

Making the most of M365 apps: tips & tricks

Charity Digital Academy



superhighways
harnessing **technology** for **community** benefit

What does Superhighways do?

Superhighways helps small charities and community groups gain essential digital and data skills backed by the right tech to achieve their goals.



What we'll cover today

**Demo,
Summary,
Hands on time**

Session 1: Overview of M365 apps

- ✓ Web vs desktop applications
- ✓ Copilot, Forms & Sway

Session 2: Teams

- ✓ Member and channel management, Chat & posts, Files
- ✓ Calls & meetings, Whiteboard & polls

Session 3: Project management & collaboration

- ✓ To do, Tasks, Planner
- ✓ Bookings, OneNote, Loop





Add-Ins

Add-Ins



Bookings

Simplify how you schedule and manage appointments both inside and outside your organization.



Calendar

Manage and share your schedule.



Clipchamp

Make and edit videos.



Delve

Get personal insights and relevant information based on who you work with and what you work on.



Engage

Connect with coworkers and classmates, share information, and organize around projects.



Excel

Budget, plan, and calculate.



Forms

Customize surveys and quizzes, get real-time results.



Insights

Improve your productivity and wellbeing with Microsoft Viva Insights.



Kaizala

A simple and secure mobile chat app for work



Learning

Keep learning, keep growing with Viva Learning.



Lists

Allows users to create, share, and track data inside lists.



Loop

Enabling teams to think, plan, and create together.



OneDrive

Safely store files, photos, and more.



OneNote

Create a digital notebook.



Outlook

Email, schedule, and set tasks.



People

Group, share, and manage contacts.



Planner

Create plans, organize and assign tasks, share files, and get progress updates.



Power Apps

Build mobile and web apps with the data your organization already uses.



Power Automate

Sync files and more to simplify your work.



Power BI

Create actionable, dynamic, and engaging data dashboards you can share with others.



Power Pages

Unleash the power of Copilot to craft secure, low-code business websites with ease.



PowerPoint

Easily make presentations.



Project

Develop project plans, assign tasks, track progress, and manage budgets.



SharePoint

Share and manage content, knowledge, and applications to empower teamwork.



Stream

Share videos of classes, meetings, presentations, and training sessions.



Sway

Create interactive reports and presentations.



Teams

Meet, share, and chat.



To Do

List and manage your tasks.



Visio

Simplify and communicate complex information visually.



Viva

Explore Viva apps that improve the way you work



Whiteboard

Ideate and collaborate on a freeform canvas designed for pen, touch and keyboard.



Word

Write, share, and make real time edits.

Which are you using already?

Let us know in Chat 😊



M365 non-profit licensing (the updated version!)

Microsoft 365 Business Basic (Nonprofit Staff Pricing)

Grant

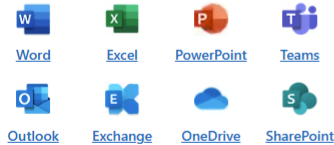
Free for up to 300 users

[Get started](#)

[Learn more >](#)

- ✓ Chat, call, and meet up to 300 attendees with Microsoft Teams
- ✓ Web and mobile versions of Microsoft 365 apps²
- ✓ 1 TB of cloud file storage
- ✓ Business-class email
- ✓ Standard security
- ✓ Anytime phone and web support
- ✓ AI chat experience with web grounding, writing assistance, data analysis, and access to agents²
- ✓ Microsoft 365 Copilot available as an add-on³

Apps and services included ²



Microsoft 365 Business Standard (Nonprofit Staff Pricing)

£2.30 user/month, paid yearly
(Annual commitment)

Price does not include VAT.

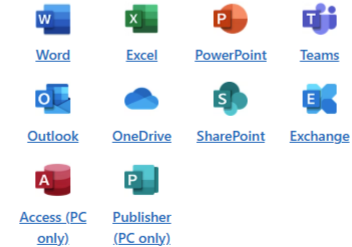
[Get started](#)

[Learn more >](#)

Everything in Business Basic, plus:

- ✓ Desktop versions of Microsoft 365 apps with premium features
- ✓ Webinar hosting in Teams
- ✓ Attendee registration and reporting tools
- ✓ Customer appointment management
- ✓ Microsoft 365 Copilot available as an add-on³

Apps and services included



Best value

Microsoft 365 Business Premium (Nonprofit Staff Pricing)

£4.20 user/month, paid yearly
(Annual subscription—auto renews)

Price does not include VAT.

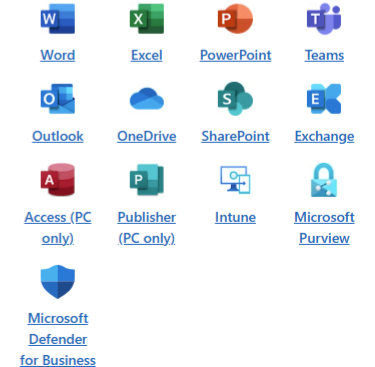
[Get started](#)

[Learn more >](#)

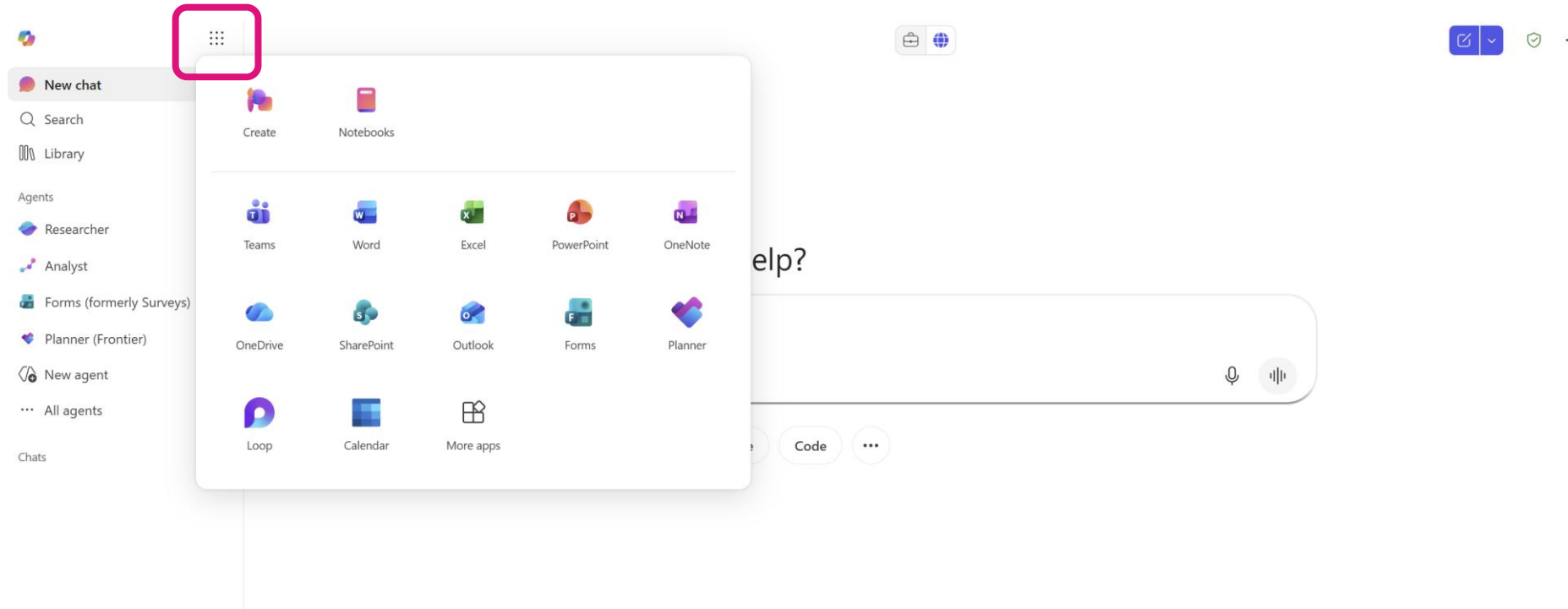
Everything in Business Standard, plus:

- ✓ Advanced security
- ✓ Cyberthreat protection
- ✓ Advanced device management
- ✓ Microsoft 365 Copilot available as an add-on³

Apps and services included



New M365 landing page



- ✓ Click on the Apps launcher (grid of 9 dots) in the top left
- ✓ Pin apps to appear in the launcher (hover over and click on 3 dots)
- ✓ Click more apps to see the full list and search option





Microsoft 365 help & learning

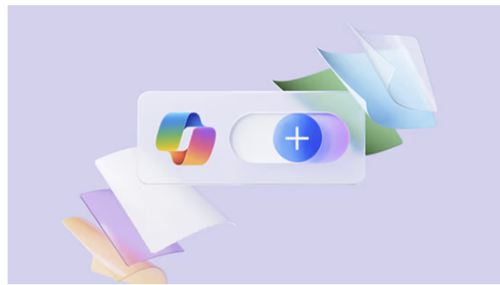
How can we help you? [→](#)

Supercharge your day with Copilot



How to get Copilot

Make your day even easier with Copilot in Microsoft 365 apps.



AI credits and limits

Learn about AI credits and feature limits for each Microsoft 365 plan.



Turn ideas into action

Draft, summarize, analyze, and explore ideas with Copilot Chat.



Take productivity on the go

Access to your AI assistant and favorite apps from your mobile device.

Get more done in your favorite apps



Microsoft 365 Copilot app



Outlook



Word



PowerPoint



Teams



Excel



OneNote



OneDrive



Clipchamp



SharePoint



Copilot



What is Copilot?

This is what Copilot says....

Microsoft Copilot is an AI-powered companion designed to assist with a wide range of tasks and provide valuable information. It's like having a knowledgeable and friendly helper at your side, ready to support you with everything from answering questions and brainstorming ideas to offering advice and creative inspiration.

Powered by ChatGPT-4 (developed by Open AI)



Copilot training [See all training videos here](#)

Explore in products ▾

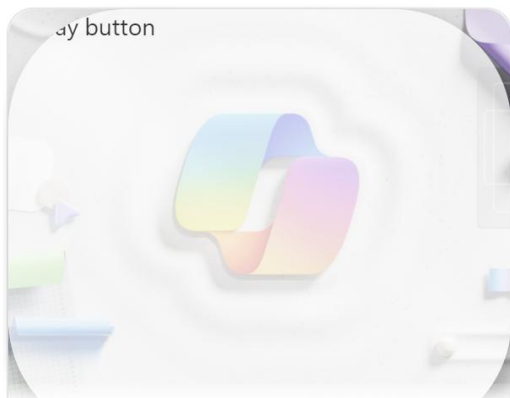
Prompts to try

Getting started ▾

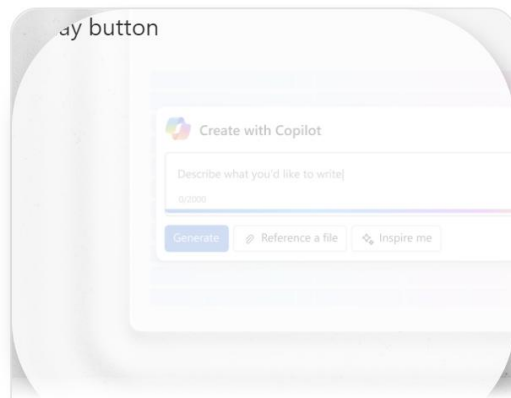
What's new



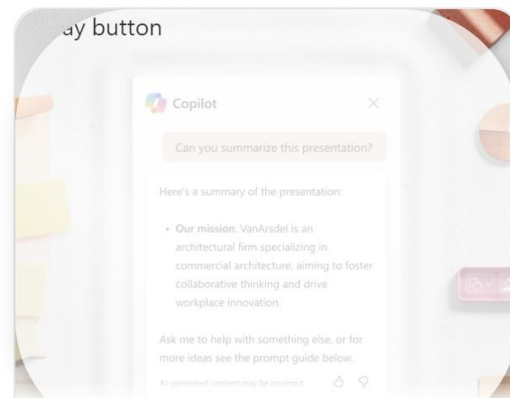
Start your Copilot journey



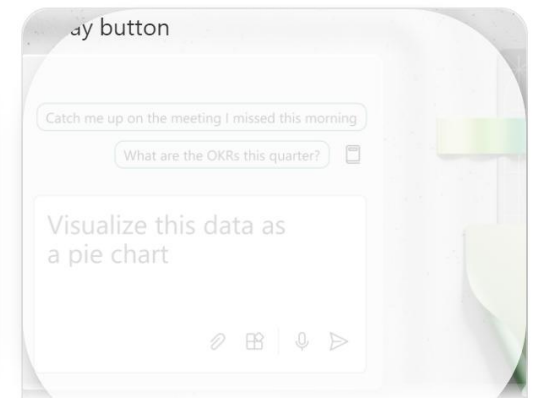
Meet Copilot



What you can do with Copilot




Start using Copilot



What is a prompt?

Copilot Chat







(part of your M365 subscription)





Copilot

Your everyday AI companion

Microsoft's enterprise compliance standards apply to this chat. Use discretion when sharing personal and organisational data.

 Code a binary search in Python Write a Python script to perform binary search	 Create a pop art image Create a pop art image of a woman wearing sunglasses and a beret	 Help me stop procrastinating What are 5 - 6 ways to beat procrastination?
 There once was an AI poet... Write a funny limerick about me	 What's getting stronger, faster, better? What are some cutting-edge technologies in sports?	 Improve my writing Can you help me edit a draft of my document if I upload or paste it?

Message Copilot...  

Copilot licensed
(circa £30 per
month ex VAT –
*now with a 15%
discount for non
profits*)

Work

Web

+ New chat



Your AI assistant for work

Get calendar info

When's my next meeting with
c Clare Chamberlain ?

Stay informed

What's the latest from
c Clare Chamberlain ,
organised by emails, chats, and
files?

Find the right questions

Suggest common questions that
can be asked to get a retrospective
started with my colleagues.

Understand the main points

Give me a bulleted list of key
points from **file**

Jump-start a draft

Create an FAQ based on **doc**

Track your tasks

What should be on my radar from
emails last week?

View prompts

Message Copilot

Add people, files and more for better results

0 / 16000



Dashboard overview

Copilot Dashboard overview

NAVCA artificial intelligence
training toolkit for
development workers



Let's take a look at how you can navigate Copilot and find out more about data security features.

[Link to video](#)



Copilot dashboard overview

NAVCA artificial intelligence
training toolkit for
development workers



1



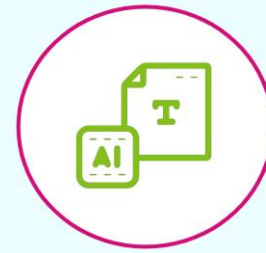
Drafting an email

2



Summarising a report or web article

3



Creating copy for social media posts



4



Researching / information gathering

5



Analysing data

6



Idea generation / brainstorming



How could you use Copilot?

7



Teams meetings summaries & actions: 2 options

8



Funding applications based on organisational docs



Copilot licensed – Inbox assistance

Copilot

Work Web

Got a task in mind?

Are there any email follow ups outstanding?

+

What matters most in my inbox today?

Which unread emails need replies?

Copilot

I've reviewed the 334 emails you've received in the last 12 hours and prioritised those that appear urgent or important based on your criteria: being on To/CC, @mentions, open requests, deadlines, and involvement from leadership or external stakeholders. Here are the top messages that may need your attention:

1. [M365 follow up from Ellen](#)

Why it matters: Ellen is requesting a connection for her bookkeeper, Sophie, who has follow-up questions about a system you previously trained them on. This is a direct request for support and may require a timely response. M365 follow up

Would you like to reply to Ellen now?

2. [Zoom Link for Tomorrow from Angela](#) (Charity Digital)

Why it matters: Angela is asking for the Zoom link for an event happening tomorrow so she can send it to delegates. This is time-sensitive and directly addressed to you and your team. Zoom Link for Tomorr...

Shall we draft a reply with the Zoom link?

3. [Re: Welcome, and Presentations from Aaron Bush](#) (SIH)

Why it matters: You mentioned bringing the slide deck to the G320 Annual Conference today. If you haven't already shared it, this could be urgent given the event timing and leadership visibility. Re: Welcome, and Pre...

Would you like to confirm the deck has been shared or send it now?



Demo time

[Monthly MS Copilot quick start training for non profits](#)





MS Copilot– a summary

- ✓ Copilot is Microsoft's AI assistant
- ✓ Uses ChatGPT technology developed by Open AI
- ✓ Copilot chat included in your M365 subscription (looks to the web or specific attachments / pasted copy)
- ✓ Copilot licensed is a paid for version, with 15% discount for charities, it's circa £300 per user per year
- ✓ Copilot licensed looks across the web AND your M365 tenant's data (any access controls and policies apply)
- ✓ Usage of both covered by Microsoft's Enterprise Data Protection – [see further information](#)
- ✓ But remember to consider carefully when using personal data





MS Forms






New Form


New Quiz

Questions

Responses

Office 365 apps training demo

Are you reading this as I'm chatting to you? Presentation hazard...



Choice



Text



Rating



Date



Ranking



Likert ⓘ



File upload



Net Promoter Score®



Section





Settings



Options for responses

- Accept responses
- Start date
- End date
- Set time duration ⓘ
- Shuffle questions
- Disable question number for respondents
- Show a progress bar ⓘ
- Hide **Submit another response**
- Customise thank you message
- Allow respondents to save their responses
- Allow respondents to edit their responses

Send and collect responses




- Anyone can respond
Anonymous response, doesn't require sign-in
- Only people in Kingston Voluntary Action can respond
- Specific people in Kingston Voluntary Action can respond

Feedback

↪ <https://forms.office.com/Pag...> Shorten URL [Copy link](#)

To:



You are invited to take this:
The big question for today ...

Hi! Would you mind taking 2 minutes to complete this form? It would be great if you can submit your response by 24 Mar 2025. Thank you!

Rewrite with Copilot

[Start now](#)

Outlook Teams (Message only) [Send](#)

Invitation will be sent via Outlook

- Collaborate or Duplicate
- Get Pre-filled URL
- Multilingual
- Print Form

- Feedback
- Terms



Responses Overview

Active

Responses

12



Average Time

00:46



Duration

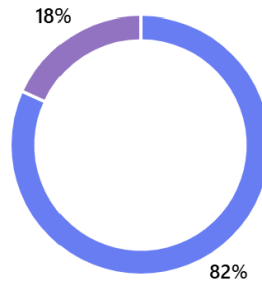
215 Days



1. How do you feel about Marmite?

[More details](#)

Love it	9
Hate it	0
Vegemite	0
Don't care. Where's the peanut butter?	2



2. According to a poll in 2021, what are the UK's favourite condiments? Place the following in order ...

[More details](#)

Insights and actions



Analyse and explore up-to-date results in Excel.



Britain's favourite condime...
Superhighways > Microsoft Forms T



Check individual results



Delete all responses



Print summary



Share a summary link



Demo time





M365 Forms – a summary

- ✓ Multi question types available (including quizzes)
- ✓ No limit on number of questions
- ✓ Branching options e.g. if answer Yes, jump to Q5
- ✓ Share to collaborate with colleagues (you can also create in Teams if using)
- ✓ Click to get an email alert for each response
- ✓ Remember to copy link allowing anyone with link to respond
- ✓ See visualisations, response summaries, or individual responses or analyse further in Excel
- ✓ [Further info](#)






Sway





Details E Emphasize A Accent Link Focus Points



Kingston Data Hack

1 - Exploring small charity data in the Roya...

Heading 1 Card



Background

Exploring small charity data in the Royal Borough of Kingston upon Thames

Text Card

The word data has the power to terrify and excite. For some it's simply the boring stuff that only the geeky understand. For others it uncovers hidden patterns, correlations and insights that can change the world.

Data is something that every small charity and community group has, such as information about the numbers of people attending activities or personal information from clients.




Image Card: Kingston Data Hack smiling.jpg

Caption





+

Suggested Text Media Group

Heading 1 Text Image Stack Upload

This panel shows the 'Suggested' category selected. It features five options: 'Heading 1' with a list icon, 'Text' with a list icon, 'Image' with a picture icon, 'Stack' with a document icon, and 'Upload' with an upward arrow icon.

+

Suggested Text Media Group

Image Embed Upload

This panel shows the 'Media' category selected. It features three options: 'Image' with a picture icon, 'Embed' with a code icon, and 'Upload' with an upward arrow icon.

+

Suggested Text Media Group

Automatic Grid Comparison Stack Slideshow

This panel shows the 'Group' category selected. It features five options: 'Automatic' with a list icon, 'Grid' with a grid icon, 'Comparison' with a magnifying glass icon, 'Stack' with a document icon, and 'Slideshow' with a code icon.

Play Share

Share

Anyone with the link can access this Sway

Get visual link Get embed code

Authors

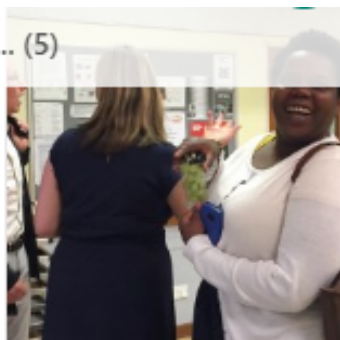


▶ 1 – Exploring small charity data in the Roya... (5)



Heading

The word data has the power to terrify and excite. For some it's simply the boring stuff that



Superhighways and Kingston Voluntary Action brought together small charities and data



Embed

▲ 2 – "I had a hunch" Hearing from peers about...



Background

Heading 1 Card

"I had a hunch" Hearing from peers about their experiences of data

Text Card

Local organisations shared how they have started on their data journey using digital tools to analyse and visualise client and outcomes data.

We heard from Kingston Young Carers' Project on how they overcame the challenge of limited reporting capacity within their database, Learn English at Home on how they have transformed the way they assess client progress and Man and Boy on their use of online questionnaires and Kobo toolbox.

Demo time





M365 Sway – a summary

- ✓ Use for presentations or online publications e.g. reports or e-news
- ✓ Choose from a range of templates & designs
- ✓ Build your Storyline by adding blocks of differing kinds of content
- ✓ Including video & embedded content (presentations, maps etc)
- ✓ Share via a link, embed in a web page, or present to a room
- ✓ Some examples:
 - ✓ [Data Hack – event round up](#)
 - ✓ [Get Online Week – a week in the life](#)
 - ✓ [CVA annual review](#)
- ✓ [Further info](#)



Hands on time

✓ 10 mins for you to play!



Take a break

Back in 5 minutes





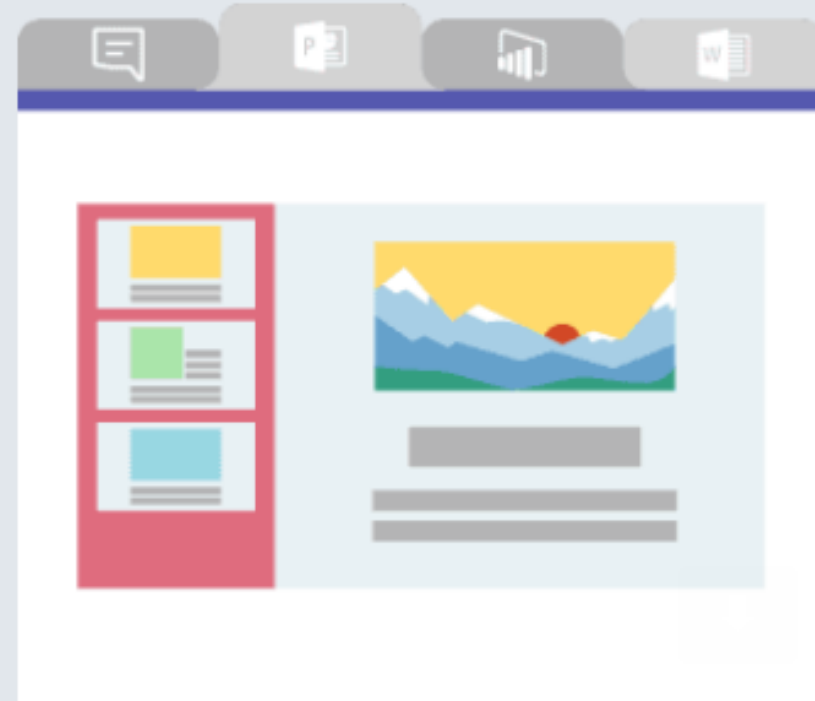
Teams





Make video calls and schedule online meetings

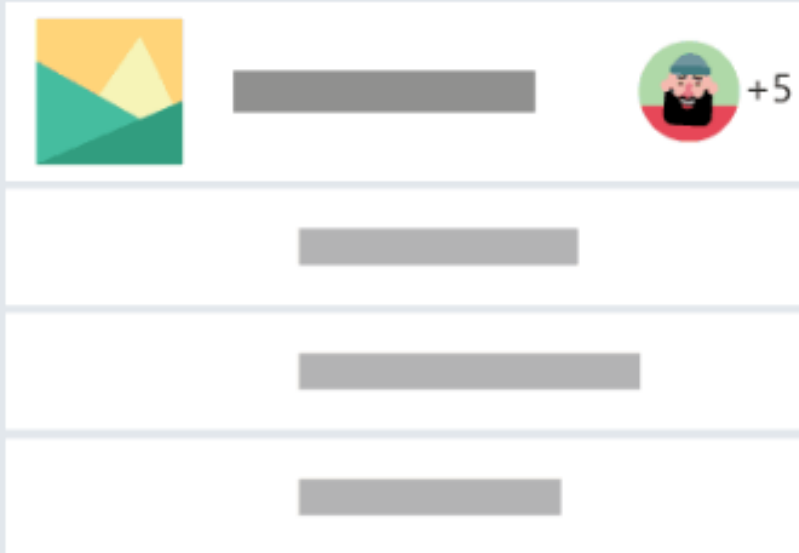
Have impromptu or scheduled meetings in any channel. Or just call someone ☐



Team files, notes, and apps in one place

Your team's tools are organized and integrated in Microsoft Teams with the power of Office 365.





Bring your team together

Create an open, collaborative workspace for your team. Use channels to organize conversations by topic, area, or anything else.



Chat 1:1 and with groups

Outside of open team conversations, chat privately and share files and notes with anyone in your organization.





Microsoft Teams video training

Get started



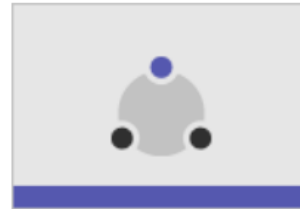
Quick start



Intro to Microsoft Teams



Set up and customize your team



Collaborate in teams and channels



Work with posts and messages



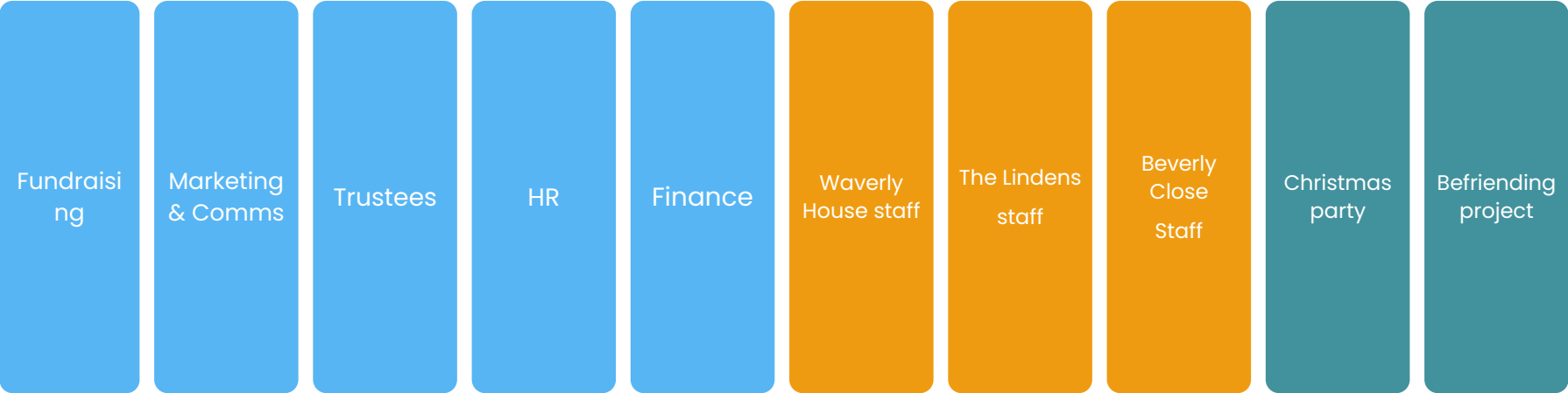
Start chats and calls

Structuring your Team with Channels – an Example

Team



Channels



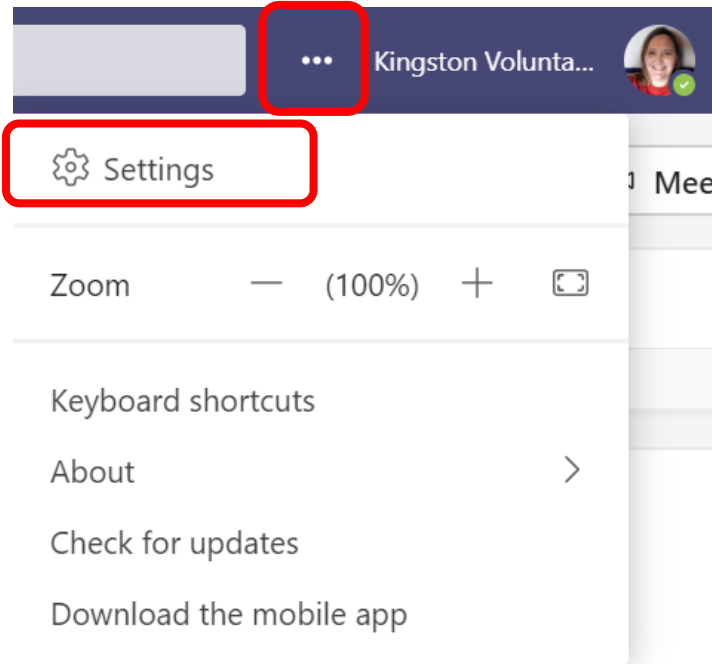
Areas of work

Sub teams

Specific projects



Check and amend Notifications in Settings



Settings

- General
- Accounts
- Privacy
- Notifications**
- Devices
- App permissions
- Accessibility
- Captions and transcripts
- Files and links
- Calls
- Recognition

Email

Missed activity emails

Once every hour

Appearance and sound

Notification style

Teams built-in

Show message preview

Play sound for incoming calls and notifications

Teams and channels

You will get desktop and activity notifications for:

All activity

New messages, reactions, and all mentions

Mentions & replies

Personal mentions and replies to your messages

Customised

Your customised settings are active.

Chat

Messages, mentions and reactions.

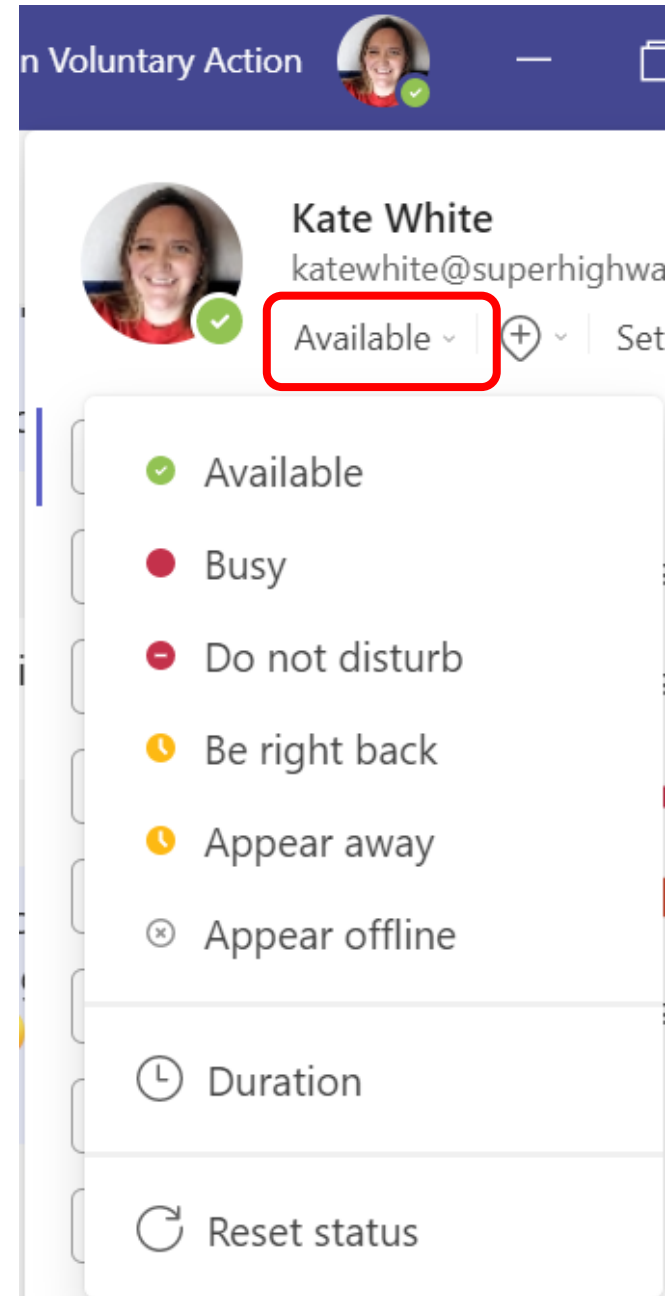
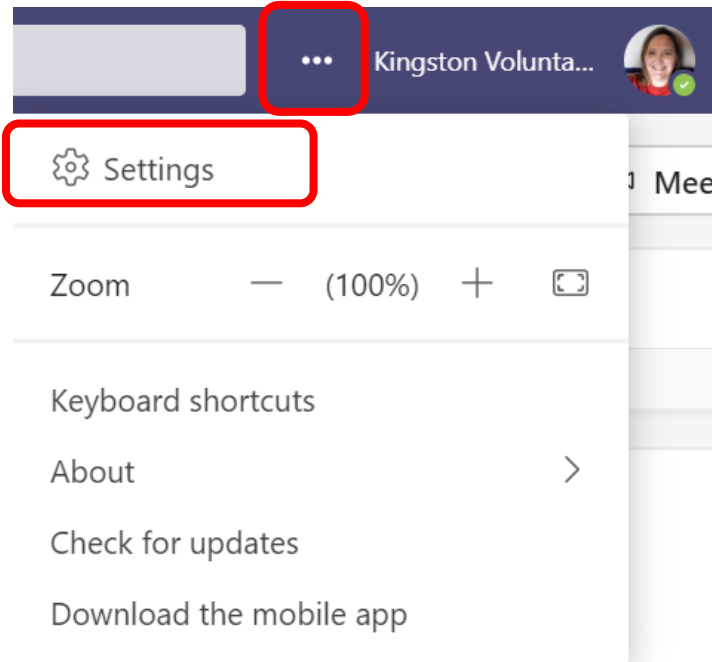
Edit

Meetings and Calls

Control notifications and reminders during your meetings and calls.

Edit

Changing your Status



@mention – to flag a person or team when posting

Search for or type a command

Kingston Voluntary Ac...

Teams

Sm Covid-19 Posts Files Wiki +

Team

Let's get the con
Try @mentioning people you want to collabora

Planner OneNote Add tab

Kate White na-29

Suggestions

- KA KVA Admin
admin@kva.org.uk
- Sm KVA Staff
Team
- KVA Twitter Feed
Channel
- KVA Infrastructure
5 people have this tag

on website
/naa Aparajit Alison Ewart There's

the data protection during this
the pandemic continues. The IC...

Activate Windows
Go to Settings to activate Windows.

Join or create a team

Start typing @ and then the name of the person, team, channel or tag to generate a list of suggestions

Select the person or group of people you want to notify



Creating and using Tags

Select the Tag tab and manage or Create a tag. Then you can @mention a Tag and all members will be alerted

Click on the 3 dots next to your Team name

The screenshot shows the Microsoft Teams interface for the 'KVA Staff' team. The left sidebar shows the 'Teams' list with 'KVA Staff' selected. The main area shows the team's details, including the 'Tags' tab. A search bar for tags is visible, and a table lists tags assigned to the user, including 'Census' with 4 members. A 'Create tag' button is also present.

Teams

- Superhighways Finance
- KVA Staff**
- General
- Big Yellow

KVA Staff ...
General KVA staff communications and Project Channels

Members Pending Requests Channels Settings Apps **Tags** 1 more

Search for tags

Tags assigned to you (4)

Name	Members	Imported from
Census	4	

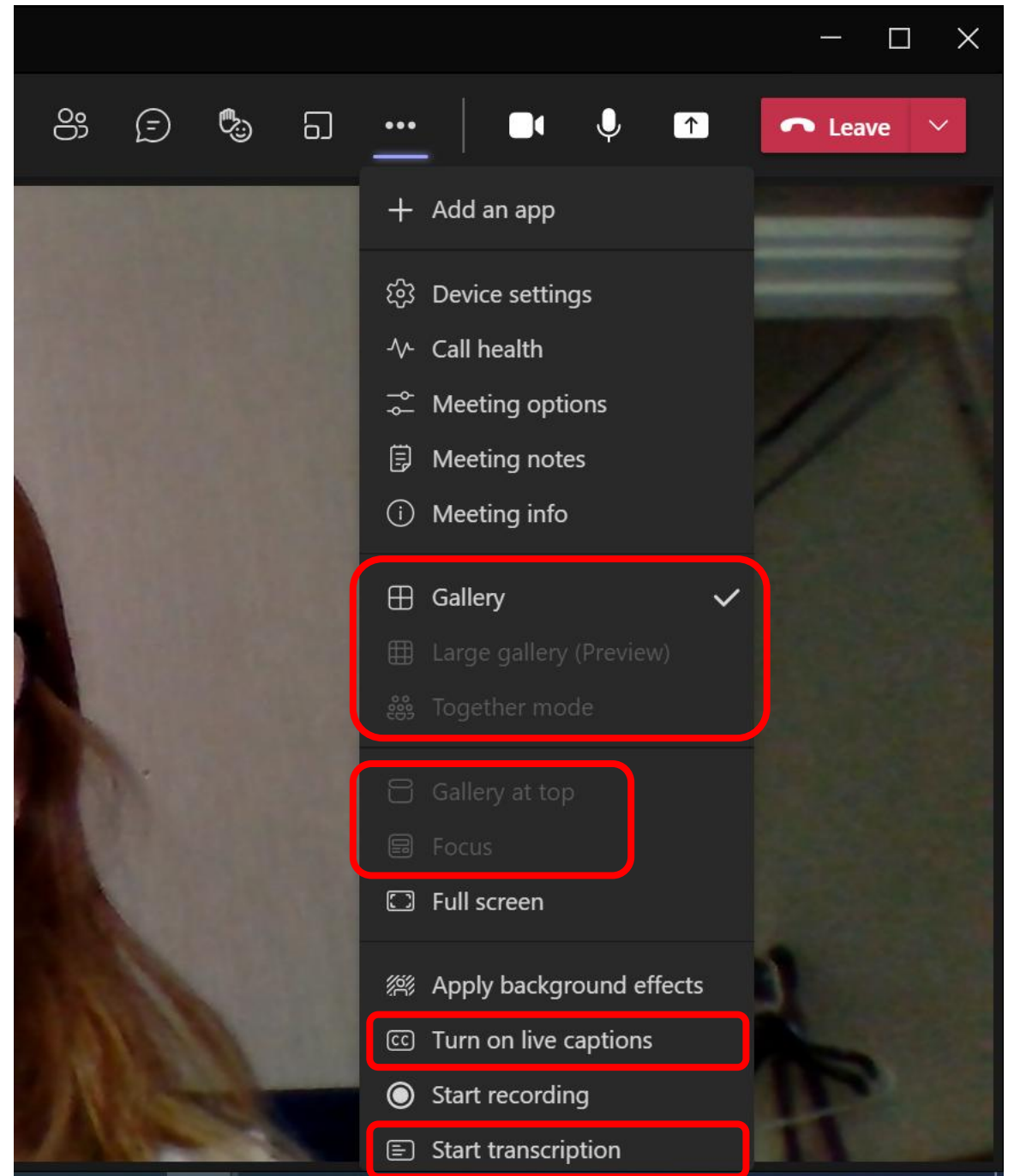
Create tag



Meetings tool bar

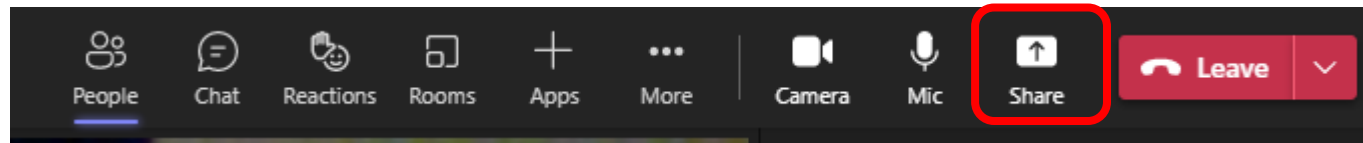
Useful features:

- Switch between Gallery & Large gallery / Together mode depending on how many people are in the call
- When someone is screensharing – choose to have Gallery at the top and / or to view in Full screen or Focus to see a larger screenshare view
- Turn on Live captions (even if you're presenting, each person needs to do this themselves) and you'll see 'subtitles' at the bottom of your screen
- Start transcription – only visible if you set up the meeting. A transcript of the meeting will then save for you to reference later. It will show in a left hand bar by default, but you can then choose to hide

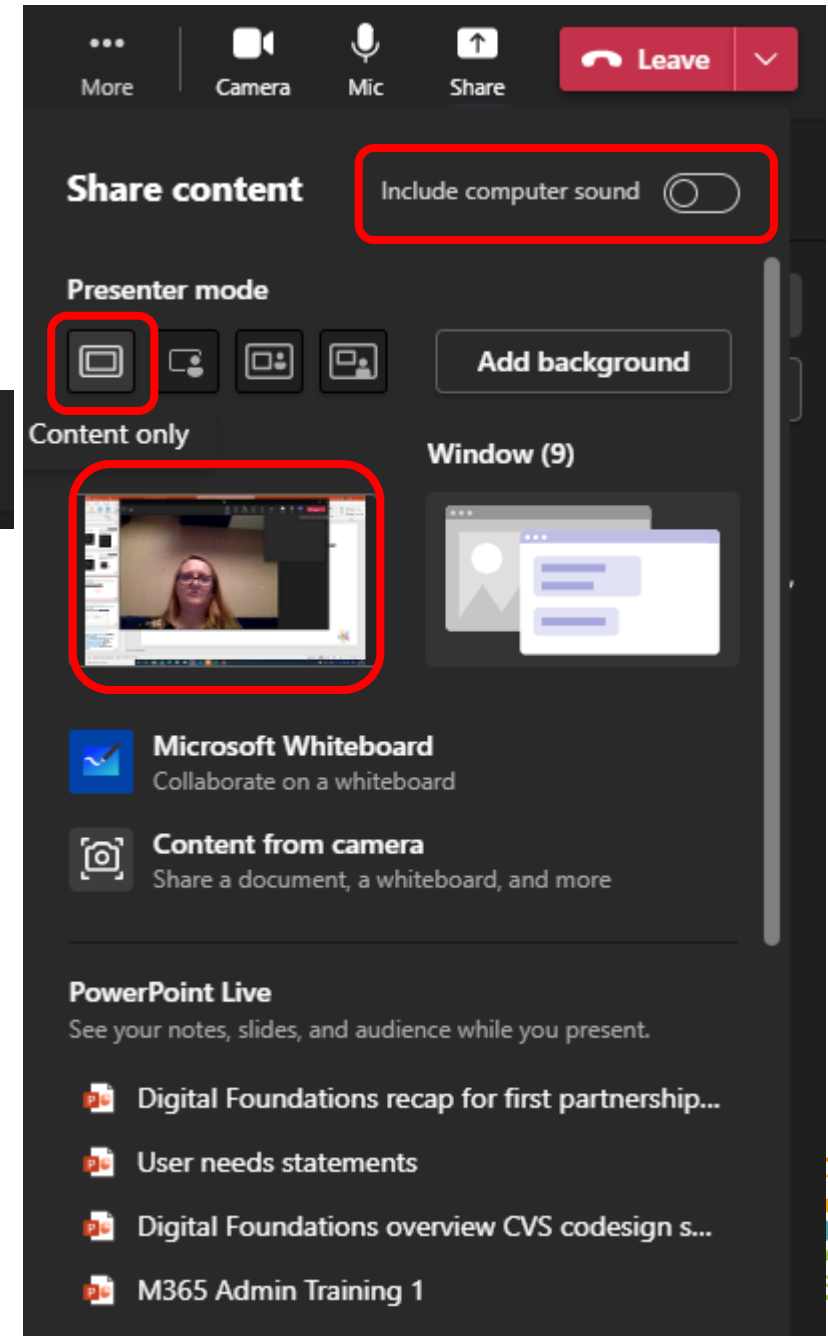


Sharing screens

- 1) Click on the Share icon to the right of the microphone icon on the tool bar

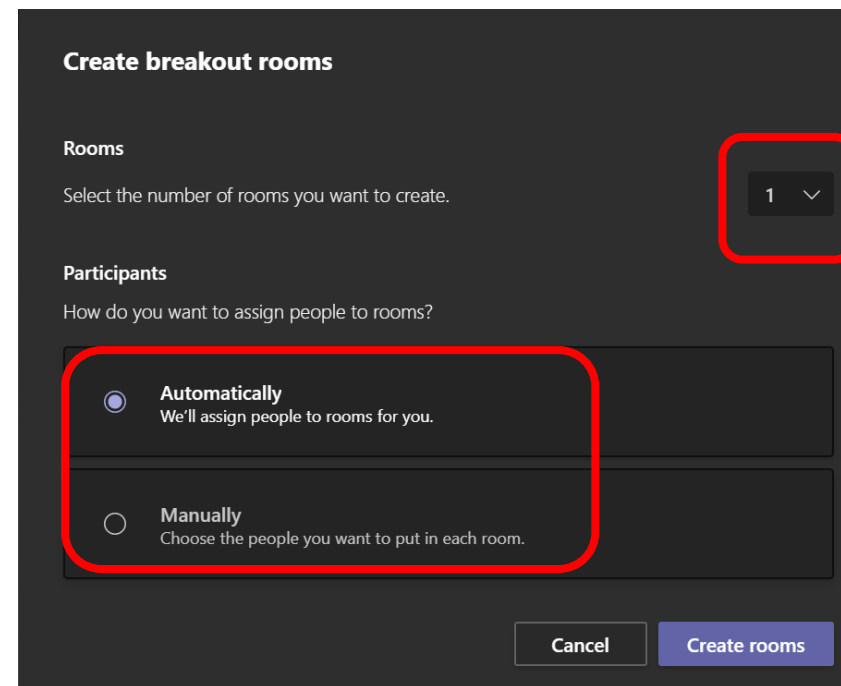
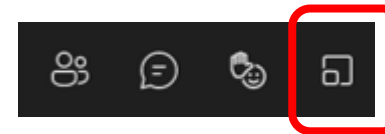


- 2) Then click on the Content only screen to share. This is the first Presenter mode (you can also use another Presenter mode such as Side by Side or Reporter).
- 3) If you want to share screens and play a video – remember to toggle on Include computer sound

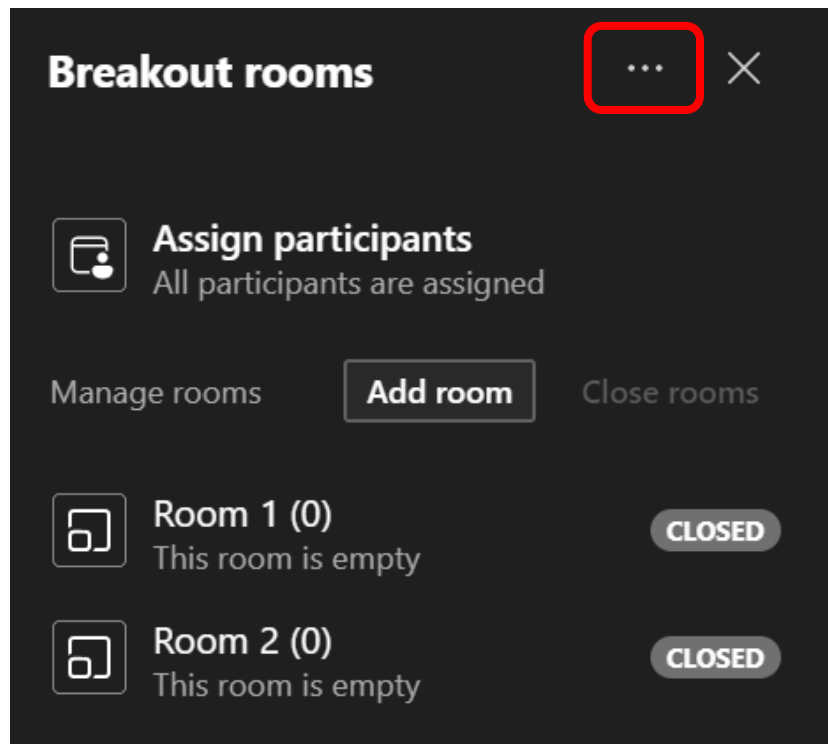


Breakout rooms

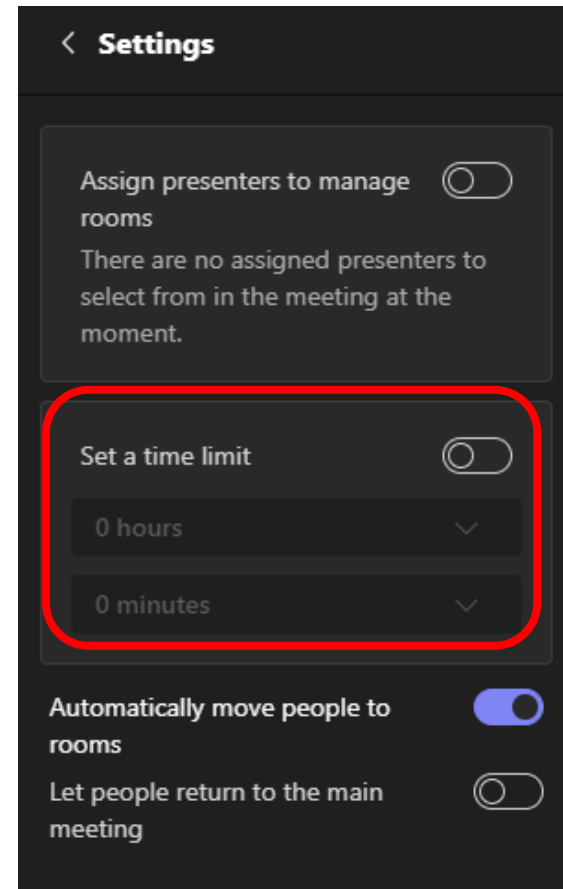
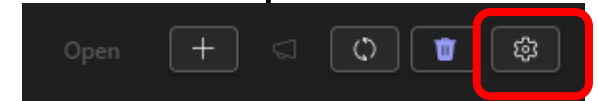
- Click on the Rooms icon on your Teams call toolbar
- Click on Create rooms and select how many you need (see drop down)
- Now choose whether you want participants to be assigned Automatically or Manually and then click Create rooms. (They won't open just yet)



- Click the 3 dots to manually make any changes needed and e.g. to Add another room

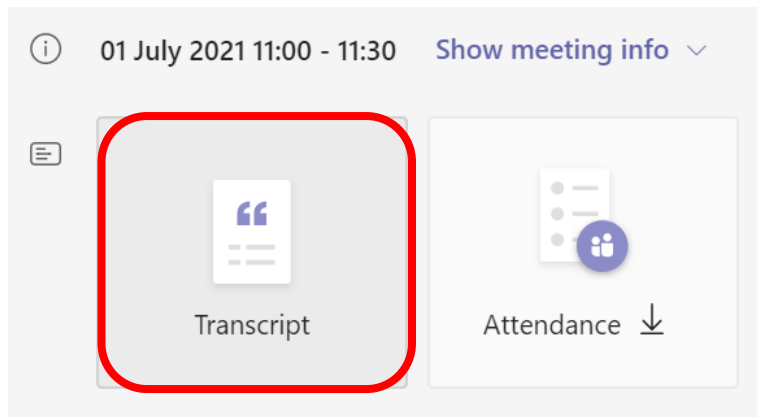
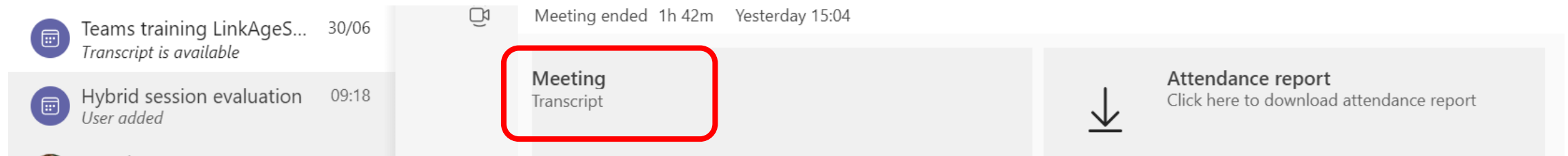


- Click on the Cog wheel icon to open the Settings window.
- Here you can change other default options and e.g. Set a time limit for your breakout room



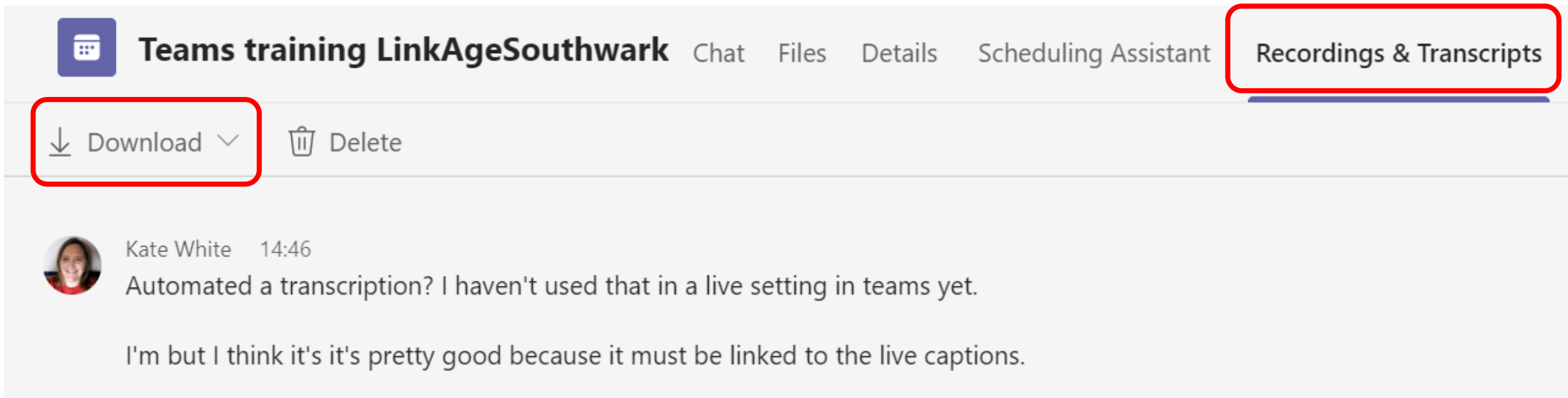
Accessing recordings & transcripts

- Option 1: Go to Chat, find the meeting in question and select it in your left-hand list. Then look for the Transcript option and click to open or download



Accessing recordings & transcripts

- Option 2: Or go to your calendar and double click on the Meeting entry & click on Transcript



The screenshot shows the Microsoft Teams interface for a meeting titled "Teams training LinkAgeSouthwark". The navigation bar includes "Chat", "Files", "Details", "Scheduling Assistant", and "Recordings & Transcripts", with the latter highlighted by a red box. Below the navigation bar, there are two action buttons: "Download" (with a dropdown arrow) and "Delete", both also highlighted by red boxes. The chat area shows a message from "Kate White" at "14:46" with the text: "Automated a transcription? I haven't used that in a live setting in teams yet. I'm but I think it's it's pretty good because it must be linked to the live captions."



24 September 2024 14:30 - 14:45

Content

Attendance

Notes

AI notes

Mentions

Transcript



Save time with AI-powered meeting notes

With Teams Premium, AI can generate notes and suggest tasks for you to follow up on. Learn more

Try Premium for free

60-day trial, no card required
[Terms of service](#)

Content

Attendance

Notes

AI notes

Mentions

Transcript



Get AI-powered meeting notes

Turn on transcription, and AI can generate notes and suggest tasks to follow up on. Learn more

AI Recap – available in Teams Premium

<https://www.microsoft.com/en-gb/microsoft-teams/premium>

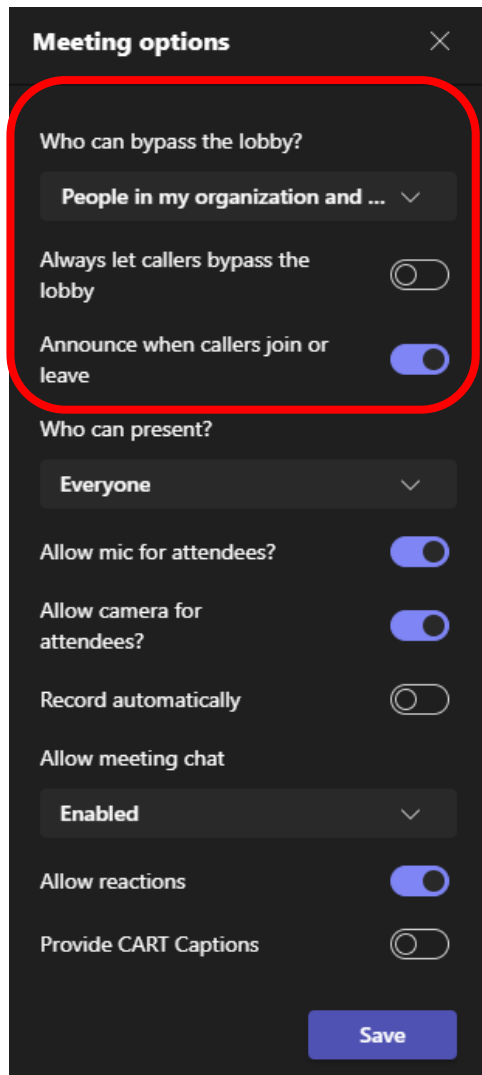
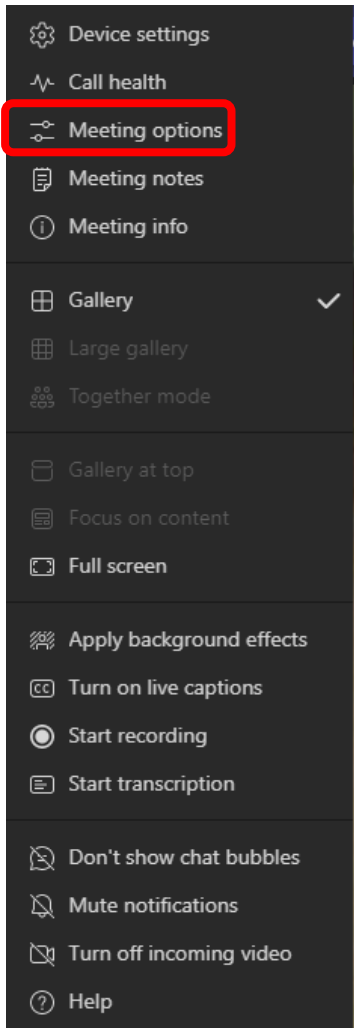
60 day free trial. Cost then £5.80 per user per month ex VAT

and in M365 paid Copilot

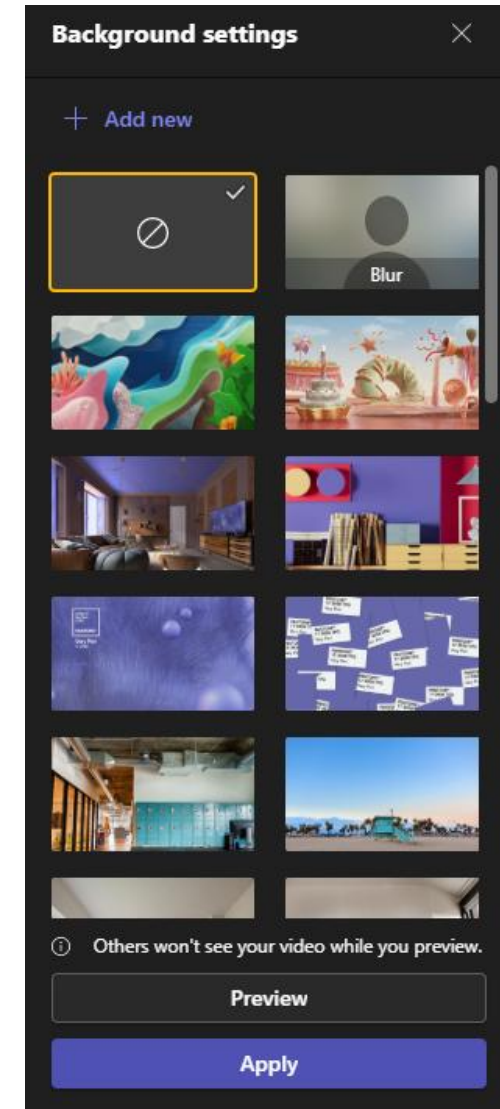
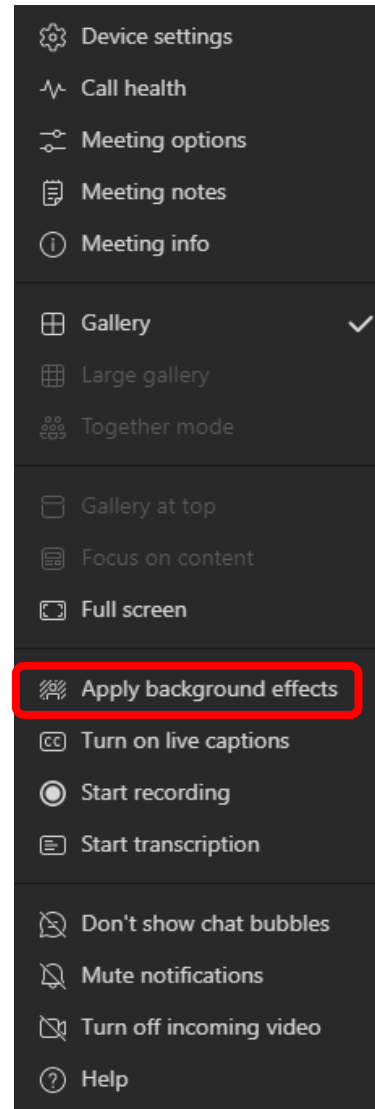
Microsoft Teams interface for a meeting titled "Celebrations on the 5th December". The interface includes a top navigation bar with options like "Chat", "Shared", "Details", "Recap", "Meeting Whiteboard", and "Q&A". A "Join" button is visible in the top right. The main content area features a large video player with a play button and the title "Celebrations on the 5th December". Below the video, it shows the date "2024-10-29 13:34 UTC" and lists the recording and organizing participants: Sue Doherty and Eneida Capaldi. A "Content" section on the right lists files like "Planning doc.docx" and "KVA 50 years 1.jpg". Below this, there are tabs for "Notes", "AI notes", "Mentions (2)", and "Transcript". The "AI notes" tab is highlighted with a red box. Underneath, a note states "Generated by AI. Make sure to check for accuracy." and a "Copy all" button. The "Meeting notes" section contains several bullet points detailing the event schedule, order of activities, engagement activities, event logistics, and food and refreshments. A "Speakers" section at the bottom lists participants: Leeni Szalay Winter, Sue Doherty, and Sorrel Parsons, each with a progress bar indicating their speaking time.



Switch on the Lobby feature in Meeting options



Choose your background in Apply background effects



Microsoft Teams – a summary

- ✓ An online collaboration space for your team
- ✓ Conversation, Wiki & Files tabs by default
- ✓ Add your own extras e.g. Planner, Forms, Weblinks
- ✓ Upload key documents and collaborate in real time (no more attached docs)
- ✓ Chat and @mention to alert colleagues
- ✓ Arrange meetings – links with Outlook calendar + video / audio calls
- ✓ Invite external partners into the space (or what about trustees?)
- ✓ [Teams video training](#)






Whiteboard








Whiteboard


New Whiteboard

 Cyber Security Trai...
Edited: 06/12/2022 13:...

 Staff meeting
Edited: 16/05/2023 09:...

 2024 planning
Edited: 03/11/2023 18:...

 Voice future
Edited: 15/05/2023 12:...

 Support supervisin...
Edited: 09/03/2023 18:...

Room 1 - Jacky, Leeni,
Alison & Alice

ATTACK the charity

What vulnerabilities can you identify? What kind of cyber attacks could these leave the charity open to?

- Testing... Vols and trustees use their own devices
- Personal devices may not have anti virus (or free anti virus)
- Devices may not have good password protection
- People walking in and around an open plan office
- Staff, Volunteers and out side partners may not have training for Cyber security
- Not logging out, cause high risk
- Shared PC, not clear on who would be using it
- Visitors having access to shared computer/laptop
- Phishing emails
- Password hacks, social media
- Malware programmes
- People forget to log out of things when working on shared compute
- Shared wifi can mean it's easy to hack into other people

Room 2

ATTACK the charity

What vulnerabilities can you identify? What kind of cyber attacks could these leave the charity open to?

- volunteers use their own devices
- Sharing Internet with Church
- Volunteers using devices - shared.
- People working from home
- Shared Devices protected
- open room so easy access to computer room
- Finance person working part time- easly to send phishing emails on days they don't work and say something like 'pay urgently for...!'
- Personal device use & working from home - home internet security



Help the Homeless cyber security case study video
youtu.be



Help the Homeless cyber security case study video
youtu.be

Templates

Recommended

My templates

Shared with me

Brainstorming

Problem solving

Design and research

Strategy

Project planning

Retrospective

Games

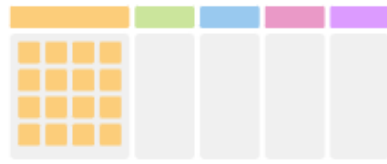
Show for new whiteboards

Search all templates



Recommended

Start with blank canvas



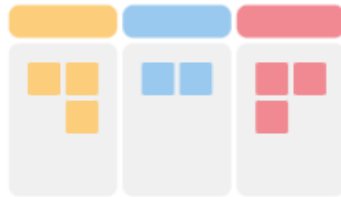
Affinity diagram



Topic Brainstorm



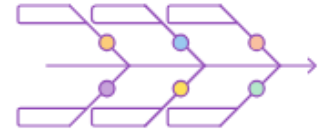
Where in the world



Daily stand-up

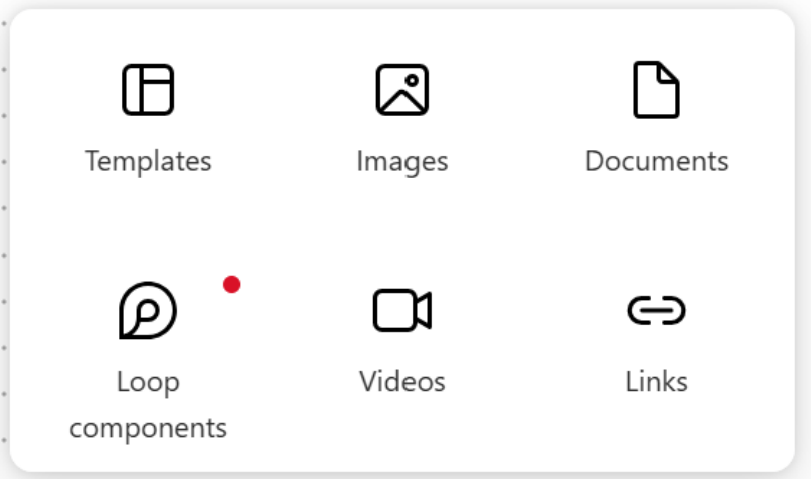
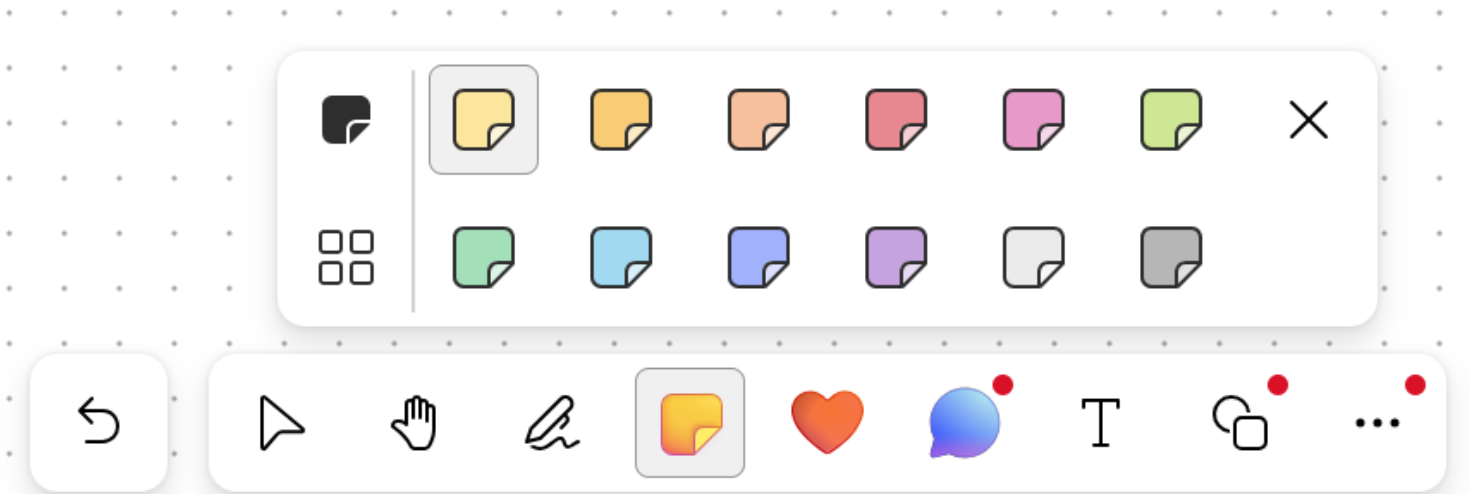


Moodboard






Cause and effect diagram





✓ Copilot licensed gives you options to help analyse board content

-  Suggest ideas and content
-  Categorise notes in view
-  Summarise note content



Demo time





M365 Whiteboard summary

- ✓ An online collaborative space similar to Jamboard, Mural & Miro
- ✓ Share a link or launch directly in a Teams meeting (Share screen and choose Whiteboard)
- ✓ Pick from a range of templates e.g. brainstorming, kanban boards, moodboards
- ✓ Export as an image
- ✓ [Further info](#)



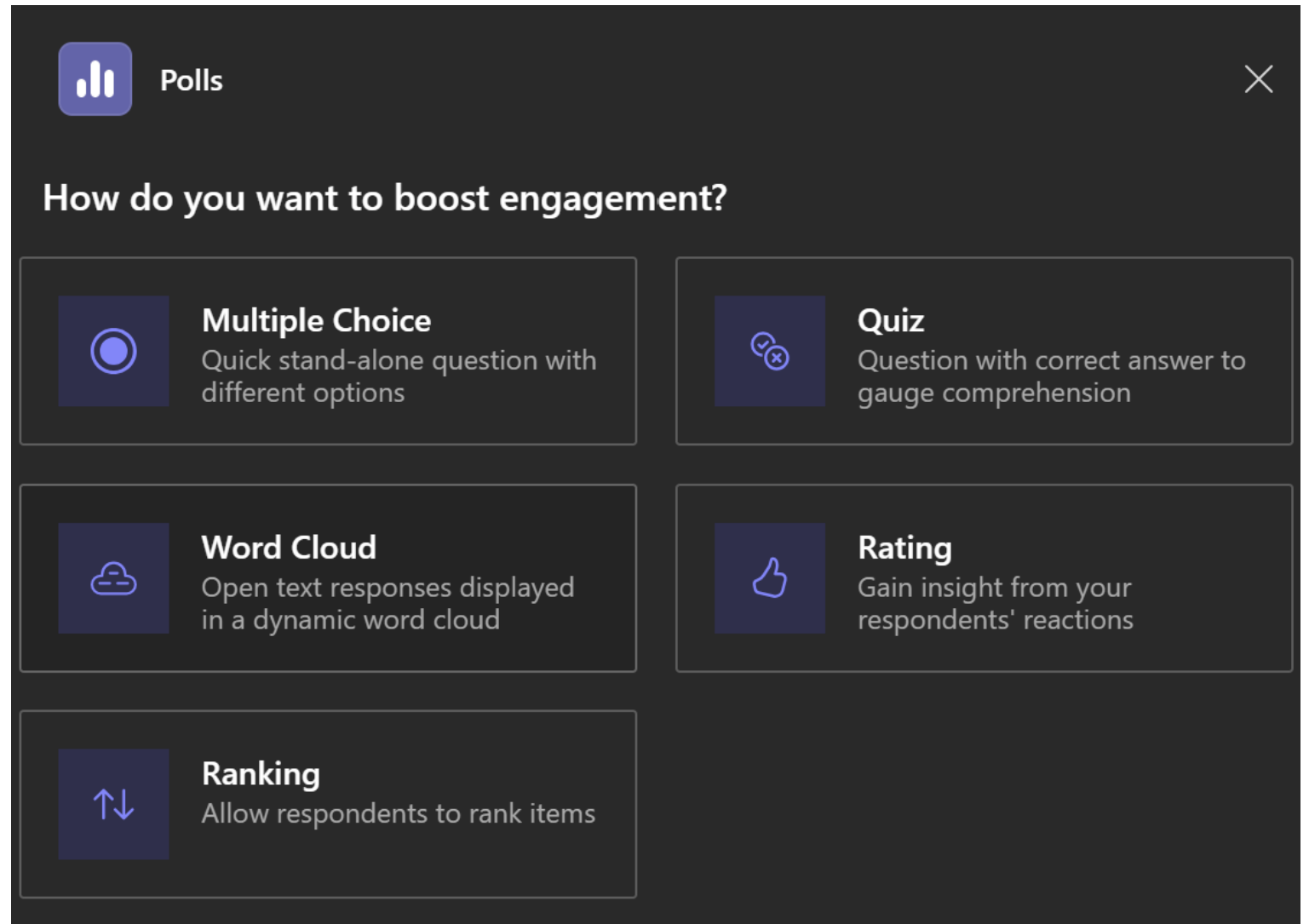


Polls



Use in Teams Calls

- ✓ Easily create multiple choice, quizzes and word cloud polls before or during your meeting
- ✓ Collect responses in real-time



The screenshot displays the 'Polls' interface in Microsoft Teams. At the top, there is a 'Polls' header with a bar chart icon and a close button (X). Below the header, the question 'How do you want to boost engagement?' is displayed. Five poll options are presented in a grid:

- Multiple Choice**: Quick stand-alone question with different options. Icon: A circle with a dot inside.
- Quiz**: Question with correct answer to gauge comprehension. Icon: A question mark inside a circle.
- Word Cloud**: Open text responses displayed in a dynamic word cloud. Icon: A cloud shape.
- Rating**: Gain insight from your respondents' reactions. Icon: A thumbs-up hand.
- Ranking**: Allow respondents to rank items. Icon: Up and down arrows.

Hands on time

✓ 10 mins for you to play!



Take a break

Back in 5 minutes





To Do








To Do – Your personal tasks list

☰

🔍

- ☀ My Day
- ☆ Important
- 📅 Planned 10
- 🚩 Flagged Email 4
- 🏠 Tasks 12
- ☰ September to do 6
- ☰ **Finish off before I go on leave!**
- ☰ Things to do before hong kong 3
- + New list

Get the app.   

Finish off before I go on leave! ...

👤 Share ↕ Sort

- ✓ VC Sutton email re database ☆
- ✓ ARCC 0365 quote ☆
- ✓ Creative Youth IT security audit report ☆
- ✓ Annual Report notes for Joanne ☆
- ✓ Get back to Kitchen Collective ☆
- ✓ Get back to Lambeth Larder ☆
- ✓ Get back to Urban Dandelion ☆
- ✓ Get back to East London Community group ☆

+ Add a task



View within Outlook too

The screenshot displays the Outlook interface. At the top, there is a search bar labeled "Search To Do". On the left, a navigation pane lists various Outlook features: Mail, Calendar, People, Teams, Tasks, and To Do. The "To Do" icon, which is a blue checkmark, is highlighted with a red square. Below this, a list of task categories is shown with their respective counts: My Day (1), Important (4), Planned (87), Assigned to me (63), Flagged email (465), Tasks (1), and "Covering Sorrel's leave" (5). The "Covering Sorrel's leave" category is selected and highlighted in blue. The main pane shows a list of tasks under the heading "Covering Sorrel's leave". The tasks are: "Add a task", "Sort out invoice for GLA event" (due today), "Get back to Abby re training sessions for after Easter", "Check in with Mahirah re Comms goals" (due Wed, March 19), "Send reminder re annual evaluation survey" (due tomorrow), and "Pick up with Young Westminster re their conference" (due Thu, March 20). The interface includes standard Outlook navigation icons like "Grid" and "List" views.

Category	Count
My Day	1
Important	4
Planned	87
Assigned to me	63
Flagged email	465
Tasks	1
Covering Sorrel's leave	5
Finish off before I go on leave!	
Nov things	5
Oct things	
September to do	4

- Add a task
- Sort out invoice for GLA event
☀ My Day • 📅 Today
- Get back to Abby re training sessions for after Easter
- Check in with Mahirah re Comms goals
📅 Due Wed, March 19
- Send reminder re annual evaluation survey
📅 Tomorrow
- Pick up with Young Westminster re their conference
📅 Due Thu, March 20



Demo time





Planner





KD **Planner** ☆
... > General

Board Charts Schedule ...

KW AR SP PT +1 Members ▾

To do **In progress** **Done** **Add new bucket**

To do

In progress

- Evaluation
15/06 ...
KW Kate White

Done

- Book venue ...
- Contact all speakers ...
- Finalise agenda ...
- Order lunch ...


Hide completed 2 ^

Create Sway round up
22/06 ...

SP Completed by Sorrel Parsons on 21/06

SWAY

Aim - 1) to share back with attendees - embedding resources & adding links out to Step by step guides etc Focus on 1st section and then just slides from other speakers
2) To share with those who didn't attend -





My Plans > **DF Digital Foundations work plan** Grid **Board** Schedule Charts Share

Filters Group by Bucket

Q4 - Feb 24	Q4 - Mar 24	Q4 - Apr	Q1 - May
<p>Data / security best... Training</p> <ul style="list-style-type: none"><input type="radio"/> Bitesize - 5 priorities cybersecurity sessions<input type="radio"/> Write copy for sessions & schedule dates Oc <p>0 / 1</p> <p>Due </p>	<p>Back office systems... Training</p> <ul style="list-style-type: none"><input type="radio"/> Office 365 training review & schedule<input type="radio"/> Agree sessions & descriptors / copy<input type="radio"/> Schedule ahead Sept - Jan <p>0 / 2</p> <p>Due </p>	<p>1:1 support</p> <ul style="list-style-type: none"><input type="radio"/> One to ones overspill<input type="radio"/> [Redacted] - Teams training<input type="radio"/> [Redacted] Methodist Church - Lee - dom<input type="radio"/> HEAR Christine - anti virus conversation <p>0 / 3</p>	<p>Completed</p>
<p>Planning & choices Research & learning</p> <ul style="list-style-type: none"><input type="radio"/> Capturing learning from LEAH strategy & feeding back <p>Due </p>	<p>Completed tasks 1</p>	<p>Completed tasks 1</p>	



Demo time

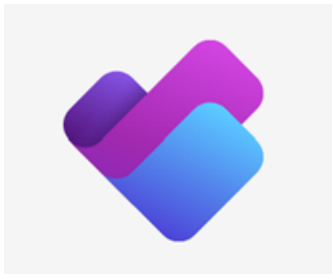




M365 Planner – a summary

- ✓ Use to manage projects and collaborate with your team
- ✓ Add your own Buckets (columns) e.g. To do, In progress, Completed or Jan, Feb, March etc
- ✓ Add tasks and allocate to colleagues & set deadlines
- ✓ Add checklists, upload files and make comments
- ✓ Colour code / categorise tasks
- ✓ View as buckets, as a calendar or filter on e.g. categories, tasks allocated to you, outstanding tasks
- ✓ [Planner video training](#)





New Planner just out!

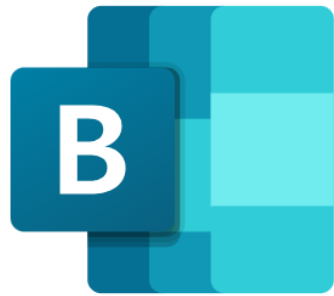
- ✓ The New Microsoft Planner brings together the simplicity of To Do, collaboration of Planner, power of Microsoft Project, and intelligence of Microsoft Copilot into a single, simple solution that spans from individual task management to enterprise and professional project management.
- ✓ [See the Planner Help Centre for more info](#)



Hands on time

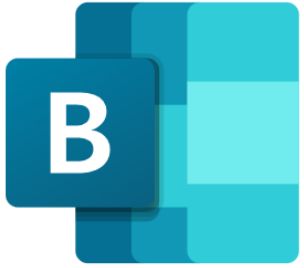
✓ 5 mins for you to play!





Bookings





M365 Bookings – two options

- ✓ Create your own **personal booking page** to share with others so they can book a slot in your calendar
- ✓ Create a **Shared booking page** with Services allowing booking across multiple staff's availability (via calendar integrations)

The screenshot displays the Microsoft Bookings interface. At the top, there is a teal header with the word "Bookings" and a grid icon. Below the header, the main content area is divided into two sections. The first section is titled "Personal booking page" and features a circular profile picture of a woman, "Kate White", with the text "Booking page" below it. The second section is titled "Shared booking pages" and shows a card for "Superhighways" with the role "Administrator" and a "Share" button. To the right of the main content, there is a promotional card for "Microsoft Bookings" with the text "Try Bookings for your team" and a "Go to book.ms" button.

Two components

- ✓ **Bookings admin app** – customise the Bookings page for your needs – define appointment types & details, manage staff schedules & availability, set business hours, and customise how appointments are booked including adding extra questions to the standard booking form
- ✓ **Booking web page** – share a direct link (including adding to your email signature), post to Facebook or embed in a web page so people can book appointments for a specific service and / or with a specific person





Add info & choose options


- ✓ Add a title, select appointment duration and set your availability
- ✓ Choose whether you want to share Publicly or Privately
- ✓ Finally select Teams meeting (as appropriate) and add a description

New bookable time - Calendar - katewhite@superhighways.org.uk


Create Feedback


 Add a title (e.g. office hours, 1:1, mentorship)


 Slot duration



 Mon-Fri, 08:00 - 18:00 [Change availability](#)


Note: People can book time with you only during the hours you specify and when you don't have a conflict.

 Privacy

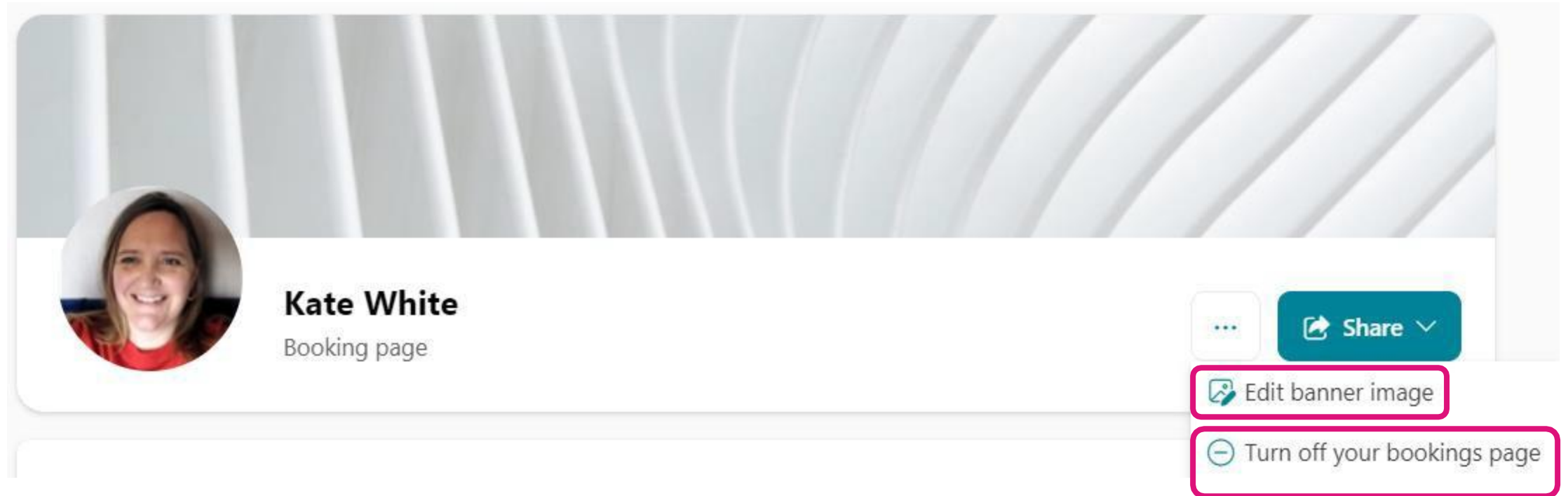
Public
 Everyone will be able to see this bookable time on your booking page.

Private
 Only people with the link will be able to see this bookable time on your booking page.

 Search for a room or location  Teams meeting

 Add a description. This will appear on your booking page.

Personal booking page

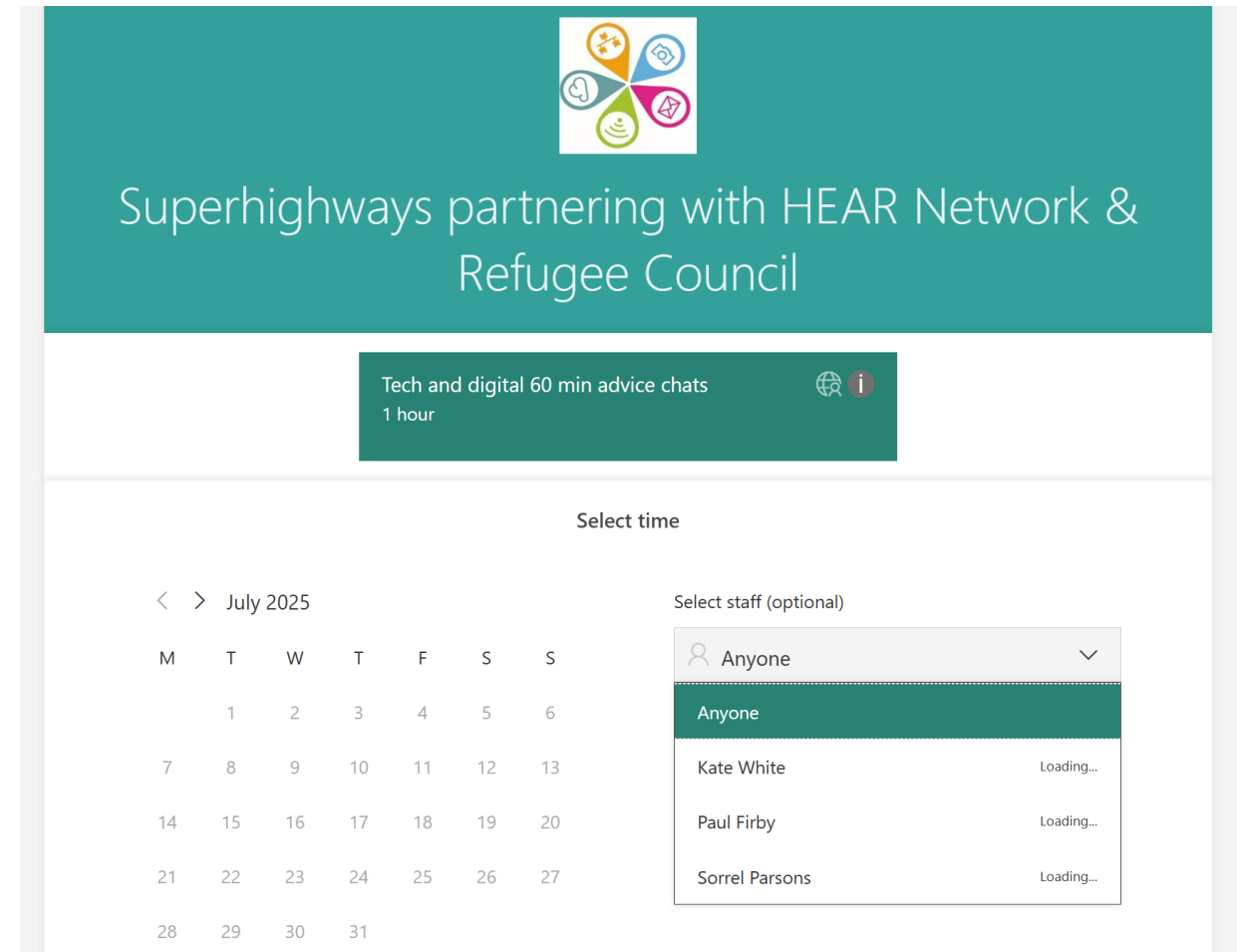


- ✓ Customise the banner image
- ✓ Note you can also Turn your bookings page off here (this takes all Bookings offline)



Service booking page

- ✓ You can connect multiple people's calendars
- ✓ People can find a time to book when all are free
- ✓ OR people can select an appointment with just one person at a time that works for them



The screenshot shows a service booking interface. At the top, there is a teal header with a logo on the left and the text "Superhighways partnering with HEAR Network & Refugee Council" on the right. Below the header is a dark teal button labeled "Tech and digital 60 min advice chats" with "1 hour" below it and a globe icon. The main content area is titled "Select time" and features a calendar for July 2025. The calendar shows days of the week (M, T, W, T, F, S, S) and dates from 1 to 31. To the right of the calendar is a "Select staff (optional)" dropdown menu. The menu is currently open, showing "Anyone" as the selected option. Below it, three staff members are listed: "Kate White", "Paul Firby", and "Sorrel Parsons", each with a "Loading..." status next to it.

Superhighways partnering with HEAR Network & Refugee Council

Tech and digital 60 min advice chats
1 hour

Select time

< > July 2025

M	T	W	T	F	S	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Select staff (optional)

Anyone

Anyone

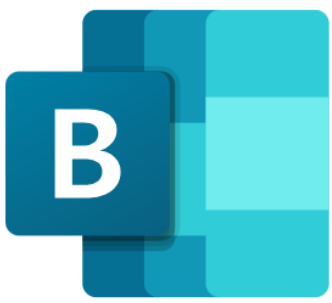
Kate White Loading...

Paul Firby Loading...

Sorrel Parsons Loading...

Demo time





M365 Bookings – a summary

- ✓ An online booking calendar which integrates with Outlook (& Teams), set up directly from Outlook on the web or the Bookings app
- ✓ Saves time when arranging appointments giving flexibility for people to book a time that works best for them
- ✓ Email (& SMS text) notifications can reduce no-shows
- ✓ Choose a Personal booking page or a Team booking page linking to multiple calendars
- ✓ Collect additional custom data via the booking form
- ✓ [Further info](#)
- ✓ [Superhighways Step by step instructions for a Personal bookings page](#)





OneNote



OneNote training / Intro to OneNote / What is OneNote?

What is OneNote?

▶ Video

Start using OneNote

▶ Video

Next: Take notes

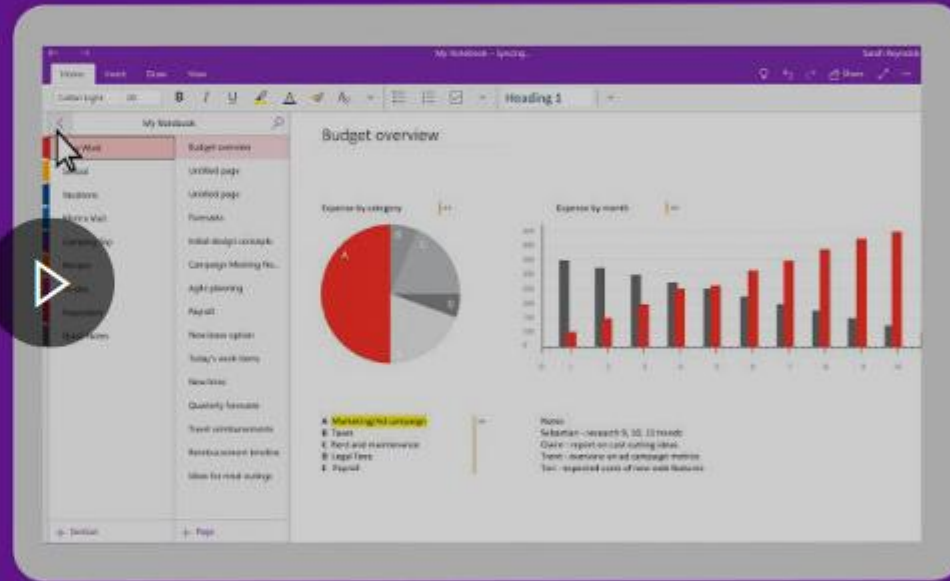
What is OneNote?



[Watch video here](#)



Start using OneNote

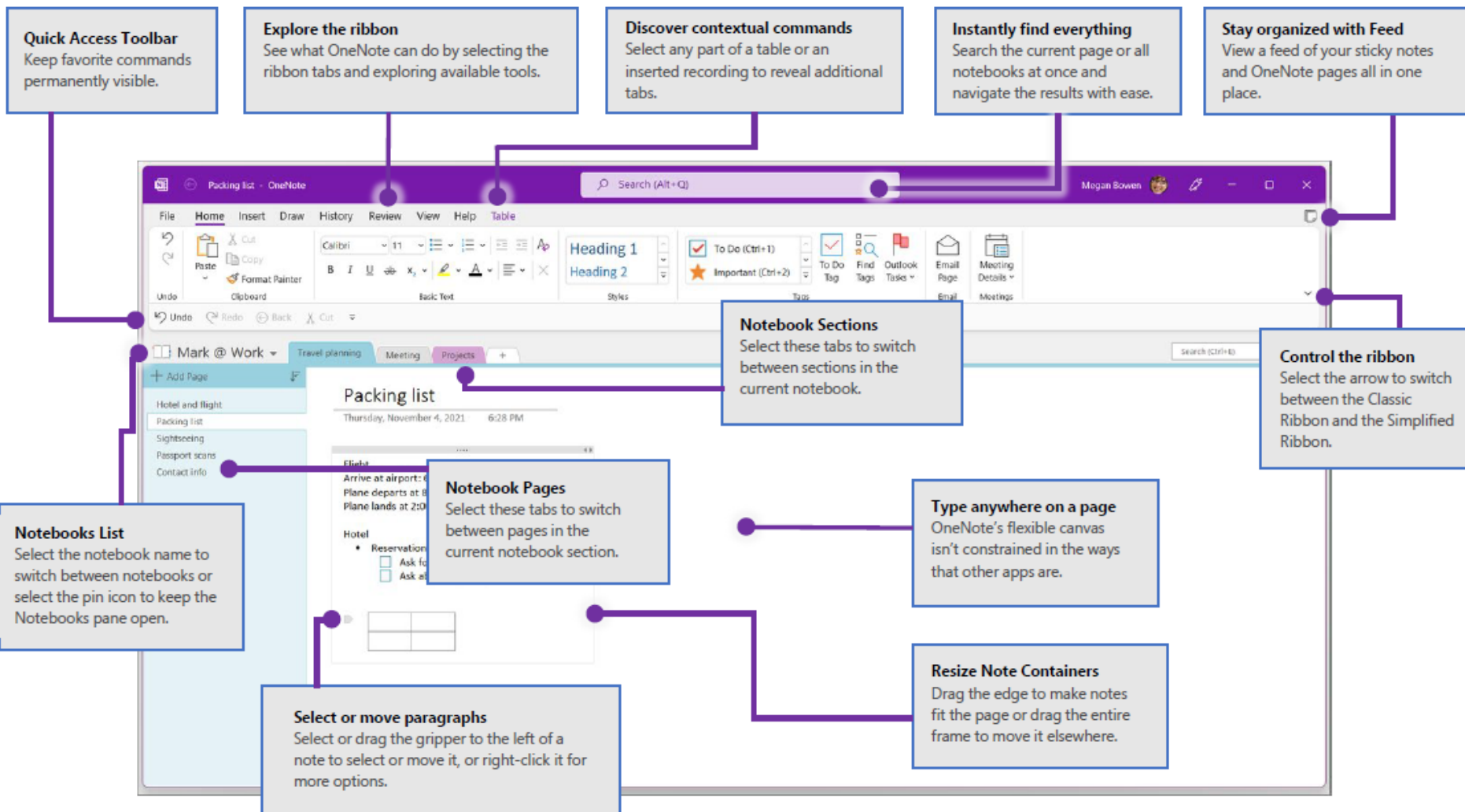


[Watch video here](#)



Quick Start Guide

New to OneNote? Use this guide to learn the basics.



Quick Access Toolbar
Keep favorite commands permanently visible.

Explore the ribbon
See what OneNote can do by selecting the ribbon tabs and exploring available tools.

Discover contextual commands
Select any part of a table or an inserted recording to reveal additional tabs.

Instantly find everything
Search the current page or all notebooks at once and navigate the results with ease.

Stay organized with Feed
View a feed of your sticky notes and OneNote pages all in one place.

Notebook Sections
Select these tabs to switch between sections in the current notebook.

Notebook Pages
Select these tabs to switch between pages in the current notebook section.

Notebooks List
Select the notebook name to switch between notebooks or select the pin icon to keep the Notebooks pane open.

Control the ribbon
Select the arrow to switch between the Classic Ribbon and the Simplified Ribbon.

Type anywhere on a page
OneNote's flexible canvas isn't constrained in the ways that other apps are.

Resize Note Containers
Drag the edge to make notes fit the page or drag the entire frame to move it elsewhere.

Select or move paragraphs
Select or drag the gripper to the left of a note to select or move it, or right-click it for more options.





Organisations

Contacts

Campaigns

Monitoring

Events

Projects

Surveys

E-mailing from Aide

Features Aide will con...

Features Aide can't i...

Questions to discuss ...

Aide Upgrade Release

Add section

Creating an Event

Managing Event Bookings

Course details

Ticket types

Event booking forms

Checking people in

Participant status

Private links

Add page

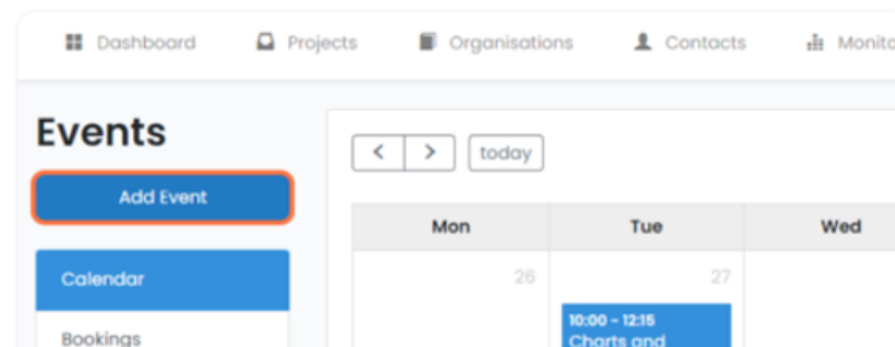
Creating an Event

Monday, September 11, 2023 12:40 PM

Creating an Event in Aide

Please note that all our Events are imported into our PowerBI dashboard so please delete any events that do not take place or are test events.

1. Log in to Aide CRM and Click on the Events Tab and then Click on Add Event in the top left-hand corner of your screen.



Demo time





M365 OneNote

- ✓ Use via the Windows or Mobile App or directly within Teams
- ✓ Store all your notes in one place (the paper notebook alternative)
- ✓ Organise in Pages & Sections
- ✓ Add text, multimedia & annotate via ink
- ✓ Share and collaborate with others
- ✓ Search for notes via tags & keywords
- ✓ [Further info](#)
- ✓ [Cheat sheet download](#)







Loop – 3 components

- ✓ **Loop components** are portable pieces of content that stay in sync across everywhere they're shared - on a Loop page, in a chat, email, meeting, or document. They can be lists, tables, notes and more. Access in Teams, Outlook, OneNote, Whiteboard, or the Loop app.
- ✓ **Loop pages** are flexible canvases in the Loop app where you can bring together people and all your components, links, tasks, and data. Loop pages can be shared across Microsoft 365 apps as a link or an embedded Loop component.
- ✓ **Loop workspaces** are shared spaces that allow you and your team to see and group everything important to your project, making it easy for you to catch up on what everyone is working on and track progress toward shared goals.
- ✓ [Get started with Loop info](#)



Demo time



Hands on time

✓ 10 mins for you to play!



About Superhighways....

A project of Kingston Voluntary Action, we provide digital, data & tech advice, support & training to the sector, including:

- ✓ Tech support
- ✓ Training
- ✓ Websites
- ✓ Digital, data & tech strategy
- ✓ Digital inclusion
- ✓ Digital leadership
- ✓ Digital / data consultancy
- ✓ Datawise London



Sign up to our newsletter for free training offers <https://superhighways.org.uk/e-news/>

Thanks for listening



superhighways
harnessing **technology** for **community** benefit

Kate White & Paul Firby
info@superhighways.org.uk
www.superhighways.org.uk

