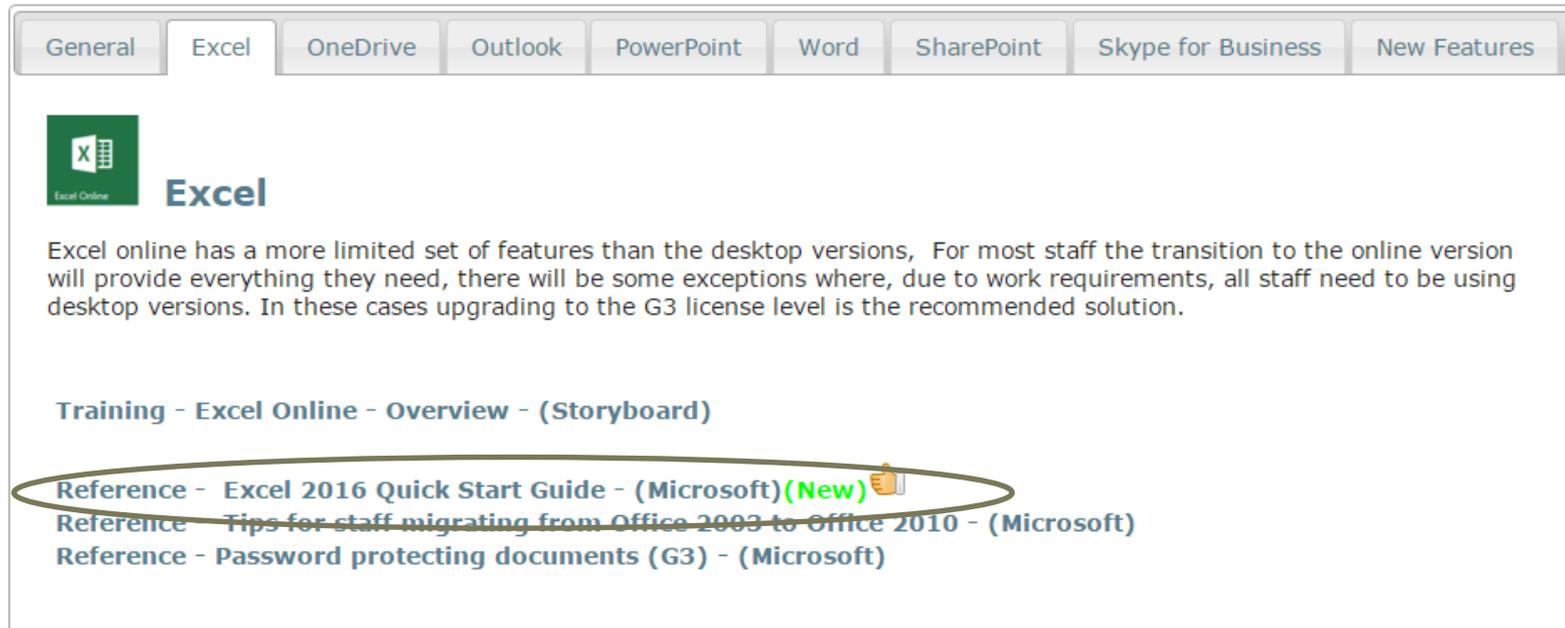
This tab contains general information regarding the Office 365 project. It is updated regularly with overall project items

- [Training - General Overview - \(Video\)](#)
- [Training - Office 2013 - Items](#)
- [Training - Microsoft Videos for Government](#)
- [Reference - Department On-Site IT Contacts](#)
- [Reference - County Help Desk O365 Support Plan](#)
- [Reference - Office 365 general FAQs](#)
- [Reference - Storing and Sharing Information - \(Microsoft\)](#)
- [Reference - Translating documents - \(Microsoft\)](#)
- [Reference - Office 365 desktop vs online feature comparison \(Microsoft\)](#)
- [Reference - File Types supported by Office online applications \(Microsoft\)](#)
- [Communications - TOMG - Office 365 Phases II & III presentation \(2-10-15\)](#)
- [Communications - TOMG - Office 365 Phases II & III presentation \(7-9-15\)](#)
- [Communications - Phase II - Terms](#)
- [Communications - Phase II - FAQ's](#)
- [Communications - Phase II - The Microsoft model](#)
- [Tools - MicroSoft File Viewers \(5-30-15\)](#)

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General Excel OneDrive Outlook PowerPoint Word SharePoint Skype for Business New Features

 **Excel**

Excel online has a more limited set of features than the desktop versions, For most staff the transition to the online version will provide everything they need, there will be some exceptions where, due to work requirements, all staff need to be using desktop versions. In these cases upgrading to the G3 license level is the recommended solution.

**Training - Excel Online - Overview - (Storyboard)**

**Reference - Excel 2016 Quick Start Guide - (Microsoft)(New)** 👍

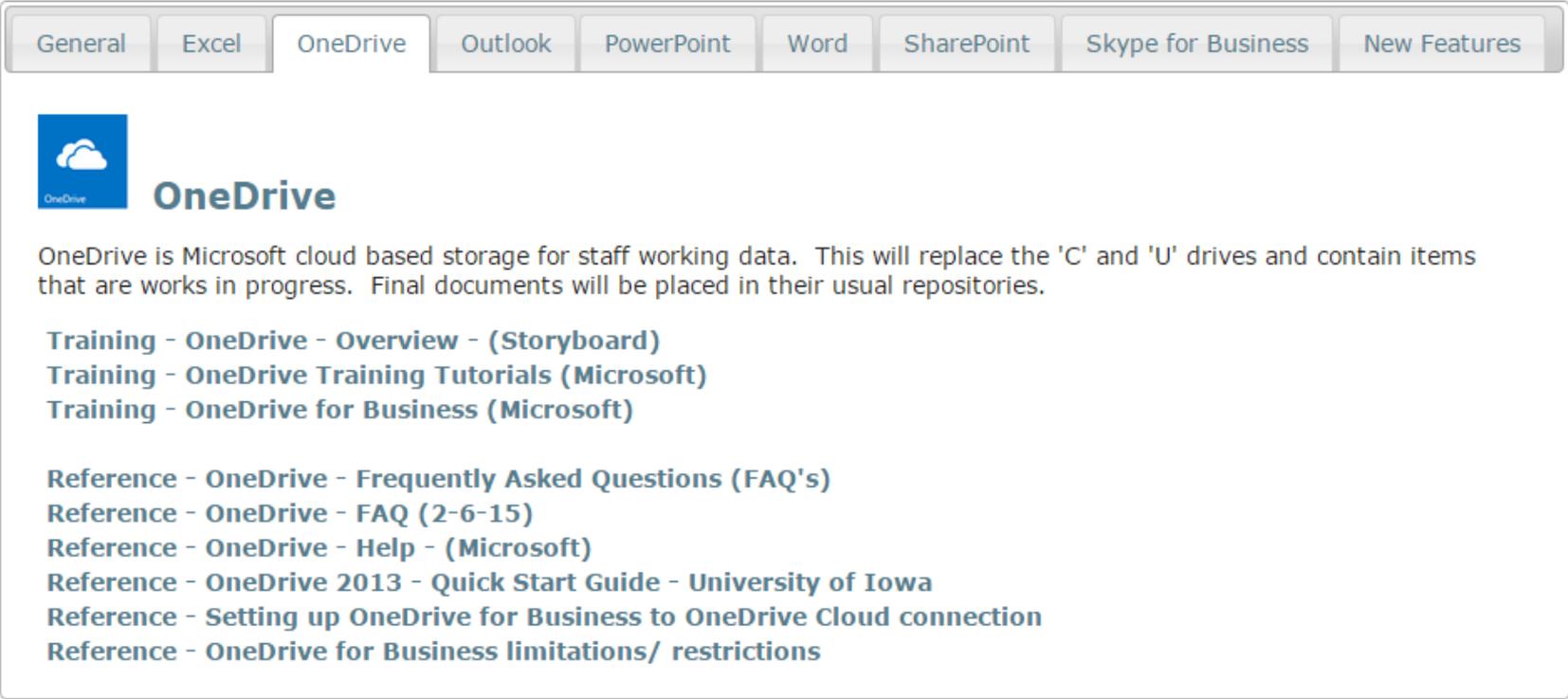
**Reference - Tips for staff migrating from Office 2003 to Office 2010 - (Microsoft)**

**Reference - Password protecting documents (G3) - (Microsoft)**

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**General** | **Excel** | **OneDrive** | Outlook | PowerPoint | Word | SharePoint | Skype for Business | New Features

 **OneDrive**

OneDrive is Microsoft cloud based storage for staff working data. This will replace the 'C' and 'U' drives and contain items that are works in progress. Final documents will be placed in their usual repositories.

**Training - OneDrive - Overview - (Storyboard)**  
**Training - OneDrive Training Tutorials (Microsoft)**  
**Training - OneDrive for Business (Microsoft)**

**Reference - OneDrive - Frequently Asked Questions (FAQ's)**  
**Reference - OneDrive - FAQ (2-6-15)**  
**Reference - OneDrive - Help - (Microsoft)**  
**Reference - OneDrive 2013 - Quick Start Guide - University of Iowa**  
**Reference - Setting up OneDrive for Business to OneDrive Cloud connection**  
**Reference - OneDrive for Business limitations/ restrictions**

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[General](#) [Excel](#) [OneDrive](#) [Outlook](#) [PowerPoint](#) [Word](#) [SharePoint](#) [Skype for Business](#) [New Features](#)



### Outlook

The Outlook migration was conducted during the summer and fall of 2014. 11,500 mailboxes were moved and all staff was provided access to the other Office 365 applications and tools. Although the migration is over the training materials are contained in the Phase I site ([link to Phase 1 site](#)),

**Training - Outlook Training - (Microsoft)**

**Video Training - QuickSteps - Creating encryption ready messages (DTS)(New)** 👍

**Reference - Outlook 2016 - Quick Start Guide - (Microsoft)(New)** 👍

**Reference - Quick Steps - Automate repetitive tasks - (Microsoft)(New)** 👍

**Reference - OWA Web App - (Microsoft)**

**Reference - Exchange online - Service Description - (Microsoft)**

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### PowerPoint

PowerPoint online has a more restricted set of features than the desktop version, For many staff the transition to the online version will provide everything they need. There will be some exceptions where, due to work requirements, all staff need to be using desktop versions. In these cases upgrading to the G3 license level is the recommended solution.

**Training - General Overview - (Video)**

**Reference - Powerpoint 2016 - Quick Start Guide - (Microsoft) (New)** 👍

~~Reference - Phase II - The Microsoft model~~

**Reference - Password protecting documents (G3) (Microsoft)**

## Support Material

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### Word

Word online has a more limited set of features than the desktop version. For many staff the transition to the online version will provide everything they need. There will be some exceptions where due to work requirements all staff will need to be using desktop versions. In these cases upgrading to the G3 license level is the recommended solution.

- [Training - Word Online - Overview - \(Storyboard\)](#)
- [Training - Word Online - Selected Functions - \(Storyboard\)](#)
- [Reference - Word 2016 - Quick Start Guide - \(Microsoft\) \(New\) 👍](#)
- [Reference - Word Online Help \(Microsoft\)](#)
- [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](http://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](mailto: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](#)*

O365



Select Language ▼

