

# Migration to Office.com and OneDrive

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# Migration to Office.com and OneDrive

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## Migration overview

### Purpose

- Upgrade aging legacy systems
- Improve functionality
- Move to 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

#### Wednesday

- Avoid using your H:\ drive as migration is in progress
- Migration of email inbox and H:\drive completes overnight

#### Thursday

- Reboot computer and start using Office.com

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

# Migration to Office.com and OneDrive

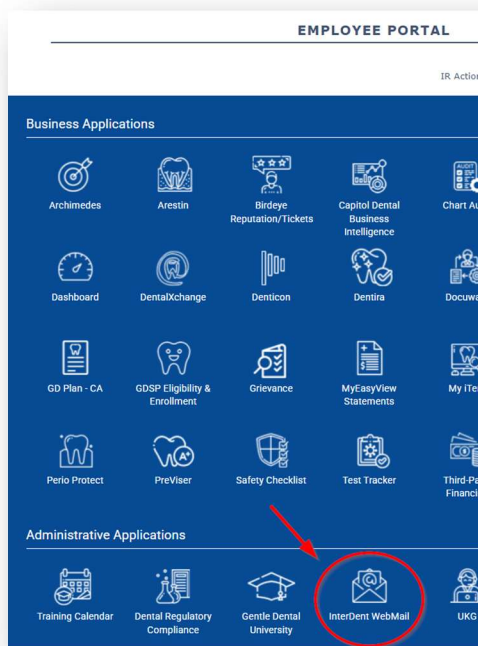
## Office.com – Introduction

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.

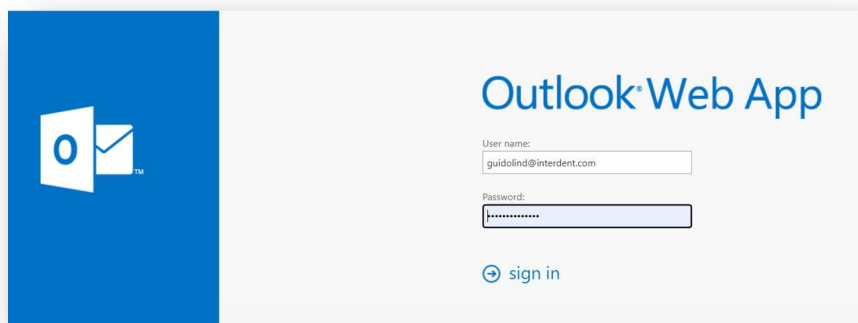
### Opening Office.com (Outlook, Word, Excel)

Practice/Business Managers will be using a **web-based app** for Outlook, Word and Excel—**Office.com**. You can access ALL of them from the **Employee Portal, InterDent Webmail** icon.

The desktop icons will NO LONGER be used to access email. Use the icon shown below:



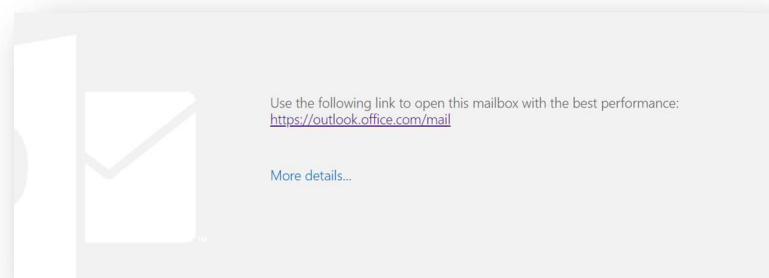
Sign in with your personal (not office) credentials. For example, SmithJ@interdent.com.



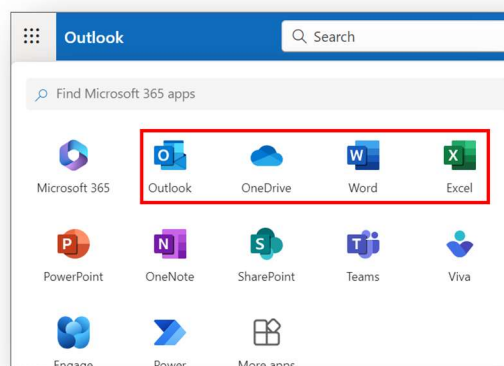
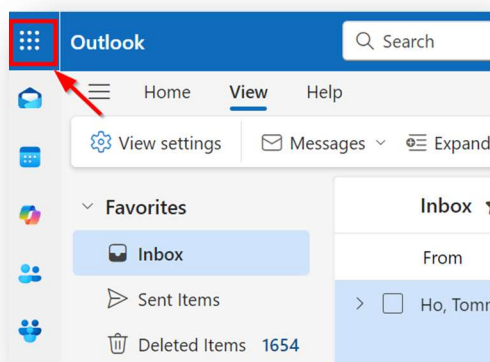
# Migration to Office.com and OneDrive

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Click the link on the next screen for **Outlook.Office.com**. This will be updated after everyone is migrated.




Select the **9-dot square** (app launcher) in the upper left corner of the Outlook screen to access the other Microsoft applications. You may see more applications than you have access to. Feel free to explore whatever apps your license allows.

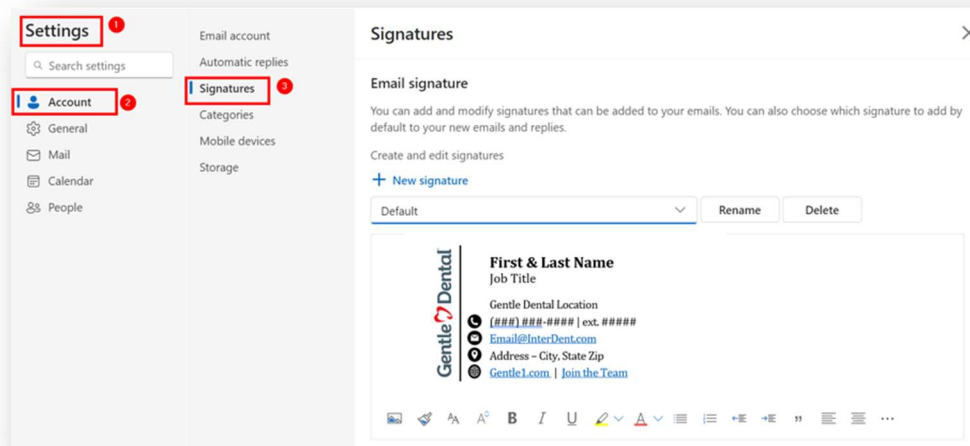


# Migration to Office.com and OneDrive

## Outlook.Office.com (Email)


### Email Signature

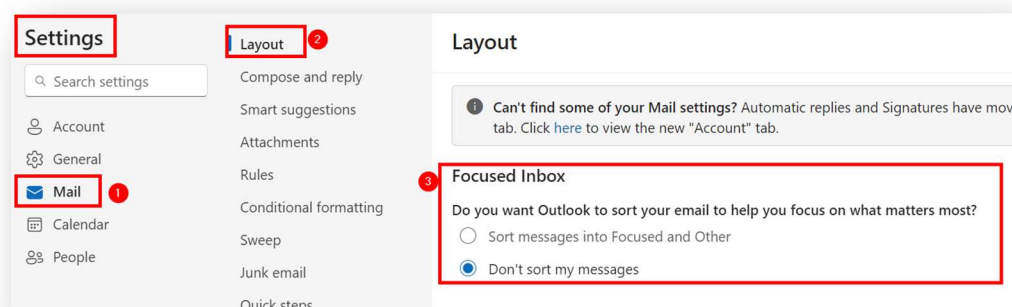
Update your signature from within **Outlook** by selecting Settings  at the top right of the screen. Then select **Account (2)** and **Signatures (3)**.



Human Resources 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](#)

### Focused/Other Inbox

Outlook inbox defaults to a "Focused" inbox. This feature curates the messages presented so you see what Microsoft believes are the most relevant messages. You can turn this off/on under Settings  at the top right of the screen. Select **Mail (1)** and then **Layout (2)** to access the **Focused Inbox (3)** settings.

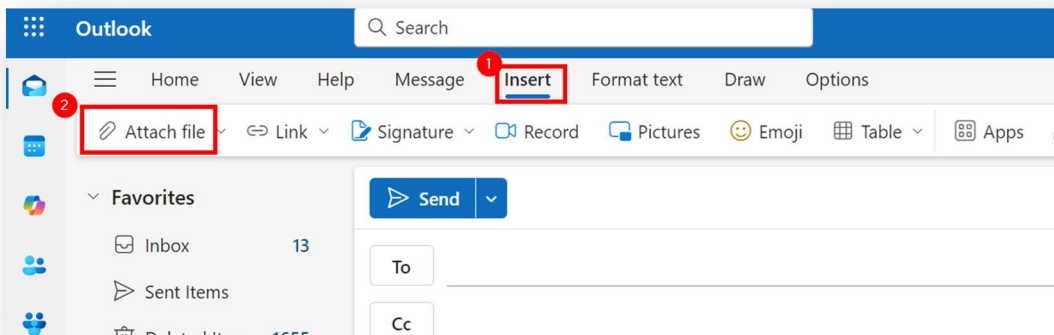


# Migration to Office.com and OneDrive

## Attaching Files in Email

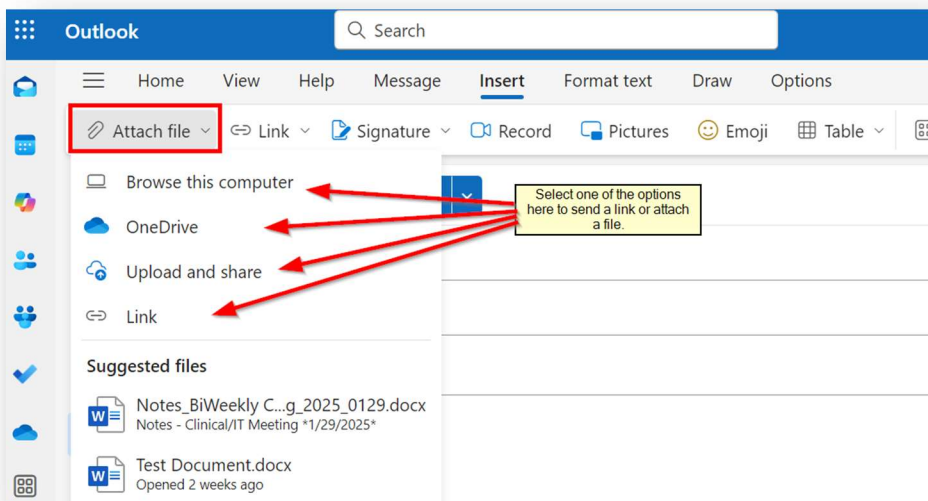
You can attach files as in prior versions using the **Paperclip** icon, but file size is limited by Microsoft. **Using links** (Sharing) is the preferred practice as it reduces demand for network resources and storage in email.

To attach a file, select **Insert (1)** and then **Attach file (2)**.



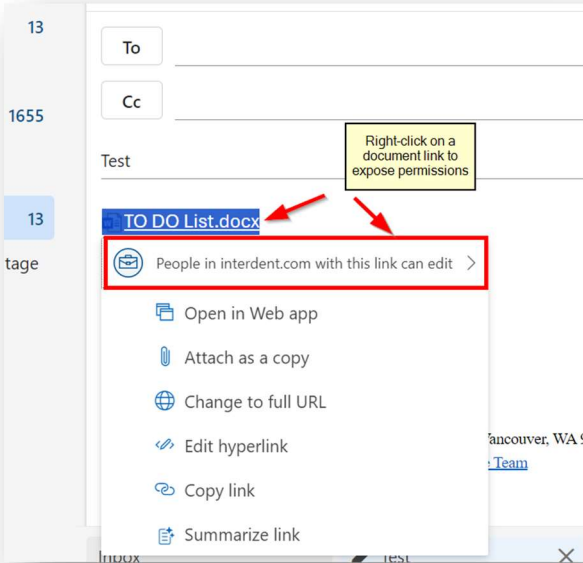
Under **Attach file** you can:

- **Browse this computer** to navigate to a network file or a file on your workstation.
- **OneDrive** to share a link or attach a personal file.
- **Upload and share** to upload a file from your workstation or the network to the cloud and share a link.
- **Link** to share a hyperlink to a site on the internet.

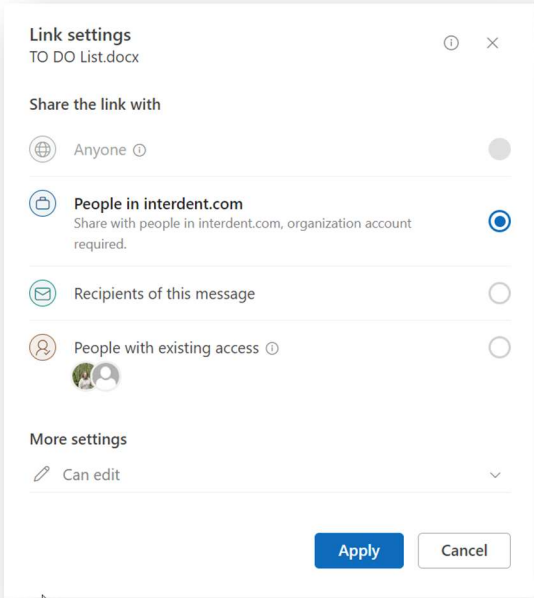


# Migration to Office.com and OneDrive

**PRO-TIP:** You can limit the permissions of a document link. Right-click on the link inside the body of the email to expose the menu.



Select the desired access and click **Apply**.



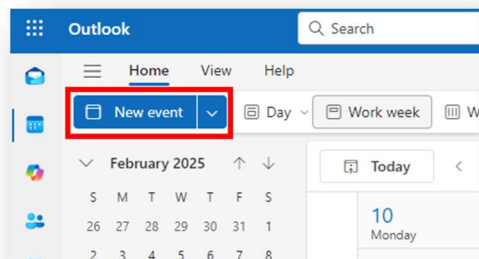
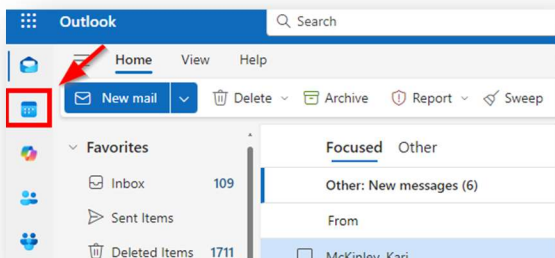
# Migration to Office.com and OneDrive

## Teams

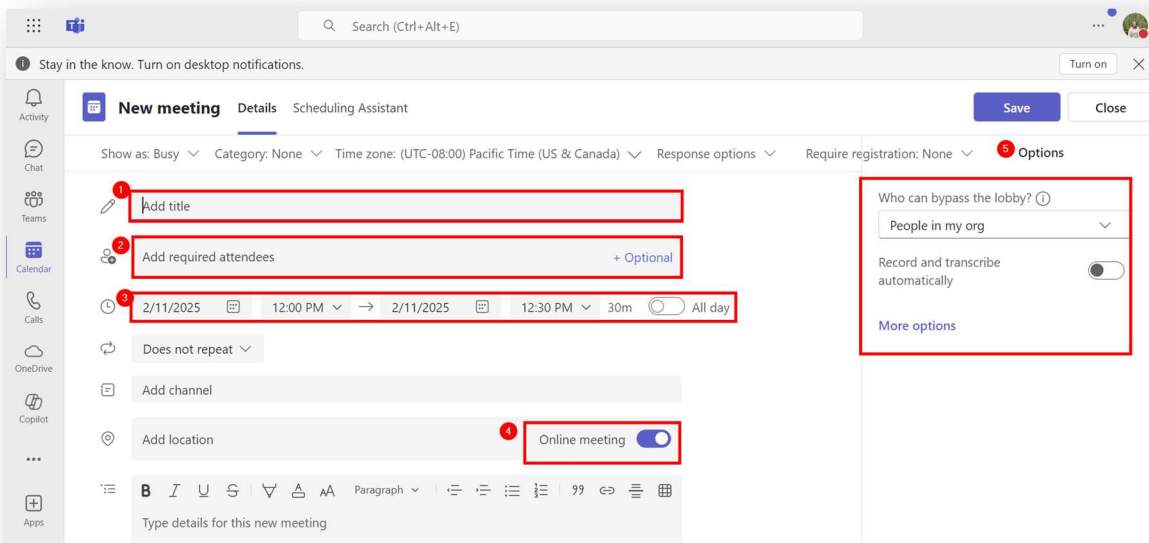
The Teams app is a collaborative tool for chatting, sharing files, scheduling meetings and much more.

### Scheduling a Meeting

Scheduling a meeting with Teams can be done through the Outlook or Teams calendar. Select the **Calendar icon** on the left of the screen and then select **New event**.



Options to customize the meeting are available in the **New Meeting Details**.



## Teams Training Videos

Microsoft Teams training videos are available on UKG at the following link and search "M365":

[https://learning.ultipro.com/academy/InterDentServiceCorporation/courses/library?sorting=priority\\_desc&type\\_id=0&lang=0&category\\_id=404943](https://learning.ultipro.com/academy/InterDentServiceCorporation/courses/library?sorting=priority_desc&type_id=0&lang=0&category_id=404943)

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## Cloud File Storage

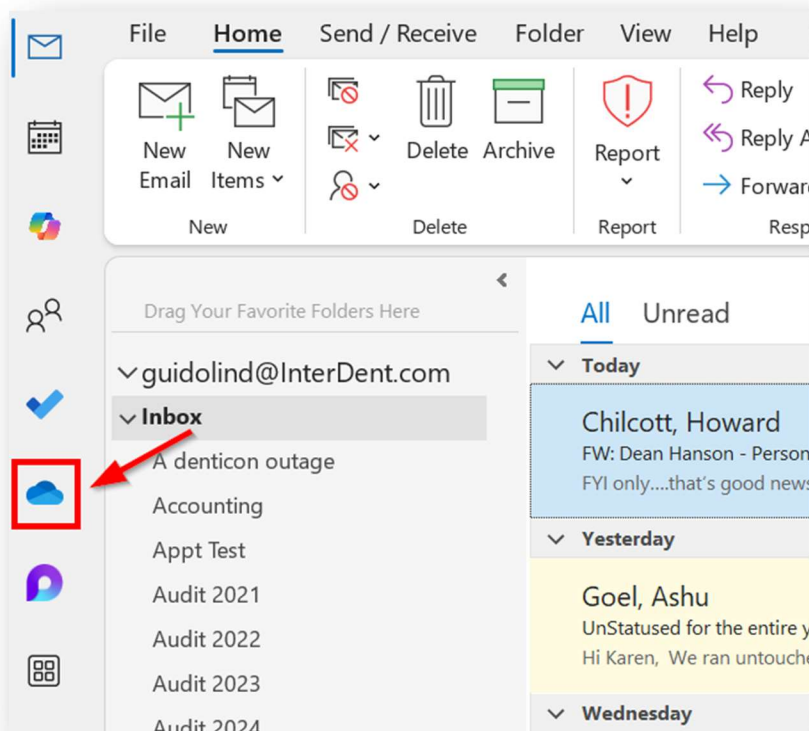
### OneDrive – Replaces Legacy H:\Drive

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

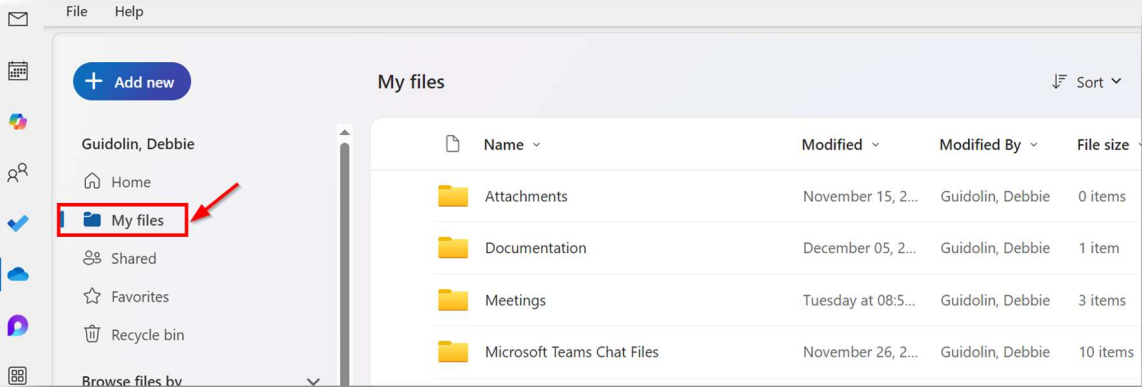
Open **Outlook**.

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

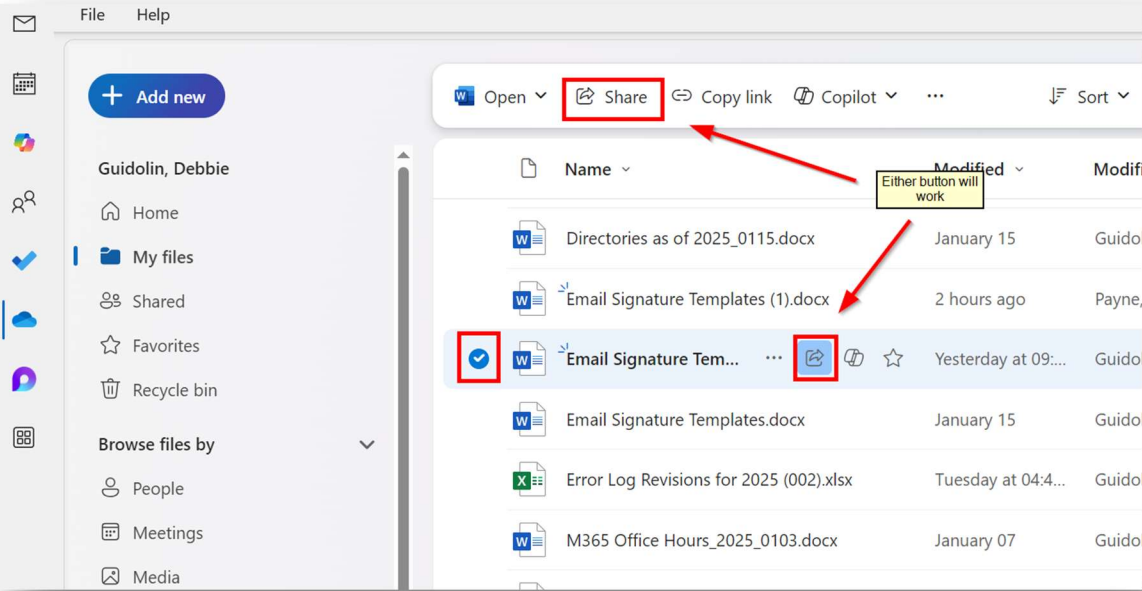


Navigate to **My Files** and click to access the files that were in your H:\Drive.

# Migration to Office.com and OneDrive

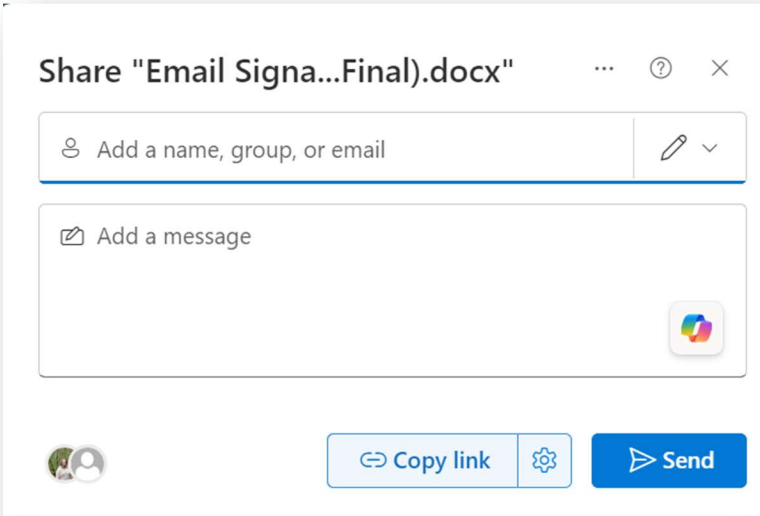



Select the file to share and then click on either one of the **Share** icons. You can also **Open** the file to edit or review.

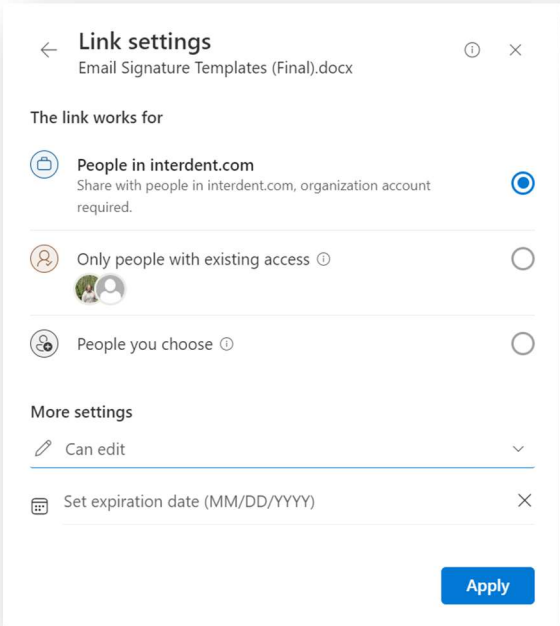


# Migration to Office.com and OneDrive

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



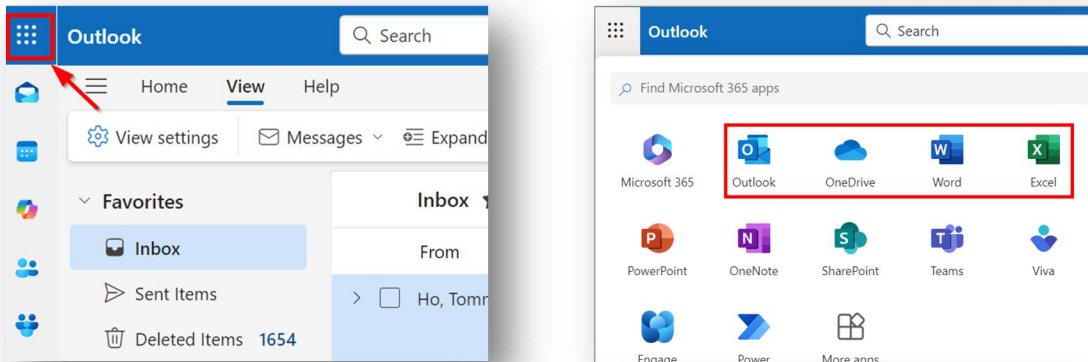
**PRO-TIP:** Click on the  to expose the settings for sharing for the specific file.



# Migration to Office.com and OneDrive

## Opening and Sharing files from the Network

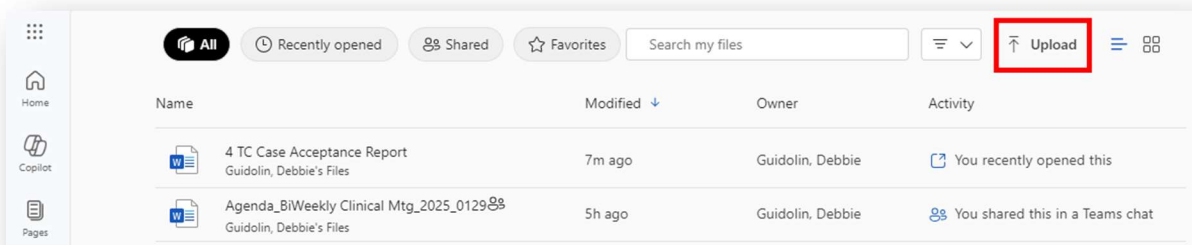
Open Outlook and click on the **9-dot menu** (app launcher) in the upper left corner of the Outlook screen to access the other Microsoft applications.



### **\*NEW WORKFLOW\***

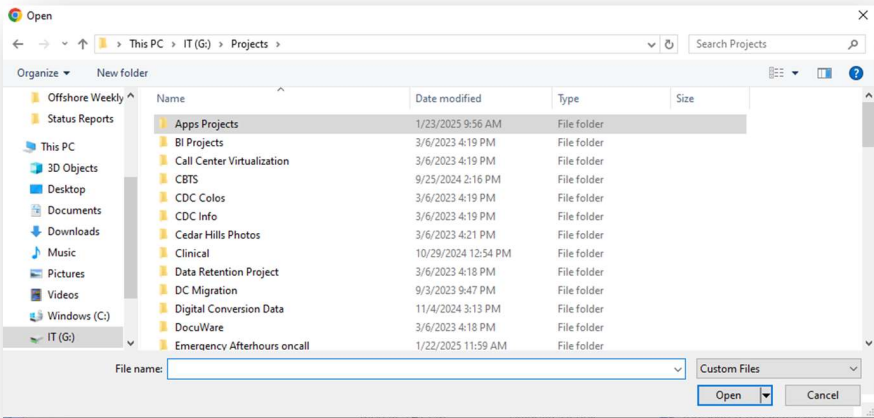
Because the network files are not in the cloud, you will need to **UPLOAD** whatever you want to edit. This process also applies to any documents you have stored on your workstation hard drive.

For example, in Word, scroll down to the file listings and click on **Upload** from the menu.

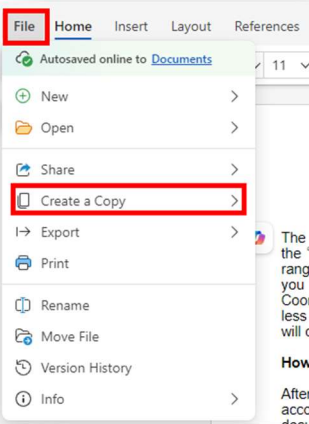


# Migration to Office.com and OneDrive

Navigate to the appropriate directory and the desired file and click **Open**.



You will now have a copy of the file in your OneDrive that you can edit and use. If you need to save the edited file back to the network, select **File** and **Create a Copy**. From there you can save a copy back to the original directory.



## 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.