

Introduction


Microsoft 365 (MS365) is a collection of web applications that will allow you to create **Word documents, spreadsheets, and presentations** as well as **store and share** your files among other options.

NOTE: MS 365 is *approved* for use with **P3** (Sensitive) /**P4** (Restricted) **data** and any files containing **Protected Health Information (PHI)** will be **encrypted** automatically by [Cipher Cloud](#).

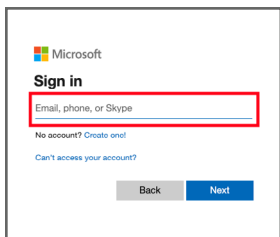
Accessing Microsoft 365

Microsoft 365 can be accessed from a web browser. This process will be detailed in the following steps:

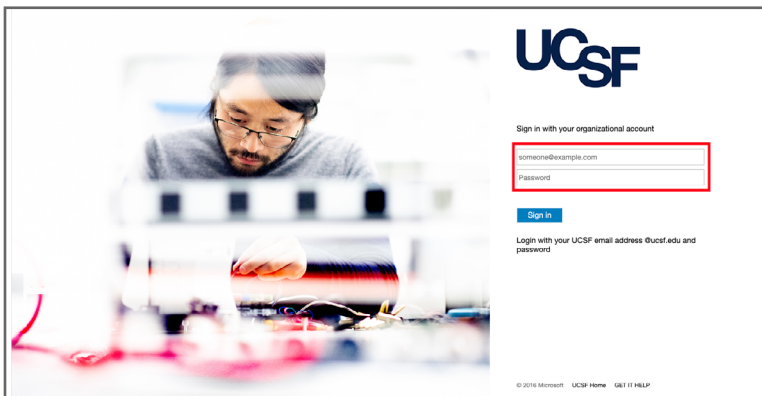
NOTE: You will **not** be able to download the desktop applications from Microsoft 365.

1. Navigate to [Office.com](#) and select the  button.

2. Enter your **UCSF email address** before clicking the  button.

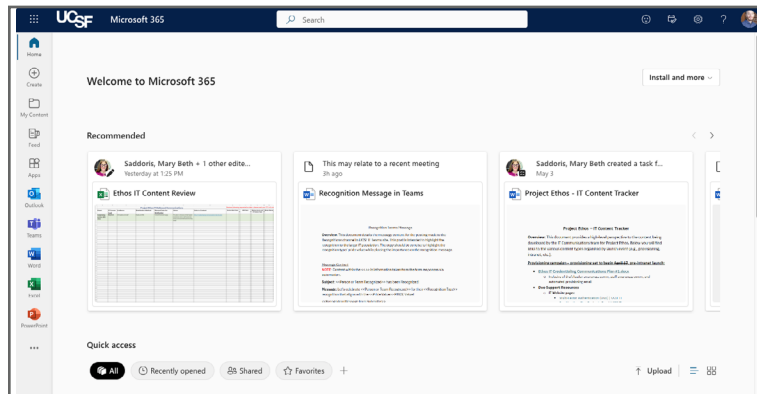


3. On the **UCSF login** page, enter your **UCSF email address** and **password** before selecting the **Sign in** button.






NOTE: If you are not on the UCSF network, you will be prompted to enter a **six-digit code** in the **Duo Mobile** app to complete the process for accessing Microsoft 365.

4. The **Microsoft 365 landing page** loads successfully.




Navigating Microsoft 365

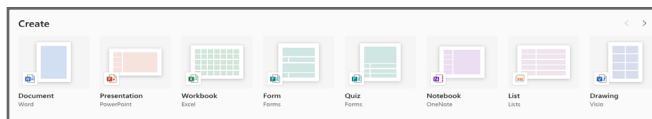
The **Microsoft Landing Page** has several *navigation options* including the **App Launcher** () , which will allow you to access all the *Microsoft applications* included with your license.

Under the *App Launcher*, there are icons to **create** documents () , access **OneDrive** () , as well as quick access to other **Microsoft applications**.

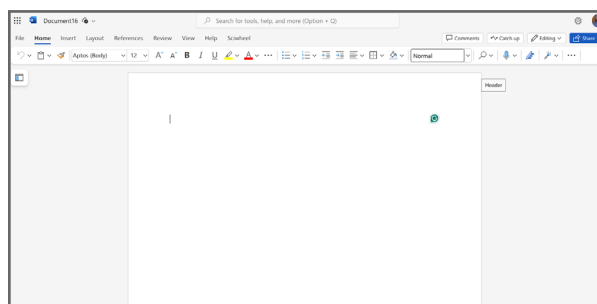
Creating Documents in Microsoft 365

Microsoft 365 simplifies the process for creating different types of documents. Let's review the process for creating documents from the MS365 landing page.

1. Select the  button from the **left-hand navigation**.
2. Under the **Create** heading, select the **document type** to load a **blank** document.

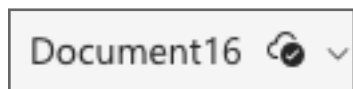


3. A **browser tab** will open a *blank document* in the selected *application*.



Creating Documents in Microsoft 365 (continued)

NOTE: Be sure to select the **Document title** to enter a unique **File Name** as MS365 will *autogenerate* one initially (e.g., Document1, Presentation1, Book1 etc.)



4. **Congratulations!** You are now able to **compose your document** in the selected MS365 application!

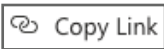

NOTE: You will not have to worry about saving documents in MS365 as each document will have auto-save enabled automatically.

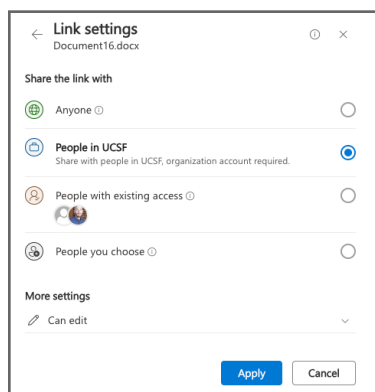
Sharing Documents in Microsoft 365

There are times where you will want to **collaborate** with your *colleagues* and Microsoft 365 makes the sharing process simple.

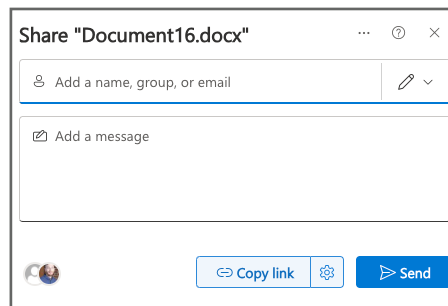
1. From an *open document*, locate the  **Share** button under your **profile picture**.

2. Select the  **Share** option.

NOTE: If you click the  **Copy Link** option, you can paste the link into a **chat** or **email**. Be sure to select the  **Settings** option to set who can **access** the document (e.g., Internally or externally) and **permission rights** for the recipient in the document (e.g., Edit, Review, or View).




3. The **Share dialog** window will load successfully:

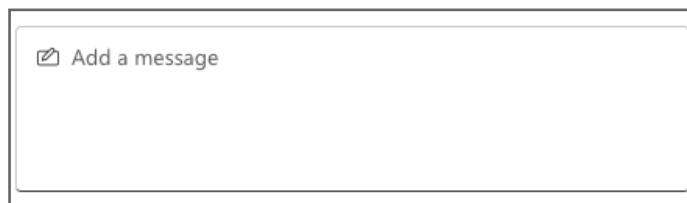



a. Enter the intended Recipient's **name** or **email address** in the **Add a name, group, or email** field.



b. Next to the *recipient's name*, select the  icon to set the **permission rights** (e.g., **Edit** or **View** access) for the document.

c. In the **Add a message** field, enter a **message** for the recipient to provide context to the document.



4. After you have entered all the desired information, select the  **Send** button to send your *message* and a *document link* to the **recipient's** inbox to provide access to the document.

4. **Congratulations!** You have successfully **shared a document** to collaborate with your colleagues in Microsoft 365!