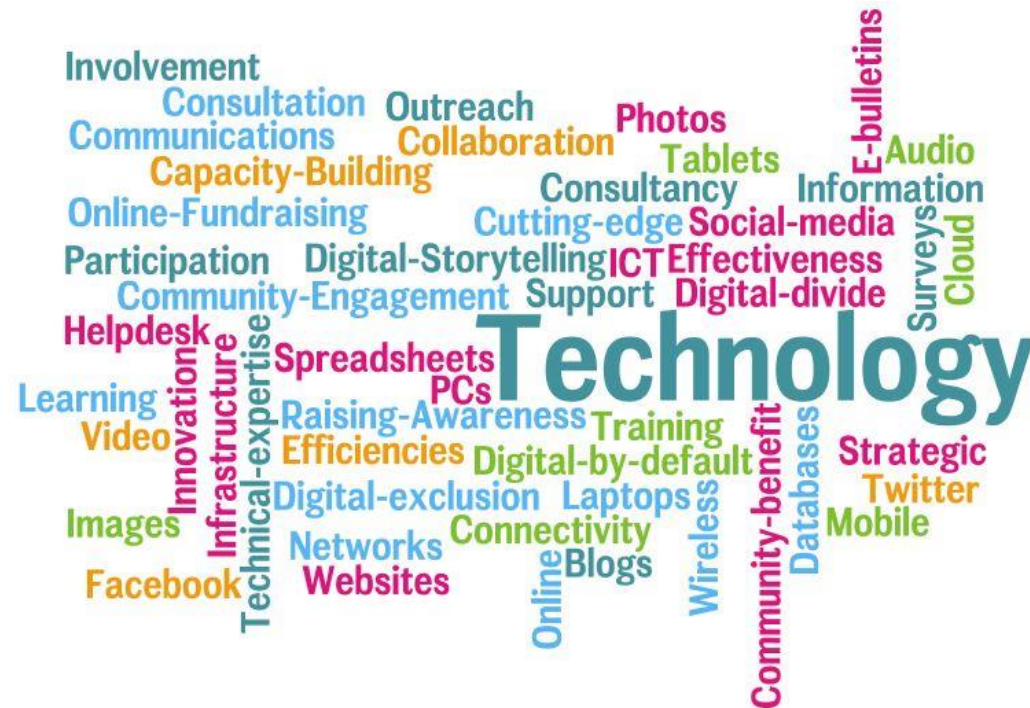


Office 365 Basics

About Superhighways....

Providing tech support to small local charities in London for 20 + years

- ✓ Support
- ✓ [Training](#)
- ✓ Consultancy
- ✓ Digital inclusion
- ✓ Impact Aloud
- ✓ [Datawise London](#)
- ✓ Websites



Don't forget to sign up to our monthly eNews

- ✓ Sign up <https://superhighways.org.uk/e-news/>



What we'll cover

- What is Office 365?
- Understanding the various packages
- What you need in place
- Registration process & migration tips
- OneDrive vs Sharepoint (vs Teams)
- Outlook for Web demo
- Sharepoint online demo
- Security measures
- Other Office 365 Apps inc Teams



Microsoft 365 Training

START WITH 6 SIMPLE STEPS >



Outlook



OneDrive



Word



Excel



PowerPoint



OneNote



SharePoint



Microsoft Teams



Yammer

[More Office apps](#) →



Learn the basics

Get going quickly and easily with Microsoft 365 video training.

[START NOW](#) >



Training templates

Learn what's possible with Word, Excel, and PowerPoint.

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Quick Starts

Get up to speed in no time with these popular guides.

[GET STARTED](#) >



Save time with tips

Work smarter and get more out of your Office apps.

[GET TIPS](#) >

Which subscription?

Microsoft 365 Business Premium (Nonprofit Staff Pricing) Donation	Microsoft 365 Business Premium (Nonprofit Staff Pricing)	Office 365 E3 (Nonprofit Staff Pricing)	Office 365 E1 (Nonprofit Staff Pricing)
Best for businesses that need all the apps and services included in Business Standard plus advanced	Best for businesses that need all the apps and services included in Business Standard plus advanced	The Office suite for PC and Mac with apps for tablets and phones, plus email, instant messaging, HD video	The online versions of Office with email, instant messaging, HD video conferencing, plus 1 TB personal file
Free 10 free licences for registered charities	From £3.80 user/month	From £4.00 user/month	Free Unlimited free licences for registered charities

- [Microsoft 365 Business Premium vs Office 365 E3 & E1](#)
- Start with the donated plans then look at what else you need
 - Enhanced security (M365 Business Premium) vs Email archiving & Legal hold requirements (O365 E3)?
 - Office applications to download vs buy outright via CharityDigital?
 - Remember you can mix and match



First things first...

- Document current set up
 - Which OS – Mac or Windows? Which versions? **You should be Windows 10**
 - Which Office version? **Office 2016, 2019 or M365 Apps (Subscription)**
It's the current & previous versions that are required to connect to Office 365
- Is your broadband up to it?
 - Your upload speed as well as download speed is important
 - Do you have contingency?
- Do you need a Server
 - Legacy software – Sage, Access (!) etc
 - Number of users, user management, roaming profiles, print management..



Registration process

- [Register with Charity Digital](#) as Microsoft use them to verify your non-profit eligibility
- Request the Microsoft 365 service by registering for the Microsoft for Non-Profit programme at <https://nonprofit.microsoft.com/en-us/getting-started>
- Verify your domain (you'll need to log on to your domain control panel and make some changes)



A phased plan of action

1. Upgrade Operating System and Office versions
2. Migrate your emails
3. Migrate your data

For each phase – plan in...

- Engagement / buy in across your organisation
- Manage expectations and showcase benefits
- Training, training, training! An ongoing offer + induction for new staff



Outlook migration – 10 questions

1. Existing provider: Webmail? On-premise Exchange? Hosted Exchange?
2. Rationalise email data if large amounts?
3. Distribution lists?
4. Forwarding / other rules?
5. Contacts? (Autocomplete won't transfer over)
6. Resource calendars e.g. meeting rooms?
7. Calendar – Meetings (updates won't work) and permissions?
8. Delegate access / shared generic accounts e.g. info@ mailboxes?
9. Organisational signatures or disclaimer?
10. Are you using Outlook's archive feature – local pst files?



Data migration – 5 questions

1. Where is current data – Server? NAS drive? Hosted Desktop? Local PCs(!) Do you have access?
2. Does your current Folder structure work - take the opportunity to restructure, reorganise and rationalise your data. A flatter structure recommended.
3. Consider the restrictions
5000 items, 400 characters, no " * : < > ? / \ |
4. Folder & file permissions
5. Local archiving may be needed if data size huge!



Data migration – options

- Set up folder structure in Office 365 (you could then replicate in current location?)
- Move data – either 'drag & drop' or use the Ms SharePoint Migration Tool or Third-party tool
- Map drives so access through Windows Explorer vs portal access only?
- OneDrive for Business Folder Sync with Files on Demand



Data storage – folders & files

OneDrive vs SharePoint (vs Teams)

Consider:

- Ownership
- Permissions management
- Collaboration
- Access
- Privacy
- Sharing



Outlook demo

- Portal access
- Opening another mailbox
- Outlook settings – out of office etc
- Encryption

- [Outlook Mail for Windows cheat sheet](#)
- [Outlook Calendar for Windows cheat sheet](#)
- [Outlook Mail on the Web cheat sheet](#)
- [Outlook Calendar on the Web cheat sheet](#)



SharePoint demo

- Navigating your folders and files
- Editing & collaborating on documents
- Sharing files with others
- Version history

- [SharePoint download guide](#)





Home

Admin

Management



Admin

Home

Documents

Office Admin

Staff Admin

Recycle bin

Edit

[Return to classic SharePoint](#)



Open



Share



Copy link



Download



Manage access

Documents



Name



Document.docx



- Open >
- Preview
- Share
- Copy link
- Manage access
- Download
- Delete
- Automate >
- Rename
- Pin to top
- Move to
- Copy to
- Version history
- Alert me
- More >
- Details



GDPR & Cybersecurity

- Multi factor authentication
- Enterprise Mobility & Security - device management, encrypted emails, data loss prevention
- Discovery – right to be forgotten & Data Subject Requests
- Organisational policies and procedures – passwords, homeworking, byod, leavers





Send Attach **Encrypt** Discard ...

Encrypt: This message is encrypted. Recipients can't remove encryption. **Change permissions** Remove encryption

To

Cc

Bcc

Add a subject

Change permissions

Choose how recipients can interact with this message

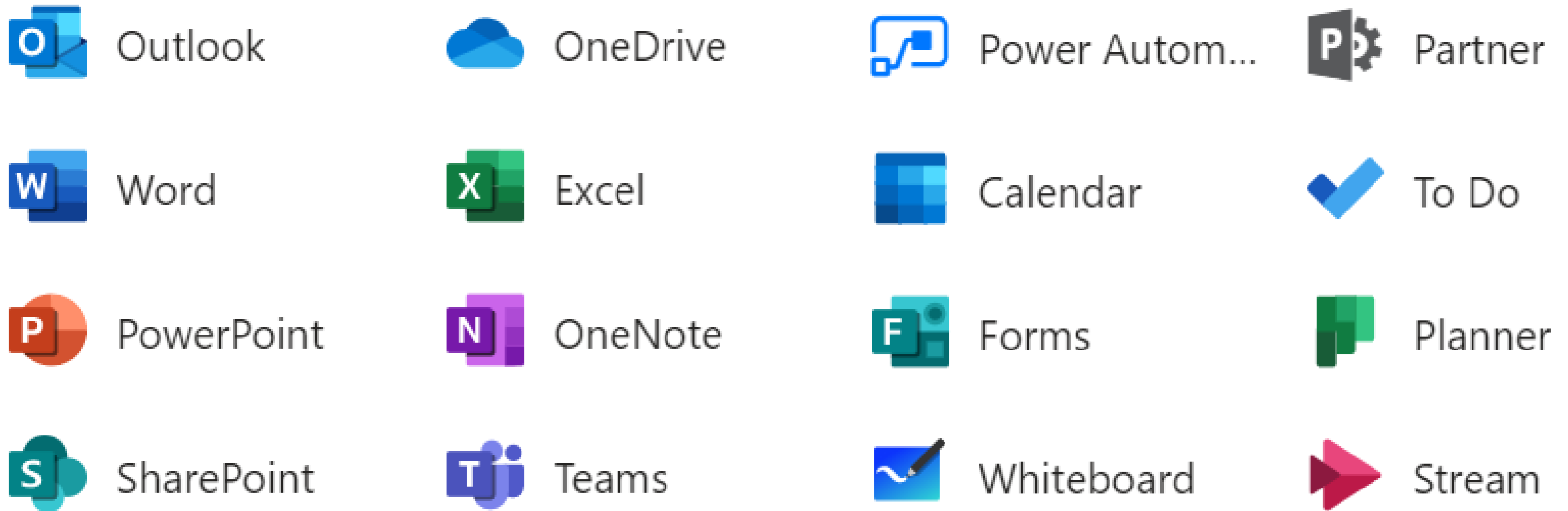
- Encrypt
- Confidential - All Employees
- Do Not Forward
- Encrypt**
- Highly Confidential - All Employees

Kate White
Superhighways Manager

Send | Discard



Office 365 has lots of amazing apps...





Microsoft Teams

Activity

Chat

Teams

Meetings

Files

Store

Favourites

- SU Superhighways
- General
- GDPR
- Members
- RBK Grant
- Team meetings
- 1 more channel
- KD Kingston Data Hack
 - General
- IA Impact Aloud 2018

Search for or type a command



KD Kingston Data Hack > General ... Private

Conversations Files Planner Eventbrite bookings +



Board Charts Schedule

Filter (0) Group by Bucket

To do

In progress

Done

+ (Add task button)

+ (Add task button)

+ (Add task button)

SWAY
 18/06

Evaluation

Book venue

Sorrel Parsons

Contact all speakers

Finalise agenda

Order lunch



Next steps

- Ask an Expert – book a 45 min 1:1 with Colin or Kate if you want to discuss Office 365 set up for your organisation. [Check dates & book here.](#)
- Office 365 - an amazing tool box of apps.
Book either [8th Oct 10 - 11.30](#) or [5th Nov 2 - 3.30](#) or [17th Dec 10 - 11.30](#)
- Introduction to Teams - a walkthrough for small charities.
Book either [9th Oct 10 - 11.15](#) or [11th Nov 2 - 3.15](#) or [8th Dec 10 - 11.15](#)



Thank you for listening!

Kate White & Colin Cregan

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