

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 <u>Cipher Cloud</u>.

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 <u>Office.com</u> and select the **button**.

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

Microsoft		
Sign in		
Email, phone, or Sk	ype	
No account? Create or	no!	
Can't access your acc	ount?	
	Back	Next

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.

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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 $(\textcircled{\oplus})$, access **OneDrive** $(\textcircled{\oplus})$, 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 $\bigoplus_{\text{created}}$ 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*.

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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 V 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).

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The Share dialog window will load successfully:

Share "Document1	6.docx"	 0 ×
8 Add a name, group, o	or email	0 ~
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C	ා Copy link හි	▷ Send

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 *level* 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.

Add a message

4. After you have entered all the desired information, select the 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!