

# Microsoft 365 Apps

## Assessment Workshop

Microsoft FastTrack

# Welcome to the assessment workshop

## OBJECTIVES

- Introduce the Office 365 deployment framework
- Determine use of OneDrive for Business
- Plan for Microsoft 365 Apps deployment
- Plan for compatibility
- Establish approach for deploying Microsoft 365 Apps
- Establish approach for servicing Microsoft 365 Apps
- Get ready to identify remediation needs

# Microsoft 365 Apps deployment framework



Getting started



Prepare



Upgrade



Manage

# Microsoft 365 Apps deployment framework

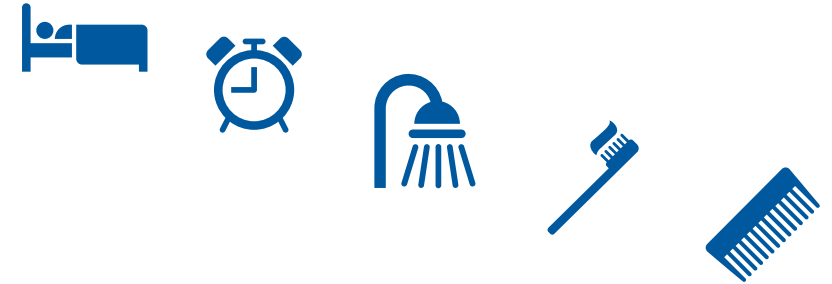


Getting started

# Office as a service



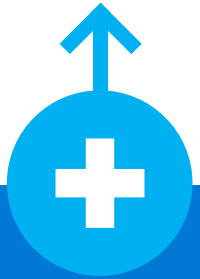
Change from a huge, jarring,  
every 3-6 years project...



...to an iterative, smooth,  
monthly or semi-annual process

- Establish team and process to evaluate monthly updates
- Security members review roll-up patches (versus individual app patches in the Microsoft Windows Installer (MSI) perpetual model)
- Helpdesk and training members review new features
- Developers (internal and third party) review for app compatibility
- Prepare for updates to software distribution and update management tools as needed
- Operationalize monthly and semi-annual deployment processes

# Microsoft 365 Apps



■ Always up-to-date

■ One TB OneDrive

■ PC, Mac, Web, Android, and iOS apps

## Microsoft 365 Apps



### Most productive

Microsoft Teams, Designer, Tap, Researcher, data types, Ideas, intelligent digital ink, dictation, 3D animation, real-time collaboration



### Most secure

Office 365 message encryption, Advanced Threat Protection (ATP) Safe Links in docs, sensitivity labels in docs, Security Policy Advisor, Safe Docs, security baseline, Application Guard



### Lowest cost

Five (5) PC, tablet, and phone installs, one (1) TB cloud storage, FastTrack deployments, Office on the web, shared computer licensing, language packs, device-based licensing

## Office 2019

Morph and Zoom | 2D maps | Funnel charts | New Excel functions | Focused Inbox | Black theme | Focus Mode (Mac) | Accessibility Checker | Click-to-Run



## Office 2016

Treemap | Sunbursts | Microsoft Tellme | Smart Lookup | Office 365 Groups | One-click forecasting | Weather forecast (Mac) | Outlook Recent Items list



## Office 2013

Templates collapse | Presentation mode | Object zoom | Quick Analysis | Flash Fill | Chart | Recommendations | Expand and collapse



## Office 2010

Most Recently Used (MRU) | File tab | Backstage | Sparklines | Protected view | Trusted Documents



# OneDrive

The intelligent files app for Microsoft 365



View and capture all files  
and photos from any  
device



Share and work  
together with anyone  
in real-time



Organize and find files  
that matter most across  
the organization



Keep files backed up,  
secured, and protected

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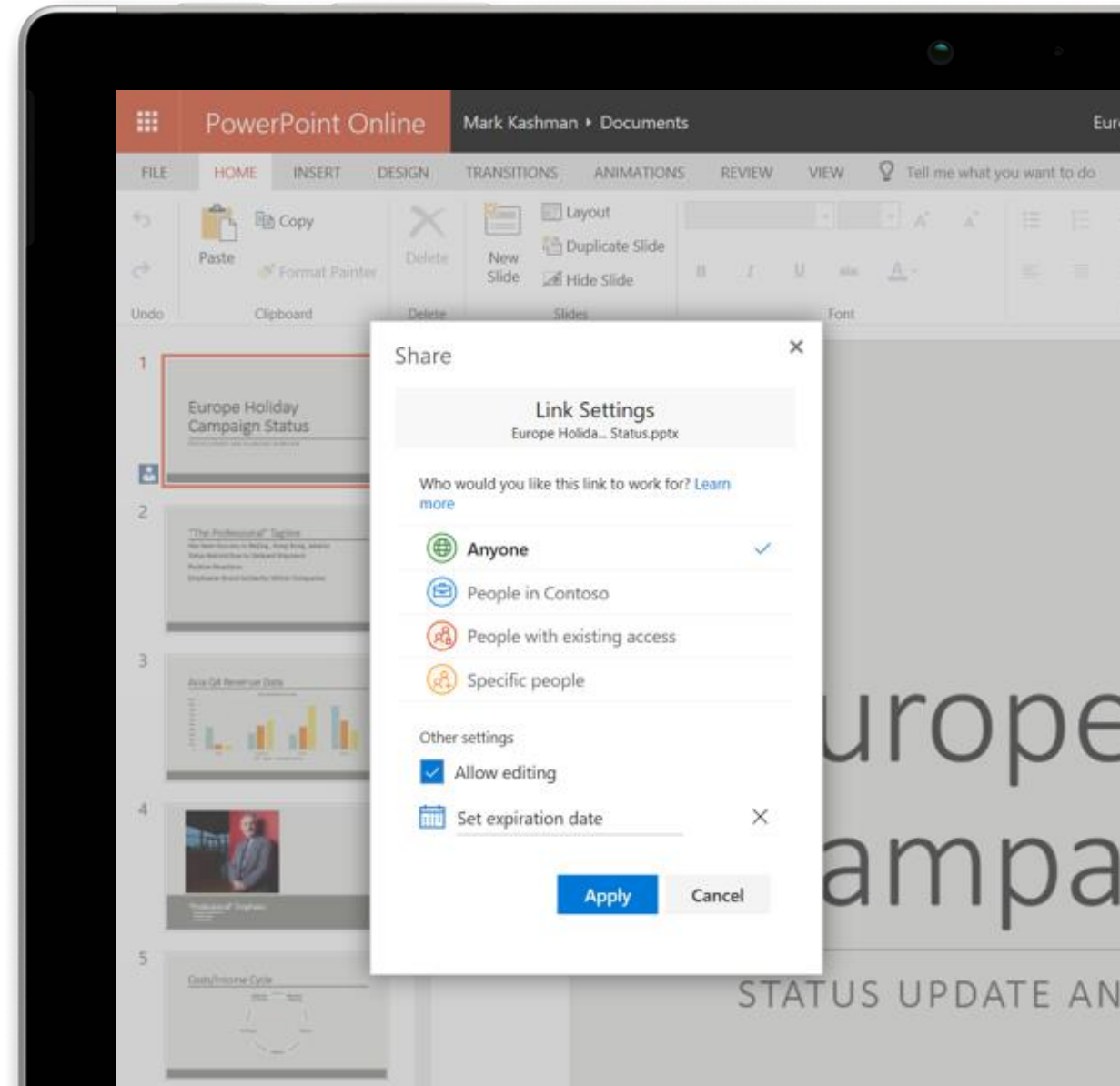
# Collaborate with deep Office integration

Share seamlessly and consistently

Open documents faster than ever  
in Office on the web

Bring people into the action with  
@mentions

Coauthor documents in Office on the  
web, desktop clients, and mobile apps





# Microsoft 365 Apps deployment framework



Prepare

# Hardware and software requirements

## Hardware requirements

- Microsoft 365 Apps
  - 1.6 gigahertz (GHz) or faster, 2-core; 4GB RAM; 4.0 GB of available disk space
  - Verify full hardware requirements
- Skype for Business
  - Verify if your AV equipment is certified

Microsoft 365 Apps  
architecture recommendation  
64-bit

## Current software requirements

- Windows 10, Windows 8.1, Windows Server 2019, Windows Server 2016
- One of the three most recent versions of macOS. When a new major versions of macOS is released, the macOS and the previous two versions
- .NET 3.5 or .NET 4.6 required
- Verify software requirements

Microsoft 365 Apps no longer supported on:

- Windows 7; Windows Server 2008 / 2008 R2; Windows Server 2012 / 2012 R2
- Windows 10 Long Term Servicing Branch (LTSB) and Long Term Servicing Channel (LTSC)
- Out-of-support Windows 10 Semi-Annual Channel (SAC) releases
- Windows Server 2016 support through October 2025

Office 2010 end of support | [October 13, 2020](#)

Limited time plan for the upcoming transition

<https://go.microsoft.com/fwlink/?linkid=2100556>

# Customers with Windows 7 | Managing Microsoft 365 Apps updates

While support has ended for Microsoft 365 Apps, security-only updates will continue to be published



## Version 2002

The last full version update (security and features) of Microsoft 365 Apps that is available for devices running Windows 7.



## Office auto-updates, by default

By default, Office auto-updates to the latest Version 2002 security updates on Windows 7 devices.



## Security updates only

Version 2002 on Windows 7 devices is available through January 2023.



## Otherwise, use customary deployment methods

IT admins can manage Windows 7 devices separate from Windows 10 devices for Office.

Version 2002 Release Schedule	
Monthly Channel	Late February 2020
Semi-Annual Channel (Targeted)	March 2020
Semi-Annual Channel	July 2020

# Recommended customer action with Windows 7

## EASY PATH – USE THE OFFICE CONTENT DELIVERY NETWORK (CDN)

Clients updating from the CDN receive the appropriate security-only updates

## CUSTOMER MANAGES UPDATES WITH SYSTEM CENTER CONFIGURATION MANAGER

Recommended actions:

- Use dedicated device collections for Windows 7 devices.
- Create an automatic deployment rule (ADR) to pull Windows 7 Microsoft 365 Apps updates based on unique title - unique 32- or 64-bit packages.
- If you use manual Office Deployment Tool (ODT) packages, be sure to download and deploy the Version 2002 build for Windows 7 devices. Use later versions for Windows 10 devices.

Failure to take action can result in:

- Deployment failures (if deploying Version 2003 onward to a Windows 7 device).
- Unsupported states (if deploying Version 2002 to a Windows 10 device after Semi-Annual Channel (SAC) extended expiration).

# Assess on-premises infrastructure

## Active Directory

- Deploy [Office 2016 Group Policy templates](#)
- Review [Microsoft 365 Apps security baseline](#)

## System Center Configuration Manager

- [Upgrade to System Center \(Current Branch\)](#)
- [Update](#) to latest feature release
- Use Windows Server Update Services (WSUS) 4.0 to get automatic updates
- CB 1906 is required for Microsoft 365 Apps upgrade readiness dashboard

## Other on-premise services

- Exchange Server 2013 onward  
[Support matrix](#)
- Supported versions:
  - SharePoint Server
  - Lync Server

Refer to the [Product Lifecycle site](#)

**Note:** We recommend either adopting the cloud service or running the latest release of the on-premises Office server products

# Licensing options

## User-based licensing

Cover every user in your organization, from power to occasional users.

License applied to a **user**

**Requires** user-level activation

**Requires** user sign-in with Azure Active Directory (Azure AD) ID

**Recommended for most scenarios**

## Device-based subscription

Extend coverage to commonly used devices.

License applied to a **device**

**Doesn't** require user-level activation

**Doesn't** require user to have Azure AD ID

### The user experience remains the same

Office client apps are available through device-based subscriptions the same as they are today in user-based licenses.



Outlook<sup>1</sup>



Word



Excel



PowerPoint



OneNote



Publisher



Access



Microsoft Teams<sup>2</sup>

User-based licenses are still needed to access cloud data storage or services.



OneDrive



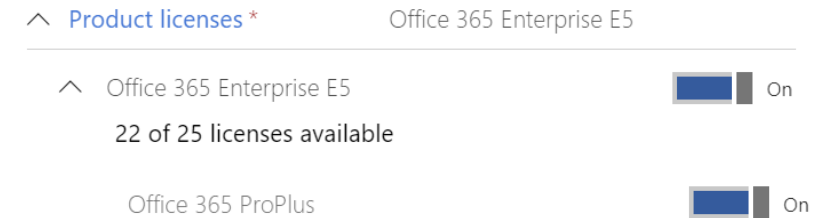
SharePoint

<sup>1</sup> The Outlook app is licensed with the device subscription, but the mailbox is set up using the user identity that is signed-in to Office.

<sup>2</sup> The Teams app requires a user identity (like user sign-in).

# User-based licensing

- Each user needs a license assigned to use Microsoft 365 Apps
- The service must be enabled in the assigned license
- Most common ways:
  - Use Office 365 PowerShell for [assigning](#) and [enabling](#) at scale
  - Leverage [Azure AD](#) and groups
  - Manual assignment using the admin portal for pilot
- Each licensed user can activate on five (5) computers plus five (5) phones plus five (5) tablets
- Assign licensing for additional products – Project and Visio – where required
- User-based licensing is the recommended and most common licensing model



# Device-based licensing



## Device-based subscription

- Assigns a Microsoft 365 Apps license to a device
- Does not necessarily require sign in
- No limit to the number of sign-ins in a given time period
- Anyone with device access can use Microsoft 365 Apps

### Typical scenario

Shared and open access device scenarios where users work across multiple shared devices or where users need occasional access.

[FastTrack site](#)



## Shared computer activation

- Designed for users with Microsoft 365 Apps license
- Requires user sign-in and activation on each device
- Limits 20 activations per user per week
- Doesn't work for shared or open access devices

### Typical scenario

Remote Desktop Services (RDS) scenarios with multiple licensed users to connect to the same remote computer at the same time.

<https://go.microsoft.com/fwlink/?linkid=2122427>



# Network foundations

## Connectivity principles

- Identify and differentiate Office 365 traffic using Microsoft-published endpoints
- Egress Office 365 data connections as close to the user as practical with matching DNS resolution
- Avoid network hairpins and optimize connectivity directly into the nearest entry point into Microsoft's global network
- Assess bypassing proxies, traffic inspection devices, and duplicate security available in Office 365

Tip:  
Networking limitations and incorrect configurations can surface as Microsoft 365 Apps performance issues. Ensure best practices are applied to provide the best user experiences in Microsoft 365 Apps.

## Package size considerations

- 1.6 GB for core Microsoft 365 Apps
- 250 MB for each language

## Update considerations

- Updating from the CDN can reduce administrative tasks
- Use of CDN requires sufficient internet connectivity from clients
- CDN updates are automatically deployed over time to conserve bandwidth
- Use local distribution or enterprise deployments where CDN isn't feasible

## Continuous connection

- All devices require internet access to establish and maintain activation
- Must connect at least once every thirty days

<https://go.microsoft.com/fwlink/?linkid=2100644>

# We're giving our customers more control

Privacy options we're giving our customers:

- The ability to make choices about the *diagnostic data* they share with Microsoft.
- Options regarding the *connected experiences* they have in Office.

## Diagnostic data

Includes diagnostic data about the use of apps and services collected when a user interacts with a service or service backed feature.

Select the level of client diagnostic data you share (Required, **Optional (default)**, Neither).

## Connected experiences

Experiences that use cloud-based functionality to provide enhanced Office features are available to you and your user. Experiences include connected experiences that analyze your content, experiences that download online content, and other functional-specific experiences.

# Office privacy – Essential services

A set of services that are essential to how Office functions and therefore can't be disabled.

For example, the licensing service that confirms that you are properly licensed to use Office.

Necessary service data about these services is collected and sent to Microsoft, regardless of any other privacy-related policy settings you have configured.

You can see this data by using the Diagnostic Data Viewer.

Service	Description
<a href="#">Authentication</a>	Authentication is a cross-platform service that validates your Office user identity. It's required to enable you to sign in to Office, activate your Office license, access your files stored in the cloud, and provides a consistent experience across Office sessions and your devices.
<a href="#">Click-to-Run</a>	Click-to-Run is the installation technology used to install and update Office on Windows. It checks for new versions of Office, and when a new version is available, downloads and installs it. Click-to-Run detects the need for, performs the download of, and installs Office updates, including security updates.
<a href="#">Enhanced Configuration Service (ECS)</a>	ECS provides Microsoft with the ability to reconfigure Office installations without the need for you to redeploy Office. It's used to control the gradual rollout of features or updates, while the impact of the rollout is monitored from diagnostic data being collected. It's also used to mitigate security or performance issues with a feature or update. In addition, ECS supports configuration changes related to diagnostic data to help ensure that the appropriate events are being collected.
<a href="#">Licensing</a>	Licensing is a cloud-based service that supports your Office activation for new installations and maintains the license on your devices after Office has been activated. It registers each of your devices and activates Office, checks the status of your Office subscription, and manages your product keys.
<a href="#">Services Configuration</a>	Services Configuration provides the ability to make updates to Office configuration settings to enable or disable client features. It's called every time an Office app is started and provides details about other Office configurations and services. Services Configuration also controls which services are designated as essential services.
<a href="#">Telemetry</a>	The Telemetry service is used to collect diagnostic data from Office apps. It enables the collection of diagnostic data generated by Office, including required and optional diagnostic data. It's also responsible for the collection of the service diagnostic data portion of required service data for Office.

# Office privacy – Controls

Configurable through Group Policy Objects (GPO) or Office cloud policy service (OCPS)

Controls available in Microsoft 365 Apps build 1904 onward - available in Monthly Channel now

Version 1904 was delivered in Semi-Annual Channel (Targeted) in September 2019 and in Semi-Annual Channel in January 2020.

Controls available to:

- Set diagnostic data level

- Configure use of connected experiences

  - Allow the use of connected experiences in Office that analyze content

  - Allow the use of connected experiences in Office that download online content

  - Allow the use of additional optional connected experiences in Office

  - Allow the use of connected experiences in Office

Overview of privacy controls for Microsoft 365 Apps – <https://go.microsoft.com/fwlink/?linkid=2111606>

## Important

- These changes apply to Access, Excel, OneNote, Outlook, PowerPoint, Publisher, and Word.
- These changes also apply to the desktop versions of Project and Visio that come with some subscription plans, like the Project Online Professional plan or Visio Online Plan 2.

# Prepare for compatibility

## Compatibility of documents

- High compatibility since Office 2010
- Most just work
- Readiness Toolkit for Office provides automated assessment

## Compatibility of add-ins

- High compatibility of add-ins
- Some require vendor support
- Readiness Toolkit for Office provides automated assessment



### Designed for compatibility

- Only four (4) API changes since 2010, none require refactoring
- Proactively monitor add-in health with developers
- Less than 0.1 percent of apps, add-ins, and macros face issues

Be confident with App Assure

*Windows 10 and Microsoft 365 Apps are designed for compatibility, but if you run into an issue, Microsoft helps you fix them at no additional cost!*

<https://go.microsoft.com/fwlink/?linkid=2060080>

# Use the Readiness Toolkit for Office

## Discover compatibility issues

- Potential macro issues, including 64-bit
- Add-in readiness information
- Deploy Readiness Toolkit for Office to devices
- Scanning MRU files recommended

## Assess impact across the organization

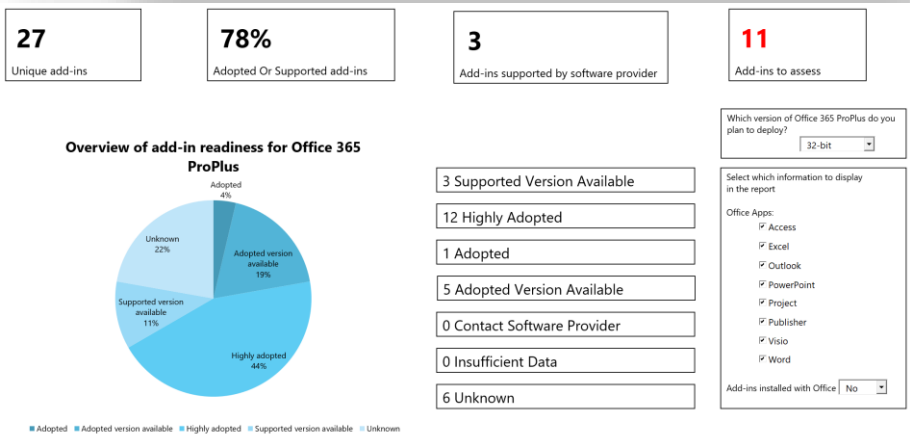
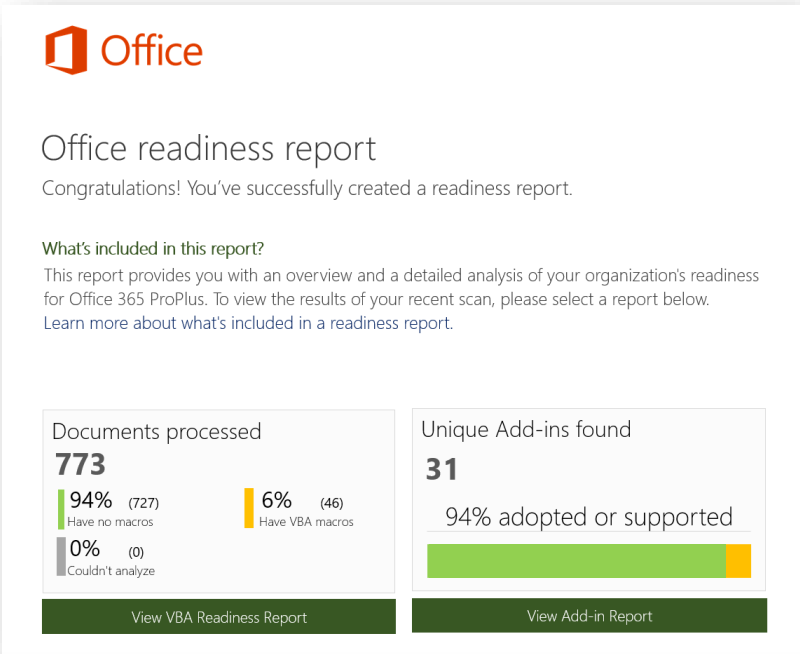
- Visual Basic for Applications (VBA) macro and add-in inventory with adoption information

## Plan with readiness report creator

- Remediation recommendations
- Advanced report recommended for remediation advice and readiness status

The following guidance aims to help with the remediation of issues we've identified within your VBA code. It is not an exhaustive list and other issues may

Category	Source File	Line #	Original Code	Proposed Changes
Suggested Fix	dataform3.xla	4	Private Declare Function ShellExecute Lib "shell32.dll" Private Declare	Private Declare <b>PtrSafe</b> Function ShellExecute Lib
Suggested Fix	dataform3.xlam	6	Private Declare PtrSafe Function ShellExecute Lib "sh	Private Declare <b>PtrSafe</b> Function ShellExecute Lib
Suggested Fix	dataform3.xlam	9	Private Declare Function ShellExecute Lib "shell32.dll" Private Declare	Private Declare <b>PtrSafe</b> Function ShellExecute Lib
Suggested Fix	driveinfo.xls	3	Private Declare Function GetDriveType Lib "kernel32" Private Declare	Private Declare <b>PtrSafe</b> Function GetDriveType Lib
Suggested Fix	king-james-bible.xlsm	2	Private Declare PtrSafe Function ShellExecute Lib "sh	Private Declare <b>PtrSafe</b> Function ShellExecute Lib
Suggested Fix	king-james-bible.xlsm	4	Private Declare Function ShellExecute Lib "shell32.dll" Private Declare	Private Declare <b>PtrSafe</b> Function ShellExecute Lib
Suggested Fix	speechcommands.xlam	3	Private Declare Function RegOpenKeyA Lib "ADVAPI32" Private Declare	Private Declare <b>PtrSafe</b> Function RegOpenKeyA Lib
Suggested Fix	speechcommands.xlam	7	Private Declare Function RegCloseKey Lib "ADVAPI32" Private Declare	Private Declare <b>PtrSafe</b> Function RegCloseKey Lib
Suggested Fix	speechcommands.xlam	10	Private Declare Function RegQueryValueExA Lib "ADVAPI32" Private Declare	Private Declare <b>PtrSafe</b> Function RegQueryValue
Suggested Fix	speechcommands.xlam	15	Declare Function GetWindowsDirectoryA Lib "kernel32" Declare	Declare <b>PtrSafe</b> Function GetWindowsDirectoryA
Suggested Fix	speechcommands.xlam	43	Dim x, TheKey As Long	Dim x, TheKey As <b>LongPtr</b>
Suggested Fix	speechcommands.xlam	38	Dim hKey As Long	Dim hKey As <b>LongPtr</b>



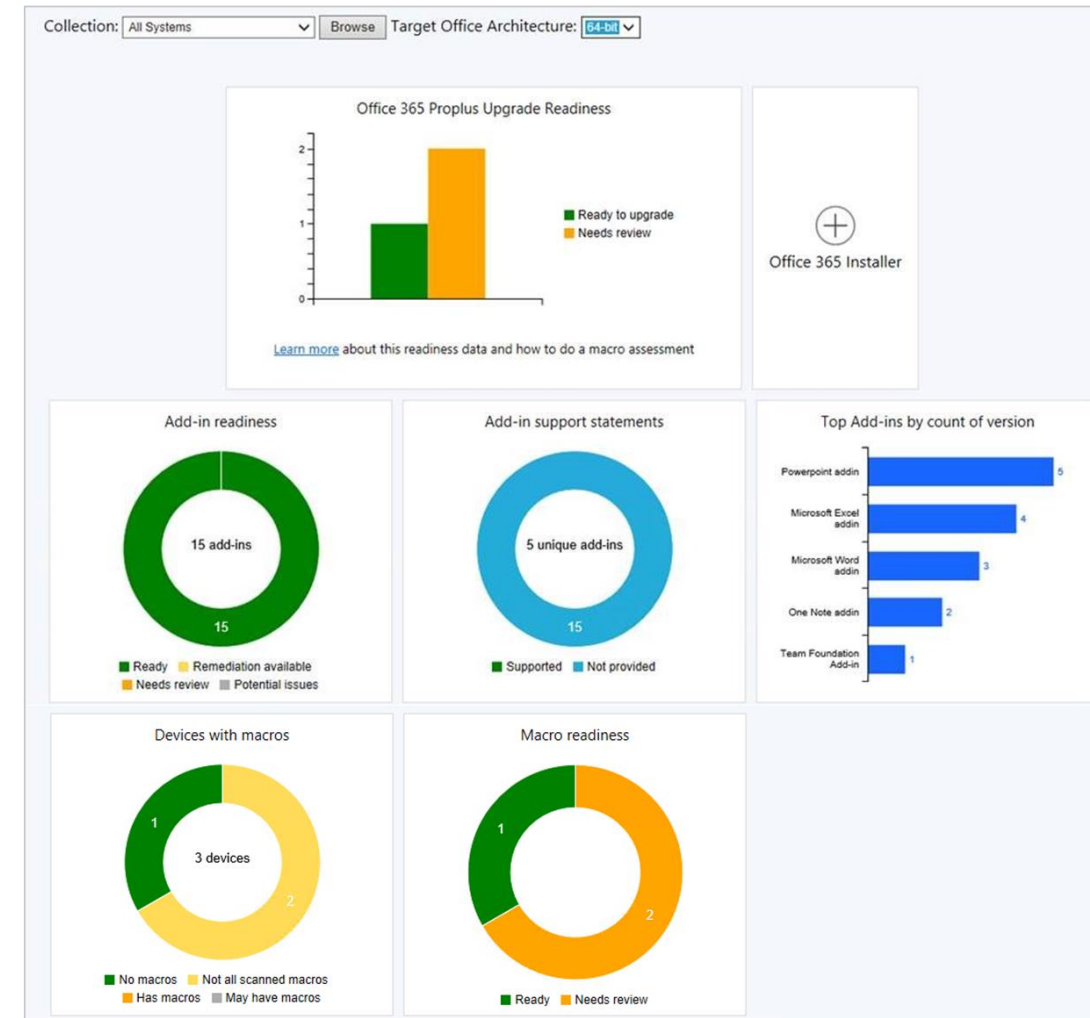
## Scale your assessment

- Deploy Readiness Toolkit for Office using System Center Configuration Manager
- Export readiness results to SQL Sever
- Report findings with customizable Power BI report

# Microsoft 365 Apps upgrade readiness dashboard

## View readiness in Configuration Manager

- Available with Configuration Manager (Current Branch)
- Built into your existing workflow
- Readily scale your assessments – unlimited devices
- Readiness views included:
  - Add-in readiness
  - Add-in support statements
  - Top add-ins by count of version
  - Number of devices that have macros
  - Macro readiness
- Review the [requirements](#) for using the dashboard
  - Enable hardware discover
  - Devices require CDN access to download add-in readiness file



# Plan deployment groups

Identify groups that enable targeting for channels, architectures, and languages

Ensure groups represent all segments of the organization

Is each department represented?

If departments like HR, Finance, and Legal aren't represented, consider adding a few users from each and cross-department integrations

Does inclusion of each department sufficiently include app usage?

Consider adding additional users from each department to get this coverage

Are the various OSs included?

If there is a mix of Windows 7 and Windows 10, ensure that both are covered

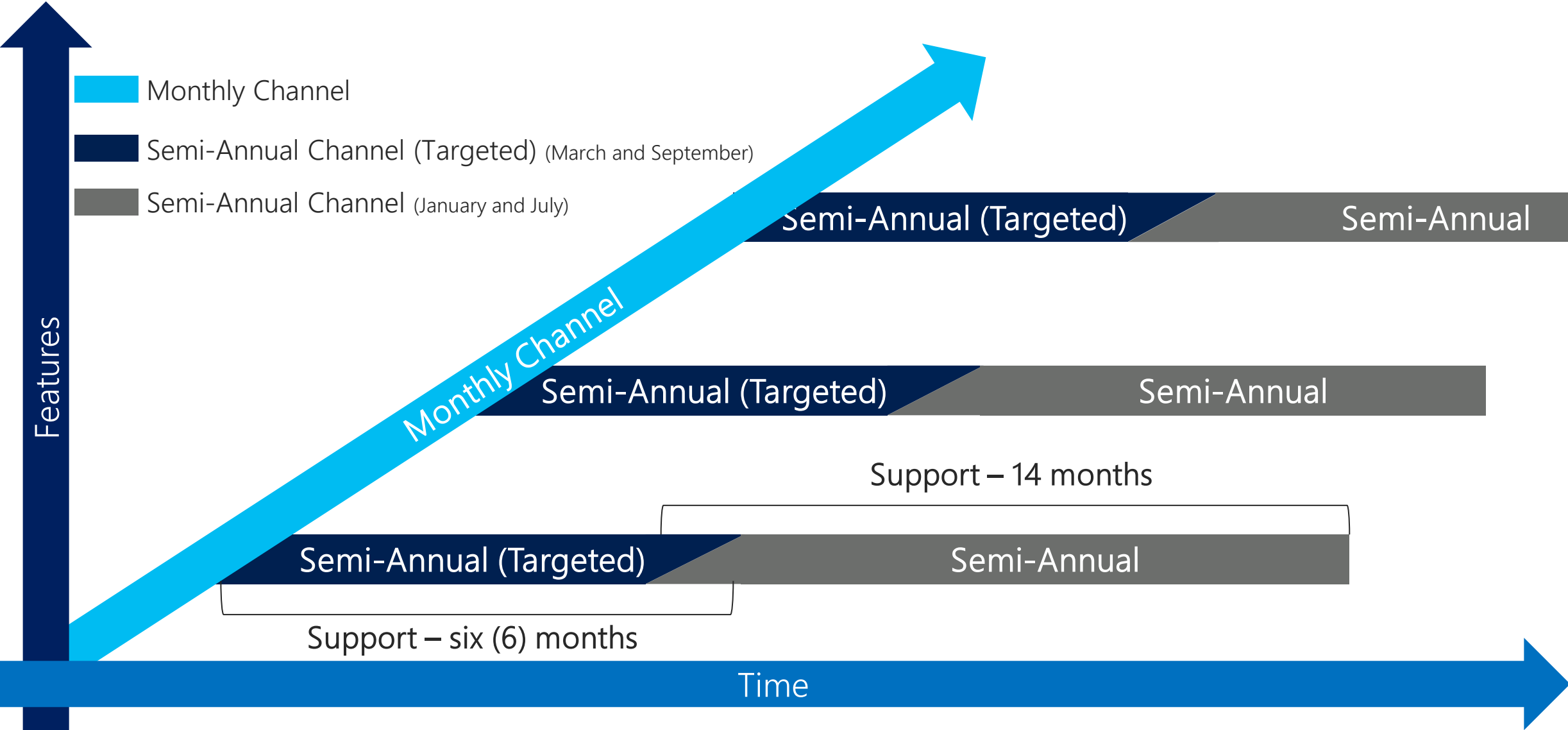
Are there any other pivots that are interesting for your deployment?

Consider if architecture (x86 and x64) should both be included


Are multiple languages used? Consider the representative set



# How channels and features relate



# Choosing the updates – Select the update frequency



	Frequency	Support duration
<b>Monthly Channel</b> Intended for users who need faster access to new features. Intended for early adopters and self-service users with limited integration.	At least monthly	Until next monthly release
<b>Semi-Annual Channel (Targeted)</b> Intended for validation prior to next Semi-Annual Channel release. Enables users to pilot new features before broad deployment.	Twice yearly (March and September) Monthly security and critical updates	Six (6) months
<b>Semi-Annual Channel</b> Intended for broad deployment. Works best when teamed with pilot groups on Semi-Annual Channel (Targeted).	Twice yearly (July and January) Monthly security and critical updates	14 months

## Best practice:

Deploy Semi-Annual Channel (Targeted) to a representative pilot group across functional groups.  
Deploy the Semi-Annual Channel to the rest of your users.  
Provides a four-month lead time for testing new Office feature updates before they're deployed broadly.  
Validate across the organization, not just with IT pros.

## Recommendation

# Building your package with Office Customization Tool

- Build configuration files with the [Office Customization Tool](https://config.office.com) – [config.office.com](https://config.office.com)
- Most configuration settings are available in the Office Customization Tool
- Retrieve Setup.exe from the [Office Deployment Tool](#) (ODT) hosted on the Microsoft Download center\*  
Leverage the *RemoveMSI* feature in the Office Customization Tool to remove legacy versions of Office products when upgrading
- Customize package with required products, apps, languages, and preferences
- Packages are saved for use in the deployment method you select in the next phase

The screenshot shows the 'Office Customization Tool' web interface at <https://config.office.com/deploymentsettings>. The page is titled 'Office Customization Tool' and includes a link to 'Learn more about the Office Customization Tool'. The main section is 'Deployment settings'. It contains several configuration options:

- Which architecture do you want to deploy?**: Radio buttons for '32-bit' and '64-bit'. '64-bit' is selected.
- Products\***: A section titled 'Which products and apps do you want to deploy?'. It includes dropdown menus for 'Office Suites' (set to 'Office 365 ProPlus'), 'Visio' (set to 'Select Visio product'), 'Project' (set to 'Select Project product'), and 'Additional Products' (set to 'Select Additional product').
- Turn apps on or off to include or exclude them from being deployed**: A table of toggle switches for various applications.

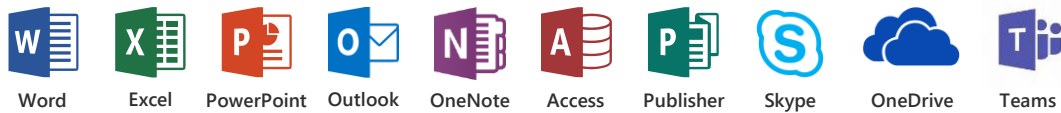
App	Toggle	Status
Access	On	On
OneDrive (Groove)	Off	Off
OneDrive Desktop	On	On
Outlook	On	On
Publisher	On	On
Excel	On	On
Skype for Business	On	On
OneNote 2016	Off	Off
PowerPoint	On	On
Word	On	On

## \*Important

- \*Setup.exe is periodically updated. We suggest you always use the newest version for deployment. An integrated Setup.exe with the Office Customization Tool is coming

<https://go.microsoft.com/fwlink/?linkid=2100580>

# Microsoft Teams is now included Microsoft 365 Apps



Included by default for all new installs, in all channels

Control new installs with the exclude app element in the deployment package

Included by default for existing installs at update, in all channels

Control existing installs using new Teams GPO to avoid install on update or prevent automatically starting Teams

## FAQ

What if the Teams desktop is already installed as a stand-alone app?

Existing installs of the Teams desktop app won't be changed.

Will Teams follow the Microsoft 365 Apps update cadence?

Teams is automatically updated approximately every two weeks with new features and quality updates. This update process for Teams is different than the update process for the other Offices apps.

<https://go.microsoft.com/fwlink/?linkid=2100717>

# Plan the source files – Control the number of packages

## Recommendation: Package for each architecture and channel

Office source files are unique for each architecture and update channel.

Languages content is unique. However, the large number of languages makes package management difficult.

Build a package for each architecture and channel including the most common language packs.

Proper packaging results in efficient management beyond your initial installs.

## Packaging tips and tricks

### Packaging with Configuration Manager

Only include the language packs you need most in your package

- Understand which language packs are the most commonly used

- Identify the number of language packs which make up 80-95 percent of your installed language packs

- Deliver remaining language packs using the Office CDN (use `AllowCdnFallback=True`)

Enable Peer Cache for Configuration Manager

- Reduce the impact of the approximately 2 GB deployment size of the core

### Reducing package size

*Exclude App* in ODT won't help reduce the package size!

- Click-to-Run has only one source package that contains all products

- With apps excluded, you still download the same source package – there's no savings to the package size

The biggest gains can be made in managing language packs

### Lean install

Use the *Match Installed* option to add additional products, like Visio or a language pack

# Microsoft 365 Apps deployment framework



Upgrade

# Choose your deployment path



Use paths that meet your requirements

Deploy from a local source with Configuration Manager [→](#)  
(enterprise managed)

Recommended

Deploy from the cloud with ODT [→](#)  
(cloud managed)

Deploy from a local source with ODT [→](#)  
(locally managed)

Deploy from the cloud using the Office portal [→](#)  
(self-install)

# Recommended use cases

Cloud-managed deployment and update	Enterprise-managed deployment and update
<ul style="list-style-type: none"><li>▪ To simplify management for mobile and remote users</li><li>▪ To simplify management of branch offices to limit infrastructure footprint requirements</li><li>▪ To simplify servicing of Windows and Office with minimal IT involvement</li><li>▪ To limit corporate bandwidth requirements for branch offices</li></ul>	<ul style="list-style-type: none"><li>▪ To allow IT admins to manage client updates with existing software distribution solutions</li><li>▪ To allow IT admins a higher level of control for client deployments and updates</li><li>▪ To allow clients to leverage their existing software distribution locations</li><li>▪ To allow IT admins to easily control distribution of software based on groups</li></ul>

We recommend you use both cloud- and enterprise-managed scenarios to meet business needs.



# Microsoft 365 Apps deployment framework



Manage

# Managing updates in Microsoft 365 Apps

## Full releases

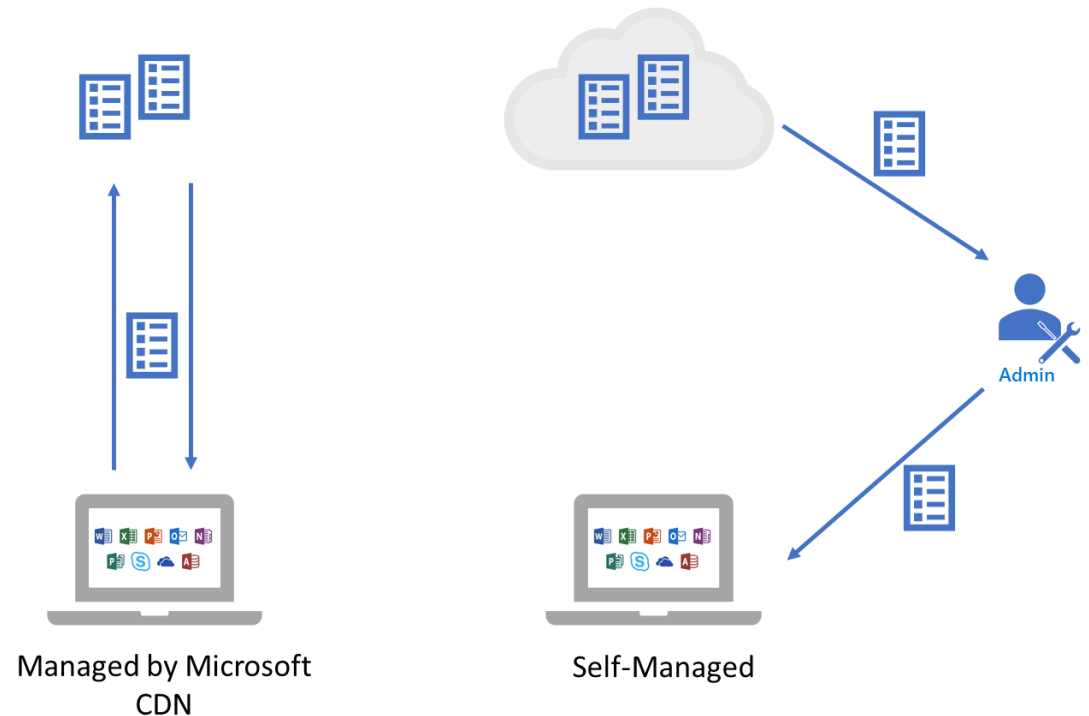
- All product updates rolled up in one package
- No individual installation (MSP)-files any more

## Update in one step

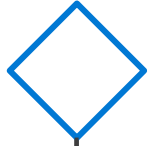
- From previous to current in one step
- Updates all Click-to-Run products with same update
- No more multiple MSP installations and restarts

## Take control of change

- Manage change using small ripples, rather than large, disruptive waves
- Consistency enables process automation



# Managing updates – Select how updates are delivered



## Update automatically

Devices updated directly from the CDN based on configured update channel

Recommended

## Enterprise-managed with Configuration Manager

Updates are downloaded and deployed to devices by Configuration Manager – often used if Configuration Manager is used for initial deployments

## Locally managed with the ODT

Updates downloads and deployed from local source using ODT, used where updates need to come from a local source without Configuration Manager

Best practice:  
Use automatic updates

Align update management strategy to meet user requirements

Possible to use a mix of the update strategies

# Microsoft 365 Apps adoption resources

Help customers drive ongoing adoption with available resources and tools

## FastTrack Resource Library

### Pre-launch

Announcement template

Countdown template

Flyer template

Editable poster template

Announcement Outlook template

Countdown Outlook template

### Launch

Tips 1 template

Tips 2 template

Tips 1 Outlook template

Tips 2 Outlook template

## Office Training Center

<https://go.microsoft.com/fwlink/?linkid=2100721>

### Online and downloadable artifacts

Learn the basics

Training templates

Quick starts

Tips

Cheat sheets

Infographics

## Microsoft 365 Learning Pathways

A fully customizable SharePoint Online communication site

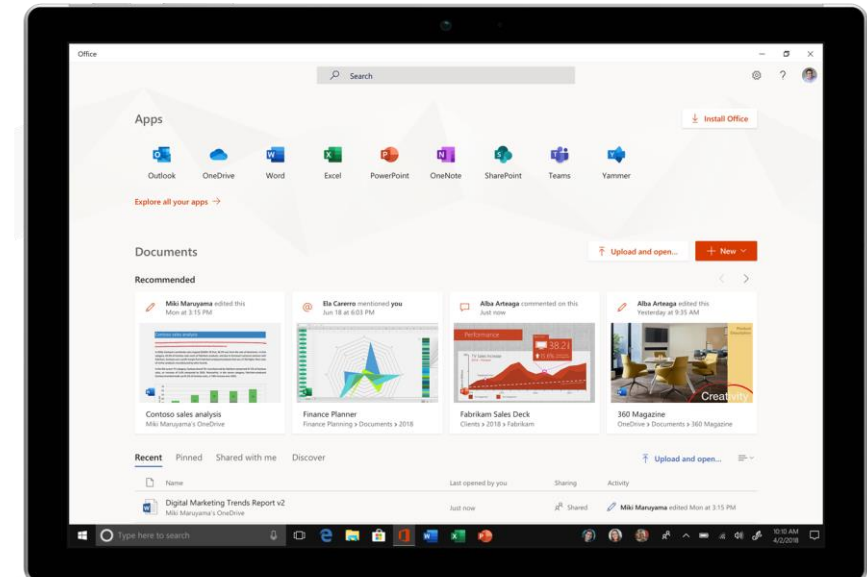
<https://go.microsoft.com/fwlink/?linkid=2101328>

## Use the Office app

The [Office app](#) enables you to get the most out of Office by helping you find all your Office apps and files in one place so you can jump quickly into your work.

Included in Windows 10 – installed by default.

Recommend pinning to the task bar for your users.



# Next steps

## Customer

- Analyze upgrade readiness with the Readiness Toolkit for Office
- Remediate items identified in the remediation checklist
- Determine pilot groups for initial validation

## FastTrack

- Assists you with Microsoft 365 Apps (schedule sync to track readiness)
  - **Remediation review**
  - **Checkpoint meetings**
  - **Enablement activities**



Thank you!

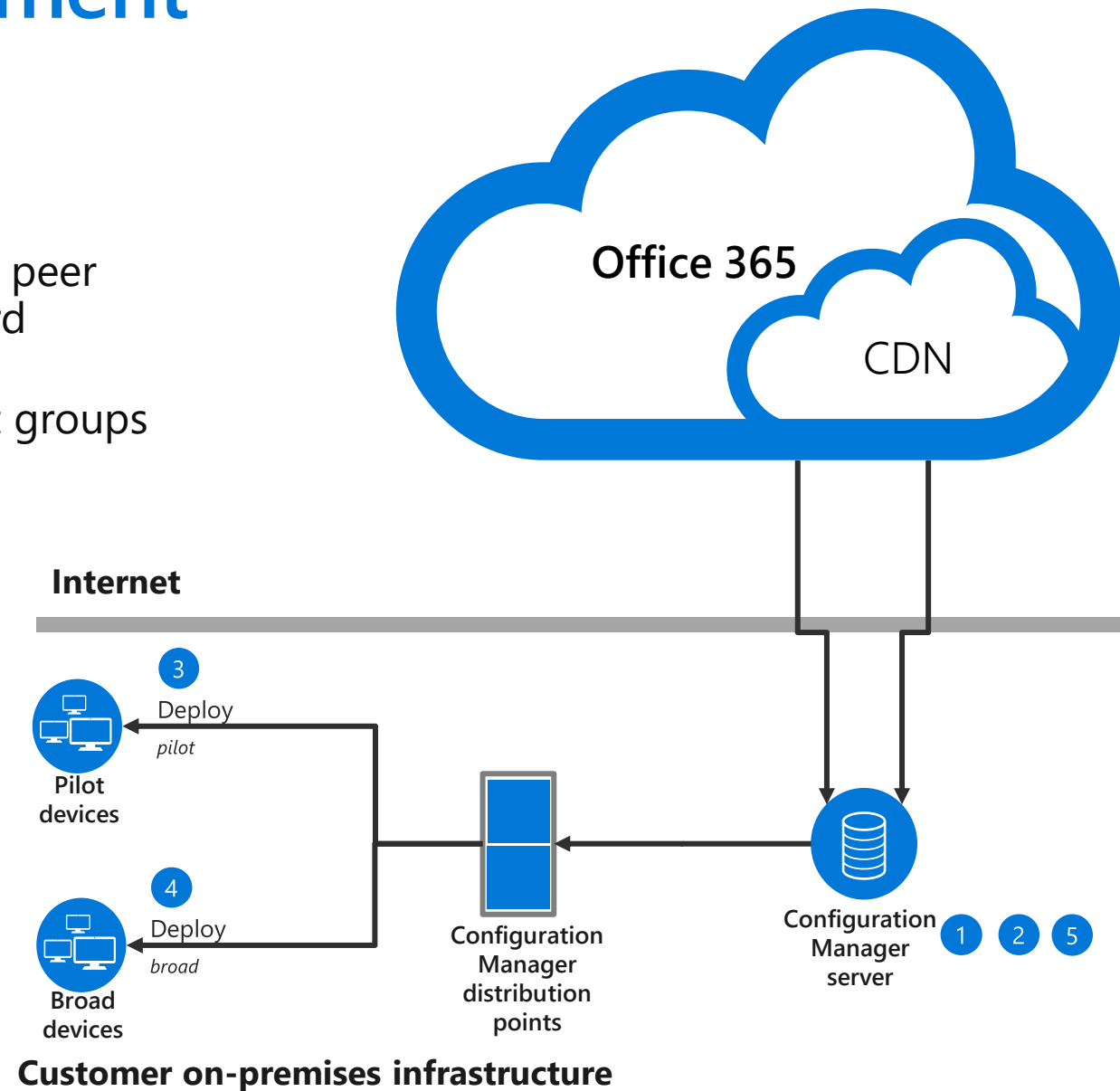
# Appendix:

## Deployment options and advanced topics

# Configuration Manager deployment

## Initial deployment

- 1 Update Configuration Manager including Current Branch, peer caching, and use the Office Client Management dashboard
- 2 Maintain your collections for pilot and broad deployment groups
- 3 Create and deploy the pilot group package
- 4 Create and deploy the broad group package
- 5 Monitor progress in the Office 365 Client Management dashboard

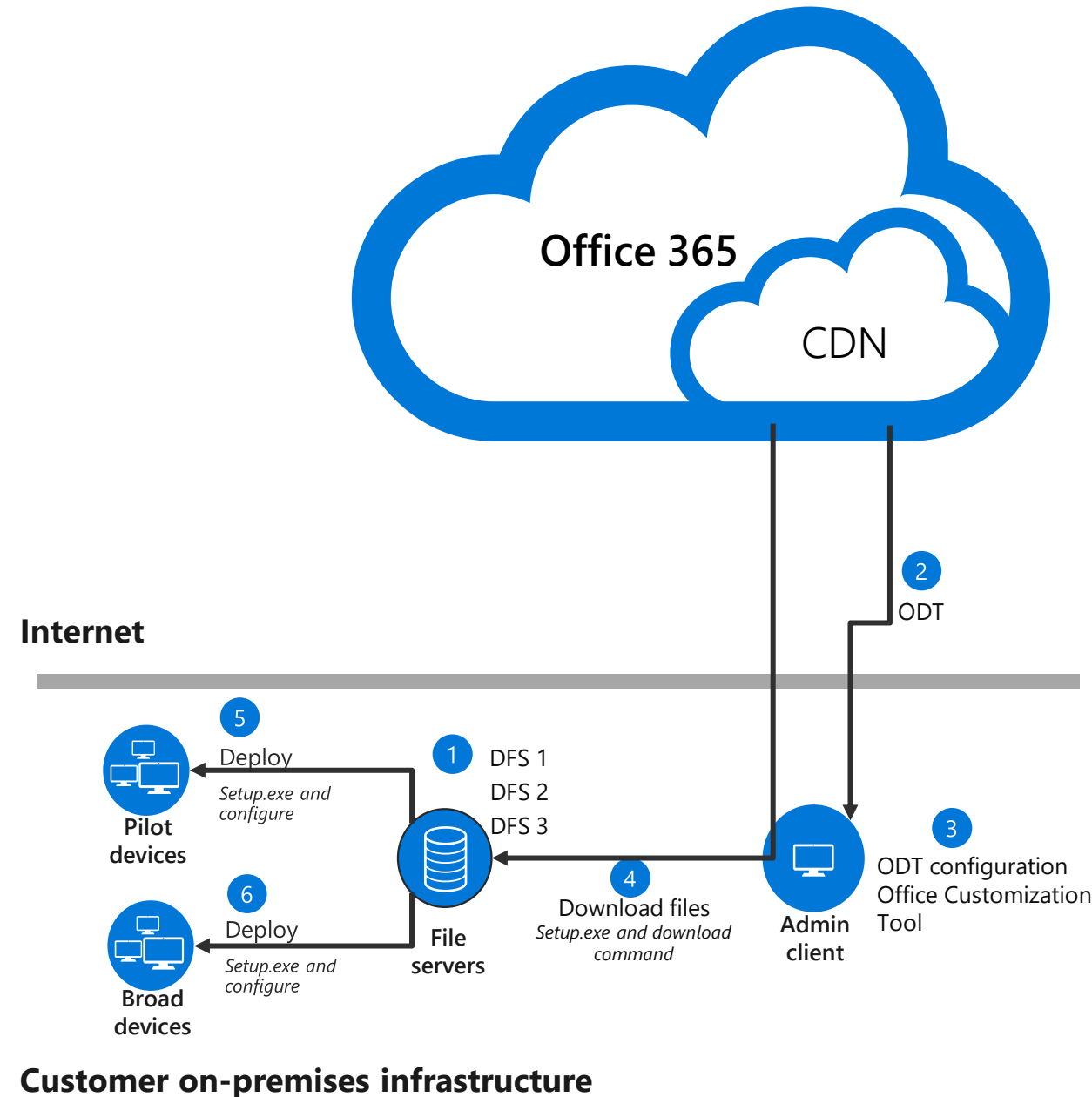




# Locally-managed deployment

## Initial deployment

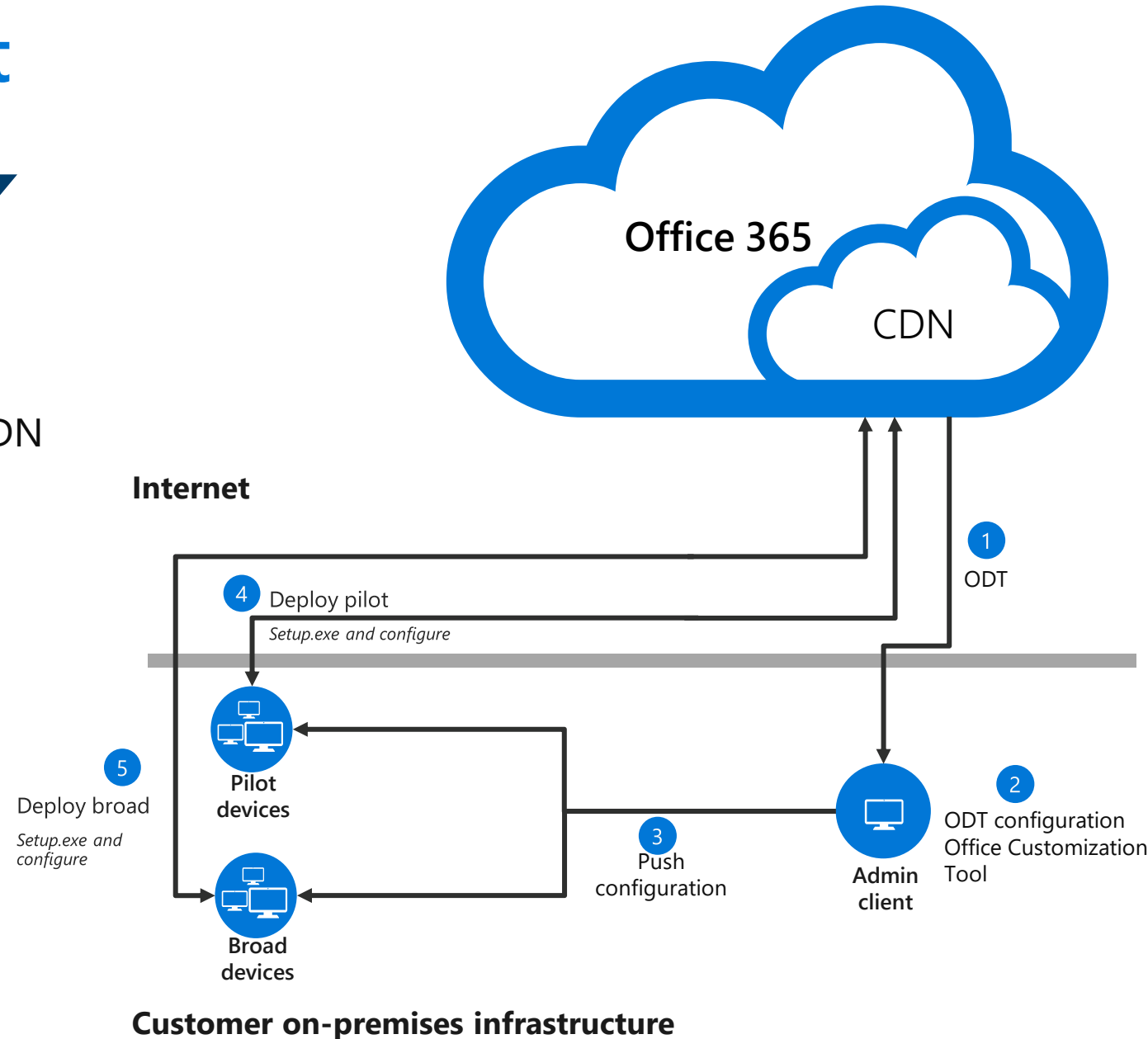
- 1 Create shared folders for installation files
- 2 Download Office Deployment Tool (ODT) from Microsoft Download Center
- 3 Build configuration files for the pilot group broad deployment groups using the Office Customization Tool
- 4 Download the Office installation packages for groups
- 5 Deploy Office to the pilot group
- 6 Deploy Office to the broad group



# Cloud-managed deployment

## Initial deployment

- 1 Download ODT from Microsoft Download Center
- 2 Build a configuration files to download from the CDN using the Office Customization Tool for groups
- 3 Push configuration files to groups
- 4 Deploy to the pilot group
- 5 Deploy to the broad group



<https://go.microsoft.com/fwlink/?linkid=2098251>

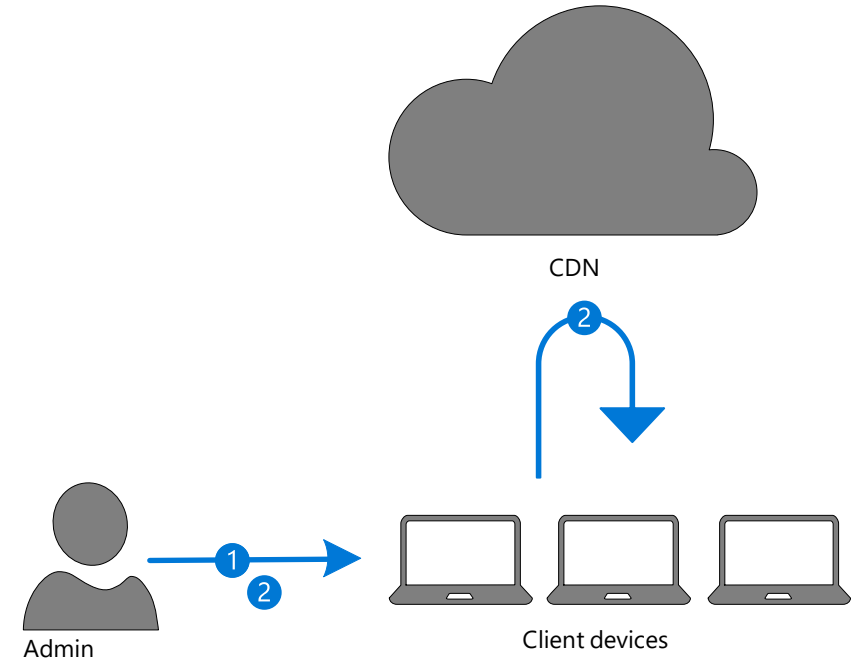
# Cloud-managed deployment

## Installation

- 1 Admin sends configuration settings for Office to client devices using ODT
- 2 Based on configuration settings, client device downloads appropriate Office package from the Office cloud and applies settings

## Updates

- 1 As part of deployment, admin configures client devices to receive updates directly from the cloud
- 2 Client devices automatically download and apply updates from CDN



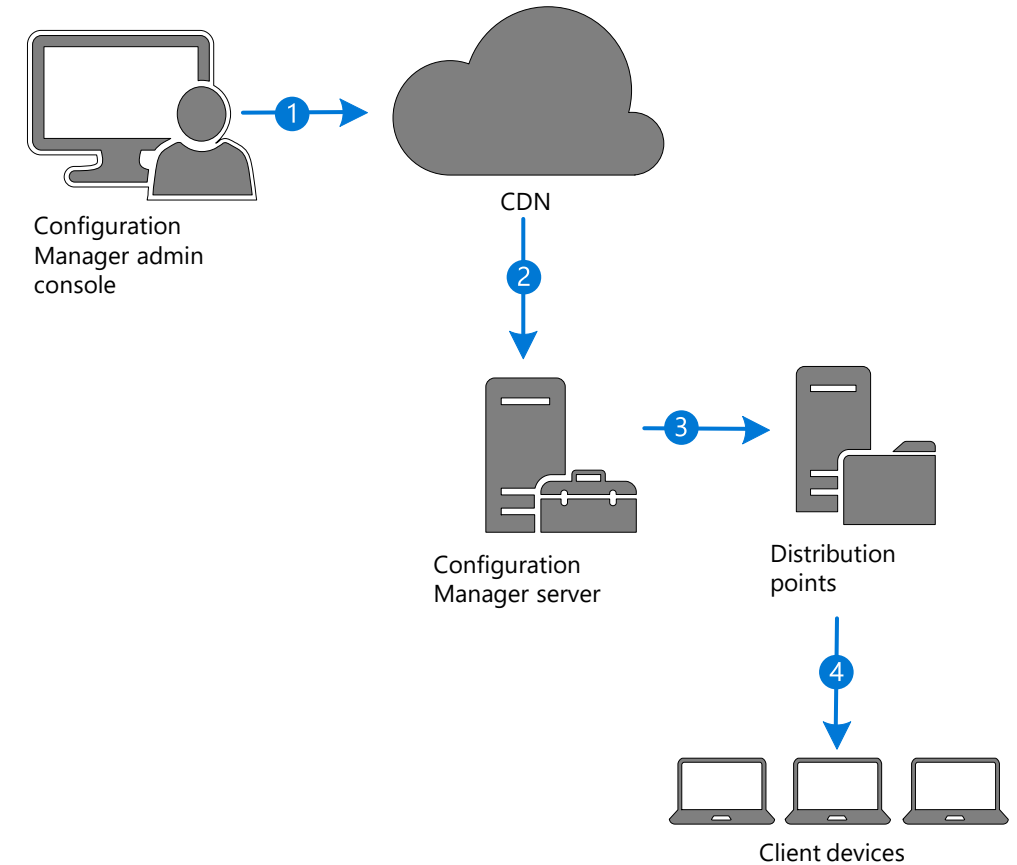
# Enterprise-managed deployment

## Installation

- 1 Admin configures deployment packages
- 2 Microsoft 365 Apps installation source files are downloaded from the CDN and placed in deployment packages
- 3 Packages are sent to Configuration Manager distribution points
- 4 Microsoft 365 Apps is installed on client devices

## Updates

- 1 Admin configures updates in Configuration Manager
- 2 Configuration Manager server communicates with Windows Server Update Services (WSUS), but Office updates are pulled directly from the CDN
- 3 Updates are sent to Configuration Manager distribution points
- 4 Updates are installed on client devices



# Language packs and proofing tools

# Language packs

## During initial deployment

- Review [available languages](#)
- Include most commonly used language packs in deployment package
- Use [MatchOS + Fallback](#) to dynamically match the Office language packs with the in-use Windows language packs
- When using Configuration Manager, use [AllowCdnFallback](#) to automatically download any missing source files

## Adding language packs later

- Use *Product ID*=["LanguagePack"](#) to add languages
- This keeps all settings, products, and apps as is

# Proofing tools

## During initial deployment

- Review [available languages](#)
- Use *Product ID*=*"ProofingTools"* to add proofing tools
- When using Configuration Manager, use [AllowCdnFallback](#) to automatically download any missing source files

## Adding proofing tools later

- Use the same Product ID as previously mentioned
- This keeps all settings, products, and apps as is

# Project and Visio



# Project and Visio guidance

## Support rules

Within a major version, all products must use the same installation technology.

For Click-to-Run, we can't have the same product in multiple major versions on a device.

### Recommended

Deploy Microsoft 365 Apps, Visio, and Project with subscription licenses

Provides consistent experience, feature set, and license management

Obtain Visio from Visio Plan 2 and Project from Project Online

### Alternative

Deploy Visio 2016 and Project 2016 using Click-to-Run and [volume activation](#)

Leverages modern installation technology

There are some combinations of Office, Visio, and Project that can't be installed together on the same computer. See the matrix at [Supported scenarios for installing different versions of Office, Visio, and Project on the same computer](#).

# Shared computers

# Overview

*Shared computer activation (SCA)* enables the use of Microsoft 365 Apps on a Virtual Desktop Infrastructure (VDI) (like Windows Server 2012 R2) or on a shared desktop.

Admins deploy Microsoft 365 Apps to a VDI or shared desktop without activating Office.

When to use:

## Non-persistent devices

- Dynamic VDI
  - Devices which are often reset (test devices, training computers)

## Desktop used by multiple users

- Remote Desktop Services (RDS)
  - Shared devices
  - Kiosk devices
  - Shift-worker devices
  - Random access and free-floating devices

## Available offers

Microsoft 365 Apps  
Office 365 Enterprise E3 and E5  
Project Online Professional  
Visio Online Plan 2

## Excluded offers

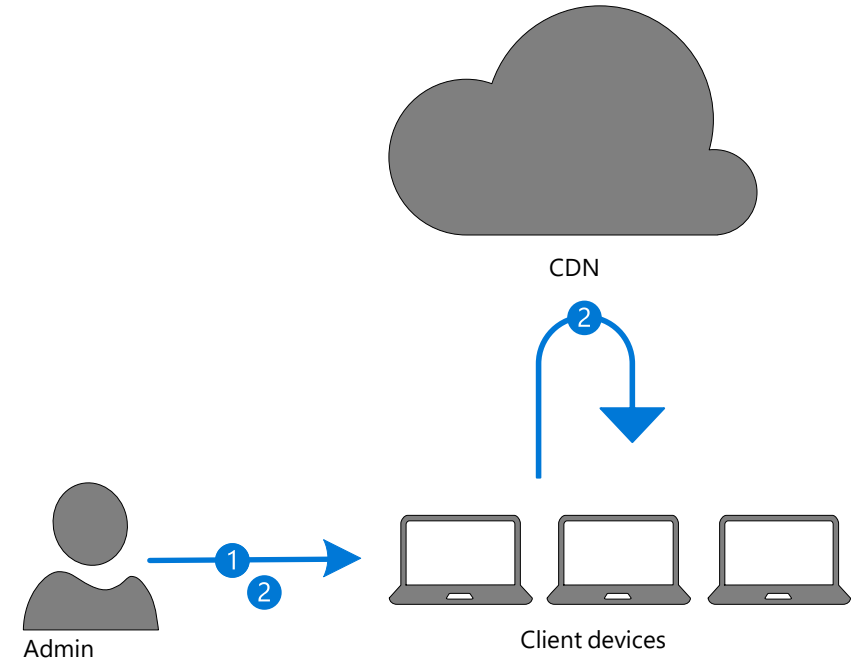
All non-Office 365 Enterprise plans

# Update paths

# Cloud-managed updates

## Microsoft 365 Apps

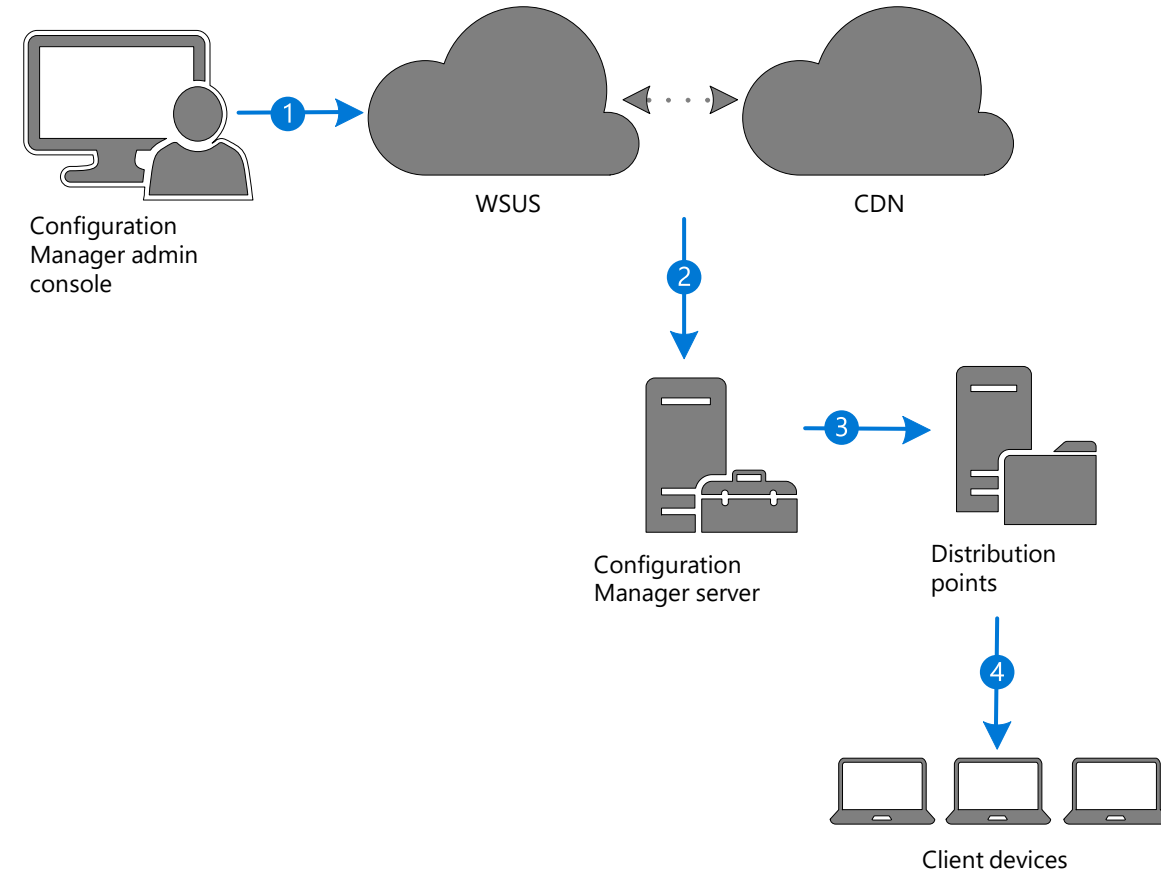
- 1 As part of deployment, admin configures client devices to receive updates directly from the cloud
- 2 Client devices automatically download and apply updates from CDN



# Enterprise-managed updates

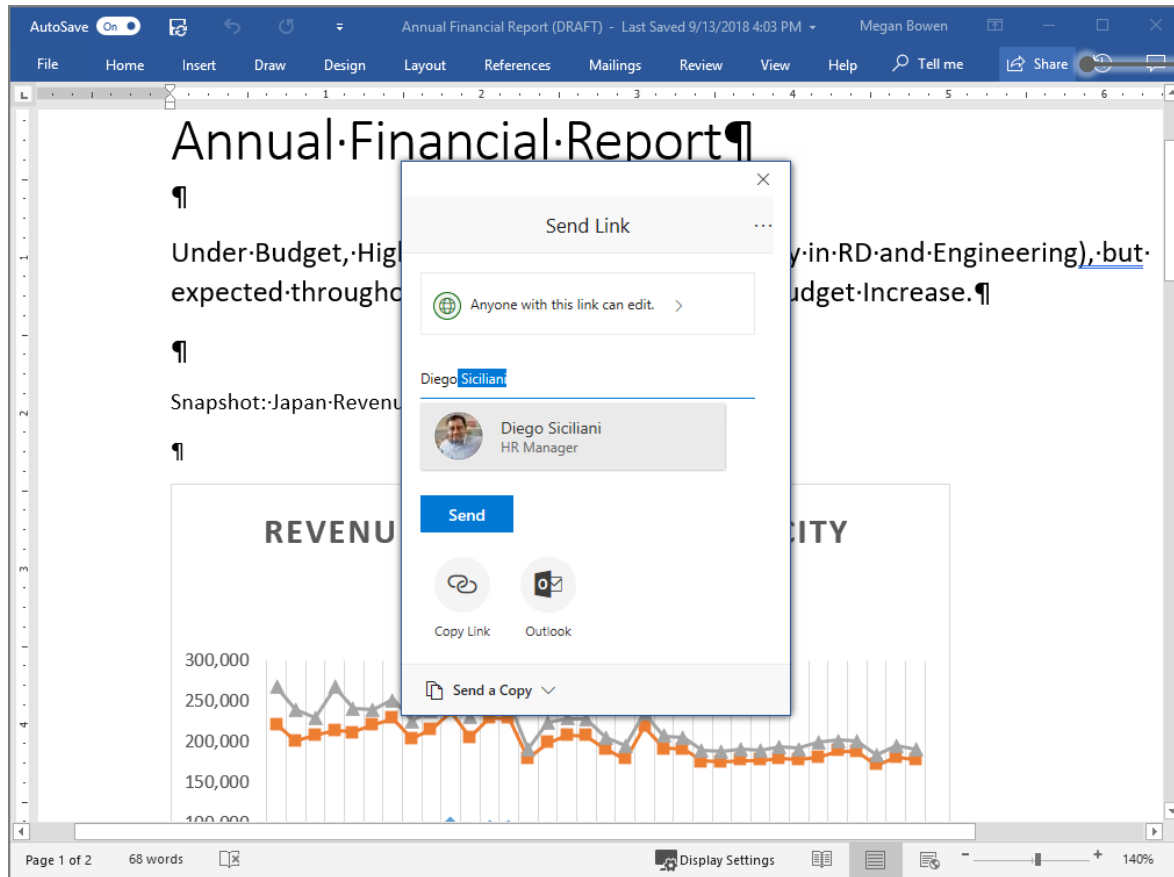
## Microsoft 365 Apps

- 1 Admin configures Office updates in Configuration Manager
- 2 Although the Configuration Manager server communicates with WSUS, the Office updates are pulled directly from CDN
- 3 Updates are sent to Configuration Manager distribution points
- 4 Updates are installed on client devices



# OneDrive for Business integration

# Share a file in Office on the desktop



1

Select **Share** on the ribbon, or select **File > Share**.

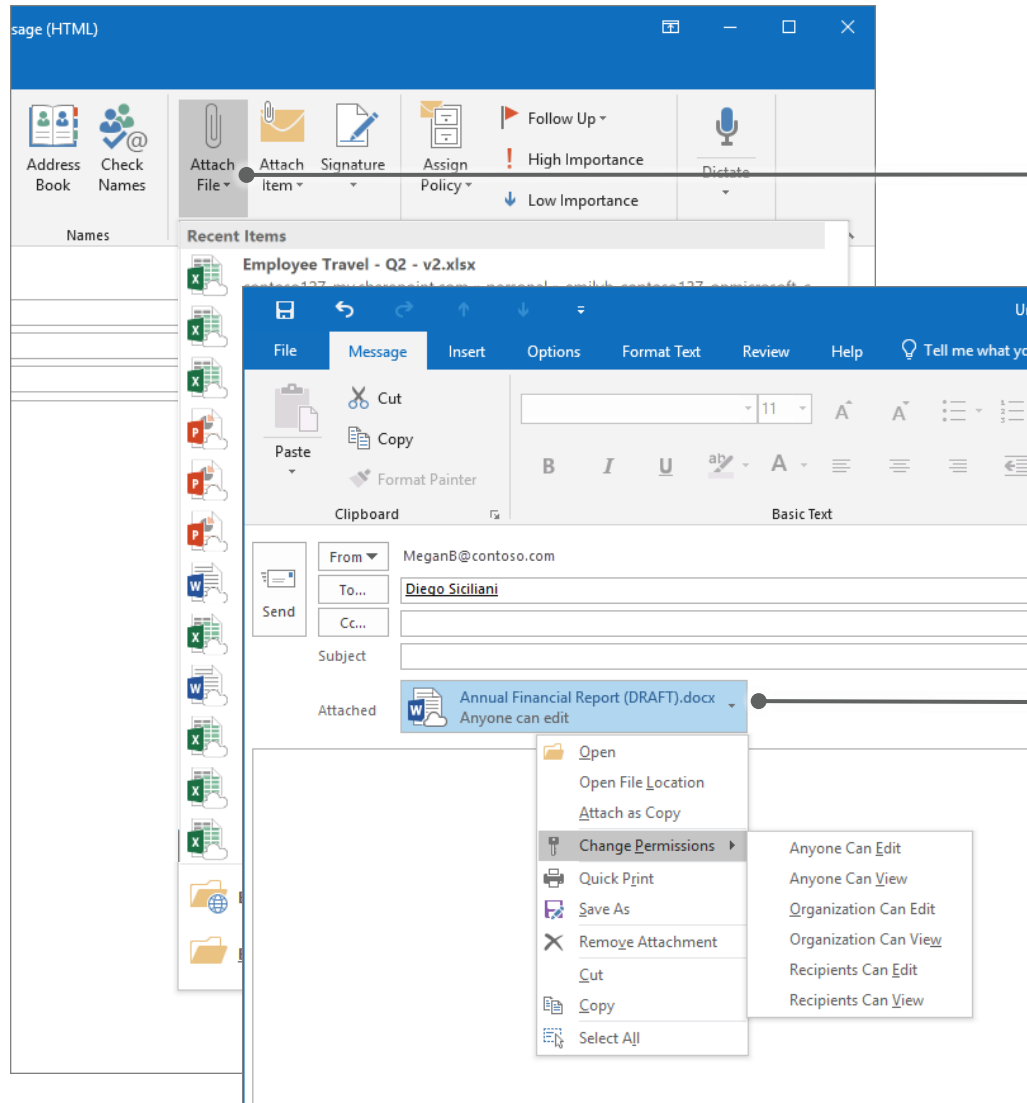
If your file isn't already saved to OneDrive, you'll be prompted to upload your file to OneDrive to share it.

2

Enter who to share the file with, select your share settings, and choose how to send the link.




# Share a link in Outlook



When you compose an email, select **Message > Attach File**.

If the file you select isn't already saved to OneDrive, you'll be prompted to upload your file to OneDrive to share.

Select the down arrow  next to an attached file to change permissions and take other actions.

# Coauthor a Word document



After you share a document, you can work on it at the same time with the people you shared it with.

Select the coauthoring notification to see names of the other people editing the document.

Select a coauthor to go to where they're working in the document.