

2-1-1 SAN DIEGO

---

---

# ***USING TECHNOLOGY TO WORK REMOTELY***

*Use this toolkit to set yourself up for success while working remotely.*

---

---

**PART ONE: SETTING UP YOUR COMPUTER**

**PART TWO: USING YOUR CXONE SOFTPHONE**

**PART THREE: USING OFFICE 365 REMOTELY**

**PART FOUR: USING MORE OF TEAMS' FEATURES**



# USING TECHNOLOGY TO WORK REMOTELY

We appreciate your patience as we transition to working remotely. Use this desk aid to help you set up your computer and access the tools you'll need to be successful. **If you have any questions, reach out to Penelope Oseguera.**

---

## PART ONE: SETTING UP YOUR COMPUTER

### COMPONENTS



COMPUTER  
MONITOR



DESKTOP  
HARDWARE



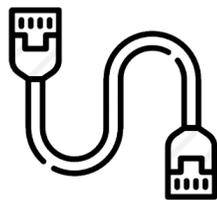
KEYBOARD



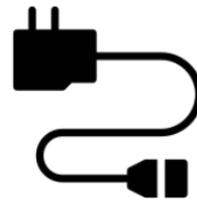
MOUSE



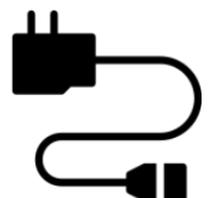
HEADSET



ETHERNET  
CABLE



POWER ADAPTER  
FOR DESKTOP



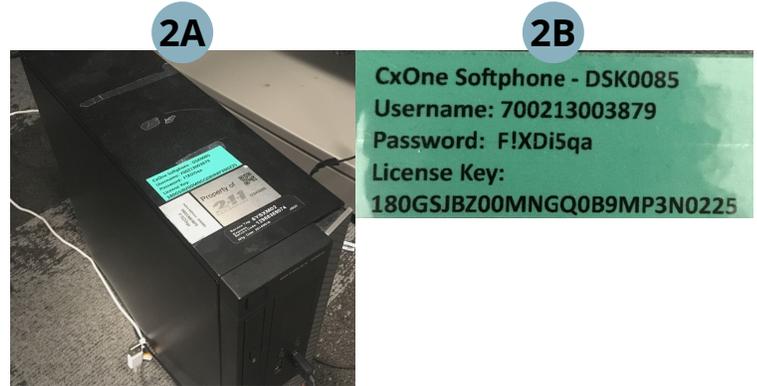
POWER ADAPTER  
FOR MONITOR

[CLICK HERE FOR A VIDEO TRAINING ON INSTALLING THESE ITEMS.](#)

# PART TWO: USING YOUR CXONE SOFTPHONE

- 1** A) Click the Windows button at the bottom left of your screen. Type "CxOne Softphone" in your Windows search bar; B) Select the program from the menu  
[Click here for a screenshot](#)

- 2** On your desktop (the hardware, **A**), locate the green sticker (**B**) that says "CxOne Softphone" followed by a Username and Password



- 3** In the CxOne Softphone window you opened, enter the 12-digit username and the password located on the green sticker and click "Sign In"

[Click here for a screenshot](#)

- 4** Visit <https://login.incontact.com/> and A) log in using your full email address and your NICE InContact password. B) on the following screen, select "Set Phone Number" and enter the 12-digit username located on the green sticker on your desktop and click "Continue"

[Click here for a screenshot](#)

- 5** Log in to Salesforce using your Work email and Salesforce password (not the same as your work password)

- 6** Within Salesforce A) click the "Phone" button in the bottom toolbar on the right of the screen. Then B) enter your work email address in the window that pops up( this window is called Salesforce agent) and C) NICE InContact password, Then click "Sign In"

- 7** **Last step to connect the two systems and be able to take calls:** A) Click on the Edit Button in the Salesforce agent toolbar, then B) Update the 12-digit number in the edit field of the Salesforce agent toolbar.

[Click here for a screenshot](#)

# PART THREE: USING OFFICE 365 REMOTELY

Since we're now working remotely, it's a great idea to become familiar with Office 365's online platform. If you create documents (ex: Word docs, Excel spreadsheets, PowerPoints) in the online versions of the Microsoft Office apps, they will auto-save. If you use the offline versions of these apps, you run the risk of saving incorrectly and losing your work. Also, if you're collaborating with coworkers you run the risk of creating multiple unsynchronized versions of the same document.

---

## ACCESSING THE PLATFORM

1

Visit <https://www.office.com/> and sign in using your work email address and work password. This is the password you use to log in to your computer every day.

2

On the landing page after you log in, you will see icons for the different Microsoft Office apps you normally use. Click on any of these icons to open online versions of programs you are familiar with, such as Microsoft Word or Microsoft Excel.

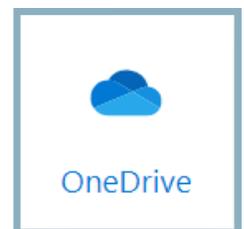
[Click here for a screenshot of the landing page](#)

[Click here to see what Word Online looks like](#)

---

## USING ONEDRIVE

Additionally, your Microsoft OneDrive is a great tool for hosting and sharing files so you can collaborate in real time with your coworkers.



Please click on the links below to watch videos provided by Microsoft Office to get an introduction to OneDrive and **reach out to Penelope Oseguera with any questions.**

 [What is OneDrive?](#)

 [Get Started With OneDrive](#)

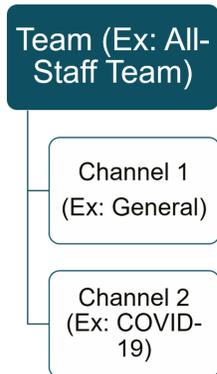
 [OneDrive Basics](#)

# PART FOUR: USING MORE OF TEAMS' FEATURES

## TEAM V. CHANNEL

**TEAM:** a collection of people, content, and tools surrounding different projects and outcomes within an organization.

**CHANNEL:** dedicated sections *within a team* to keep conversations organized by specific topics, projects, or discipline



---

## MEETINGS IN TEAMS

Since we're now working remotely, Meetings in Teams will be a great tool for you to collaborate with your supervisor and team members. This is where you can video call, audio call, and screen share with other 2-1-1 employees.

Please click on the links below to watch videos provided by Microsoft Office to get an introduction to Meetings in Teams and **reach out to Penelope Oseguera with any questions.**

- [▶ Join a Teams Meeting](#)
- [▶ Create Instant Meetings with Meet Now](#)
- [▶ Tip: Meet in a Channel](#)
- [▶ Manage Meetings](#)
- [▶ Show Your Screen During a Meeting](#)
- [▶ Move Around During a Meeting](#)

---

## ADDITIONAL RESOURCES

In December 2019, we created a couple job aids to help you get started in Microsoft Teams. Please find links to them below:

- [Microsoft Office Teams Introduction](#)
- [Microsoft Office Teams Additional Skills](#)