

OFFICE 365

Employee Setup Guide

OFFICE 365

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This employee guide was created for you, our valued employee.

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Employee Guide Overview

Overview

Why Office 365?





#1: Up-To-Date Versioning

Office 365 means that RSI will always use the latest version of Office applications without the need to implement major migration projects or to provide significant resources. The latest Office, Exchange, SharePoint or Skype for Business product is available at all times, whether accessed on your device or in the cloud. This includes Microsoft Project and Visio.

What is Included in Office 365?

More than just the regular suite of Office products are included in Office 365! Take a look at the full list of applications available to you:



Overview Participant Guide

Why Office 365?, continued



Forms



PowerApps



PowerPoint



SharePoint



StaffHub



Stream



Sway



<u>Planner</u>



asks



Teams



To-Do



<u>Video</u>



Word

y Yammer

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Employee Guide Overview

Why Office 365?, continued



IMPORTANT NOTE

If you currently have Microsoft Project or Visio installed (and will continue to use it) on your device, please contact the <u>help desk</u> prior to installing Office 365.

Please note: Microsoft Project licenses are limited to project managers at RSI.



#2: Advanced Security

At the service level, Office 365 uses the defense-in-depth approach to provide physical, logical, and data layers of security features and operational best practices. In addition, Office 365 gives you enterprise-grade user and admin controls to further secure your environment.¹

Office 365 applications are accessed through 128-bit SSL/TSL encryption so that if a transmission is intercepted by someone without authorization, they won't be able to read it.

Other key security factors:

- Antivirus signatures are kept up to date, and security measures are applied in accordance with the Microsoft Trustworthy Computing initiative
- Exchange Online uses Forefront Online Protection for Exchange (FOPE) to protect mail messages from malware, and it uses anti-spam filtering and antivirus with multiple virus engines
- The Security Development Lifecycle (SDL) is applied to Microsoft Online Services development, deployment, and maintenance

(Microsoft, 2016)

Overview Participant Guide

Why Office 365?, continued

#3: Cost Savings

With Office 365 businesses have the capability to scale their users up and down at any time.

Office 365 offers the predictability of a monthly cost that is straightforward and easy to budget for.

Cost Savings are geared towards small to medium sized companies and offer the flexibility needed to optimize saving and fine tune expenditures.

#4: Reliability

Microsoft Online Services provides a service level agreement (SLA) and has a 99.9 percent scheduled uptime

Microsoft has multiple datacenters, located all over the world, hosting redundant network architecture. If there is an outage at one datacenter, another can act as a backup. Customers hosted by the first datacenter are transferred to another, with as little service interruption as possible.

This added level of reliability helps to bolster a strong and robust Business Continuity (BC) Plan.

#5: Single Sign on

With Office 365 you can configure active directory federation services to achieve single sign-on.

Single Sign On allows users to log on to the domain and be automatically authenticated to office 365

Further integration with many third party applications allows for the true SSO across a large variety of platforms and tools. This will include our current learning platform. No more username@training accounts to log into the platform.

#6: Compliance

Microsoft Office 365 services have been certified as compliant with ISO 27001 standards, completed SAS70 Type I and II audits, and achieved the EU Safe

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Employee Guide Overview

Why Office 365?, continued

Harbor seal. Microsoft has also added controls for helping customers comply with HIPAA (Health Insurance Portability and Accountability Act) and FERPA (Family Educational Rights and Privacy Act)

Microsoft's internal control system is based on the National Institute of Standards and Technology (NIST) special publication 800-53, and Office 365 has been accredited to latest NIST 800-53 standard as a result of an audit through the Federal Risk and Authorization Management Program (FedRAMP) using the test criteria defined in NIST 800-53A (Rev. 4).

#7: Productivity Gains

One of the key features of Office 365 is that it is cross-platform. That means that it runs just as happily on apple or android as it does on windows. This is important because more organizations are allowing their employees to bring their own devices (BYOD).

Office 365 is available anywhere you have internet. This allows your staff to have a little work life balance, and access needed documents from home or on the go.

Increased collaboration allows users to track changes to documents across the organization without generating multiple versions of the same document. Integration with SharePoint and Skype for Business allows for instant sharing of ideas and helps to foster innovation.

#8: Office Web Apps

A convenient feature of Office 365 is that it offers web based versions of all of your favorite Microsoft products in a browser.

This allows you to make quick edits on the go from any internet connected machine while remaining secure .

Utilizing Intune you also have the ability to download mobile versions of Office 365 so that you can work both online and offline with out interruption your workflow or creativity.

Overview Participant Guide

Why Office 365?, continued

#9: Reduced Infrastructure Footprint

When we move to Office 365, we are removing the need for onsite infrastructure. The infrastructure required to run software grows exponentially as our organization adopts enterprise applications. Even a relatively modest set of servers needs a redundant power supply, multiple Internet connections, a backup plan, and a secure and fireproof location in which to reside.

As our organization grows, the amount of infrastructure required grows quickly until an entire team is dedicated to keeping the servers running 24 hours a day. The costs involved in purchasing, managing, and maintaining the infrastructure involved for enterprise class software can be downright daunting.

That is all taken care of by Microsoft. Without the need for all the servers and software required to run the software, we can focus on the more important issues affecting our business. In a nutshell, we are removing the burden of having on-site infrastructure but still achieve the competitive advantage that comes with using software, such as SharePoint, Lync, Office, and Exchange.

#10: Improved Emergency Response Time

Office 365 offers a variety of tools that can be accessed through the cloud, including SharePoint, Exchange Online, Skype, and other similar Office desktop applications. What this means is users can rest assured that work continuity will be provided even in times of disaster in the form of:

Access: In case of any unexpected disastrous situation, Office 365 allows access to emails, docs, calendars and contacts, all of which are critical to a business's survival. Important files can be accessed to work normally with easy access through mobile devices or computers.

Uptime: Besides offering users the option to minimize downtime and disruption, Office 365 has a 99.99% guaranteed uptime. This enables businesses to quickly recover from unseen events like data failure, application or hardware failure, or other similar incidents that negatively impact users.

Flexibility: Microsoft Office brings its users five levels of protection to secure your business data. This high degree of security is unattainable to those who use systems that are on premise. Inbuilt Data Loss Prevention reduces the risk of giving away sensitive information and multifactor authentication further assists in ensuring safe access outside of the business network.

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Employee Guide Overview

Why Office 365?, continued

As per research, 60% of businesses who lose their data go out of business. Office 365 offers the perfect solution and ensures business continuity, enabling businesses to continue operating despite any disruptions that can affect operations.

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Implementation Schedule



Phased Rollout Schedule

The rollout schedule for the full implementation of Office 365 is as follows:

Phase I: COMPLETE

Phase I task was to create all Office 365 accounts.

Phase II: Mid-June

- Migration to Office 365:
 - All RSI employees will be receiving detailed instructions around how to install and configure Office 365 and Intune
 - All RSI employees will be receiving detailed instructions around howto setup one drive for backups/sync

Phase III: Late June

- Transition to 365 Exchange and Skype
 - All RSI employees will be receiving detailed instructions around how to transition their existing accounts over to 365 so that they can begin taking advantage of the 365 interconnectivity and improved collaboration

Phase IV: In planning

- SharePoint migration to 365
- Single-sign on for learning portal and other operations portals (UltiPro, OpenAir, etc.)

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Employee Guide Installing Office 365

Installing Office 365

Uninstall Current Office Applications



PREREQUISITES TO THIS PROCESS:

- Can log into Office.com. If are unable, please contact help@rsimail.com
- If you have Microsoft Project and/or Visio Installed on your machine, you must first contact help@rsimail.com for new licenses prior to following instructions below.
- All custom ribbon/styles will be retained post-Office 365 install.

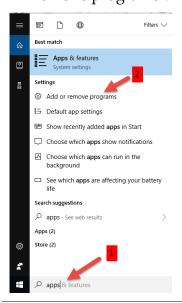


Cumulative time to complete entire uninstall/install process: 20 Min



Before you can install Office 365 to your computer, you must first uninstall all prior Office products. To uninstall all products, follow these steps:

1. In the Cortana search box in Windows, type 'apps' and then select 'Add or remove programs'.



Installing Office 365 Participant Guide

Uninstall Current Office Applications, continued



2. Find and select the current version of Microsoft Office

Apps & features Mail and Calendar 7.88 MB Microsoft Corporation 4/25/2018 16.0 KB Microsoft Corposition 4/8/2018 Messaging 56.0 KB Microsoft Cor ration 2/2/2018 Microsoft Ed 4/11/2018 Microsoft Office Professional Plus 2013 Microsoft Corporation 12/17/2017 Microsoft OneDrive 103 MB 4/5/2018 Microsoft Corporation Microsoft Project Professional 2010 43.4 MB Microsoft Corporation 12/17/2017 Microsoft Silverlight 50.7 MB Microsoft Corporation 4/19/2018 Microsoft Solitaire Collection 16.0 KB Microsoft Studios 12/19/2017 Microsoft Store 1.01 MB 4/25/2018 Microsoft Corporation Microsoft Visio Standard 2016

3. Select 'Uninstall'



- 4. Uninstall Microsoft Visio and Project also if you have them currently on your device.
- 5. Once uninstallation completes, click Close.

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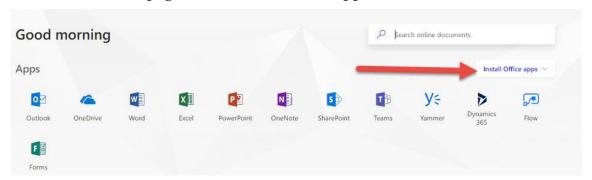
Employee Guide Installing Office 365

Installing Office 365 Applications

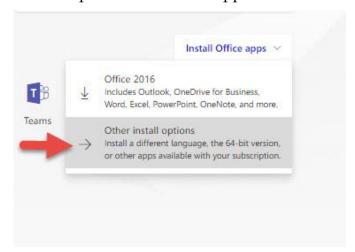


To install Office 365 on your device, follow these steps:

- 1. Log into your Microsoft 365 account at https://www.office.com
- 2. From the home page, select 'Install Office Apps'



3. A drop-down menu will appear. Select 'Other Install Option'



4. At the next screen, select 'Advanced'

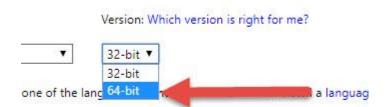


Installing Office 365 Participant Guide

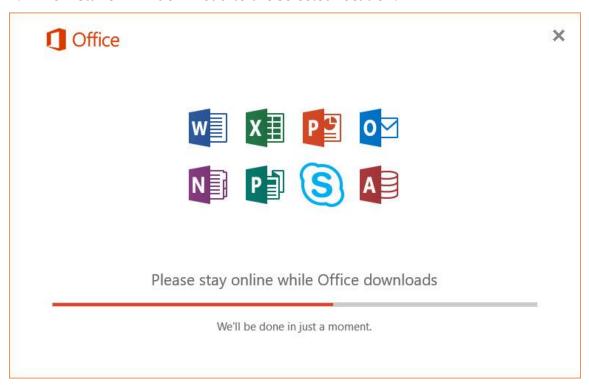
Installing Office 365 Applications, continued



5. Click the drop-down button and select '64-bit'



- 6. Select a location for the file.
- 7. The installer will download to the selected location.



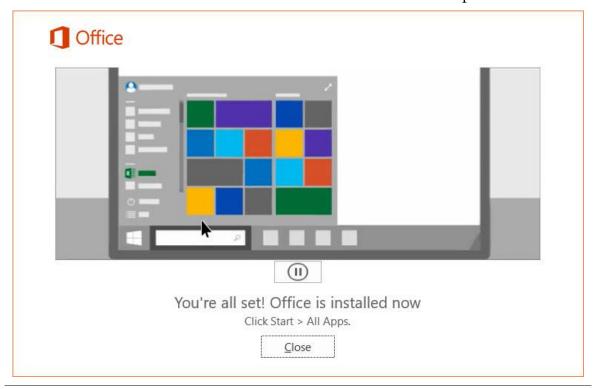
8. Run the file. It will install Office 365 on your machine.

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Employee Guide Installing Office 365

Installing Office 365 Applications, continued

9. You will see the window below when the installation is complete.



OneDrive

Overview



What is OneDrive for Business?

OneDrive for Business is an integral part of Office 365 or SharePoint Server, and provides place in the cloud where you can store, share, and sync your work files. You can update and share your files from any device with OneDrive for Business. You can even work on Office documents with others at the same time.

Synch vs Upload in OneDrive

With a OneDrive for Business account, you have the option to synch files from your device up to the OneDrive for Business cloud account. If you have very large file on an external device, you may consider just uploading the large files directly from the external device, to the OneDrive online account.

Instructions for installing and configuring OneDrive for Business is covered later.



OneDrive for Business vs OneDrive + Office 365 Team Site:

OneDrive for Business is different from OneDrive, which is intended for personal storage separate from your workplace. OneDrive for Business is also different from your Office 365 team site, which is intended for storing team or project-related documents.

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Employee Guide OneDrive

Data Privacy & Security in OneDrive





All files that you store in OneDrive for Business are private unless you decide to share them. You can also share files and folders with specified co-workers so you can collaborate on projects. If you're signed-in to Office 365, you may even be able to share with partners outside of your organization, depending on what your company allows.

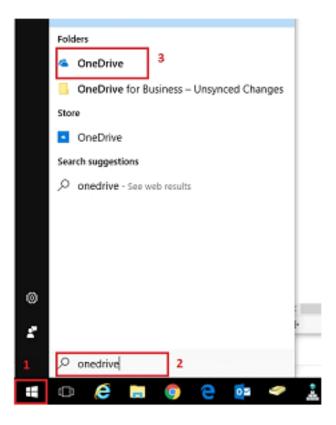
Tip: When you send email from Outlook Web App, you can attach a OneDrive for Business file as a link, instead of sending an attachment. When you Attach a file as a link, you automatically give the people you send the message to permission to edit the file. Plus, you save space in everyone's mailbox and encourage people to edit the same copy in OneDrive for Business.

Installing OneDrive



To install OneDrive, follow these steps:

1. From your laptop, click on the Windows icon and type 'onedrive'



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Employee Guide OneDrive

Installing OneDrive, continued



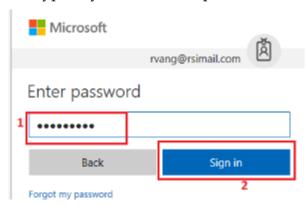
- 2. Select the OneDrive icon from the results
- 3. Type in your RSI email address and click 'Sign in'



4. Click on 'Work or School'

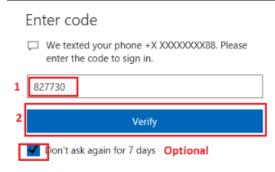


5. Type in your Office 365 password and click 'Sign in'



6. Provide verification for multi-factor. Optional: place a check mark on Don't ask again for 7 days.

Installing OneDrive, continued



- **Note:** You will either receive a call for verification, a verification code via text message, a verification notification via Windows Authenticator app, or a verification code via Windows Authenticator app. This is dependent on which method you chose during your first Office 365 portal login
- 7. The application will be installed in the location:

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Sync your Documents folder with OneDrive



Moving My Documents Folder

If you keep all your files in your My Documents folder, you will want to sync the contents of that folder.

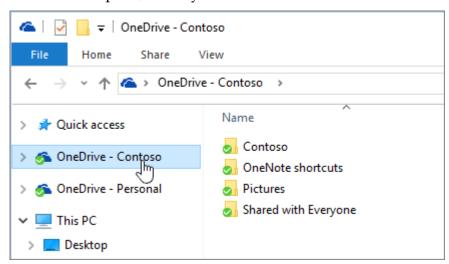
OneDrive only syncs items that are within your OneDrive folders. To enable your Desktop, Documents, or Pictures folders to be included to OneDrive, you must change their default folder locations.



Before you begin

Before you sync the **Desktop**, **Documents**, or **Pictures** folders on your computer with OneDrive, make sure that there's a folder by that name in your OneDrive or OneDrive for Business folder:

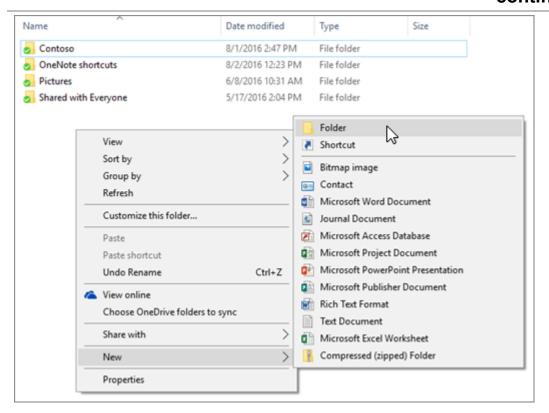
- 1. On your taskbar, select **File Explorer**
- 2. In the left pane, select your OneDrive or OneDrive for Business folder.



3. If there isn't a Documents folder inside your OneDrive or OneDrive for Business folder, right-click inside the right pane and select **New > Folder**.

Sync your Documents folder with OneDrive, continued





- 4. Name the new folder **Documents**.
- 5. Use File Explorer to sync your Documents folder with OneDrive

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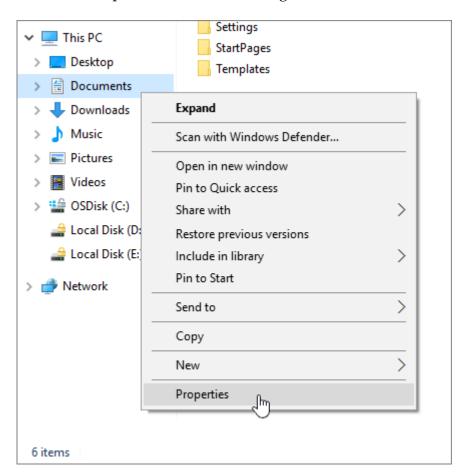
Sync your Documents folder with OneDrive,

continued



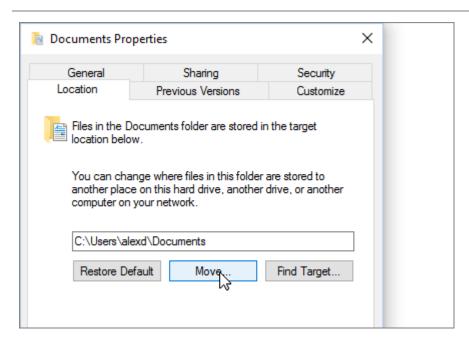
To use File Explorer to sync your Documents folder with OneDrive, follow these steps (must have a 'Documents' folder inside of OneDrive folder already – see steps above):

- 1. On your taskbar, select **File Explorer**
- 2. You can also open File Explorer by pressing the Windows key + E on your keyboard.
- 3. In the left pane, under **This PC**, right-click **Documents** and select **Properties**.

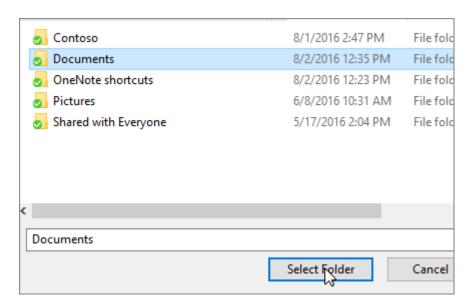


4. Select the **Location** tab and select **Move**.

Sync your Documents folder with OneDrive,



5. In the left pane of the **Select a Destination** dialog box, select OneDrive or OneDrive for Business, select the **Documents** folder, and click **Select Folder**.



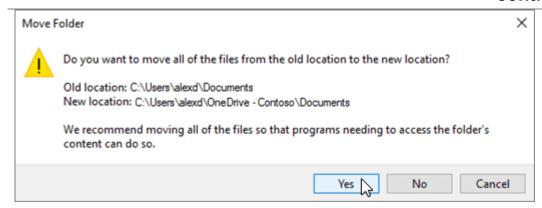
6. Select **Apply**, and in the dialog box that appears, select **Yes**.

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Sync your Documents folder with OneDrive,

continued



Tip: If you change your Desktop location setting without saying Yes, your PC's Desktop may suddenly look empty. We recommend always saying Yes when moving to avoid losing files.

Sharing Files from OneDrive



Need to Share Files? Sharing is Easy!

You can use OneDrive to share photos, Microsoft Office documents, other files, and entire folders with people. The files and folders you store in OneDrive are private until you decide to share them and you can stop sharing at any time.

You can share a document you are currently working on, directly from the document. In all Office 365 standard applications, you will always see the

icon. Simply click the icon to share out the file within the organization.

If you want to share folders or files that you are not currently working on, follow the steps below.

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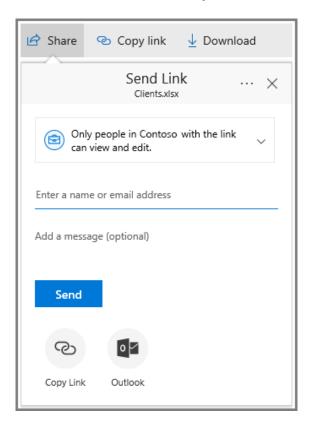
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Sharing Files from OneDrive



To share files from OneDrive to someone in the organization, follow these steps:

- 1. Go to the OneDrive website and sign in with your work or school account.
- 2. Select the file or folder you want to share, and then select **Share**.



3. Enter the names of the people you want to share with and a message, if you want.

(Optional) Click the drop down list to change the type of link. The Details pane opens, where you can change who can access the link and whether people can edit the item you're sharing.

Options for **Who would you like this link to work for** (options vary based on admin settings):

Anyone gives access to anyone who receives this link, whether they receive it directly from you or forwarded from someone else. This may include people outside of your organization.

Sharing Files from OneDrive, continued



People in <Your Organization> gives everyone in your organization access to the link, whether they receive it directly from you or forwarded from someone else

Specific people gives access only to the people you specify, although other people may already have access. If people forward the sharing invitation, only people who already have access to the item will be able to use the link.

By default, **Allow editing** is turned on. If you want people to only view your files, uncheck the check box.

- 4. When you're done, click **Apply**.
- 5. When you're ready to send the link, click **Send**.

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Employee Guide Training Resources

Training Resources

Online Resources



Lynda/LinkedIn Learning Resources

- Microsoft Office 365 First Look
- Office 365 Training Tutorials
- Learning OneDrive
- Yammer 2018 Essentials
- Microsoft Dynamics 365 First Look (CRM/ERP Planning tool)
- <u>Learning Microsoft Flow</u> (Business workflow automation)

Youtube Videos

- What is Office 365?
- 10 Tips Every Office 365 User Should Know

Appendix Participant Guide

Appendix

FAQs



Office Apps FAQ:

1. Are Office applications (Word, Excel, PowerPoint etc.) still going to be available for use on laptop or desktop or do I have to always log into the cloud?

All Office 365 applications (Word, Excel, PowerPoint, etc.) are installed on your laptop or desktop and they can be used offline (no internet needed). You will however, need internet connectivity during the initial download/installation and be connected at least once every 30 days so that your license can be validated.

One of the added benefits of Office 365 is that, in additional to your normal Office functionality, you also get access to a wide variety of collaboration tools that allow you to work with other team members in a more efficient, seamless manner.

2. We have heard the Office 365 version of Excel may not be compatible with some of our more complex sheets that include macro's. Will we still be able to use Excel locally and will it support all of the standard functionality?

Excel can be used locally as well as online (i.e. Excel running through your browser). While the online version does not appear to be as robust from a functionality standpoint it does support all of the same feature content so it should be able to support all of our complex macros and custom sheets.

What really sets the 365 version apart is that you can access your spreadsheets from pretty much any computer, laptop, tablet or phone so you always have access to the data that you need and are always working of the latest version.

3. Does Office 365 support documents and spreadsheets that were prepared on older versions of Office, especially with lots of macros?

We do not expect major compatibility issues with older version of documents or spreadsheets as Office 365 is fully backwards compatible. We do however, recommend you test your more complex worksheets and/or documents as part of the migration and highlight any anomalies so that we can work with Microsoft to resolve any issues as quickly as possible.

With respect to editing or generating new macros, we recommend that you utilize Office 365 from your laptop or desktop as the browser based (i.e. online version) of Excel does not give you create new macros, only to run them.

If you do find yourself in a situation where a specific feature or function no longer exists or is incompatible with Office 365 please reach out to help@rsimail.com so that we can work with your directly to find a resolution.

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Employee Guide Appendix

FAQs, continued



4. Will Outlook still be installed on my laptop or desktop and still be operational?

All Office 365 applications, including Outlook, are installed locally (i.e., on your laptop) and can be used offline. This provides you the ability to use Outlook as you do today but also gives you the added ability to access the same data from any of your other devices (e.g. tablet, home computer, phone, etc.) after performing a secure login.

5. What happens if you are not connected to the internet and need to access email, documents, etc.?

Each time you connect to the internet Office 365, using OneDrive, will sync up all of your files so that you have a copy locally as well as online. This gives you the ability to access, edit, create or delete content on your local system (while disconnected from the internet). Once you reconnect to the internet again, those files that you changed will by synced up so that you can then access the latest version of the document from any location. RSI has configured OneDrive so that it will retain version history on all of your documents allowing you to go back and access older versions of your documents or review changes that you made.

- 6. Does Office 365 allow people to leave multiple Excel, Word, and other documents open at the same time, even if not connected to the internet?

 Office 365 functions just like your current Microsoft Office Product Suite as it relates to the number of open widows and/or documents. An added benefit of Office 365 is that Microsoft is constantly upgrading the application with new functionality and bug fixes. You will no longer need to wait years to access changes via new installs or large service pack downloads as they will be integrated directly into the product and made available to you as they are released.
- 7. Can I use Office 365 apps for development or testing environments? *Short answer is no. Due to licensing issues Office 365 is only meant for individual RSI users.*

For Development and Test HW/VM's we will still need to use Office 2016 or 2013 which will be available through MSDN. Should you have questions or need assistance please email help@rsimail.com and we will be happy to assist you in the download and install.

- 8. How can I get Office through MSDN for DEV/TEST Use.

 Please contact IT at help@rsimail.com to get a MSDN copy and license key.
- 9. What happens if I must use older versions of Office for specific purposes?

Appendix Participant Guide

FAQs, continued

Please contact IT at help@rsimail.com to request specific version and/or license. In most cases we will assist you in creating a separate VM containing the older version of Office so that you do not run into compatibility or licensing issues with your Office 365 install.

10. What about current VISIO or Project installations?

When you install Office 365, all prior versions of Office must be upgraded. Both Project and Visio are included in the Office 365 install and will not require a separate license file.

If you have a need for an older version of Project or Visio please contact <u>help@rsimail.com</u> so that we can help configure an VM to meet your needs.

Exchange FAQ:

1. What happens to my emails during the Exchange migration?

During the migration all your email correspondence will be duplicated between the two versions of Exchange (i.e. our current local Exchange server and the new Office 365 Exchange Service). For a majority of our users this will be seamless as everything will be taking place behind the scenes.

In general, full migration is expected to take roughly 10 days while older emails are synced to the new 365 Exchange profile. We do not expect a degradation in the speed of delivery during this process but should you experience any issues we encourage you to reach out to help@rsimail.com

2. Will I still be able to access old Exchange servers after migration?

Note: After the 60 days mentioned above we will be archiving the older files to tape. All of the data will be accessible but the process of retrieving data will take more time (several days on average).

3. What happens after migration?

All emails will be delivered to Office 365 Exchange mail boxes and Employees will be instructed to connect their local outlook app to Office 365 to retrieve emails.

4. What is the Office 365 Mail box Size limit?

Current max mailbox size limit for Office 365 is 100GB with unlimited archive storage.

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Employee Guide Appendix

FAQs, continued

5. Can I sync emails to Mobile devices (Ex mobile phones and tablets) with Office 365?

Yes, Office 365 Email sync works with all mobile devices.

6. I am searching for an old email in 365 but I can't find it. What should I do?

Full syncing of the older emails can take up to 10 days once the migration starts. During the migration your older files might not be readily accessible via Office 365. If the need is urgent we recommend using your local version of exchange for the search as it should still be able to access the older data during the syncing process.

While we don't expect issues with the migration process, if you are unable to find a specific email or are running into usage problems, please contact IT at help@rsimail.com and we would be happy to assist you.

7. What do I need to do to make sure my cell phone remains synced during the process?

8. Does Office 365 ask for Two factor authentication every time I access email through outlook app or mobile devices?

Yes and no, as this is configurable. Prior to the migration you will be provided detailed instructions around the recommended configuration as well as a couple of supported alternate configurations.

Skype and Online Meeting FAQ:

1. Any changes to Skype setup and usage? Will the existing Skype work during and after migration? Will I be cut off from Skype if I don't upgrade at the time of migration or will it be running parallel?

With the Office 365 upgrade, Skype For Business will be upgraded automatically. This does not affect current usage.

Once migrated, the older (in-house) Skype server will be turned off and all requests will be redirected to new Office 365 Skype services.

There will be detailed instructions provided around the upgrade process but should you have questions or run into issues please contact help@rsimail.com so that we can assist you as quickly as possible.

2. What capabilities does the new Online Meeting/Skype offer?

Appendix Participant Guide

FAQs, continued

New Online Meeting has the capacity to host meetings with 10,000 participants. Due to high band width availability, video conferencing, file sharing and screen sharing performance will be much better than current Lync/Skype infrastructure.

3. Are there any changes expected to voice conferencing system?

Currently we do not have any plans to change the existing Avaya Voice Conference System. Please continue to use our conference bridges in meetings.

Yammer and Microsoft Teams:

1. What is the purpose of Yammer and is there a strategy or will there be any communication about its required use?

Microsoft purchased Yammer back in 2012 and has been diligently integrating it into framework. Yammer is essentially a social engineering platform for businesses.

The product gives the ability for employees to communicate with each other in a manner similar to Facebook or Twitter (but for business purposes). You can 'Like' threads that are of interest to you and easily collaborate among your colleges. Many companies are adopting this platform to maintain proprietary information security standards (confidentiality, intellectual property and Legal standards) while also providing an easy to use collaboration tool. RSI is very excited about the increased level of communication that this tool will provide. The HR department, in conjunction with Security and IT, is actively building out a strategy for this product and is hoping to have something to share with the company shortly.

2. What is the purpose of the new Microsoft Teams app and what would I use it for?

Microsoft Teams is a chat-based workspace to facilitate collaboration with in a team. MS Teams will also be configured and rolled out to select teams as it is designed more for small to medium team working groups. If you have a small-to-medium sized workgroup you feel might benefit from a chat-based coloration tool, please contacthelp@rsimail.com so that we can assist you as quickly as possible.

3. Are the data/conversations saved in Yammer and Microsoft Teams? *RSI's current policy is to save all data indefinitely. All work performed on RSI HW, SW and tools is subject to review and archival.*

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