

Migration to Office 365 and OneDrive

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Migration to Office 365 and OneDrive

Migration overview

Purpose

- Replace aging legacy systems
- Improve functionality
- Migrate to the Cloud

Microsoft Suite is a multifaceted and dynamic solution making migration a several step process. For a few weeks, InterDent will operate in two environments, which may present some challenges. We ask for your patience as migration expands enterprise-wide.

We encourage you to also take advantage of the available resources, such as Google search and Microsoft training videos. While there may be some initial difficulties, we believe this change will lead to long-term improvements in how we work, communicate, and collaborate.

This is just one of many steps we will take this year to make InterDent's technical infrastructure best-in-class. Operations will lead the company in adoption, specifically Office.com and OneDrive.

Thank you for your "can-do" attitude and support. Together, we will make this transition a success and continue to enhance our work environment.

Timeline

Tuesday

- Receive emailed instructions from Stephen Hill
- Please print the instructions

Wednesday

- Avoid use of H:\ drive all day while migration is underway
- Migration is completed overnight

Thursday

- Reboot computer and start using the new system
- Follow the instructions shared via email regarding phone (MDM) setup

If you need help at any point during the migration process, **please submit a ticket** to the Service Desk for assistance.

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M365 - Introduction

Outlook, Excel and Word are not significantly different in M365. The benefit we will realize is the updated system architecture and storage in the cloud. Teams, however, is a game changer for collaboration and communication.

Additionally, we are now able to move from VDI to VPN for remote access. Details about this change are covered in the documentation you will receive from Stephen Hill (HillSt@interdent.com).

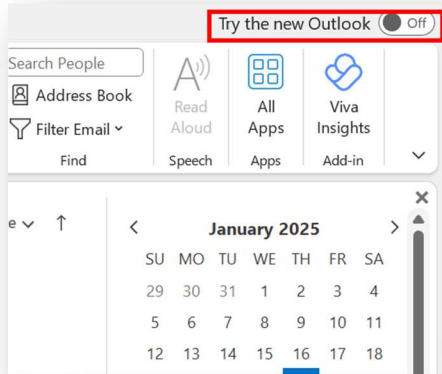
Please note that there is more than one way to do many functions. This document will show you **one way** to do various functions. As you explore the applications, you may find other methods and shortcuts.

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Outlook

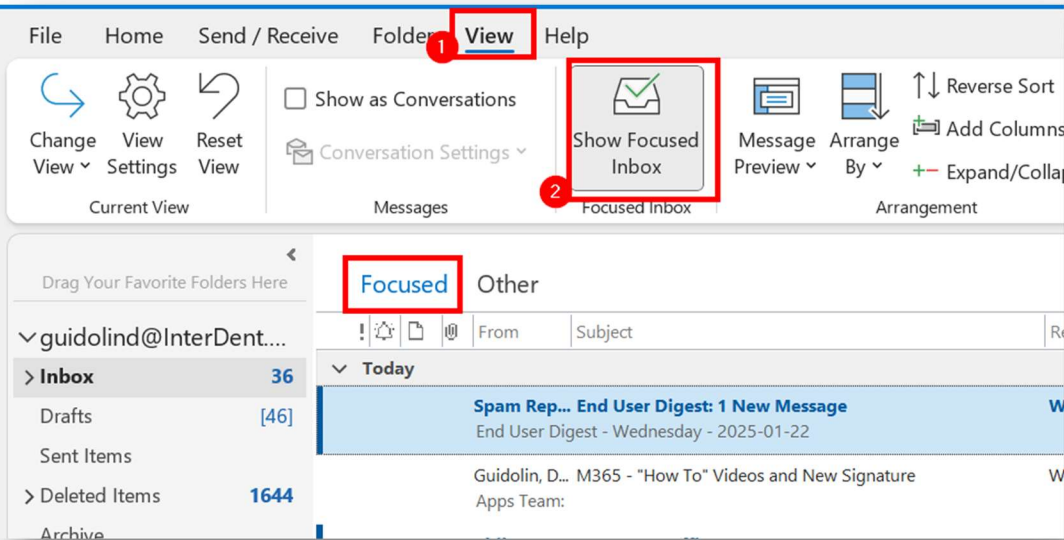
Leave “Try new Outlook” set to Off

At the top right of your Email, there is an option to try a newer version of Outlook. InterDent is not moving to the new version as it consumes significantly more PC resources and negatively impacts the user experience.



Changing Inbox from Focused/Other to All/Unread

Outlook will default to categorize your Inbox messages as **Focused** and **Other**. You can change this to **All** and **Unread** under **View** in the menu bar. This setting *toggles* off and on.

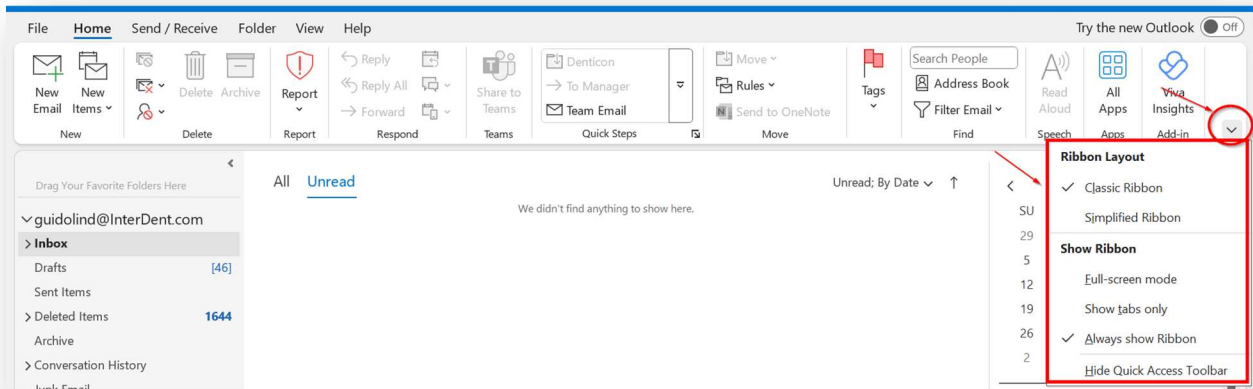


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Reverting to the “Classic Ribbon”

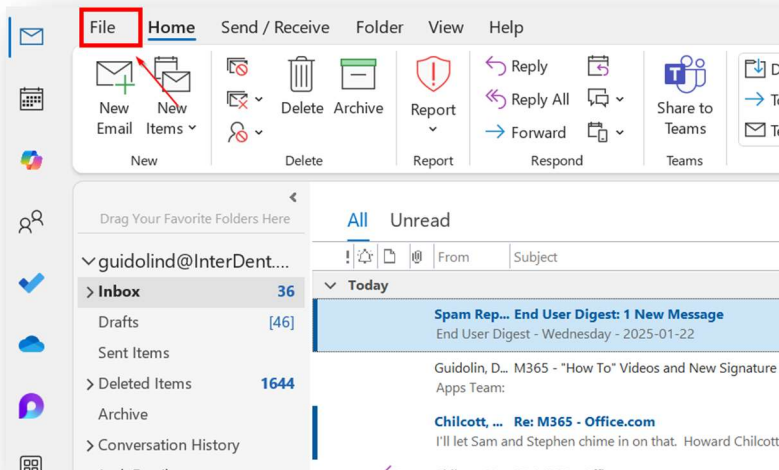
Select the down arrow in the top right-hand corner of your Outlook screen.

Then select **Classic Ribbon**. This will change your view back to the standard ribbon options.



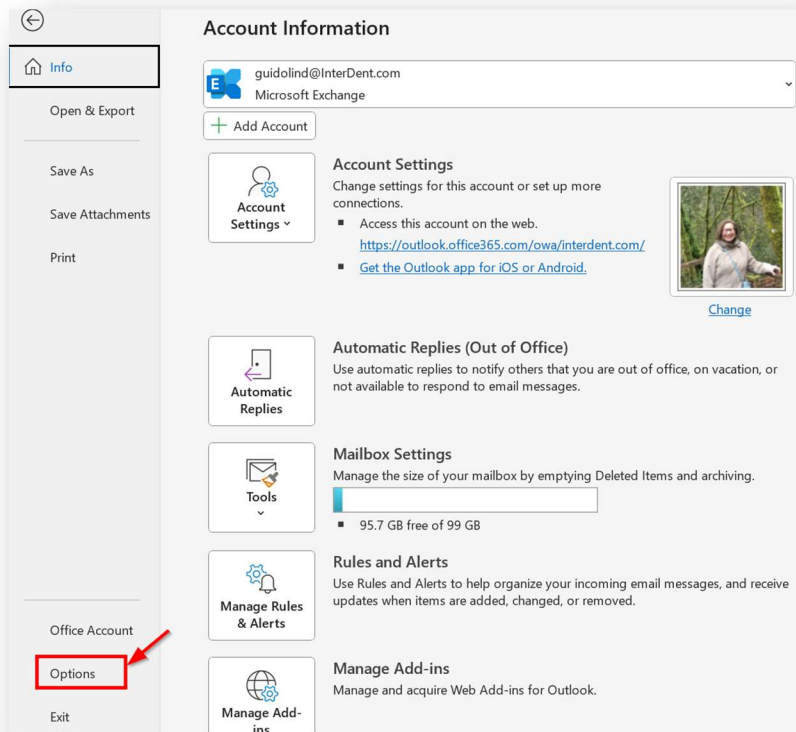
Email Signature

Update your signature from within Outlook by selecting **File**.

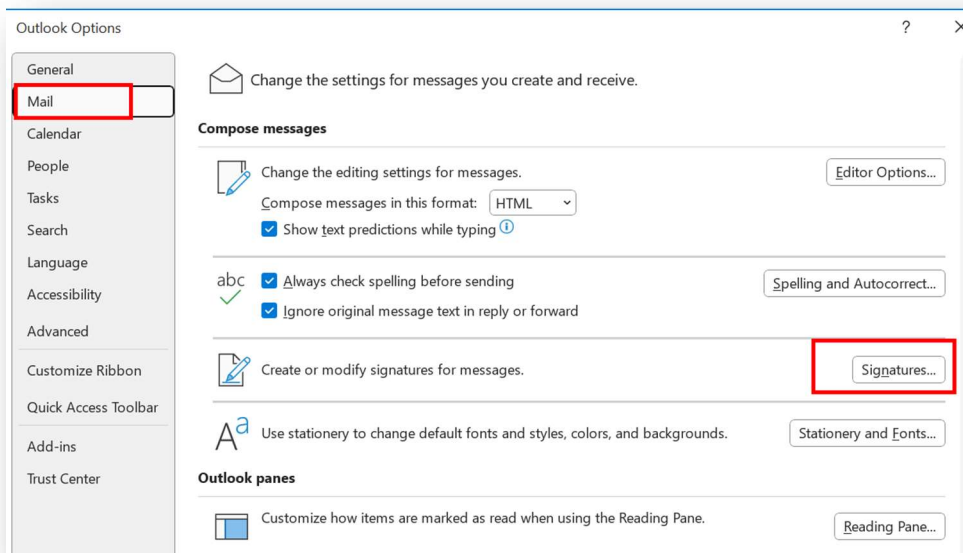


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Then select **Options** from the Account Information.

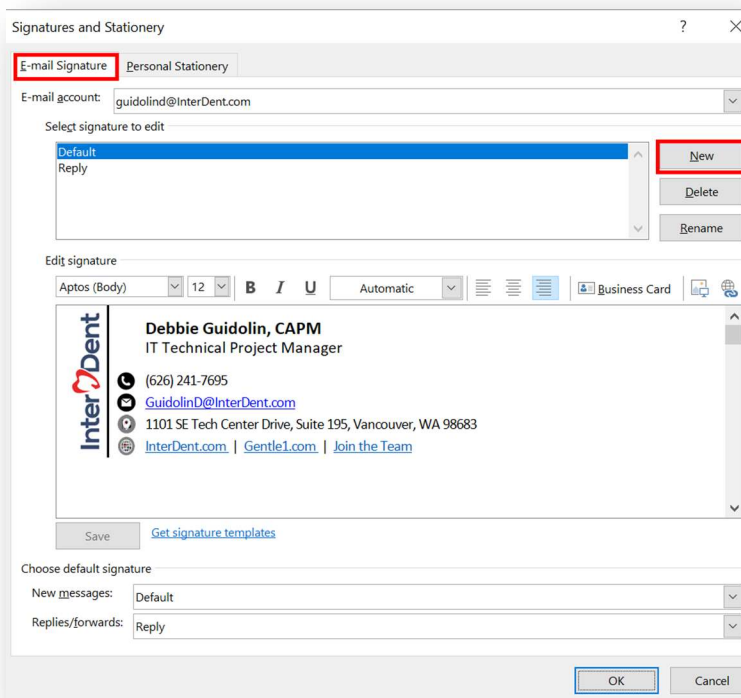


Select **Mail** and then **Signatures**.



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From the **E-mail Signature** tab you can create a new default signature or edit an existing one.



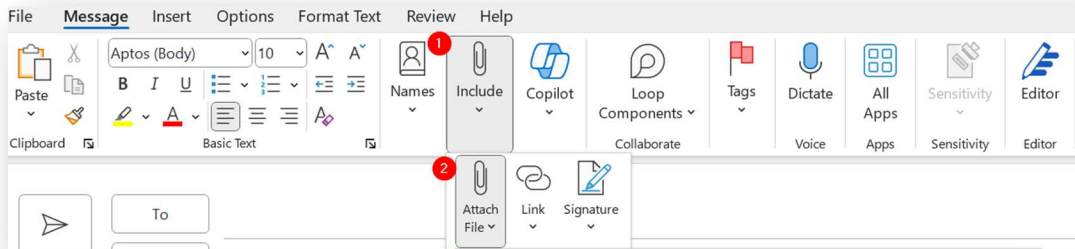
HR has provided a template for signatures that you can customize for your office. Here's a link to the templates: [Email Signature Templates \(Final\).docx](#)

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Attaching Files in Email

You can attach files as in prior versions using the **Paperclip** icon, but file size is limited by Microsoft. **Using links** (Sharing) is the preferred practice as it reduces demand for network resources and storage in email.

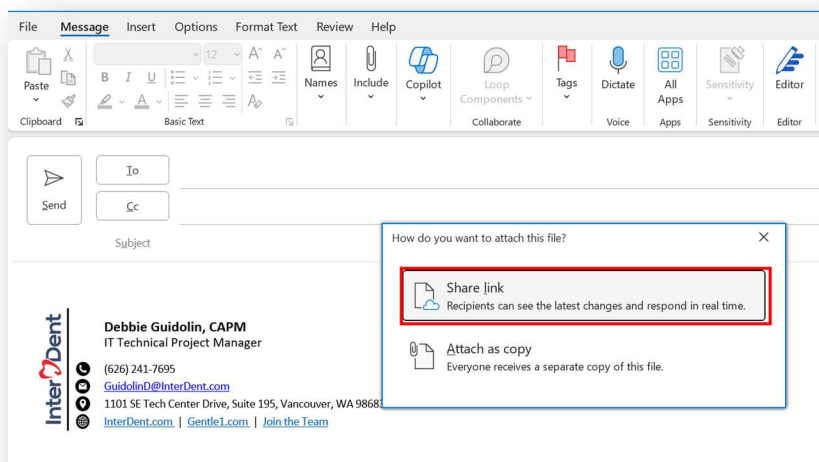
To share a file, select the **Include** and then **Attach File**.



From the **Attach file** dropdown, select a file, **Browse Web Locations** to connect to OneDrive **-OR-** select **Browse this PC** to select a file from one of the network drives.



Once the file is selected you will be given the option to **Share link** or **Attach as copy**. Sharing a link is best practice.



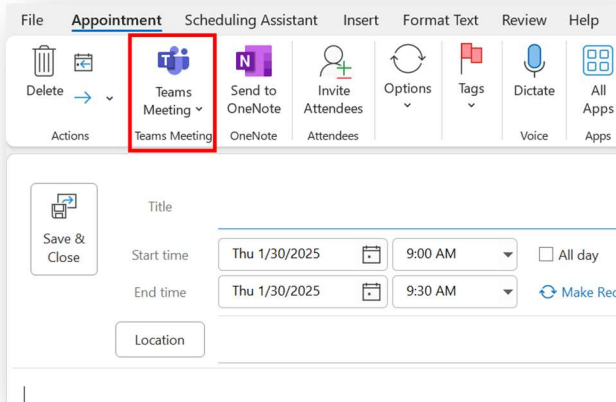
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Teams

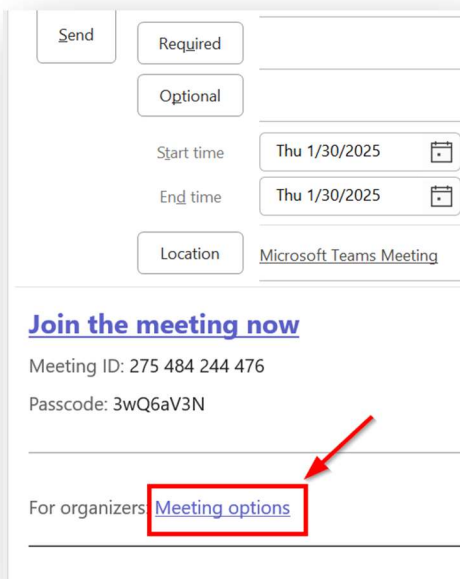
The Teams app is a collaborative tool for chatting, sharing files, scheduling meetings and much more.

Scheduling a Meeting

Scheduling a meeting in Teams is much the same as it is in Zoom. For Teams, simply add an item to the calendar and use the **Teams Meeting** button.



Options to customize the meeting are available from the **Meeting options** link in the body of the calendar item.



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Meetings while Traveling

To attend a meeting when you are away from your computer, use the Teams app on your phone to connect. This is a change from Zoom where a call-in number is provided. With Teams, you can attend the meeting on your phone without dialing in.

Teams Training Videos

Microsoft Teams training videos are available on UKG at the following link or search “M365” on the site:

https://learning.ultipro.com/academy/InterDentServiceCorporation/courses/library?sorting=priority,desc&type_id=0&lang=0&category_id=404943

Cloud File Storage

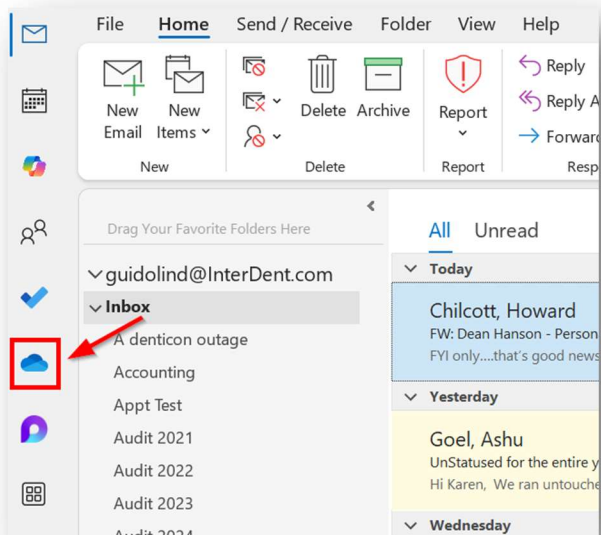
OneDrive – Replaces Legacy H:\Drive

Your H:\drive will be moved over to OneDrive for you overnight before go-live. Going forward, files will default to save in your OneDrive.

Opening and Sharing files from OneDrive

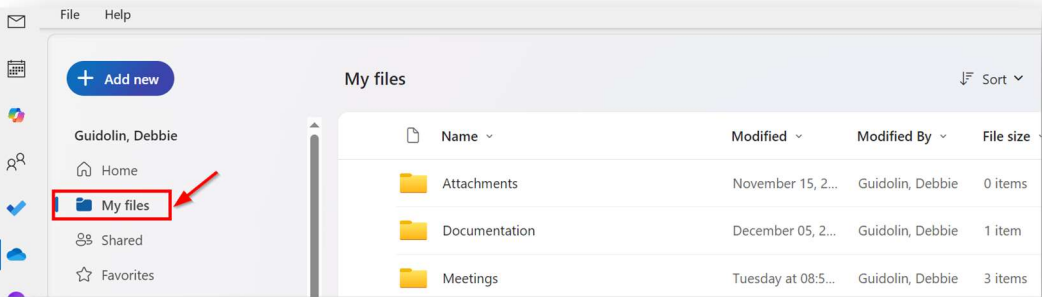
Open **Outlook**.

Use the **Cloud** icon on the left of your **Outlook** inbox.

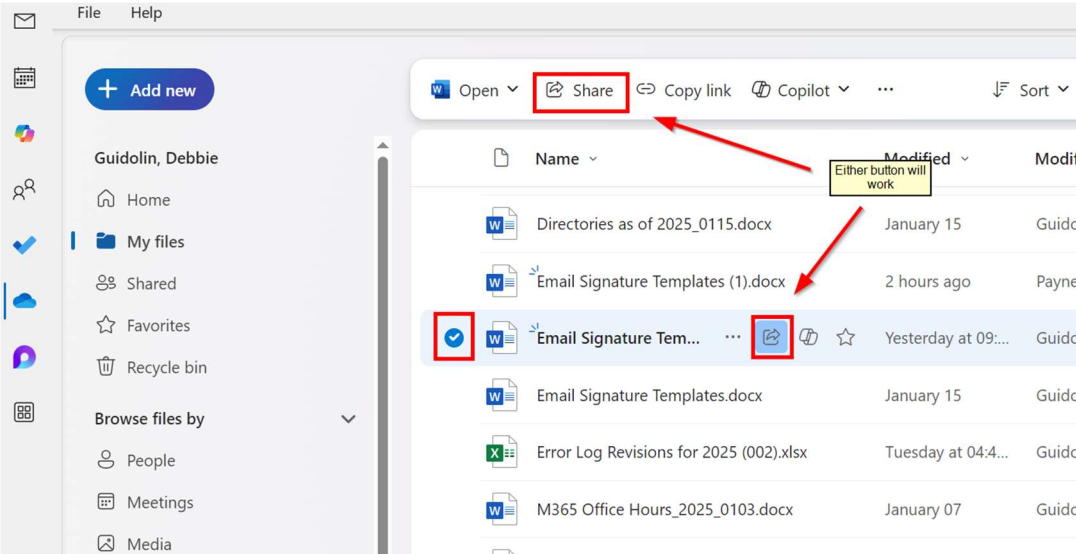


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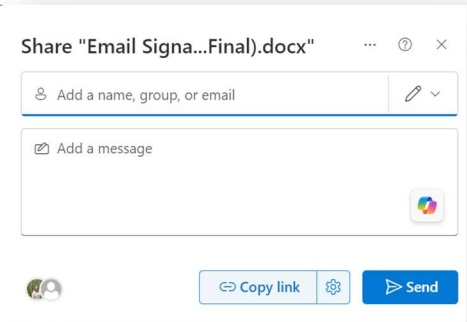
Navigate to **My Files** and click to access the files that were in your H:\Drive.



Select the file to share and then click on either one of the **Share** icons.

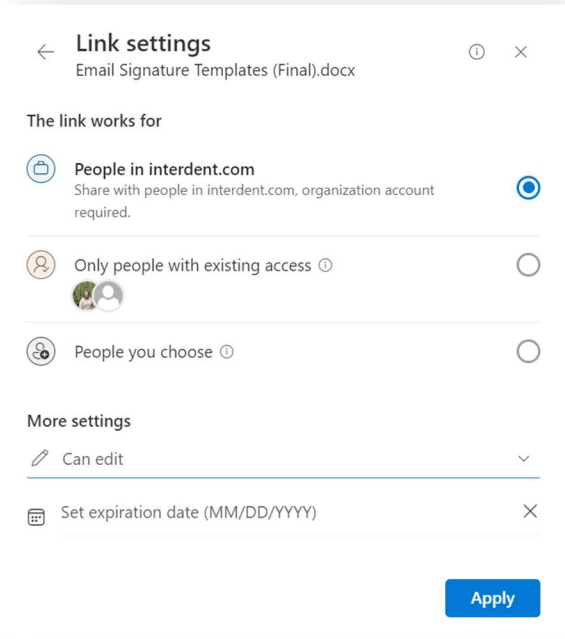


At the next window, there will be options for sending an email or copying a link to paste into a document or email.



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PRO-TIP: Click on the  to expose the settings for sharing for the specific file being shared.



SharePoint – Replaces Legacy Department/Shared Drives

In the coming months, the network drives will be migrated to SharePoint. This will move all our digital assets to the cloud. This will make sharing and collaboration even easier.