

Introduction

As you have joined UCSF, you will have the ability to add the Intune Company Portal to your mobile device. This quick start guide will take you through the process for configuring Intune, installing Microsoft 365 mobile applications to your device and demonstrating the process for using these applications.

Microsoft Intune

What is the Intune Company Portal?

UCSF has minimum security standards for accessing and storing UCSF data including data stored on mobile devices. Intune was selected to enforce these standards by requiring the following:

- Device PIN required
- Device encryption required
- Ability to remote wipe device on loss/theft only
- Operating System version compliance check for minimum version requirements

Are there requirements prior to installing the Intune Company Portal?

UCSF has minimum security standards for accessing and storing UCSF data including data stored on mobile devices. Intune was selected to enforce these standards by requiring the following:

- Your device needs to be updated to a supported operating system (e.g., One of the last three versions)
- Remove UCSF email from default email client (iOS)

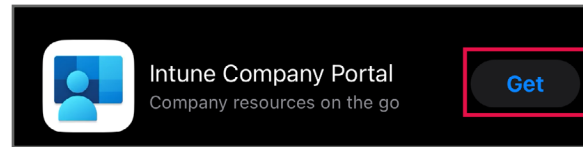
NOTE: UCSF email cannot be used within the default email client for Android devices

- Remove all previously installed Microsoft mobile applications from your device

NOTE: These applications will be installed from within the Intune Company Portal

Installing the Intune Company Portal

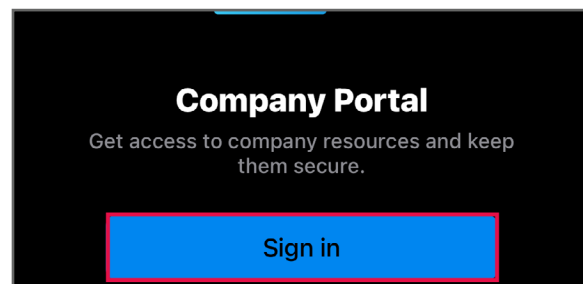
1. From your device's **app** store, search for **Microsoft Intune Company Portal**
2. Click the **Get** button (**Install** on Android Devices)



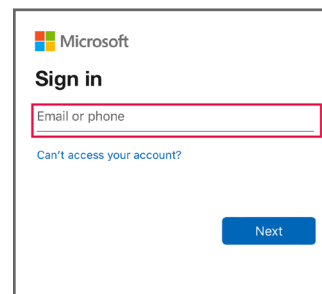
3. *Microsoft Intune Company Portal* has been successfully installed to your mobile device

Installing the Device Management Profile

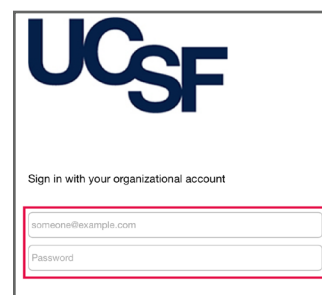
1. Open the **Company Portal** app and select **Sign In**



2. On the **Intune** screen, enter your **UCSF email address** before clicking the **Next** button



3. Sign in with your **UCSF username and password**



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Installing the Intune Company Portal (continued)

NOTE: Be sure to have Duo installed as you will need to approve a **Push Notification** to continue this process

4. Review the *notifications* message before clicking **Ok**.

5. Select the  icon before selecting the **Begin setup** option.

Android Install Step: You will *review* the terms for Intune before clicking **Accept All**.

6. Select **Begin** to start the enrollment process. Review the **privacy** information before downloading and installing the **UCSF device management profile**.

Android Install Step: On the **What's Next?** screen, select the **Next** option. When prompted, select the **Allow** option.

7. Navigate to your device's **Settings** application before selecting the **General** option.

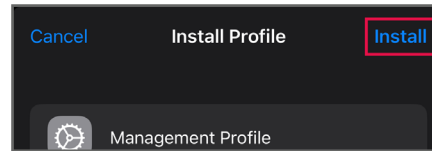
Android Install Step: On the **Activate device admin app** screen, select the **Activate this device admin app** option. The **ELM Agent screen** will load, select the **Read and Agree** checkbox before clicking **Confirm**.

8. Select the **VPN & Device Management (iOS)** before selecting the **Management Profile** button.

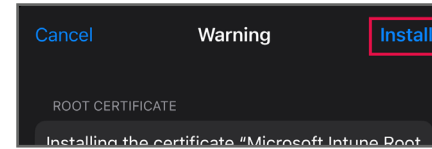
Android Install Step: On the **Company Access Setup** screen, select the **Continue** button. **NOTE:** You may be prompted **Update device** settings, select the **Resolve** button to initiate the resolution process before clicking the **Continue** button when all issues are resolved.

9. Click the **Install** option before entering your device's passcode.

NOTE: You may need to create a complex six-digit pin that does not contain three sequential or repeated numbers.



NOTE: Click the **Install** option on the **Warning** screen. When prompted, click the **Trust** button.



11. Once installed, click the **Done** link.

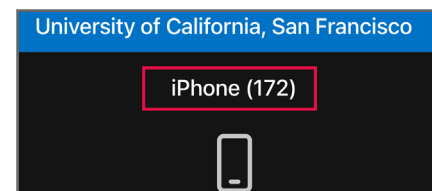
Android Install Step: The **You're all set** screen will load. Select the **Done** button to complete the install.

12. Return to the *Intune Company Portal* app, and select the **Continue** button.

13. On the **Installation** checklist, select the **Done** option.

Verifying Device Enrollment in the Intune Company Portal

After **Done** is selected, you will be returned to the **Device Screen**. This screen will detail information about your mobile device and will act as confirmation of successful enrollment in the Intune Company Portal.



Installing Mobile Microsoft 365 Applications

From the Intune Company Portal application, you are able to install the mobile versions of the Microsoft 365 applications.

NOTE: If your mobile device is an iOS device, you can add your UCSF email address to the native email client after the Device Management Portal is successfully installed.

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Installing Mobile Microsoft 365 Applications (continued)

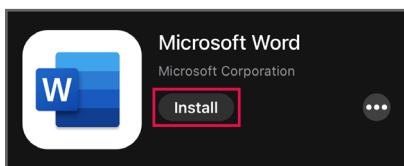
1. From the **Intune Company Portal** app, select the **Apps** icon.



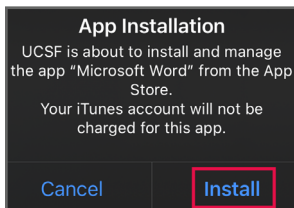
2. Select the **View all apps** link.

3. On the **All apps** screen, select the **mobile application** to be installed.

4. Select the **Install** option.



NOTE: When prompted by the **App Installation** message, select the **Install** button.



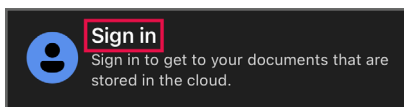
5. The application installs successfully to your device.

Accessing Microsoft Mobile Applications

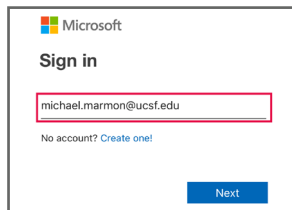
NOTE: When the application is initially installed, you may be signed into the mobile application but let's take a moment to review the process for accessing a Microsoft 365 mobile application.

1. From your device's **home screen**, select the **application** icon for the downloaded mobile application (e.g., Word, PowerPoint, Excel etc.).

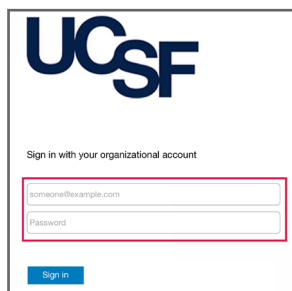
2. Select your **Profile Picture** before clicking the **Sign In** button.



3. On the **Microsoft Sign in** screen, enter your **UCSF email address** before clicking the **Next** button.

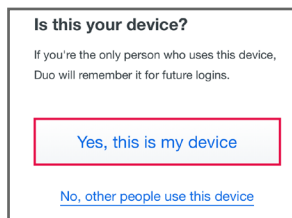


4. On the **UCSF sign-in** screen, enter your **UCSF email address** and **password** then click the **Sign in** button.



5. When prompted, authenticate your device within *Duo Multifactor Authentication*

6. Return to the downloaded application, select the **Yes, this is my device** button



7. The mobile application landing screen loads successfully

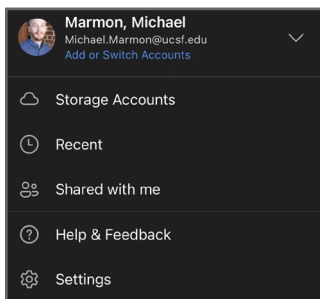
Using Microsoft 365 Mobile Applications

From the application landing screen, you will be able to create new documents, spreadsheets, and presentations depending on the mobile application. In this section of the training, we will review how to navigate and use the mobile version of Microsoft Word.

Using Mobile Microsoft 365 Applications (continued)

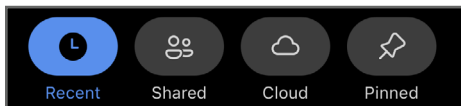
Navigation

Profile – Selecting your Profile Picture (or initials) will provide quick access to your Account, Storage Accounts, Recent and Shared Files as well as application settings.

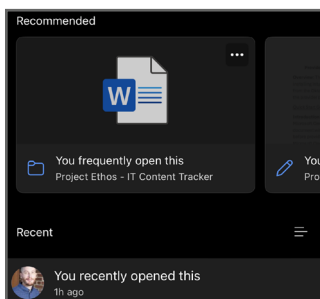


Landing Page Navigation

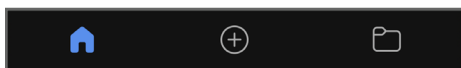
- **Top level navigation** contains a search box to locate files, access to recent, shared, cloud and pinned buttons.



- The **middle section** of the screen highlights recommended and recent files.

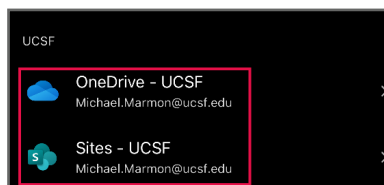


- **Bottom level navigation** contains the home button, new document option and access to your file folders




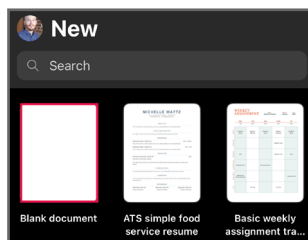
Folder Navigation

The **folder** icon allows users to navigate your **OneDrive** and **SharePoint** site folders. Additionally, there is navigation to your recently used folders as well.



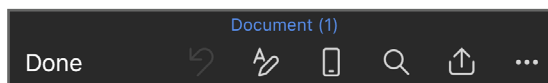
Creating Documents

1. Select the  icon in the bottom navigation.
2. Select the **Blank document** option or one of the available *templates* to start a new document



Document Navigation

- **Top level navigation** – You have many options available at the top of document including document formatting, document view and the ability to save the document to cloud

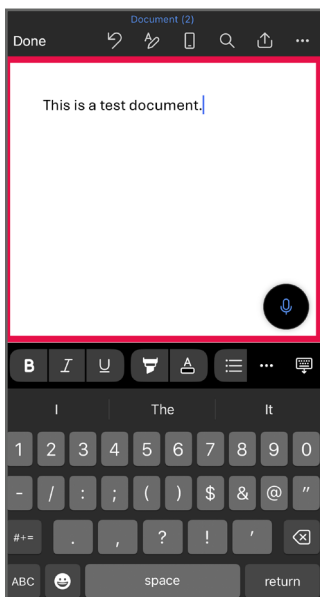


- **Bottom navigation** – Provides the ability to format your document including text formatting (bold, italic, underline), bullet and number lists. Other options include hyperlinks, picture, and tables among many more.



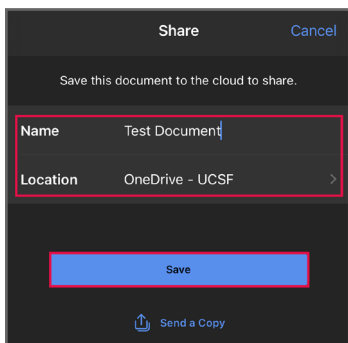
Now that we have reviewed the formatting options, we can spend some time to create our document. After all the desired information has been added to the document, you will need to save the document.

Using Mobile Microsoft 365 Applications (continued)



Saving your Document

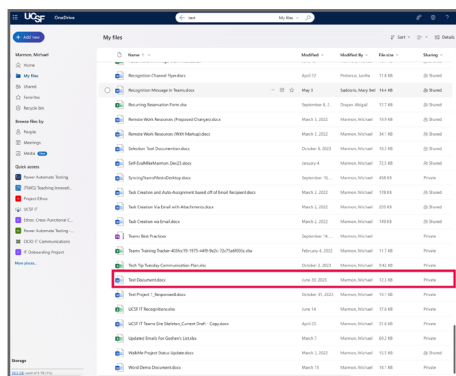
After completing your document's composition, you must select the export icon to be taken to the Share screen to save it.



1. Enter a **Name** for your document
2. Select the **Desired** location
3. Click the **Save** button

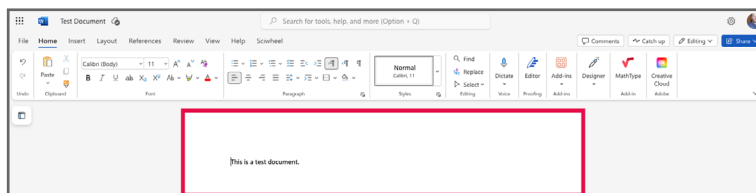
Accessing your Document Online

1. Log into **OneDrive**
2. Navigate to the **file location**



3. Double-click the **file** to launch it

4. You will notice that the information entered in the mobile application appears in the web version.



NOTE: If you add information in the web version of a document, it will auto-save and those changes will be accessible in the mobile version as well.