



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

# Making full use of M365

**Outlook** & a bit of Todo and Planner

**Power Automate**

**Sharing Information** – Teams, Sway, SharePoint

**CoPilot**

**Paul Firby – Superhighways**

#DigitalFoundations

# Digital Foundations programme

There are many ways we can help small community organisations make sound choices about the digital tools and technology they use.



## Communications made easy

Raise your profile using digital tools to engage supporters and fund your future

[Read more »](#)



## Digital basics

Work and collaborate online using free and affordable digital tools and technology

[Read more »](#)



## Websites for communities

Put your website at the heart of your charity or community organisation's story

[Read more »](#)

[Find out more about the Digital Foundations programme](#)





# Making full use of M365

## Outlook

Paul Firby – Superhighways

#DigitalFoundations

# What we could cover today, but we don't have time...

- ✓ Settings & views
- ✓ Flagging & categorising
- ✓ Sorting, filtering & search
- ✓ Sub boxes, moving emails
- ✓ Scheduling emails & mail merge
- ✓ Signatures & Out of office
- ✓ Encrypting emails
- ✓ Email templates
- ✓ Using CoPilot with Outlook
- ✓ Turning emails into Tasks
- ✓ Snoozing emails
- ✓ Using rules
- ✓ Focused & Conversation modes
- ✓ Quick steps

*\* And becoming familiar with Settings options and using Help so you can look things up & make changes in future \**



# Why Outlook on the web?

Within Microsoft 365, Outlook for Windows requires a M365 Business Standard or M365 Business Premium licence.

These are not provided as donated/free within the non-profit program.

Outlook on the web is available in the non-profit program as part of the Business basic licence for free (up to 300 users)

And it does everything (ok - there is probably an exception) that you need it to do!



# Get more help with the new Outlook on the web

## Email: Compose or reply

Create, reply to, or forward email messages in Outlook on the web

Create and add an email signature in Outlook on the web

Add pictures and attach files to emails in Outlook

Turn on automatic forwarding in Outlook on the web

Block senders or unblock senders in Outlook on the web

Use intelligent technology in Outlook on the web

## Email: Customize settings

Focused Inbox for Outlook

Reset your Microsoft 365 password

POP and IMAP email settings for Outlook

## Email: Organize

Manage email messages by using rules in Outlook

Organize your inbox with Archive, Sweep, and other tools in Outlook on the web

Use categories in Outlook on the web

Recover and restore deleted items in Outlook

Filter junk email and spam in Outlook on the web

# Microsoft cheat sheets

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

## Cheat sheet - Outlook on the web Mail



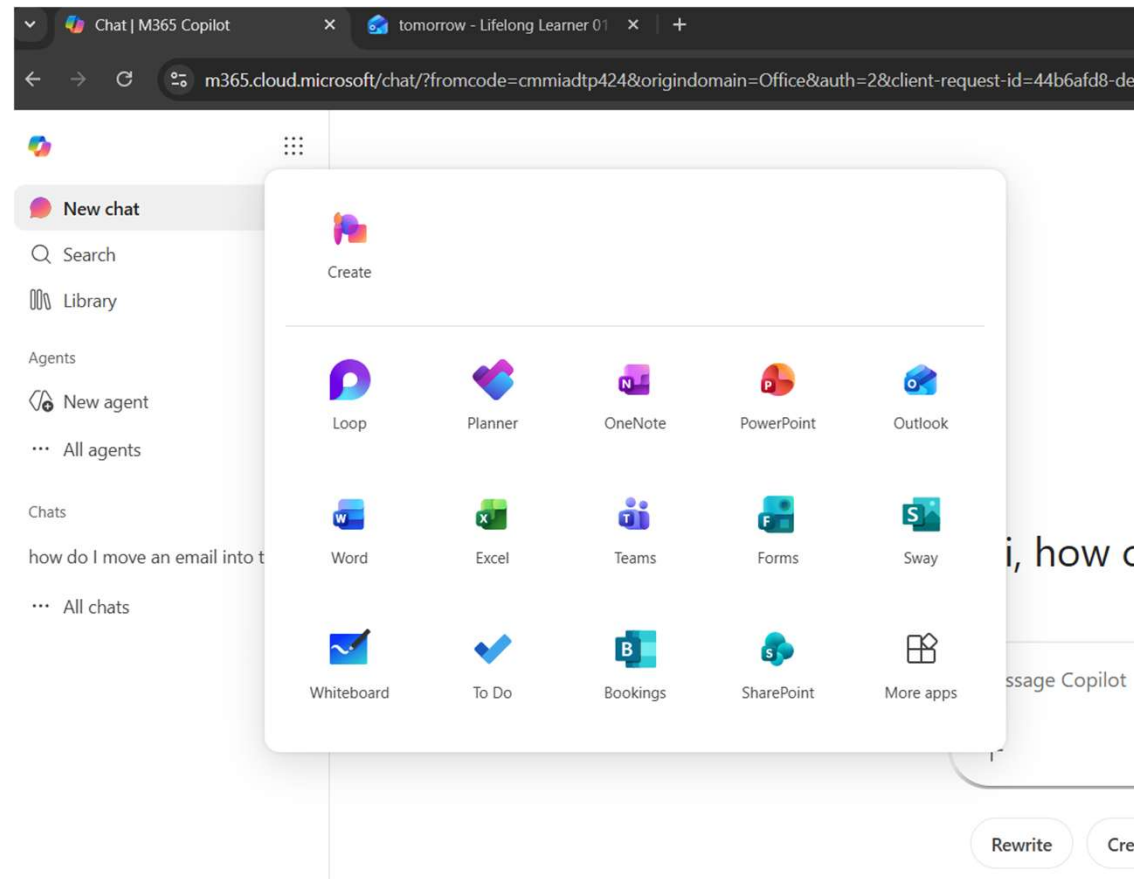
### Organize your Inbox

The screenshot shows the Outlook web interface with the following callouts:

- Switch between **Focused** and **Other** inbox.
- Filter, sort, and turn on **Conversations** and **Focused Inbox**.
- See only your **Unread** messages.

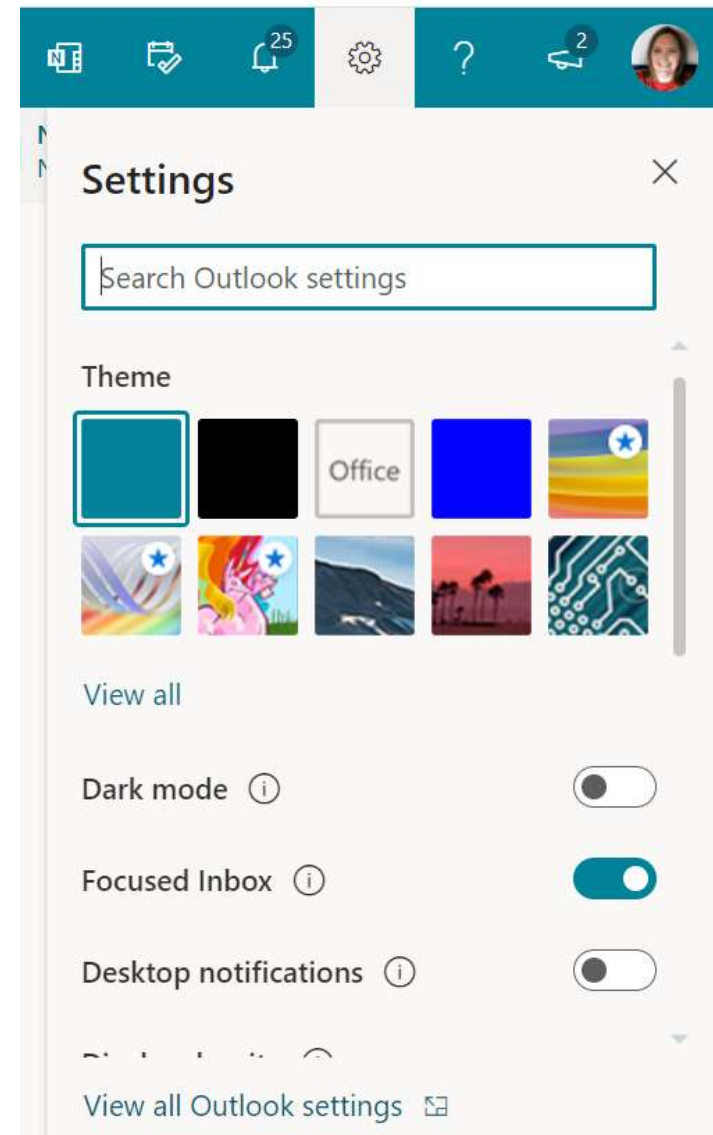


# Outlook web app (online Outlook accessed via a browser)



# Outlook Settings

- ✓ Click on the cog wheel at the top right to access Settings
- ✓ Either scroll through or use the Search box e.g. 'Out of Office' will find you the Automated responses settings



# Changing your View

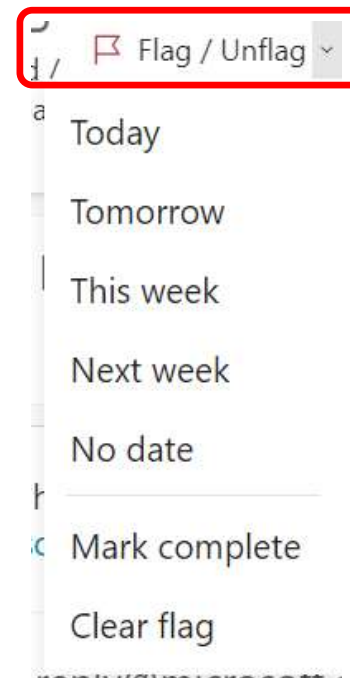
- ✓ Select the View tab
- ✓ Click on e.g. Message preview and Reading pane and choose the options that suit you – e.g. whether you have a preview of emails as well as a list
- ✓ Choose to select (or not) Conversation View (this links email replies in a single thread but allows you to navigate to a specific email when you click the arrow to expand the conversation)
- ✓ Choose how your emails are sorted – e.g. by Date (you can choose which order)
- ✓ Alternatively use the View settings option (top right) for more options including Focused inbox



# Flagging emails for follow up

Useful as a reminder to follow up on an email when you don't have time there and then...

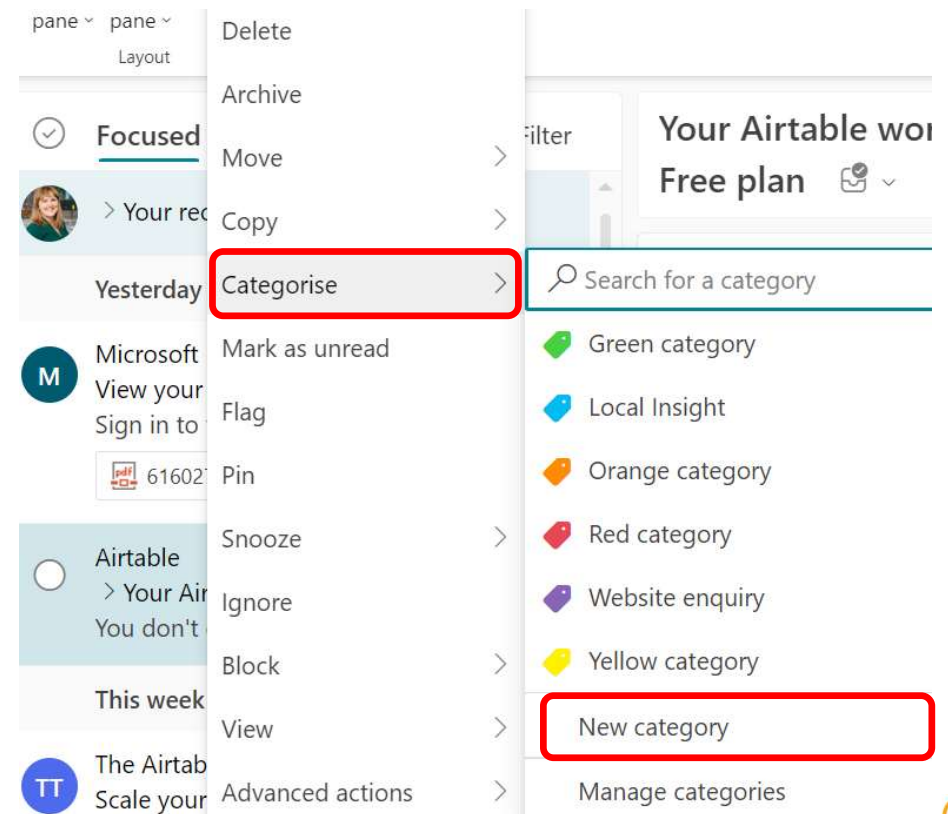
- ✓ Right click on an email
- ✓ Select Flag
- ✓ Or select email and use the Flag/Unflag option in the menu bar, Home tab
- ✓ Here you can choose a timeframe



# Categorising emails

Categorise your emails against standard or custom options – you can then search and filter for quick access

- ✓ Right click on an email
- ✓ Select Categorise & select a Category
- ✓ To add a new Category, select New category



✓ Choose Manage categories so you can:

- ✓ Create a new category
- ✓ Rename existing ones
- ✓ Change the colours

## Categories

Categorising your emails and calendar can help you organise and track your time or person. You can create new categories and assign them names and colours.

+ [Create category](#)

 Green category		
 Local Insight		
 Orange category		
 Red category		
 Website enquiry		
 Yellow category		

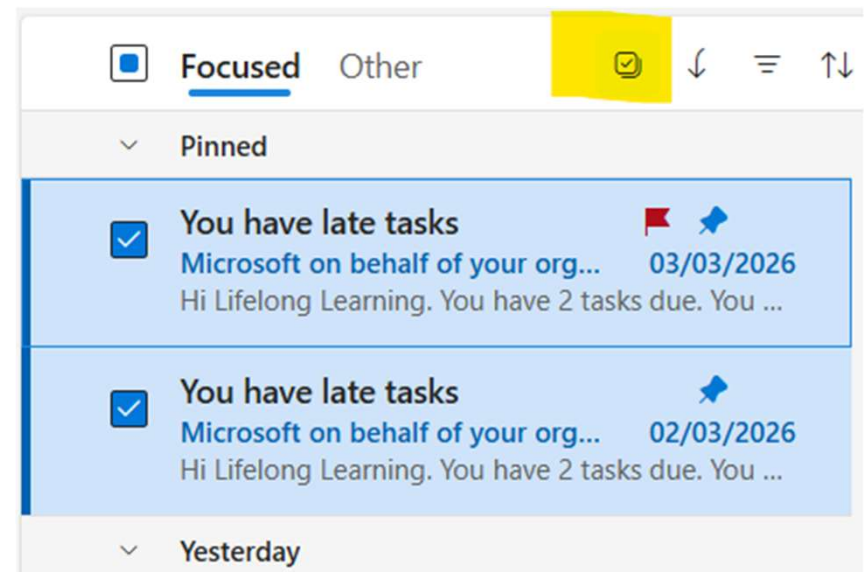


# Using the Select Box to Manage Multiple Emails

Click on the select box at the top of the email list:

Select emails you wish to action together

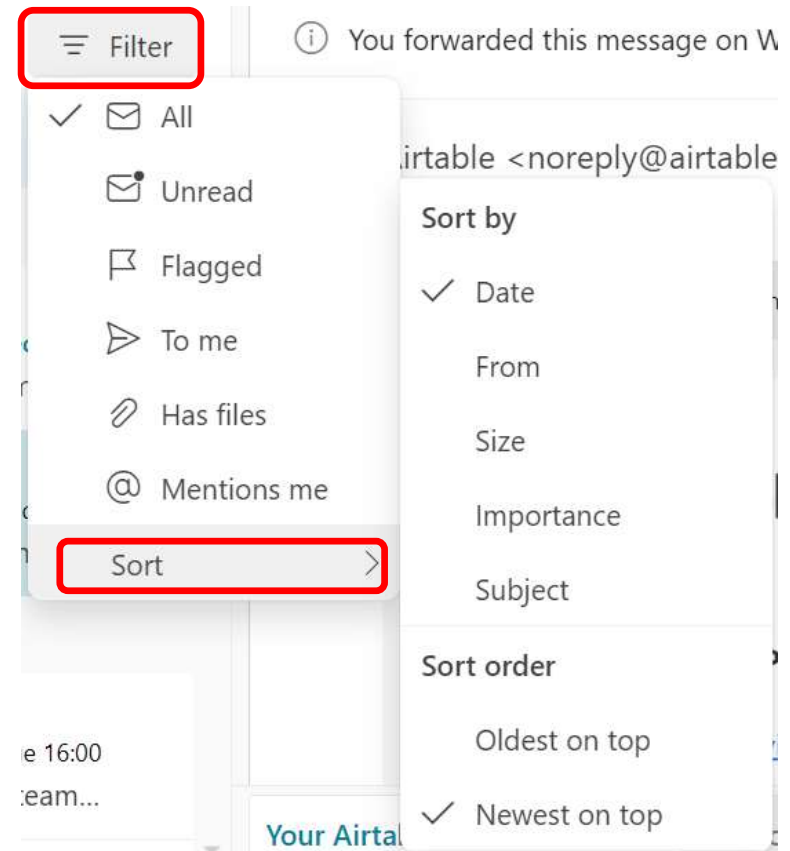
Choose the action: delete, move, categorise, move , flag etc.



# Filtering & sorting

Filtering & sorting can help you quickly find and action an email

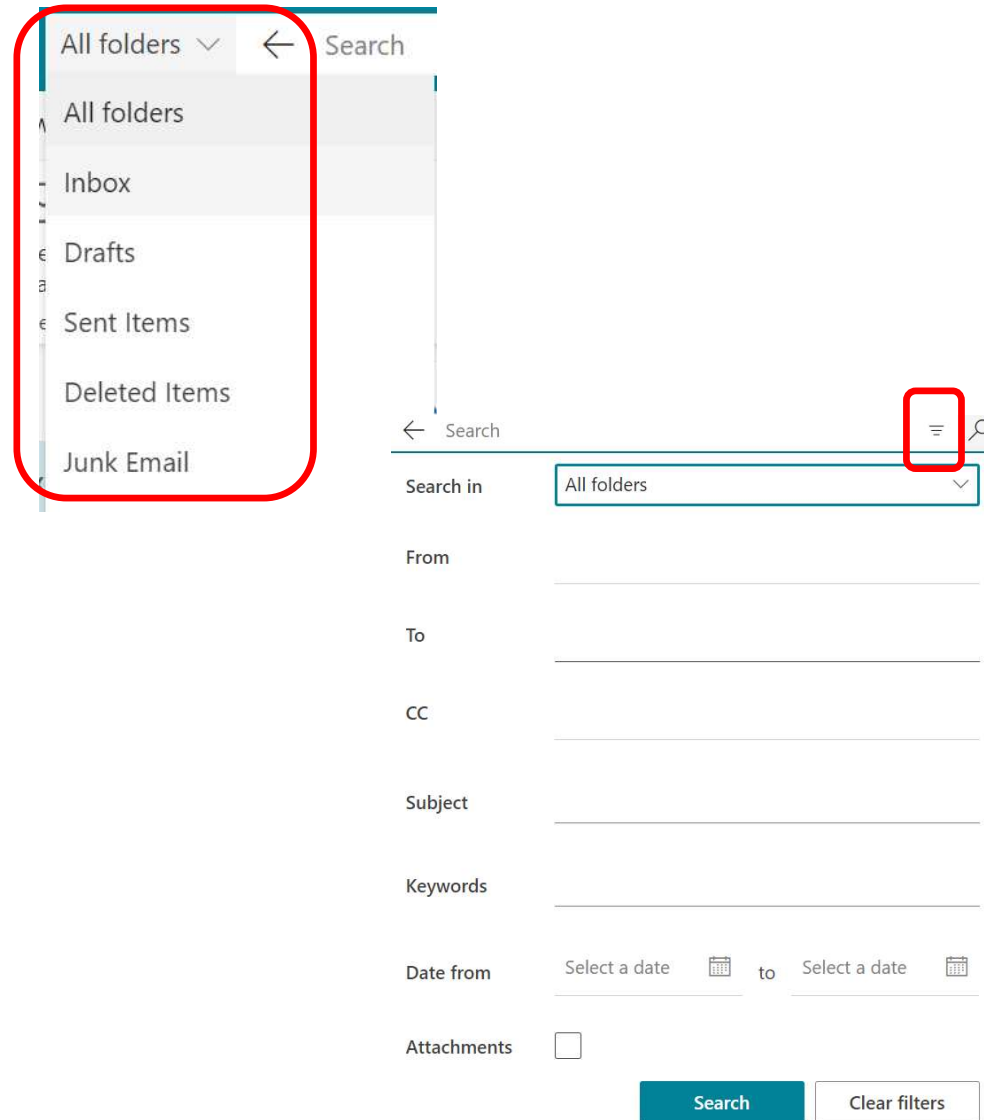
- ✓ Click on the Filter icon at the top right of your list of emails
- ✓ Either Sort on e.g. Size, Date, From (and reverse the sort to suit) and your emails are re-ordered accordingly
- ✓ Or choose one of the Filter options e.g. Flagged, Unread or Has files – and only those email will be shown



# Using search

The Search bar is at the top of your Window

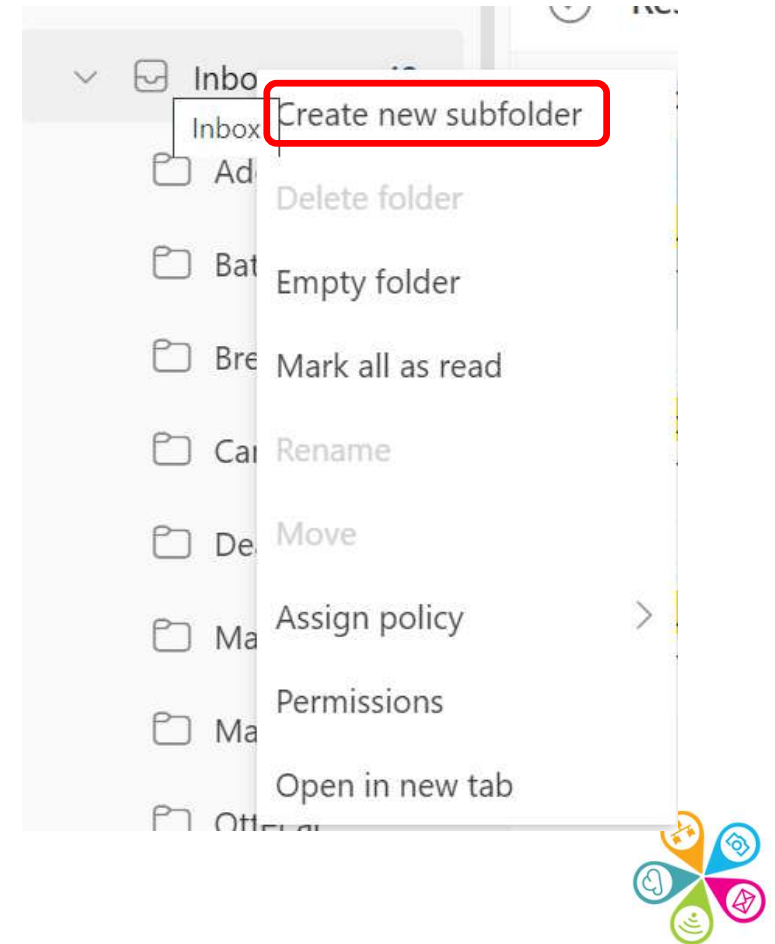
- ✓ By default, search will look in all folders. Click the left arrow to specify a particular folder to search in e.g. Sent
- ✓ Select the Filter icon at the right of the Search bar for more advanced search options as shown



# Sub folders

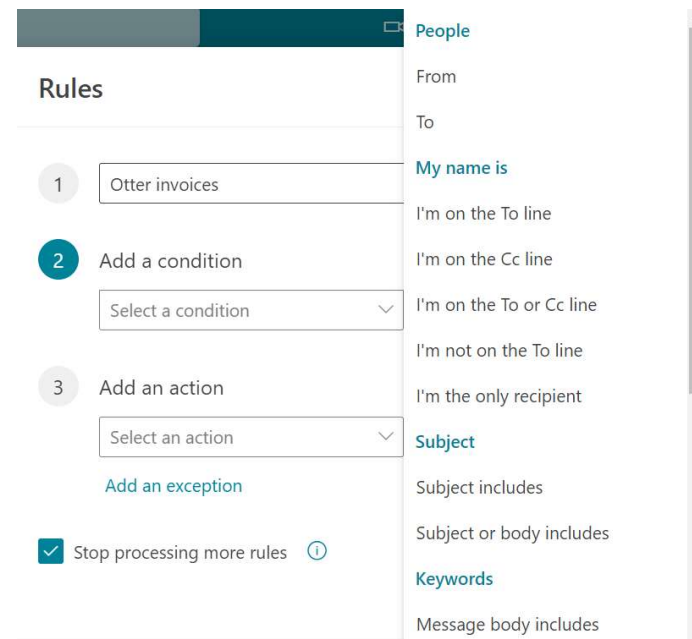
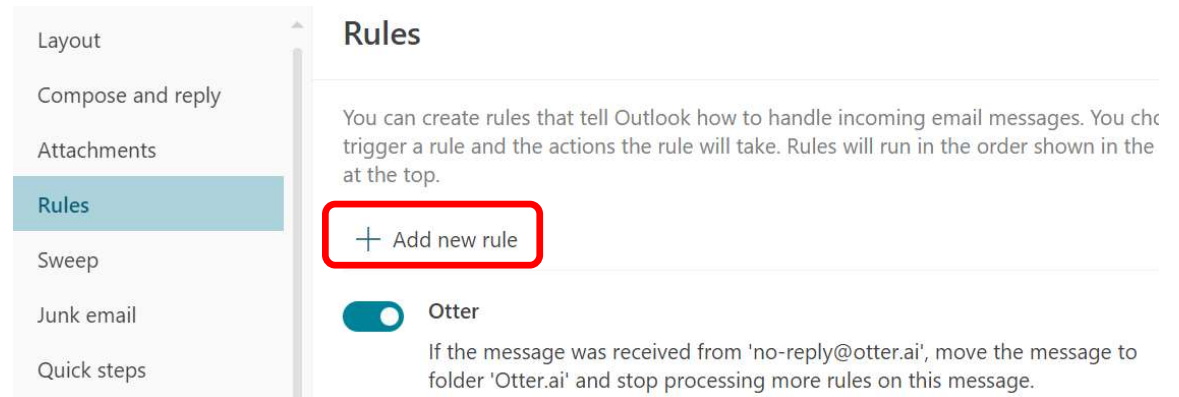
Setting up sub folders can help you organise your inbox to find emails you need...

- ✓ Right click on your Inbox
- ✓ Select Create new subfolder
- ✓ Give your folder a name
- ✓ Either right click on emails and choose Move to folder
- ✓ Or drag and drop emails to this folder



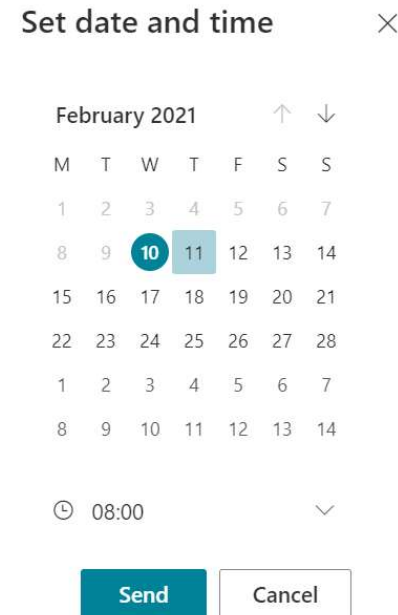
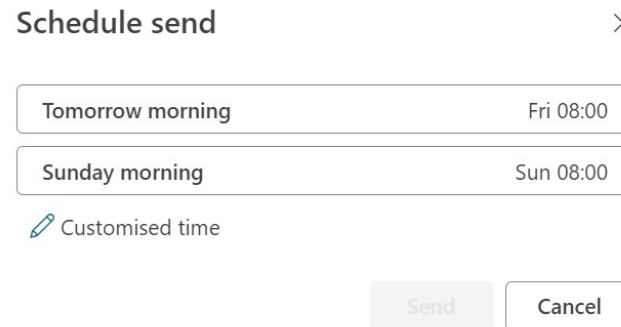
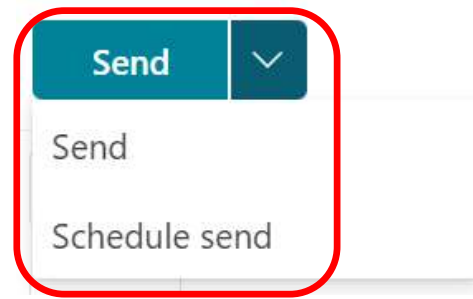
# Rules

- ✓ Search for Rules via the Settings cog and select Inbox rules
- ✓ Here you'll see any rules already applied to your account
- ✓ You can also Add a new rule
- ✓ Identify your new rule with a name and then choose the Condition and Action from the options available



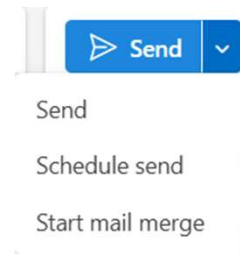
# Scheduling send

- Click the Down arrow next to Send and select Schedule send
- Now choose the date and time from suggested options or choose **Customised time** and choose exactly when you'd like the email to send



# Send Mail Merge

- Click the Down arrow next to Send and select
- Now choose the recipients.
- Every recipient will receive their own copy of the email without other recipients listed




# Adding / editing signatures

- ✓ Search for signature via the Settings cog
- ✓ Add your signature and choose whether to include just in new messages or also for replies and forwards
- ✓ Bookings link!

## Compose and reply

### Email signature

Create a signature that will be automatically added to your email messages.



The toolbar contains the following icons from left to right: an image icon, a link icon, a text color icon (AA), a background color icon (A with a diamond), a bold icon (B), an italic icon (I), an underline icon (U), a highlighter icon (pencil with a checkmark), a text color icon (A with a checkmark), a bulleted list icon, a numbered list icon, a reply icon (left arrow with a checkmark), and a reply all icon (right arrow with a checkmark).

- Automatically include my signature on new messages that I compose
- Automatically include my signature on messages I forward or reply to

# Out of Office (Automatic Replies)

- ✓ Search for Out of Office in Settings
- ✓ Then choose Automatic Replies
- ✓ Toggle Automatic replies on
- ✓ Set a date range *(or a reminder in your calendar to manually switch this off when you're back!)*
- ✓ You can set a different message to send internally (to your colleagues) and externally

## Automatic replies

Use automatic replies to let others know you're on holiday or aren't replies to start and end at a specific time. Otherwise, they'll continue

Automatic replies on

Send replies only during a time period

Start time 13/04/2023 08:00

End time 14/04/2023 08:00

Send automatic replies inside your organisation

Rich text editor toolbar with icons for undo, font color, background color, bold, italic, underline, link, unlink, bulleted list, numbered list, and indent.

Add a message here

Send replies outside your organisation

Send replies only to contacts



# Encrypting emails

## Sending encrypted emails (Outlook / M365)

- Email is protected so only the intended recipient can read it
- Works with any email address – no Microsoft account required

## What recipients experience

### Microsoft 365 users:

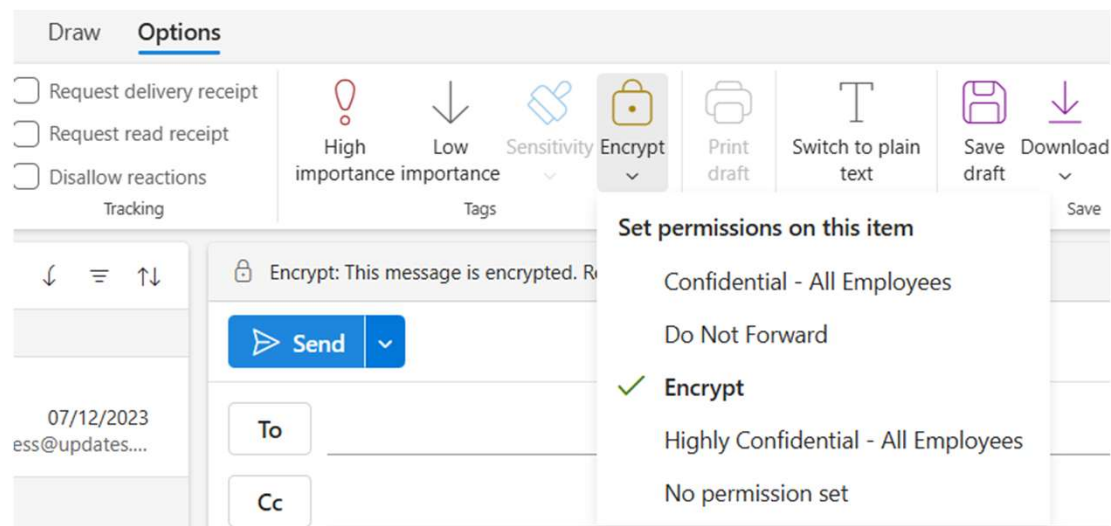
- Opens directly in Outlook
- No extra steps

### Gmail / other email users:

- Click “Read the message” link
- Enter a one-time passcode or sign in

### Non-technical users:

- May need guidance the first time
- Extra step compared to normal email



# Email Templates

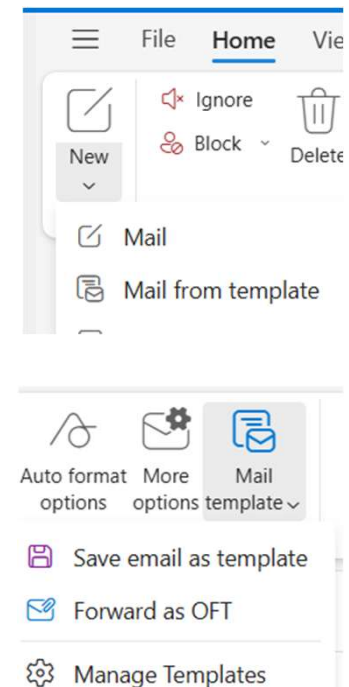
Access via: settings, new or mail template

Reusable, pre-formatted emails:

Outlook templates let you save messages (including subject, content, formatting, and even attachments) so you can quickly reuse them instead of writing from scratch.

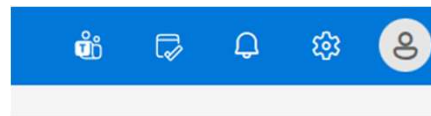
Improve efficiency and consistency:

They help you send replies faster while keeping messaging consistent, reducing errors and ensuring a professional tone across communications.



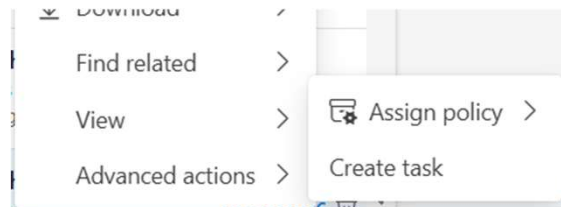
# Turning emails into tasks

Click tasks in top bar



Select email & right click, create task.

You can then edit the task title, give it due dates etc.



Quick steps great for this!



# Open another mailbox via web

- ✓ Click on your profile pic / initials in the top right and select Open another mailbox
- ✓ Type in the mailbox you need to open (this will depend on what you have access to) and click Open. It will open in a new Tab.

Open another mailbox

Open

Cancel



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# Making full use of M365

## Power Automate

Paul Firby – Superhighways

#DigitalFoundations

An intro to:

# Power Automate

Part of our Digital  
Foundations programme



# What is Power Automate?



- ✓ Part of the Microsoft 365 suite
- ✓ Enables creation of automated data sharing & workflows between different applications and services
- ✓ 'Connectors' serve as bridges between different systems either within M365 or with external applications
- ✓ There are a range of templates to help you get started



# What is Power Automate?

It lets you create simple automations so that tasks happen automatically instead of being done manually.

Every automation follows a basic pattern:

- A trigger (something happens)
- One or more actions (what happens next)
- Optional conditions (extra rules if needed)

Think of it as linking your systems together so they talk to each other and do the admin for you.



# How does an automated workflow work?

Automations have 3 basic steps (which might be repeated if it's a complicated flow):

- ✓ Step 1: Choose a source & a destination
- ✓ Step 2: Set up a trigger
- ✓ Step 3: Define an action



# Common triggers include:

## Emails

- When a new email arrives
- When an email is flagged or categorised

## Forms

- When a form is submitted

## Files and documents

- When a file is created or updated in SharePoint/Teams or OneDrive

## Data changes

- When a new row is added to Excel or a list

## Scheduled time

- At a set time each day, week or month

## Other systems

- When something happens in another app (e.g. website, CRM, Mailchimp).



# Why it matters for charities

Power Automate helps small teams save time and stay organised.

It can:

- Reduce repetitive admin
- Make sure important tasks don't get missed
- Create more consistent processes
- Free up time for frontline work

For charities with limited staff or volunteers, it adds structure without needing complex systems.



# Quick wins to start with

These are simple, high-impact automations:

Forms and enquiries

- Someone fills in a form → confirmation email sent + team notified

Shared inbox

- Email arrives → automatically categorised or flagged
- Unanswered emails → reminder sent

Files and documents

- Email attachment → saved to SharePoint in the right place

These are usually the easiest places to start and deliver immediate value.



# Everyday charity use cases

## Finance and approvals

- Expense submitted → sent for approval → finance notified

## Tasks and projects

- New service user → create a checklist in Planner
- Event created → generate task list

## Data and tracking

- Form responses → logged in Excel or SharePoint
- Updates → trigger notifications

## Reminders and compliance

- DBS or policy review dates → automatic reminders



# Things to keep in mind

Power Automate is powerful, but works best when:

Your processes are clear

- Your data is consistent
- The team agrees how things should work
- Start small and build gradually.

A good first step is:

- Automating what already happens regularly, not redesigning everything at once.



# Reality check

Automation doesn't fix messy processes — it just automates them

- Start with something simple
- Test it
- Adjust as needed

You don't need to get it perfect. It's about improving things step by step



What we'll  
be covering  
today

- ✓ What is Power Automate
- ✓ How does it work
- ✓ Some examples and demos
- ✓ Identifying your automation
- ✓ Mapping the logic
- ✓ Building your Power Automate



# Demo 1

Alerting the team to a new Form response via a shared Outlook inbox





## Demo 2

Saving email attachments in SharePoint folders  
two streamline the invoice payment process





- Create a flow to automate a task
- Connect different apps and services
- Automate repetitive tasks
- Integrate with other Microsoft 365 apps

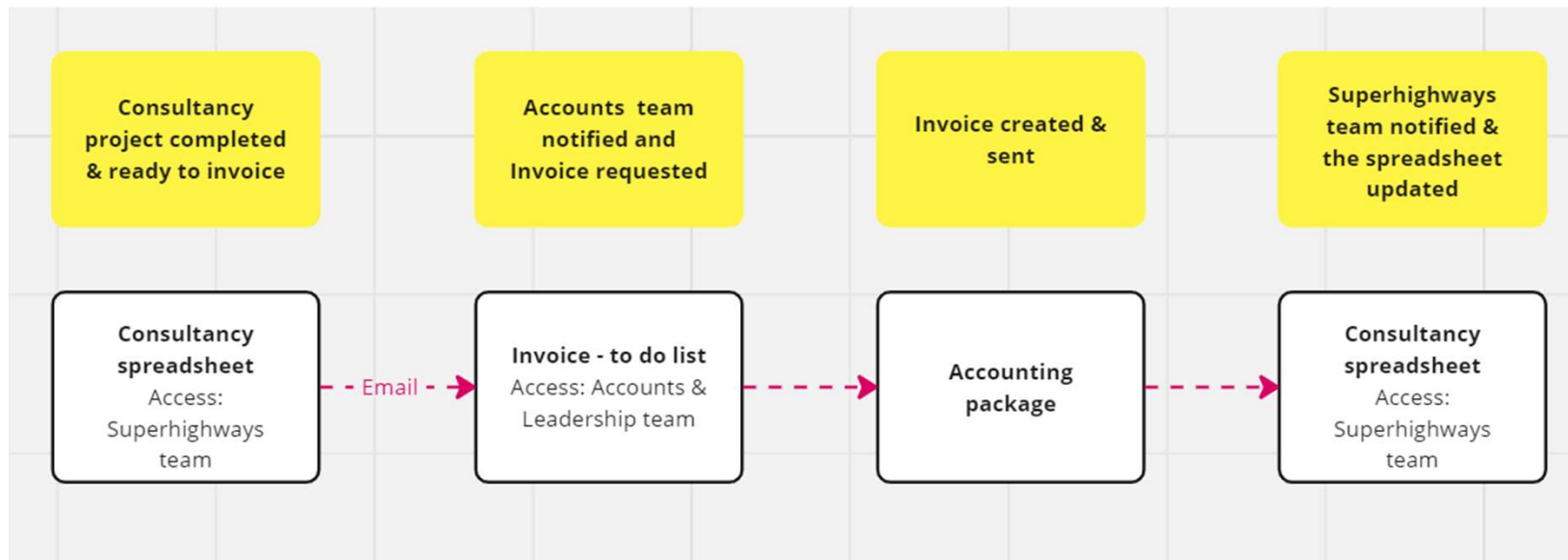


## Demo 3

Automating spreadsheet management and communications between two teams



# Mapping the problem






# Creating the flows

## Flows

Cloud flows

Desktop flows

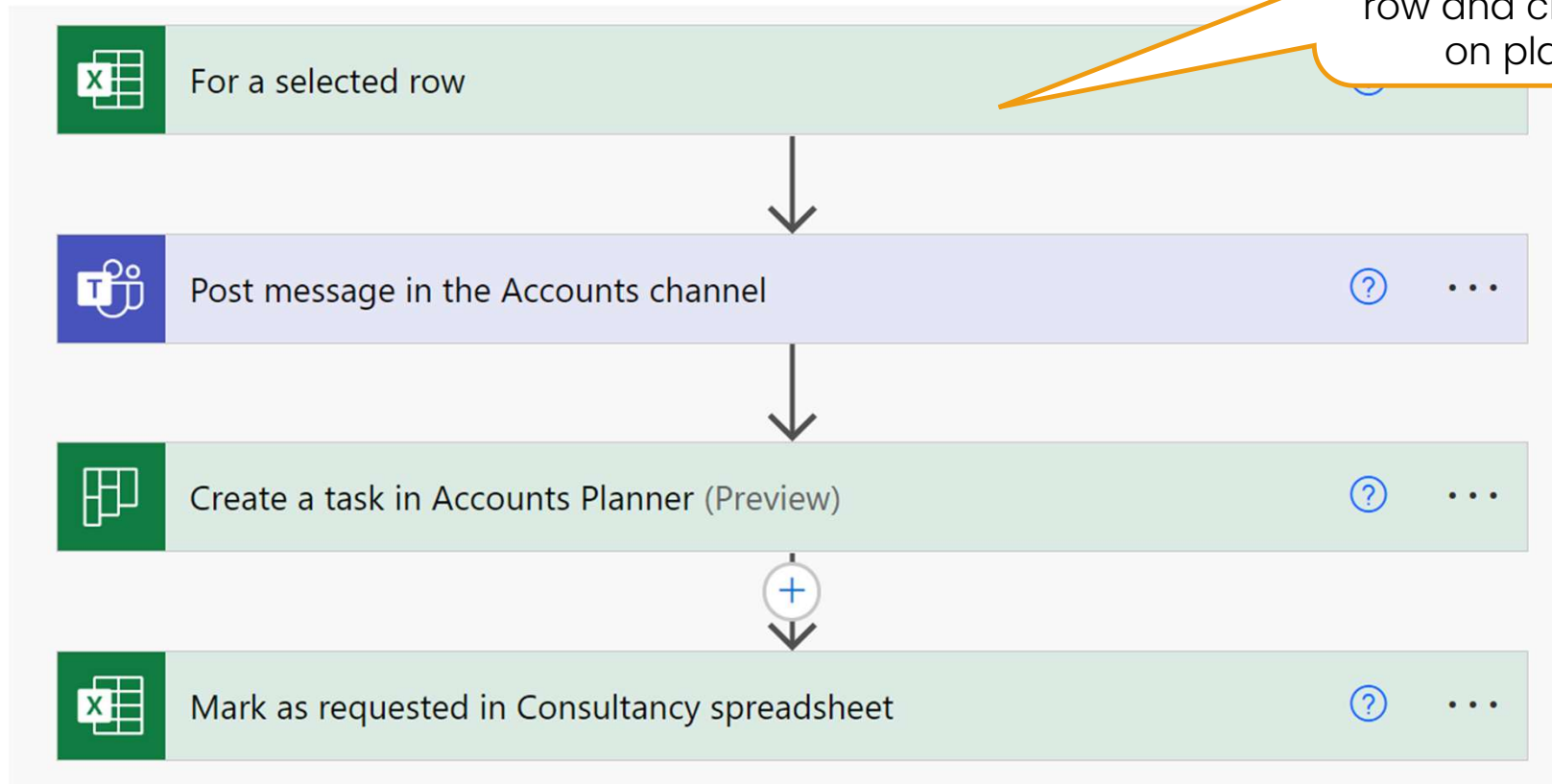
Shared with me

	Name	Modified	Type
	Ready to invoice	9 sec ago	Instant
	Invoice done	3 min ago	Automated



# Requesting an invoice

Trigger set in motion by a person selecting a row and clicking on play



C13

Invoice ID	Type	Status	Expected start date	Invoice requested?	Invoice amount	Invoice date	
Pine-1	C	paid	12/05/2022	Yes	£ 1,000.00	2022-05-19T06:32:55.8918137Z	
Oak-2	T	paid	16/09/2022	Yes	£ 600.00	2022-6-19T06:32:55.8918137Z	
Chestnut-3	C	invoiced	24/10/2022	Yes	£ 1,000.00	2023-10-19T06:32:55.8918137Z	
Elm-4	T	invoiced	25/01/2023	Yes	£ 400.00	2023-10-19T06:32:55.8918137Z	
Fir-5	C	invoiced	26/04/2023	Yes	£ 3,000.00	2023-10-19T06:32:55.8918137Z	
Apple-6	Training	invoiced	27/05/2023	Yes	£ 300.00	2023-05-19T06:32:55.8918137Z	
Plum-7	Consulting Database devel	£ 1,000.00	Invoiced	08/06/2023	Yes	£ 1,200.00	2023-06-19T06:32:55.8918137Z
Willow-8	Consulting PowerBI dash	£ 1,000.00	Invoiced	09/07/2023	Yes	£ 1,000.00	2023-07-19T06:32:55.8918137Z
Beech-9	Consulting Voice training	£ 400.00	Invoiced	30/08/2023	Yes	£ 400.00	2023-08-19T06:32:55.8918137Z
Birch-10	Consulting Infrastructure	£ 600.00	Invoiced	30/09/2023	Yes	£ 600.00	2023-09-19T06:32:55.8918137Z
Magnolia-11	Consulting Database devel	£ 8,000.00	03/10/2023	Yes	£ 8,000.00	2023-10-19T06:05:16.813384Z	
Holly-12	Training Video tools	£ 200.00	06/10/2023		£ 200.00		
Cherry-13	Consulting Cyber security	£ 200.00	07/10/2023		£ 200.00		
		£ 17,700.00			£ 17,900.00		

1. Select the row that is ready to invoice

2. Click on the play button

Flow

Only your flows for this

Name


Ready to invoice

Excel templates you might like

[Sign Out](#)

[Microsoft Power Automate](#)

# Linking the steps to your data

 For a selected row ? ...

\* Location  
 v

\* Document Library  
 v

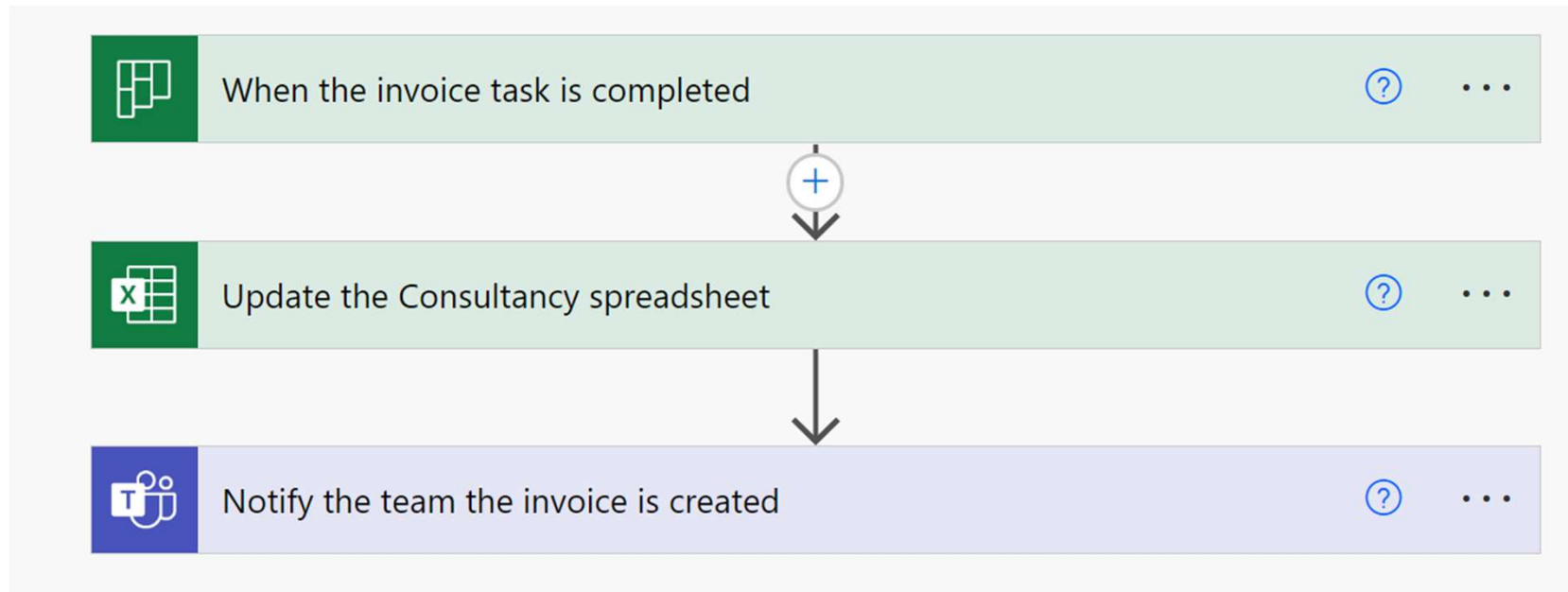
\* File  
 📁

\* Table  
 v

[+ Add an input](#)



# Notifying the team



# Considerations to take?

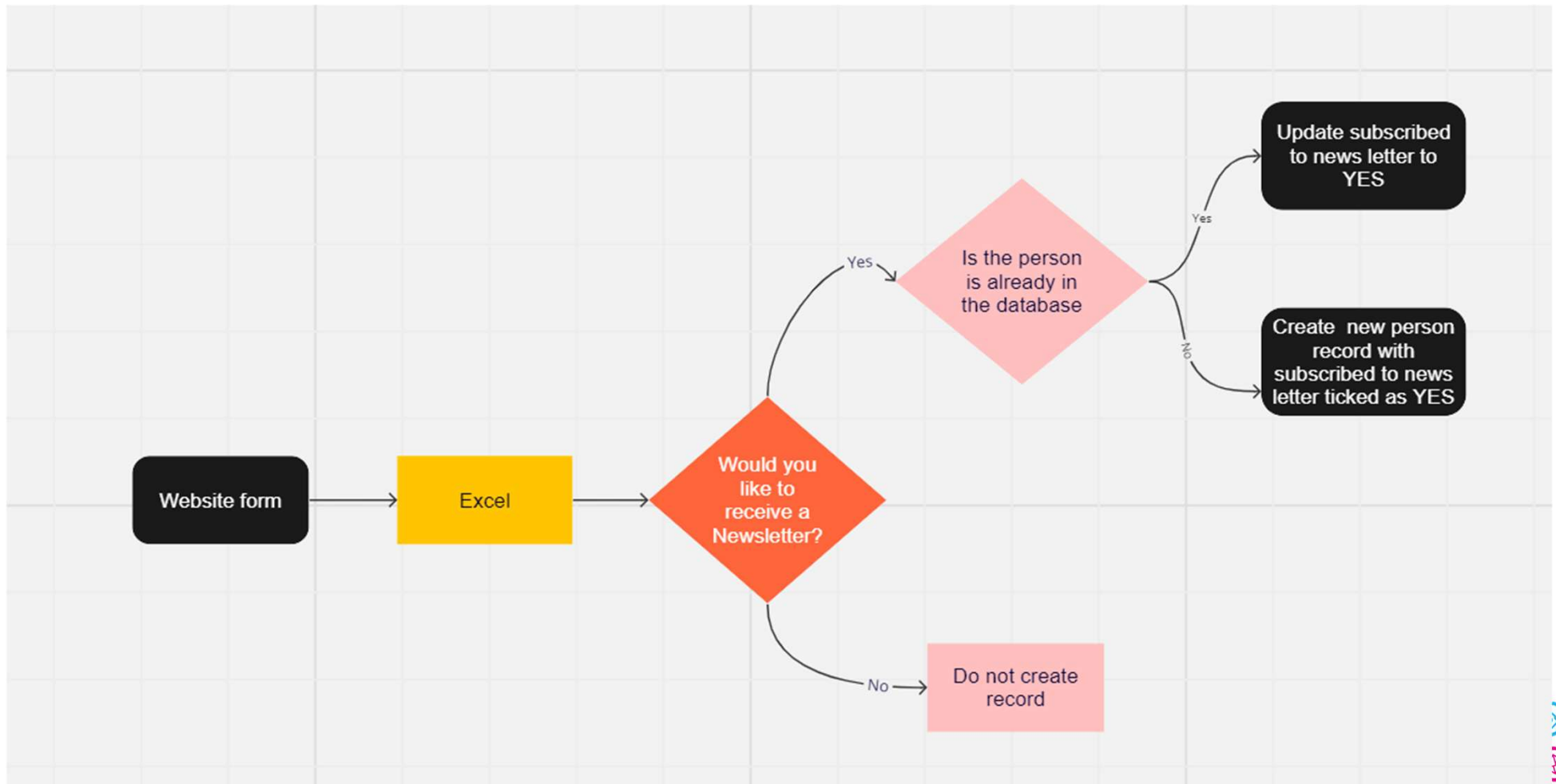
- ✓ Identify where your files are – if it's a Teams file the linking Excel will require you to have your data in [Tables](#).



# What automations would you like to set up?



# Visualising the problem



# Power Automate templates

The screenshot displays the Power Automate web interface. At the top, there is a navigation bar with the Power Automate logo, a search bar, and options for 'Environments', settings, and help. A left-hand navigation pane lists various features: Home, Approvals, My flows, Create, Templates (highlighted), Connectors, Data, Monitor, AI Builder, Process advisor, Solutions, and Learn. The main content area features a search bar for templates and a dropdown menu set to 'Sorted by popularity'. Below this, a grid of six template cards is shown, each with a title, author, and popularity count.

Template Title	Author	Popularity Count
Notify me and store the response when a student completes a quiz	By Microsoft	64940
Keep track of your Twitter mentions on a Google Sheet	By Microsoft	1341
Save email attachments from Outlook.com to Dropbox	By Microsoft	5871
Approve a Microsoft Forms response to add a row to an Excel spreadsheet	By Microsoft Power Automate Community	42294
Create a task in Planner based on Office 365 Outlook calendar event	By Microsoft Power Automate Community	22241
Save Gmail attachments to a Dropbox folder	By Microsoft	5894



# Automating automations!

**Let's automate something. What should it do?**

| Describe in detail how you want your automation to work

**Generate**

This AI-powered feature is in preview. [See terms](#)



# Alternative integration tools

Solution	When to use it	Cost
<a href="#">Power Automate</a>	Brilliant when working within the Microsoft suite of products but harder to link external solutions	Free with MS 365 licence (There is a premium version but everything we looked at today is in the free one)
<a href="#">Zapier</a>	Free for 3 single step automations. Easy to use & allows you to integrate with thousands of products.	£200 for the paid version per year or £170 with a charity discount
<a href="#">Make</a>	Slightly more complex to use, but the plus of this is greater capability to do branching flows & a lower price tag.	£100 per year

For more info check out our [Integration & Automation resource](#) on our [Datawise London](#) site





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

# Making full use of M365

## Sharing Information

Paul Firby – Superhighways

#DigitalFoundations

# An intro to:

# Sway

Part of our Digital  
Foundations programme





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

A photograph showing two women in a professional setting. One woman is wearing a dark blue dress and the other is wearing a white top. They appear to be engaged in a conversation or presentation.

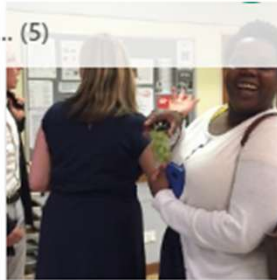


▶ 1 – Exploring small charity data in the Roya... (5)



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.



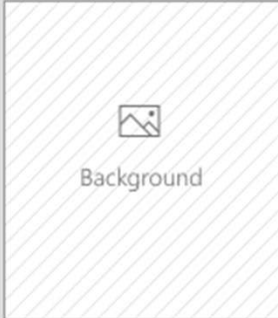
Sway

▶ 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	<code>&lt;/&gt;</code> Embed				
▶ 2 – "I had a hunch" Hearing from peers about... (6)								
 Heading	Local organisations shared how they have started on their data journey using digital tools to	 Group (1)	2.1 Kingston Young Carers	2.2 Learn English at Home	2.3 Man and Boy			





2 – Supporting Kingston's carers with one to...



Heading 1 Card

## Supporting Kingston's carers with one to one training with Kingston Carers' Network

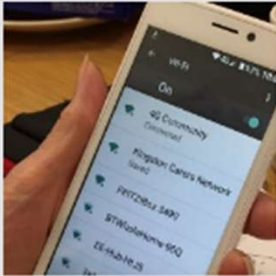


Image Card: 16.png

"How do I connect to the WiFi?"

Text Card

"I was really lucky to find this session, all my family is too busy to help me with these few simple things and someone dropped out so I could come. It has been really useful"



Image Card: KCN1.jpg

"Why can't I see the password?"

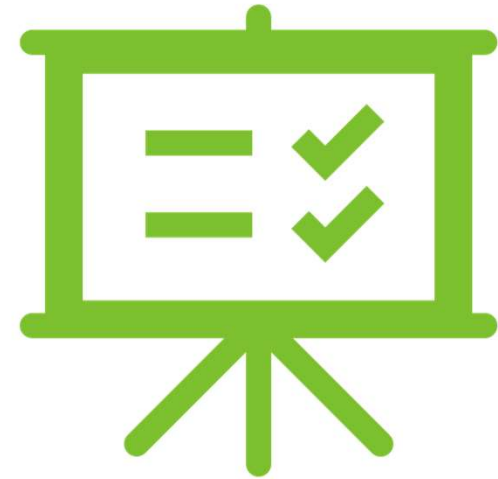


# M365 Sway – a summary

- ✓ Use for presentations or online publications
- ✓ 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](#)

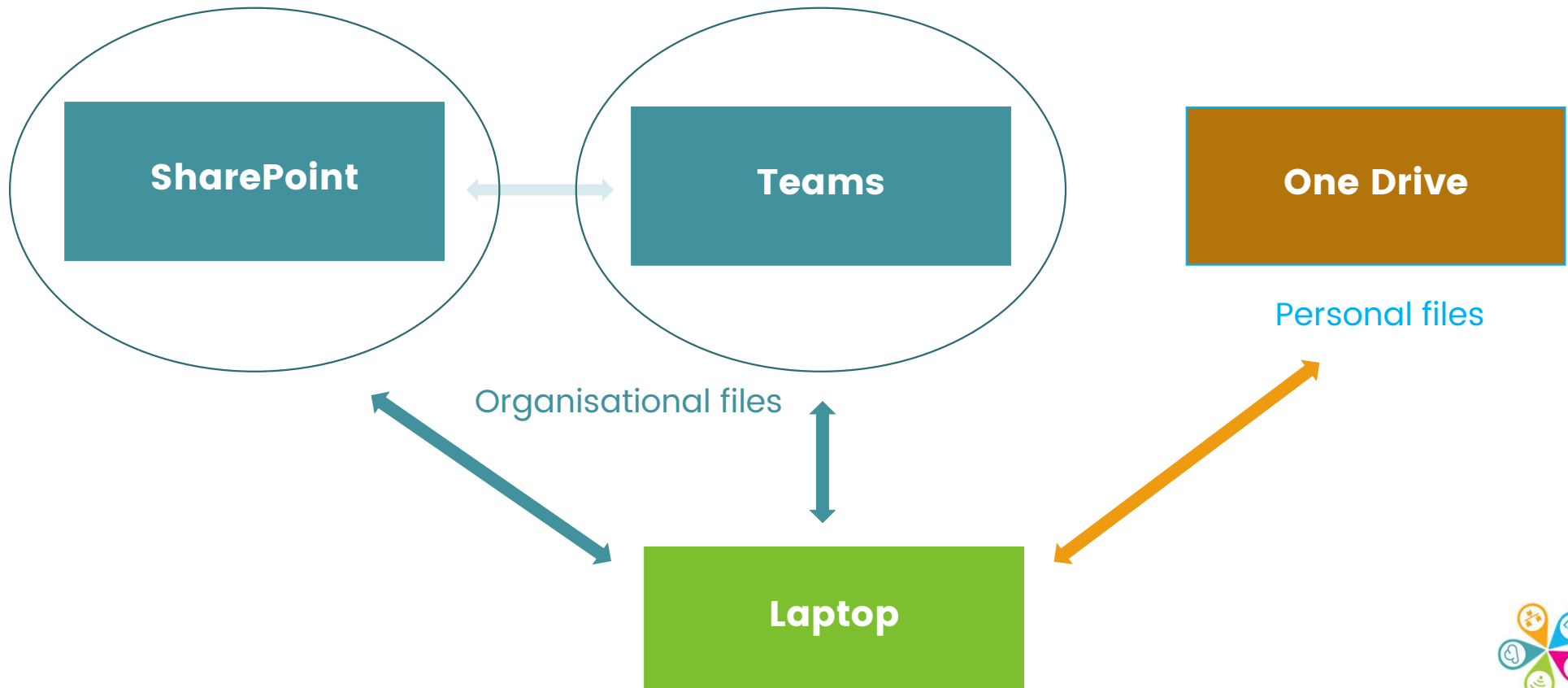


# File storage & collaboration – OneDrive, SharePoint & Teams



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

# A likely scenario



# Data storage

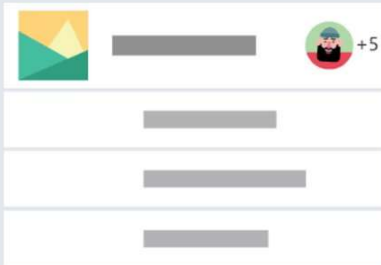


# As a rule of thumb

- ✓ Create and store all organisational docs in SharePoint or Teams
- ✓ These are then available to everyone (with permissions)
- ✓ Only create and store 'in progress' or personal files in your One Drive
  - These are by default private to you so not accessible to others – you have to share at an individual File level
- ✓ If you leave the organisation – OneDrive files are deleted with your account (although a warning is given and you can assign access to someone else)
- ✓ Do not save files locally to your laptop (if your laptop fails or is lost or stolen – your files are lost)

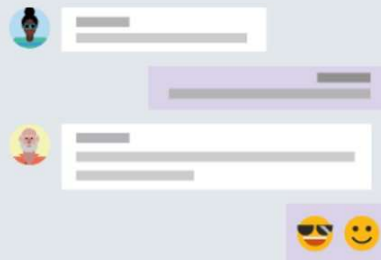


# What is Microsoft Teams?



## Bring your team together

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



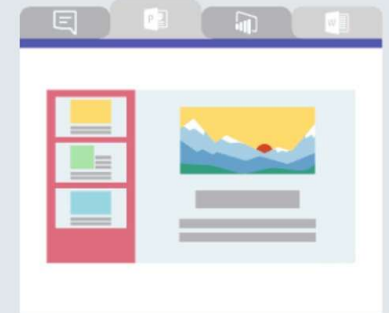
## Chat 1:1 and with groups

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



## 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.



# Files in Teams

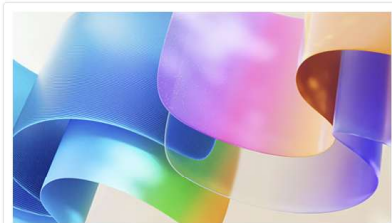
- ✓ Create folders and upload or create files in public or private channels
- ✓ Navigate via Channels (public or private) and the Shared tab or click on Files on the left-hand vertical menu
- ✓ Share with everyone, specific people or via link (same as SharePoint)
- ✓ Invite Guests into your Team to access and collaborate (they'll need to set up a 365 account and be logged in)
- ✓ [Watch the How to videos](#)



# Microsoft 365 help & learning

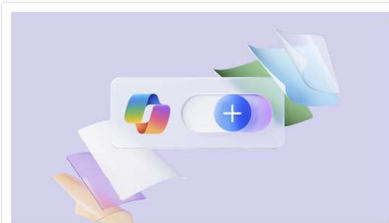
 [→](#)

## 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 |

[FIND MORE MICROSOFT 365 PRODUCTS >](#)





# An intro to MS Teams

Paul Firby - Superhighways

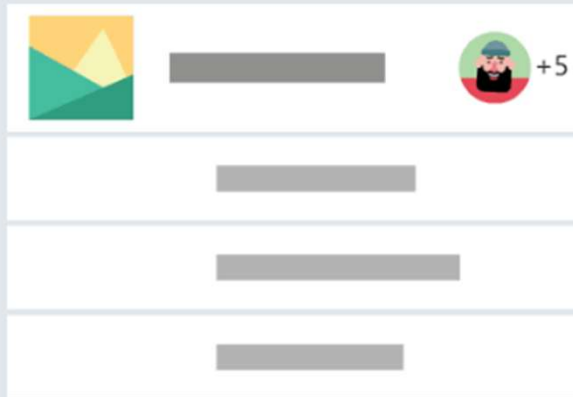


# What we'll cover

- What is Teams?
- Teams desktop, web & mobile apps
- Teams settings, updates & notifications
- Teams & Channels – creating & managing
- Posts
- Files – navigating, editing & collaborating
- Chat – individual & groups
  
- *Calls & Meetings* ([see session resources here](#))



# What is Teams?!



## 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

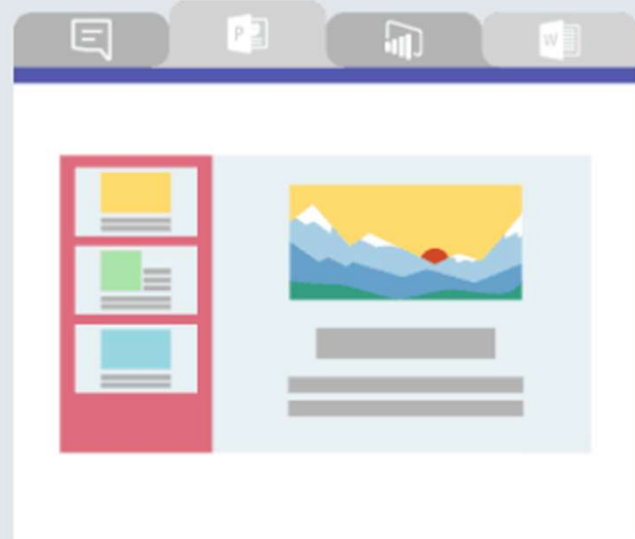
Outside of open team conversations, chat privately and share files and notes with anyone in your organization.





### **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.



# 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.

[DOWNLOAD NOW >](#)



## Quick Starts

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

[GET STARTED >](#)



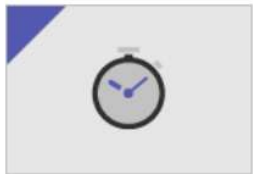
## Save time with tips

Work smarter and get more out of your Office apps.

[GET TIPS >](#)

# Microsoft Teams video training

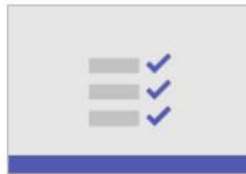
## Get started



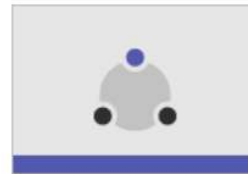
**Quick start**



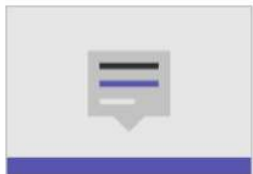
**Intro to Microsoft Teams**



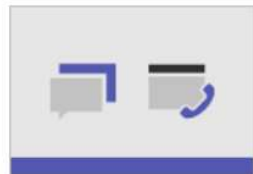
**Set up and customize your team**



**Collaborate in teams and channels**



**Work with posts and messages**



**Start chats and calls**

# Teams quick reference card

The image shows a screenshot of the Microsoft Teams application interface with several components highlighted by red boxes and labeled with text:

- Your Teams:** Points to the left sidebar containing the 'Teams' list.
- Start a new chat:** Points to the '+' icon in the top navigation bar.
- Command bar:** Points to the search bar at the top of the main content area.
- Apps:** Points to the vertical sidebar on the left containing icons for Activity, Chat, Teams, Calendar, Calls, and Help.
- Join or Create a team:** Points to the 'Join or create a team' button at the bottom of the left sidebar.
- General:** Points to the selected channel tab in the top navigation bar.
- Write a message:** Points to the text input area at the bottom of the chat window.
- Send your message:** Points to the send button (paper plane icon) at the bottom right of the chat window.
- A chat:** Points to the main chat area containing messages and attachments.
- Activity:** Points to the 'Activity' icon in the left sidebar.
- Chat:** Points to the 'Chat' icon in the left sidebar.
- Teams:** Points to the 'Teams' icon in the left sidebar.
- Calendar:** Points to the 'Calendar' icon in the left sidebar.
- Calls:** Points to the 'Calls' icon in the left sidebar.
- Apps:** Points to the 'Apps' icon in the left sidebar.
- Help:** Points to the 'Help' icon in the left sidebar.
- Search for or type a command:** Points to the search bar in the top navigation bar.
- Kingston Voluntary Action:** Points to the user profile in the top right corner.
- General:** Points to the selected channel tab in the top navigation bar.
- Posts:** Points to the 'Posts' tab in the top navigation bar.
- Files:** Points to the 'Files' tab in the top navigation bar.
- OneNote:** Points to the 'OneNote' tab in the top navigation bar.
- Superhighways:** Points to the 'Superhighways' tab in the top navigation bar.
- Calendar:** Points to the 'Calendar' tab in the top navigation bar.
- Office clear out day:** Points to the 'Office clear out day' tab in the top navigation bar.
- Team:** Points to the 'Team' icon in the top right corner.
- Today:** Points to the 'Today' header in the chat area.
- Philippa Leary:** Points to the first message in the chat.
- Alice Linell:** Points to the second message in the chat.
- Philippa Leary:** Points to the third message in the chat.
- Start a new conversation:** Points to the text input area at the bottom of the chat window.
- Activate Windows:** Points to the 'Activate Windows' watermark at the bottom right of the chat window.



# The left hand menu bar

## Microsoft Teams Apps



Activity

The activity app is your single inbox for all activity across Teams – when someone posts something in a team or sends you a message the Activity icon will alert you.



Chat

Chat & share files one-to-one or in a group outside of a Team.



Teams

Chat & share files with your team. The @ indicates that you or one of your teams has been mentioned in a post



Calendar

Schedule meetings with your team and have it synch with your Outlook calendar



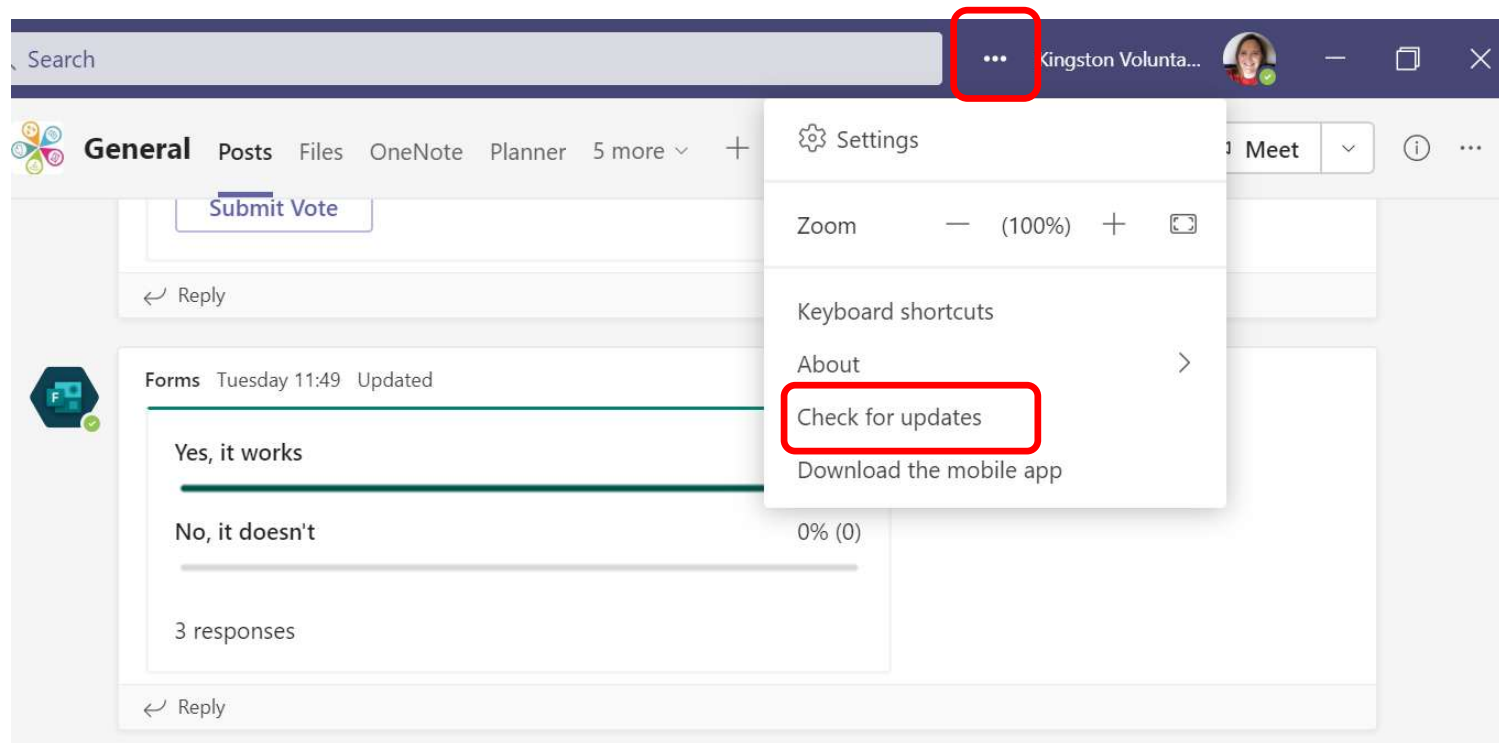
Calls

Call people both internally & externally



# Update to the latest version of Teams

- Click on the 3 dots to the left of your profile pic / initials at the top right of your screen
- Click Check for updates

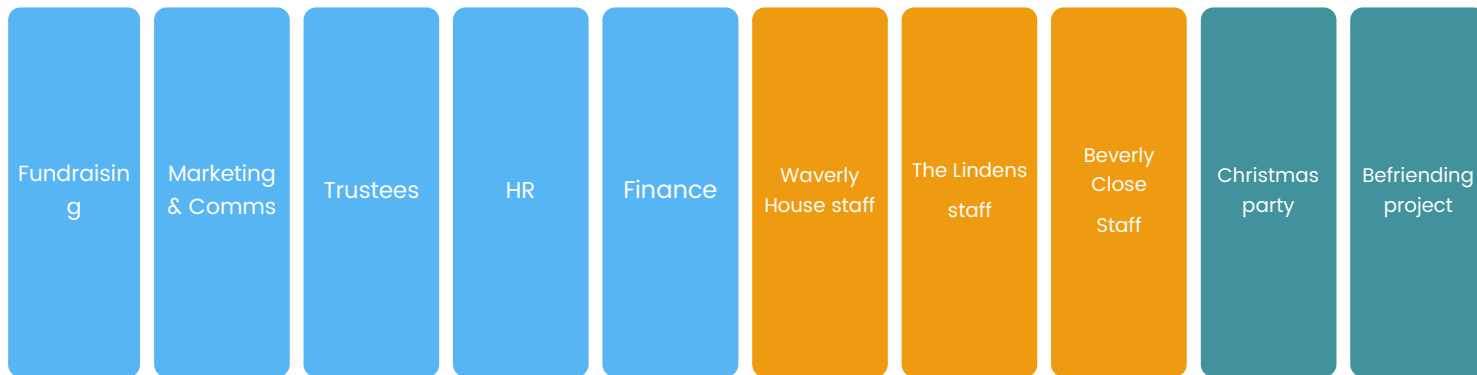


# Structuring your Team with Channels – an Example

**Team**

**KSH Support**

**Channels**



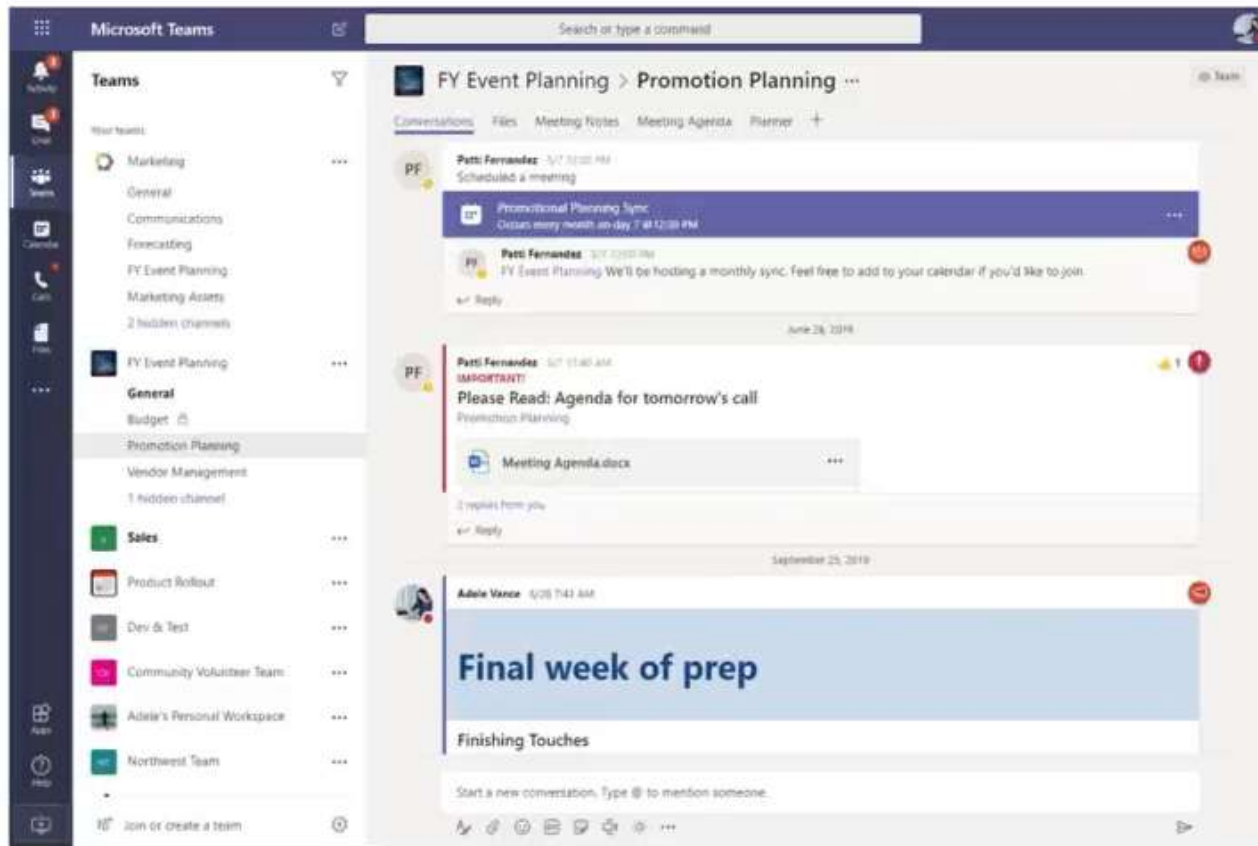
**Areas of work**

**Sub teams**

**Specific projects**



# Align work groups and manage projects



Conversations, files and tools in a shared workspace

Threaded conversations and announcements

Integrated meeting notes and recordings

Owners, members, guests and moderators

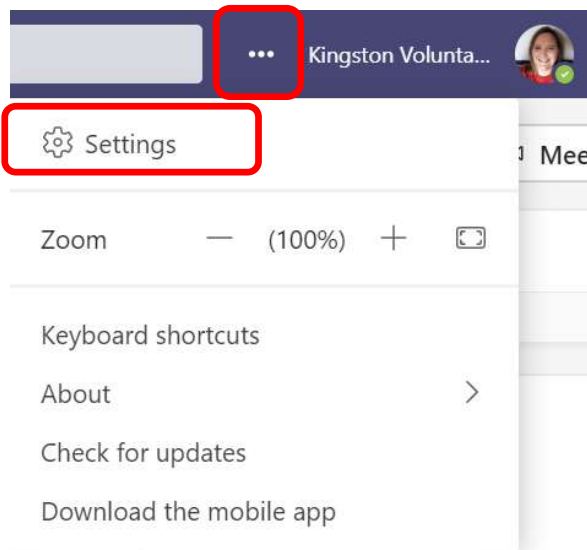
Public visibility plus private channels

# Update to the latest Teams version

The screenshot displays the Microsoft Teams application window. At the top, there is a search bar and a user profile for 'Kingston Volunta...'. A red box highlights the three-dot menu icon next to the user profile. This menu is open, showing options: Settings, Zoom (100%), Keyboard shortcuts, About, Check for updates (highlighted with a red box), and Download the mobile app. Below the menu, the main chat area shows a 'Forms' poll titled 'Forms Tuesday 11:49 Updated'. The poll has two options: 'Yes, it works' and 'No, it doesn't' with a progress bar showing 0% (0) responses. A 'Submit Vote' button is visible above the poll. The bottom of the chat area shows a 'Reply' button.



# 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.

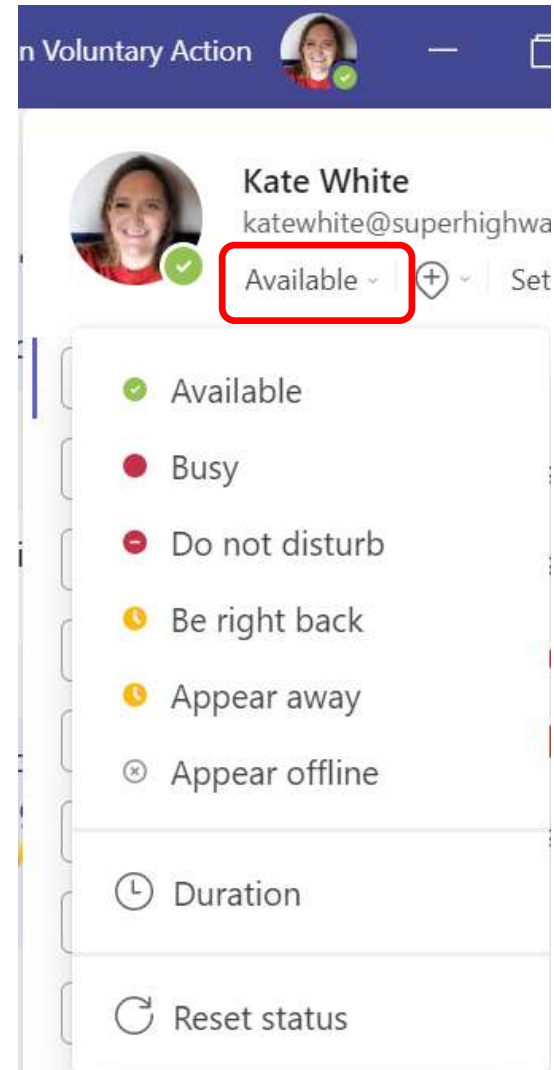
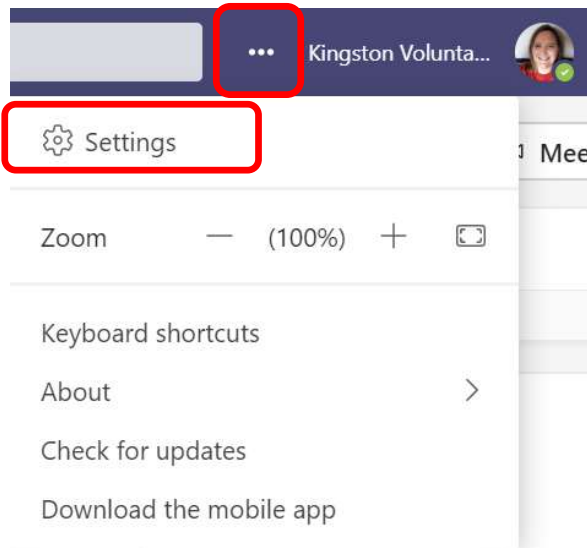
### Chat

Messages, mentions and reactions.

### Meetings and Calls

Control notifications and reminders during your meetings and calls.

# 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 09:29

Suggestions

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

@KV

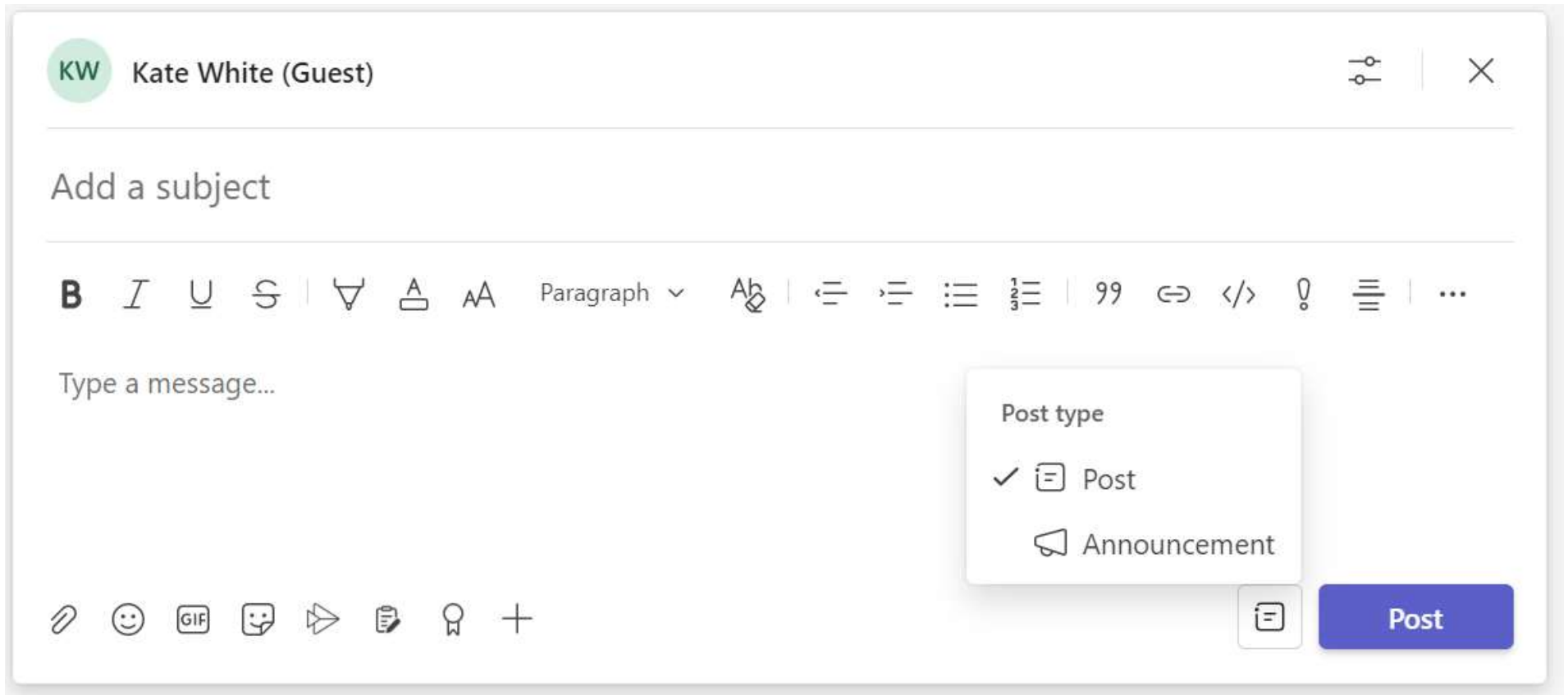
Activate Windows  
Go to Settings to activate Windows.

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



# @mention – to flag a person or team when posting



The screenshot shows a chat post composer interface. At the top left, the user is identified as 'KW Kate White (Guest)'. Below this is a field for 'Add a subject'. A rich text editor toolbar is visible, containing icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, code, help, and more options. The main text area contains the placeholder 'Type a message...'. A dropdown menu is open, showing 'Post type' with two options: 'Post' (selected with a checkmark) and 'Announcement'. At the bottom left, there are icons for attachments, emojis, GIFs, reactions, sending, copying, and a plus sign. At the bottom right, there is a 'Post' button and a small icon of a document with a checkmark.



# 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 displays the Microsoft Teams interface. On the left, the 'Teams' sidebar shows a list of teams, including 'KVA Staff'. A red callout box points to the three dots next to the 'KVA Staff' team name, with the text 'Click on the 3 dots next to your Team name'. The main area shows the 'KVA Staff' team page. The 'Tags' tab is selected in the navigation bar. A red callout box points to the 'Tags' tab with the text 'Select the Tag tab and manage or Create a tag. Then you can @mention a Tag and all members will be alerted'. Below the navigation bar, there is a search box for tags and a 'Create tag' button. A table titled 'Tags assigned to you (4)' is visible, with columns for 'Name', 'Members', and 'Imported from'. One tag, 'Census', is listed with 4 members.

Name	Members	Imported from
Census	4	





# 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](#)



## Further resources to help you get started...

- ✓ [New to Teams – we'll show you around](#) – Superhighways blog post with screen shots
- ✓ [Getting started with Teams – chats, calls and meetings](#) – Superhighways blog post with screen shots
- ✓ [Microsoft Teams Quick Start Guide](#) – MS resource
- ✓ [Microsoft Teams YouTube channel](#) – Good range of videos as reminders or to share with others
- ✓ [Microsoft Teams Video Training](#) – as above
- ✓ [Instructor Led Live Training](#) – from Microsoft – book a date and join



## What we'll be covering

- ✓ Structuring & settings
- ✓ Posts
- ✓ Files
- ✓ Adding apps
- ✓ Chat
- ✓ Meetings
- ✓ Management

I'll be demoing then you can have a play!



# What's your experience?

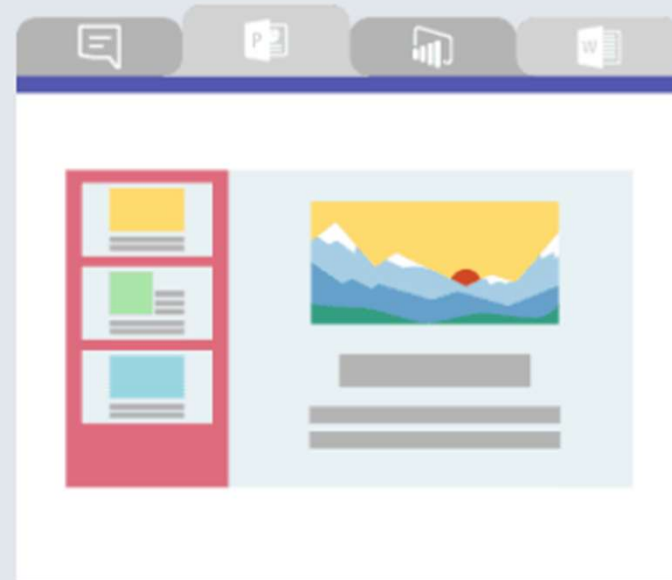
- ✓ Let's see how Polls in a Teams call work!





## Make video calls and schedule online meetings

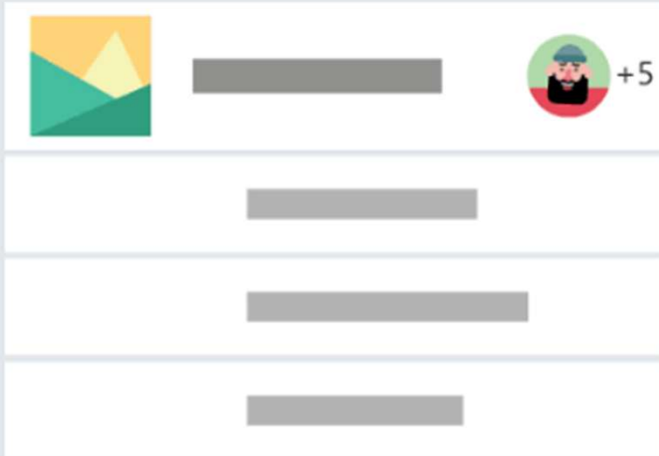
Have impromptu or scheduled meetings in any channel. Or just call someone ☐



## 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 help & learning

How can we help you?



Meetings



Chat



Notifications & settings



Teams & channels



Calls & devices



Files



Troubleshoot

## New to Microsoft Teams?

Learn all about Teams' essential features here.

[MEETINGS >](#)

[CHAT >](#)

[NOTIFICATIONS >](#)

[TEAMS >](#)

[CHANNELS >](#)

[CALLS >](#)





## Discover Microsoft Teams Premium

Enhance security and productivity in Teams with Premium features.

[EXPLORE TEAMS PREMIUM >](#)

- ✓ Gives you AI notetaking and recap functionality, including multiple language captions
- ✓ Plus other security and customisation options
- ✓ Non profit UK pricing – circa £40 per user per year (look for the Upgrade option when using Teams – you can opt for a 30 day free trial to test features before committing)



# Teams quick reference

The image shows a screenshot of the Microsoft Teams interface with several components highlighted by red boxes and labeled with text:

- Start a new chat**: Points to the '+' icon in the top navigation bar.
- Command bar**: Points to the search bar at the top of the chat window.
- Apps**: Points to the vertical sidebar on the left containing Activity, Chat, Teams, Calendar, and Calls.
- Join or Create a team**: Points to the 'Join or create a team' button at the bottom left of the chat window.
- Write a message**: Points to the text input area at the bottom of the chat window.
- Send your message**: Points to the send button (paper plane icon) at the bottom right of the chat window.
- Your Teams**: Points to the 'Teams' section in the left sidebar.
- General**: Points to the 'General' tab in the top navigation bar of the chat window.
- A chat**: Points to the main chat area containing messages and attachments.
- Your Profile**: Points to the user profile icon in the top right corner.

The screenshot shows a chat window for the 'General' channel of the 'Superhighways' team. The chat history includes a message from Philippa Leary (07:07) with attachments 'IMG\_2903.JPG' and 'how to make a team call.mp4', and a reply from Alice Linell (08:41). A message from Philippa Leary (09:09) is also visible. The interface includes a top navigation bar with 'Microsoft Teams', a search bar, and a user profile. The left sidebar shows 'Your Teams' and 'Apps'. The bottom of the chat window has a text input area and a send button.

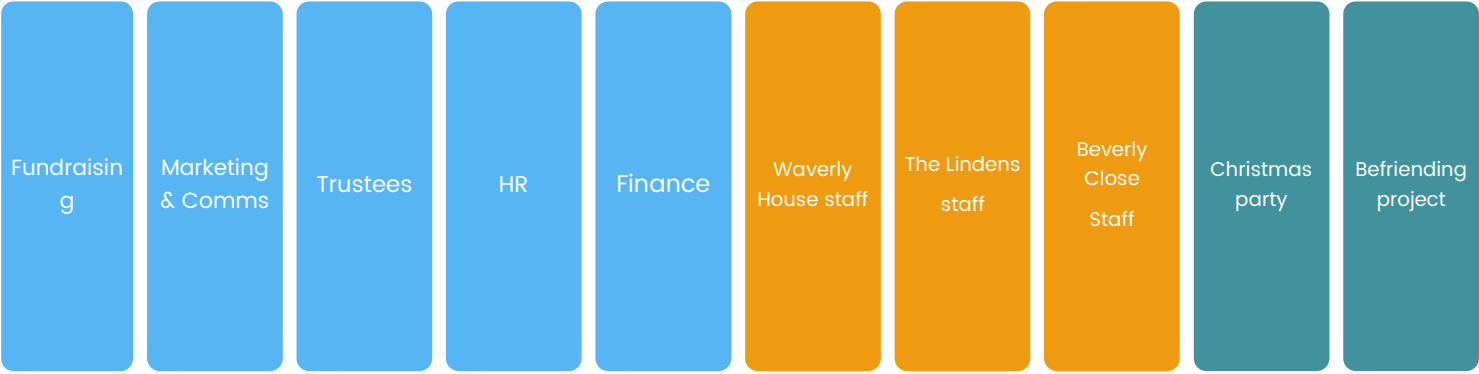


# Structuring your Team with Channels

**Team**



**Channels**  
(some examples)



**Areas of work**

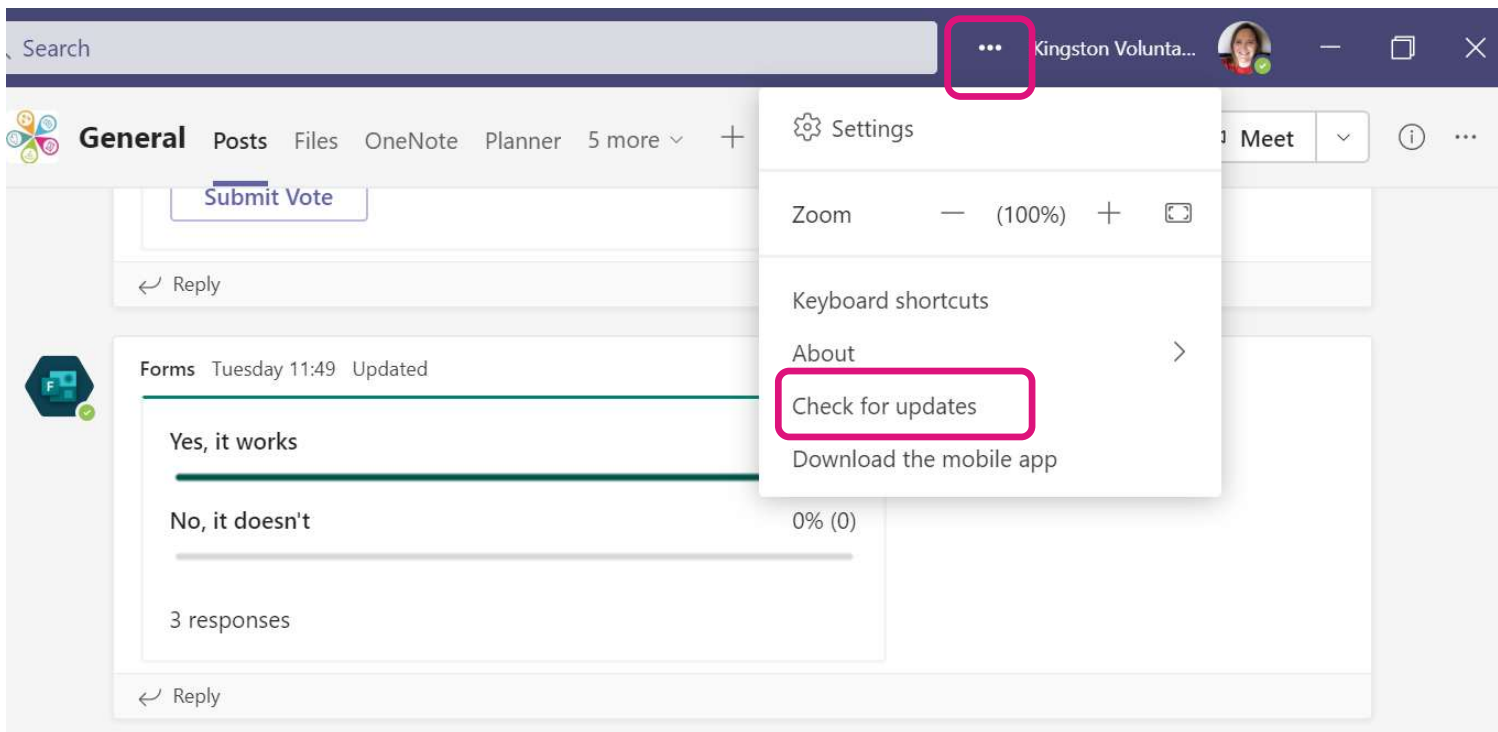
**Sub teams**

**Specific projects**



# Updating to the latest version

- ✓ Click on the 3 dots to the left of your profile pic or initials in the top right of your screen and then click Check for updates

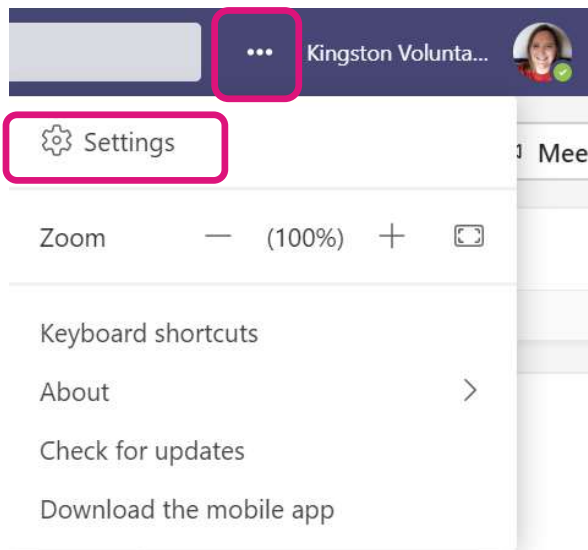


The screenshot displays a Microsoft Teams meeting window. At the top right, the user's profile name 'Kingston Volunta...' is visible next to a profile picture. A red box highlights the three-dot menu icon to the left of the profile. A settings menu is open, listing options: Settings, Zoom (100%), Keyboard shortcuts, About, Check for updates, and Download the mobile app. The 'Check for updates' option is highlighted with a red box. The background shows a meeting chat with a 'Forms' poll titled 'Yes, it works' vs 'No, it doesn't'.

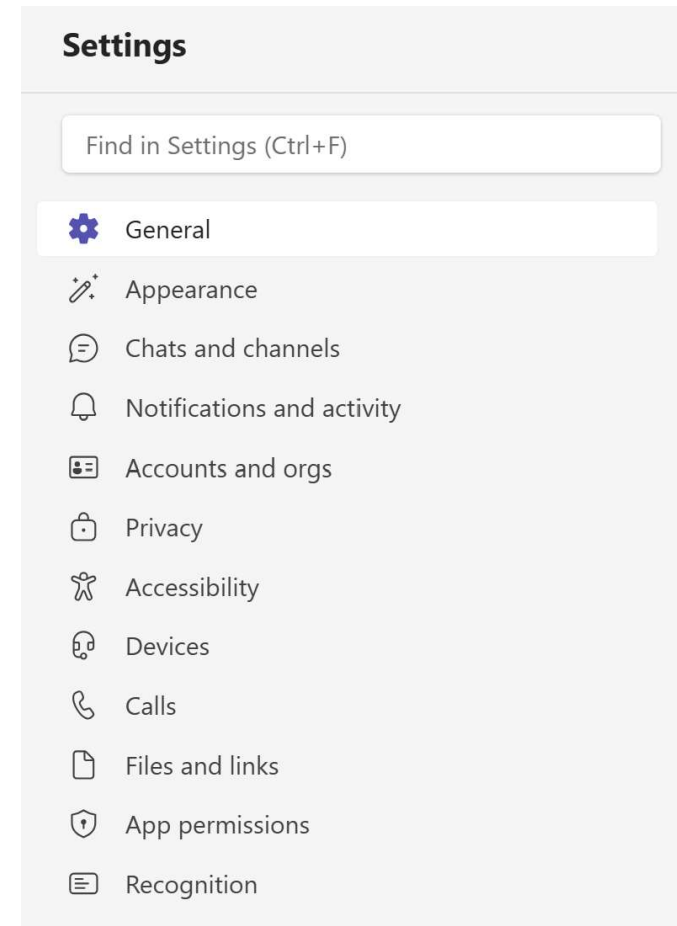


# Teams settings

- ✓ Click on the 3 dots to the left of your profile pic or initials in the top right of your screen and then Settings (the cog wheel icon)

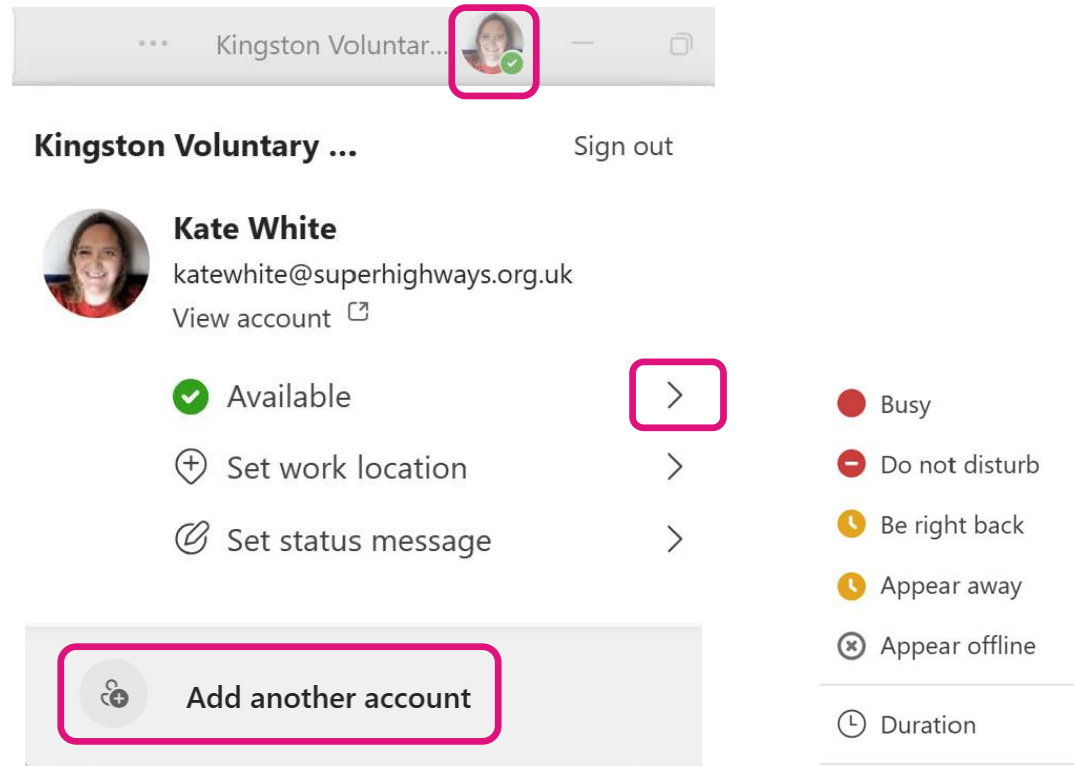


- ✓ Now choose from the left hand menu (or work your way through) to customise the default settings



# Changing your Status

- ✓ Click on your profile pic or initials
- ✓ Change your Status (this automatically updates e.g shows Busy when you're in a Teams call), but you can override. Do not disturb will pause notifications
- ✓ You can also Add another Teams account. When listed, you can then switch between different Teams you are a member of.



The screenshot shows the Microsoft Teams profile settings for a user named Kate White. At the top, there is a header bar with a menu icon, the text "Kingston Voluntar...", a profile picture of Kate White (highlighted with a pink box), a minus sign, and a share icon. Below the header, the name "Kingston Voluntary ..." and "Sign out" are visible. The main profile section shows a circular profile picture of Kate White, her name "Kate White", her email "katewhite@superhighways.org.uk", and a "View account" link. Below this, there are three settings: "Available" (with a green checkmark icon and a pink box around the right arrow), "Set work location" (with a location pin icon and a right arrow), and "Set status message" (with a pencil icon and a right arrow). At the bottom, there is a button labeled "Add another account" with a plus icon inside a pink box. To the right of the main settings, there is a list of status options: "Busy" (red circle), "Do not disturb" (red circle with a minus sign), "Be right back" (yellow clock icon), "Appear away" (yellow clock icon), "Appear offline" (grey circle with an X), and "Duration" (clock icon).



# Choose your preferred layout

## Settings

Find in Settings (Ctrl+F)

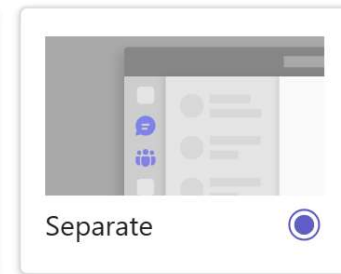
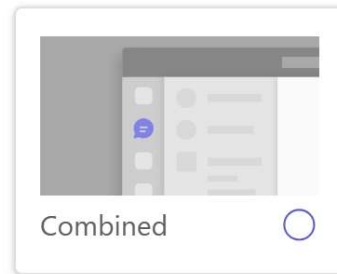
- General
- Appearance
- Chats and channels**
- Notifications and activity
- Accounts and orgs
- Privacy
- Accessibility

## Chats and channels



### Viewing chats, teams, and channels

See all conversations in a combined view, or keep chats separate from teams and channels.



# Posts tab (broadcast messaging)

- ✓ Send a message to a Channel
- ✓ @Mention specific people or the whole channel
- ✓ Click on the Plus to Schedule your post
- ✓ Hover over someone else's message to add an emoji (thumbs up and more)
- ✓ Reply to posts in a thread
- ✓ Click on the 3 dots for more options including Pin the post for everyone

 Mahirah Rahman 13/01 13:00 Edited

## Jan newsletter - what we've been up to

Hi General,

Can you please send me one thing you've been working on recently for the newsletter? Also remind me where you went on holiday for me to add to the "Enjoying our Christmas and New Year breaks!" bullet point 😊

Newsletter will go out this afternoon hopefully. Thanks!



 Sorrel Parsons 13/01 13:01

Creating a new Ai for small charities course in partnership with NAVCA for community development workers across the UK to deliver (sorry, bit long!).



 Clare Chamberlain 13/01 13:55


Preparing for up-coming January Training events:

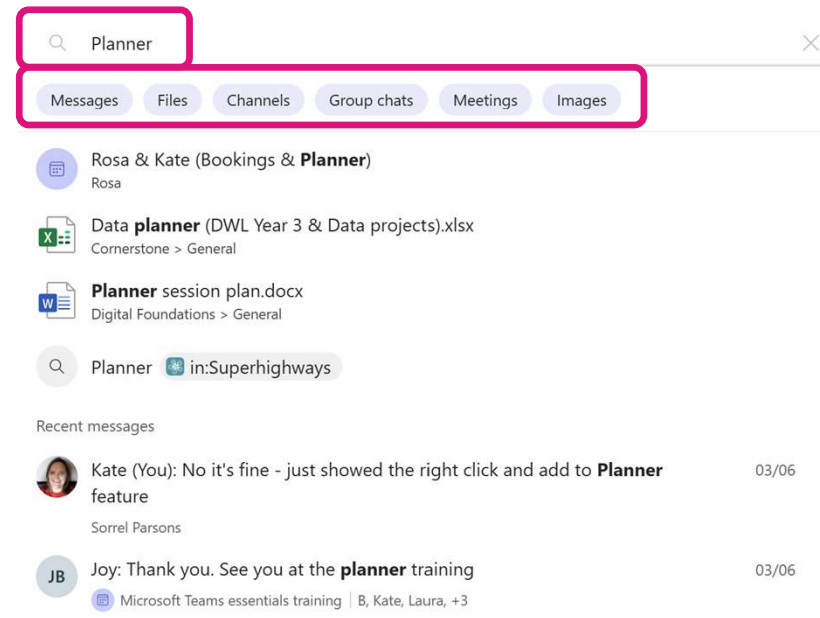
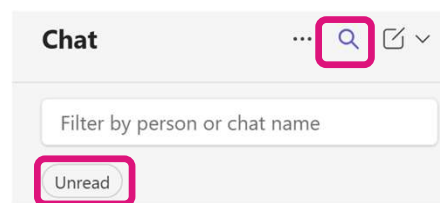
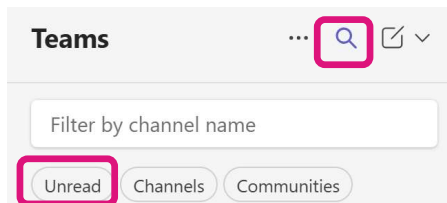
- Power BI Interactive Dashboards - 14/01/2026
- Advanced Excel Tips & Tricks - 15/01/2026
- Advanced Power BI Training - 20/01/2026
- Exploring the new Indices of Deprivation data for London - 26/01/2026

(See screenshots in Chats section for further info)



# Searching & filtering to find things

- ✓ Use the Search bar at the top of Teams to search on keywords
- ✓ Refine your answers by Filtering on Messages, Files etc
- ✓ To find Pinned posts or chats – click on the Open details icon  at the top right hand side of your screen
- ✓ Similarly you can use the Search icon at the top of the left hand menu in Teams or Chat, The Unread filter can be quite helpful!



# Shared tab (used to be called Files)

Name	Modified	Modified By
Assets	January 20, 2023	Sorrel Parsons
Co-design workshops	June 10, 2022	Sorrel Parsons
CVS Development Worker Network	October 10, 2022	Clare Chamberlain
Development	June 5, 2023	Sorrel Parsons
Evaluation & reporting	February 5, 2023	Kate White

- ✓ Click on new to create a file to store in that location. You can also add a file or web link
- ✓ Upload files from your device
- ✓ Everyone in that Channel will have access

- Folder
- Word document
- Excel workbook
- PowerPoint presentation
- OneNote notebook
- Forms survey
- Visio drawing
- Markdown document
- Text document
- Clipchamp video
- Link



# Working with files

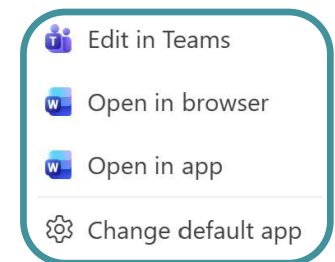
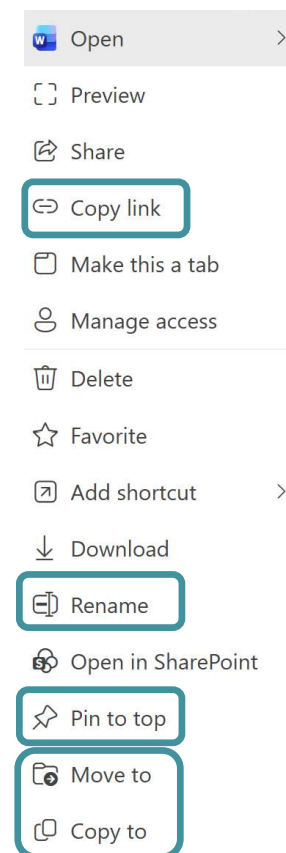
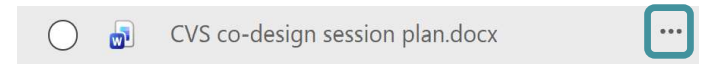
✓ Click on the 3 dots to the right of the file name to access the menu

✓ Choose where you want to open the file (you can override the default with your own preference)

✓ Choose from a range of other options to manage your file including Copy link and Rename file

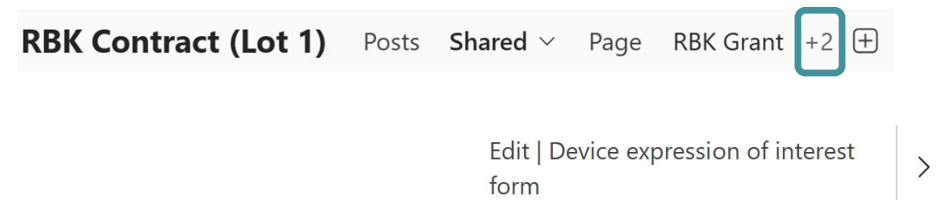
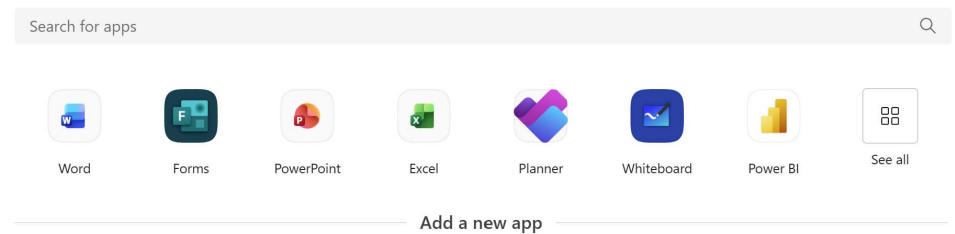
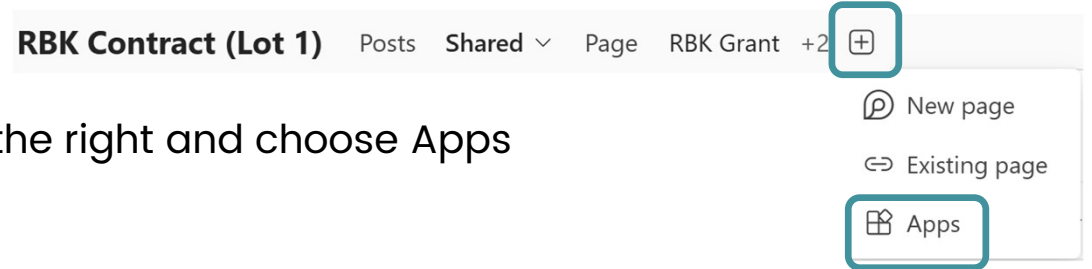
✓ Pin to top for the file to display above the list giving quick access

✓ Move or Copy the file to a place of your choice (within the Team or to another Team)



# Adding other Apps

- ✓ Click on the + icon in the top menu to the right and choose Apps
- ✓ Select the App you want to add for example Forms
- ✓ The App should now show in the menu bar – you may need to click on the + to see it in a drop down underneath



# Some Chat tips

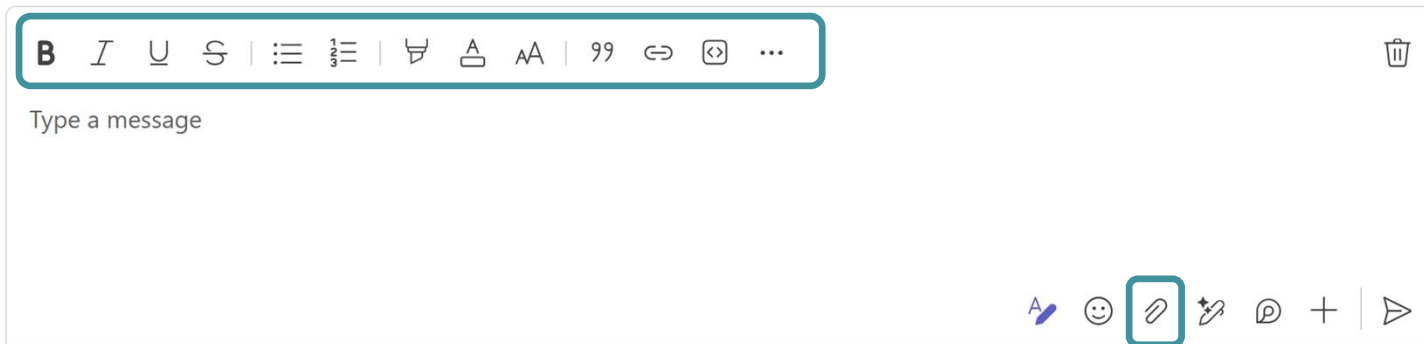
Chat



- ✓ Click on Chat in the left hand menu and the Pen/Square icon to start a new chat
- ✓ Type your message and click on the arrow to send



- ✓ Click on the A with pencil icon to access the standard formatting options



- ✓ Click on the paperclip icon to attach files (either upload from device or paste an image)

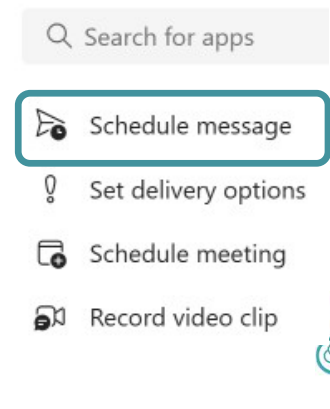


# Chat tips continued

- ✓ Click on the + icon for more options

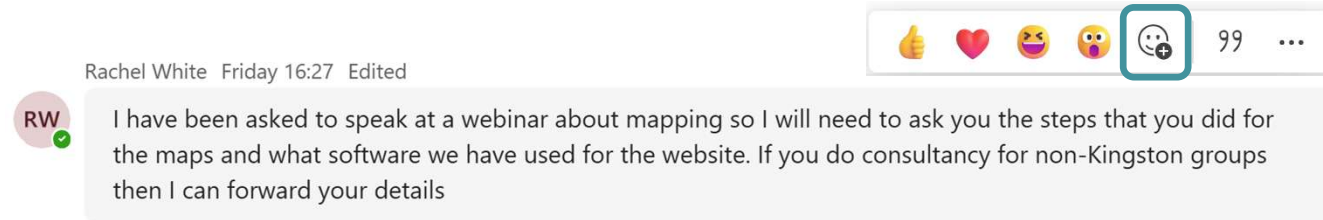


- ✓ This includes the Schedule message feature where you can set a date and time for your message to send – very useful!

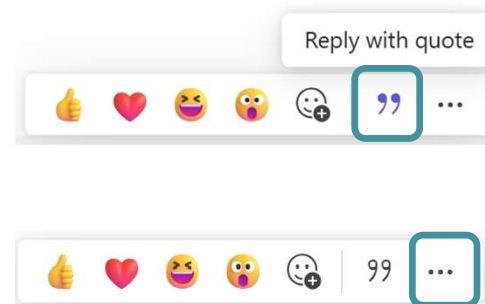


# Chat tips continued

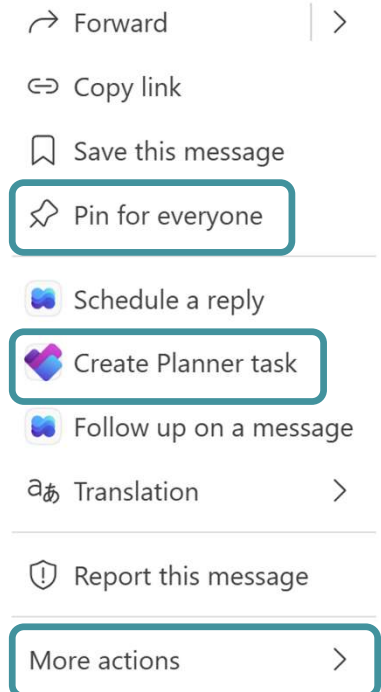
- ✓ Hover a chat message you've received and choose an Emoji reaction (we use thumbs up a lot to show we've seen a message). Click on the Emoji + icon for more.



- ✓ Click on the quotation marks to reply to a specific message (it shows inline)
- ✓ Click on the 3 dots ellipsis for more options

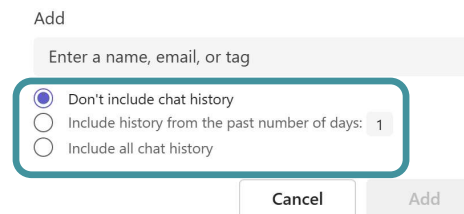
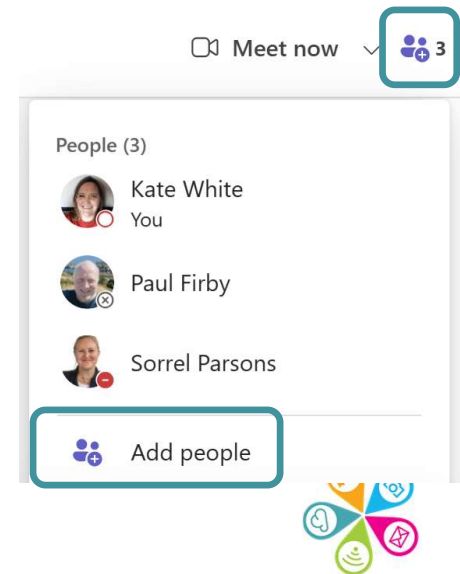
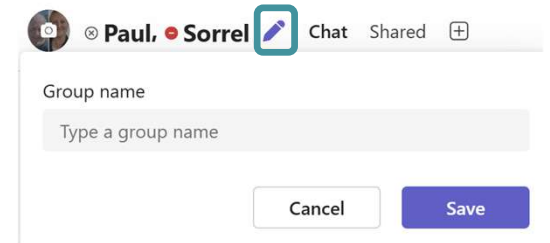


- ✓ These includes Pinning the message (so stays visible), Creating a Planner task or in More actions – send to Outlook or set up other Workflows



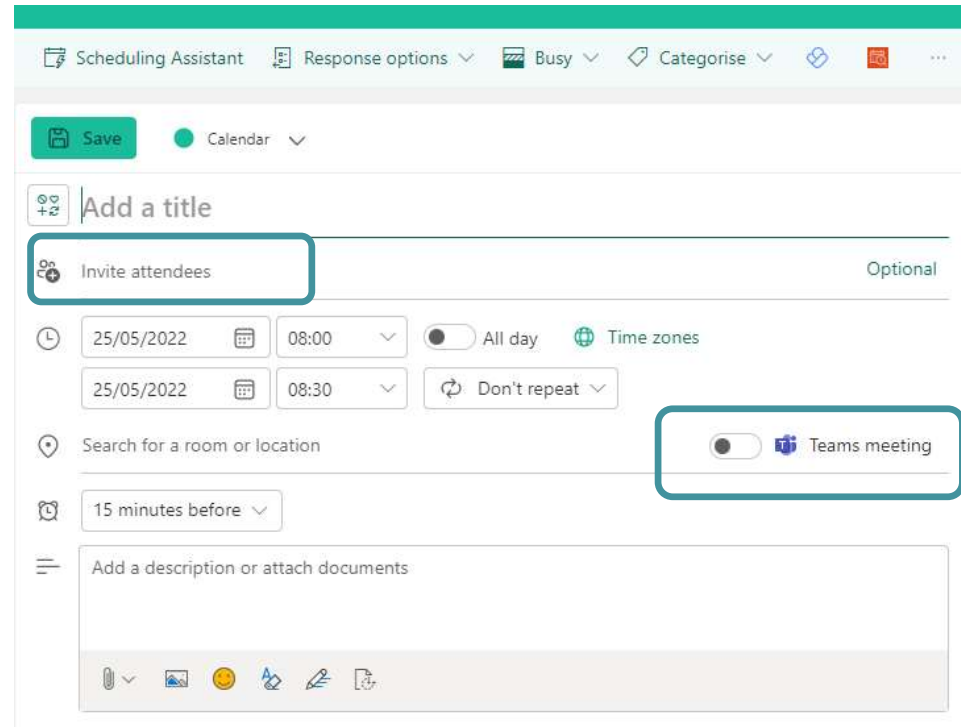
# Group chats

- ✓ When you start a new Chat – just add multiple people to turn into a Group chat
- ✓ Add a Group chat name if you'd like to by clicking on the pencil icon next to the member names
- ✓ At a later date you can add additional people by clicking on the People + icon at the top right
- ✓ You can then choose what chat history they can see



# Setting up a Teams meeting from Outlook

- ✓ You can do this from your Outlook calendar – create a calendar entry and as soon as you have added an attendee, depending on your settings, either the Teams meeting option will show as on, or you might need to manually click, to toggle it on

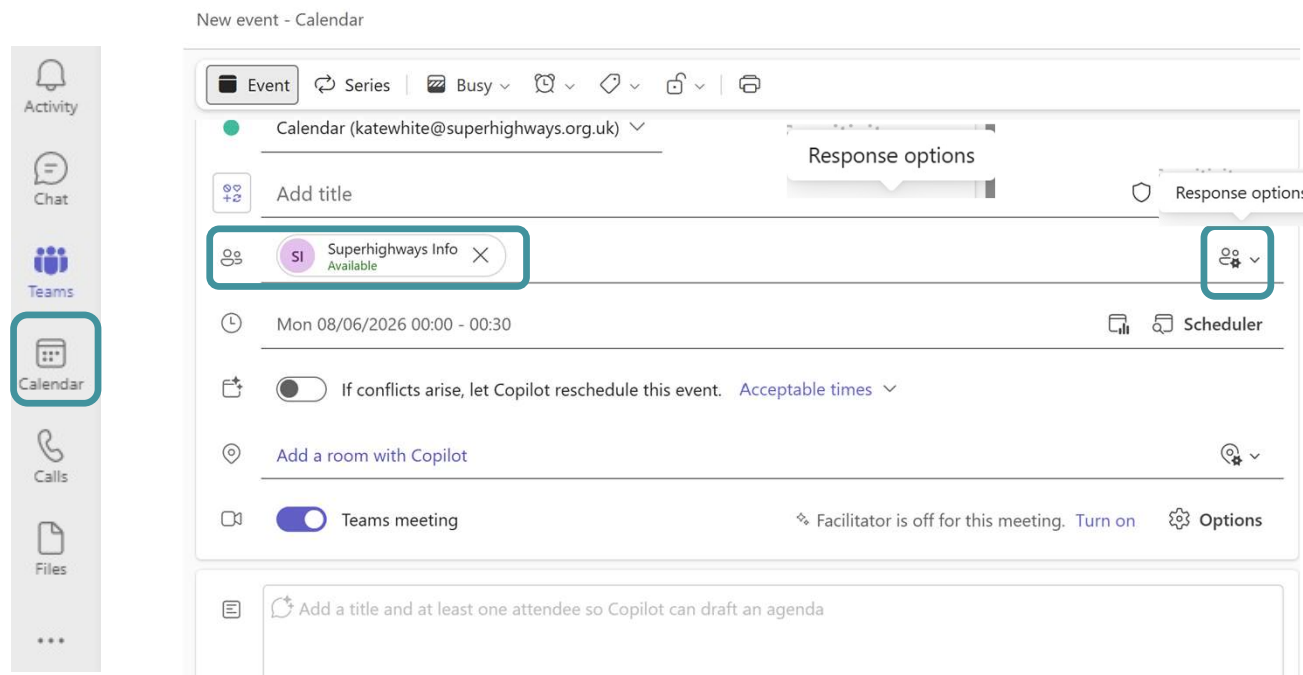


The screenshot shows the Outlook 'Scheduling Assistant' interface for creating a calendar event. At the top, there are navigation options: 'Scheduling Assistant', 'Response options', 'Busy', 'Categorise', and a red 'On' indicator. Below this is a 'Save' button and a 'Calendar' dropdown menu. The main area has a text input field for 'Add a title'. Below the title field is a red-bordered box containing the 'Invite attendees' button. Further down, there are date and time pickers for the start and end of the event (25/05/2022, 08:00 to 08:30), with options for 'All day', 'Time zones', and 'Don't repeat'. A red-bordered box highlights the 'Teams meeting' toggle switch, which is currently turned off. Below the toggle is a search field for 'Search for a room or location'. At the bottom, there is a '15 minutes before' notification dropdown and a text area for 'Add a description or attach documents' with various attachment icons.

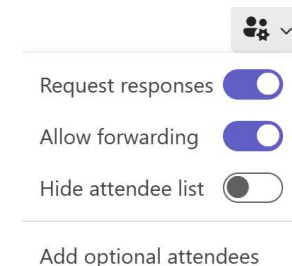


# Setting up a Teams meeting from the Teams Calendar

- ✓ Alternatively, you can create your Teams call directly in the Teams calendar (see left hand vertical menu bar)
- ✓ Now invite attendees as usual – they will get a link to the Teams call included in their calendar invite so they can click to join

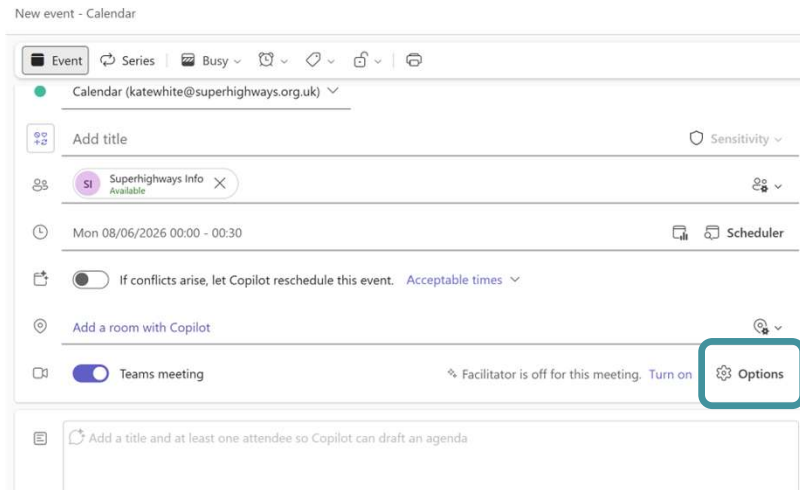


- ✓ Click on Response options and toggle on/off the options – Hide attendee list is similar to BCC in email.



# Meeting options

✓ Click on Options for more settings



✓ Click on Options for more settings and work your way down the list to override default settings

## Meeting options

### Meeting access

- Roles
- Production tools
- Participation
- Recording & transcription
- Copilot and other AI
- Accessibility

### Meeting access

#### Who can bypass the lobby?

Even if Everyone is selected, your org policy may require certain participants wait in the lobby until a member of your org or a trusted org joins. This could include people joining without an account, people from untrusted orgs, and people dialing in.

People in my org

#### People dialing in can bypass the lobby



#### Who can admit from the lobby

Organizers, co-organizers, and presenters

#### Show meeting info on join screen

Display details about the meeting like title and start time, number of others joined, and presence of the organizer.

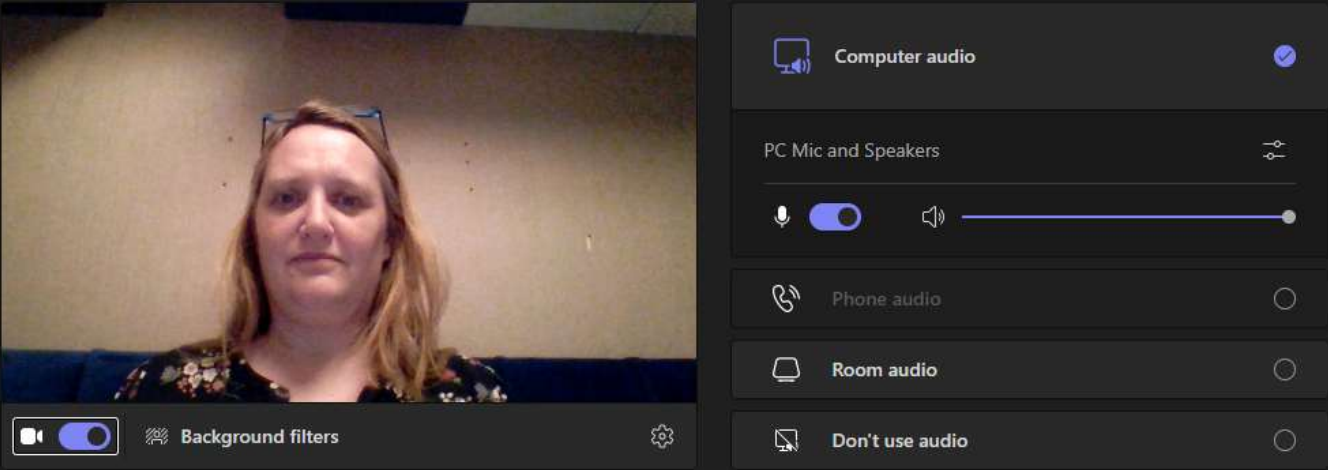
Users allowed to by pass the lobby

#### Announce when people dialing in join or leave



# Settings when joining a meeting

Choose your video and audio options



Video preview: A woman with long blonde hair and glasses on her head, wearing a floral top, is shown in a video frame. Below the frame are a video toggle (on), a 'Background filters' button, and a settings gear icon.

Audio options:

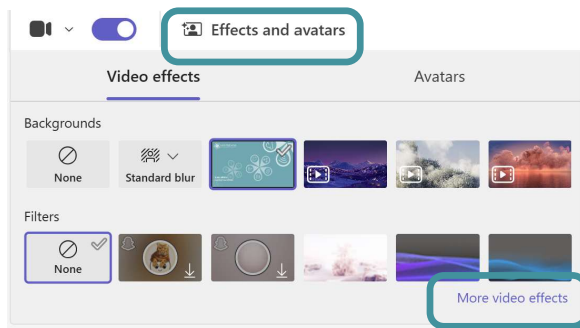
- Computer audio
- PC Mic and Speakers  (Volume slider)
- Phone audio
- Room audio
- Don't use audio

Buttons: Cancel, Join now

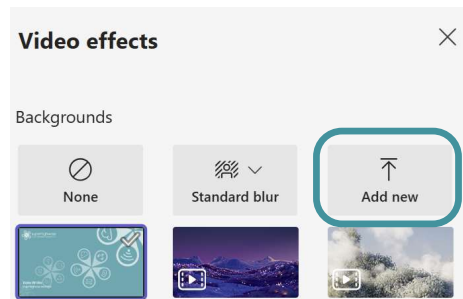


# Choose / add a background

- ✓ Before you Join a meeting, Click on Effects & avatars and More video effects



- ✓ Choose from Blur or one of the background options. Or click Add new to upload your own



- ✓ Your background image should satisfy the following formatting requirements

Image requirements:

- Min Size: 360 x 360 px
- Max Size: 2048 x 2048 px
- File type: jpeg, jpg, png, bmp
- Aspect ratio (Width:Height): Less than 4



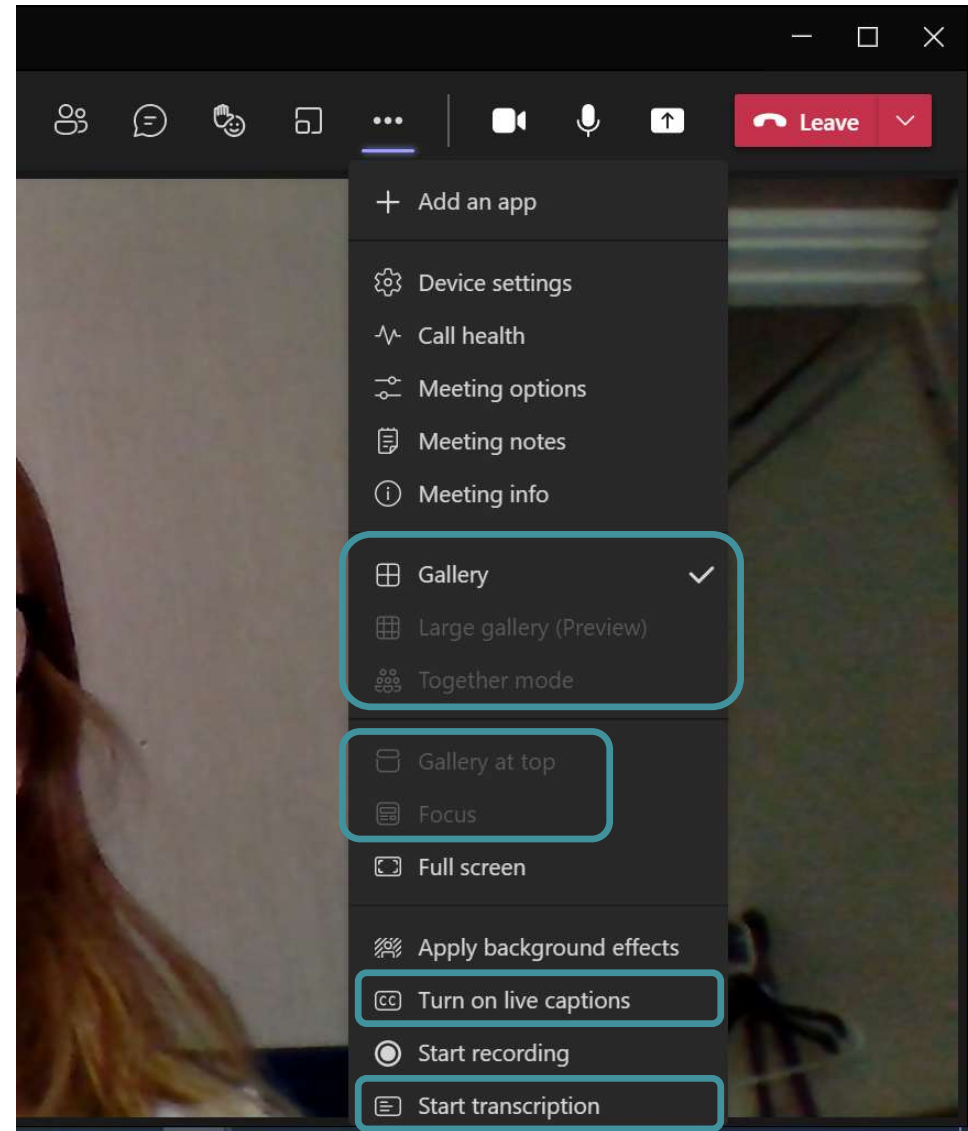
- ✓ If you have writing – it will show as 'back to front' to you, but the right way round in the meeting for others!



# Meetings tool bar

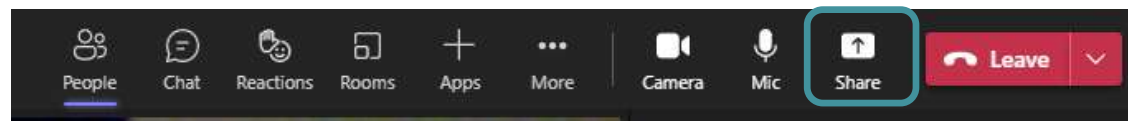
## Useful features:

- ✓ Switch between Gallery & Large gallery / Together mode
- ✓ 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. If you have Premium Copilot – you will get an AI recap

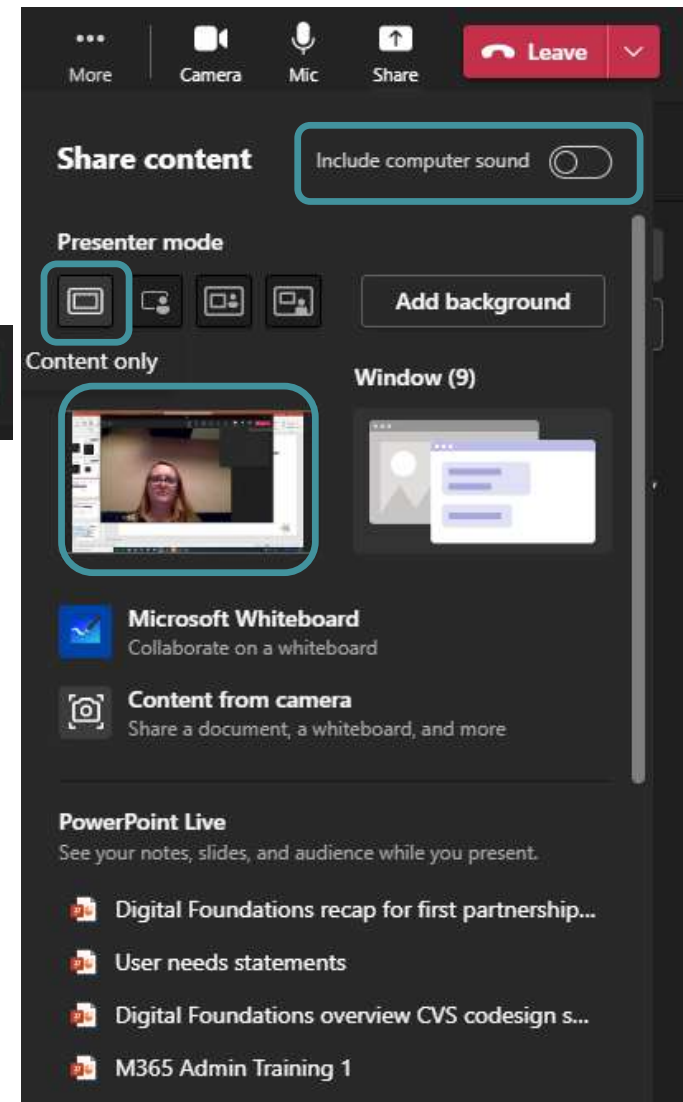


# Sharing screens

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

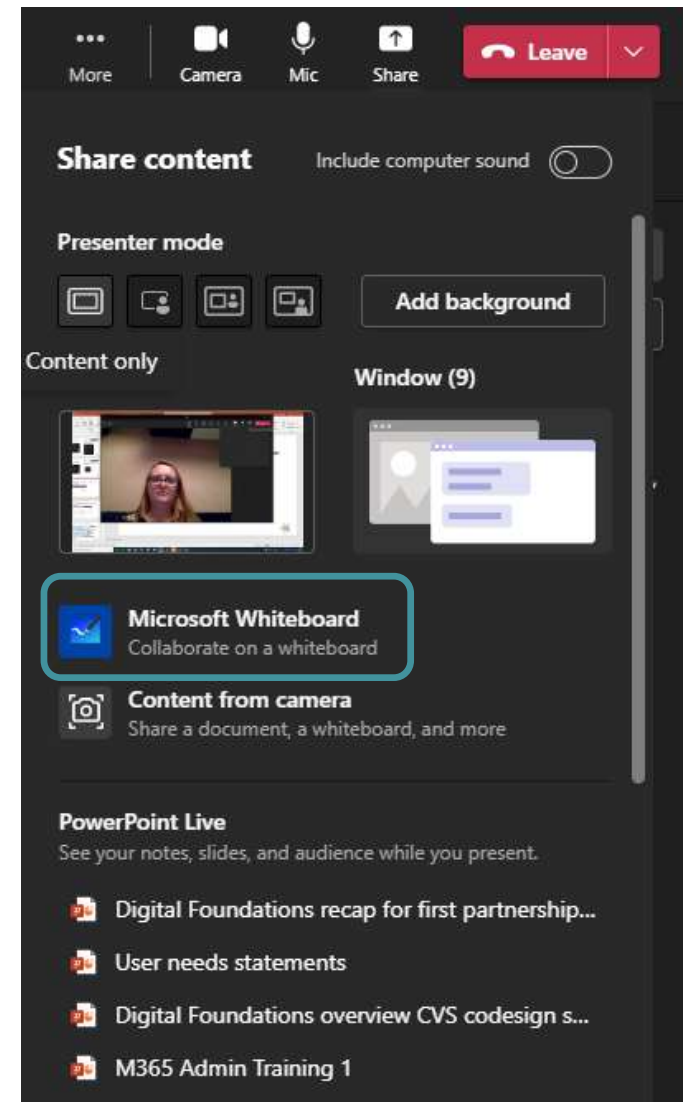
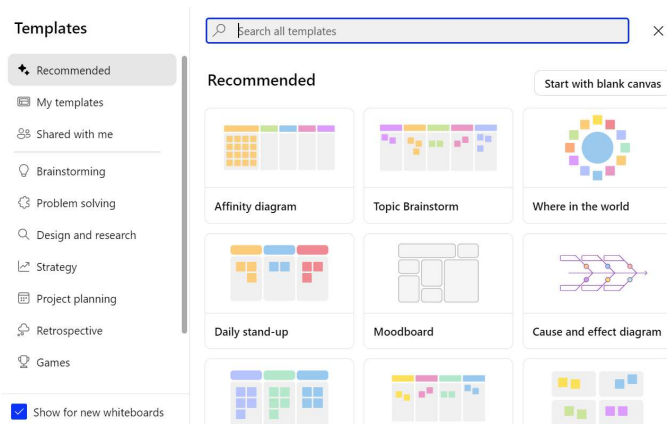


- ✓ Then click on the Content only screen to share. This is the first Presenter mode (you can also use another Presenter mode such as Side by Side or Reporter)
- ✓ If you want to share screens and play a video – remember to toggle on Include computer sound



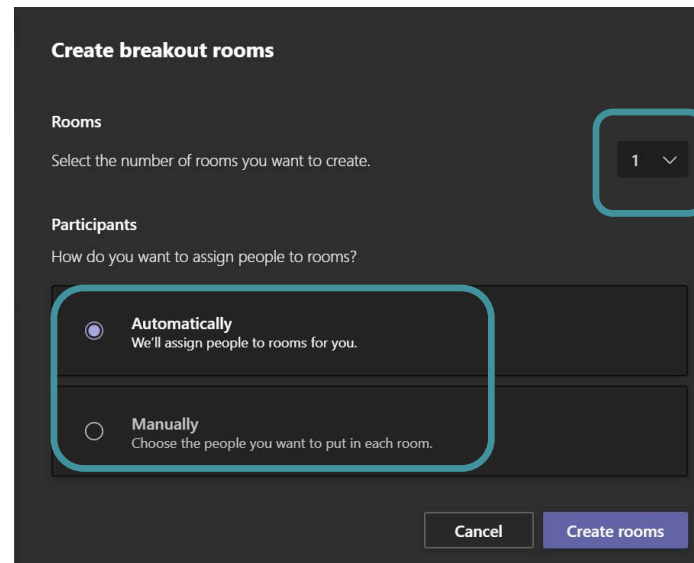
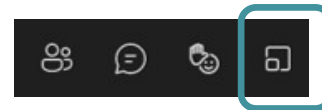
# Sharing interactive Apps

- ✓ You can also link and share other Apps to your Teams meetings to make them more interactive
- ✓ One option is a Poll – you can set up in advance and then launch from the Meeting tool bar
- ✓ You can also set up and prepare a Whiteboard in advance of a meeting and then Share this so everyone can interact within the meeting window e.g. add sticky notes when doing a practical exercise. Choose one of a good range of templates

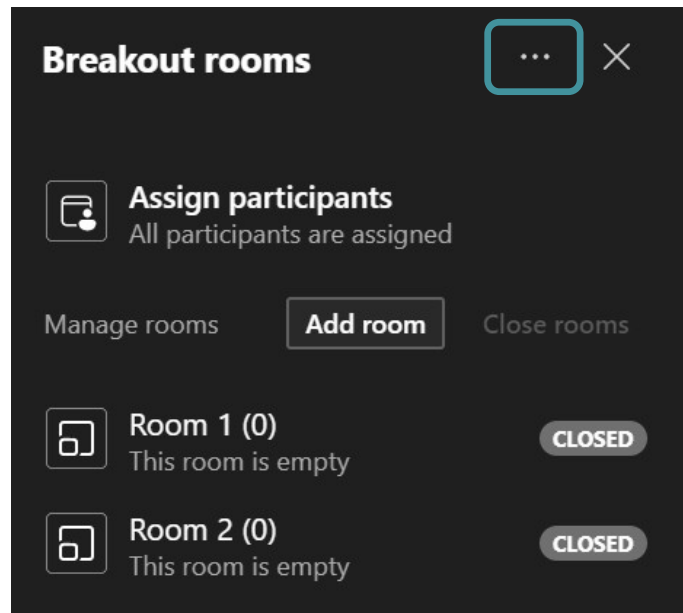


# Breakout rooms

- ✓ 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)



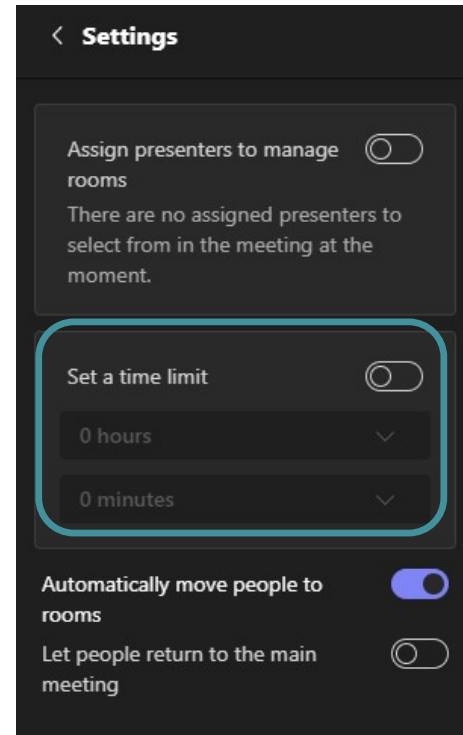
- ✓ Click the 3 dots to manually make any changes needed and e.g. to Add another room



- ✓ Click on the Cog wheel icon to open the Settings window

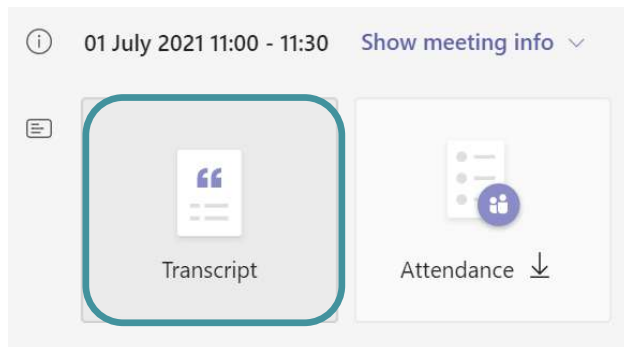
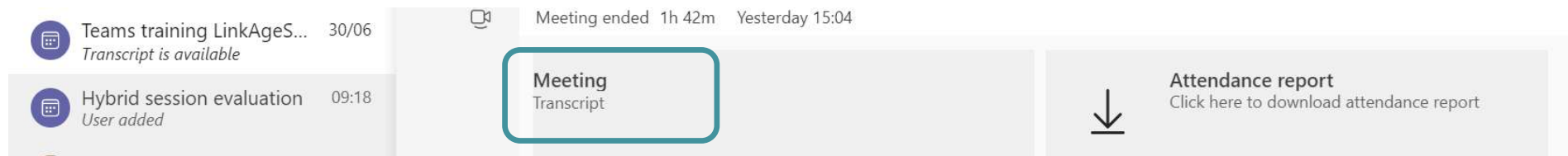


- ✓ Here you can change other default options and e.g. Set a time limit for your breakout room



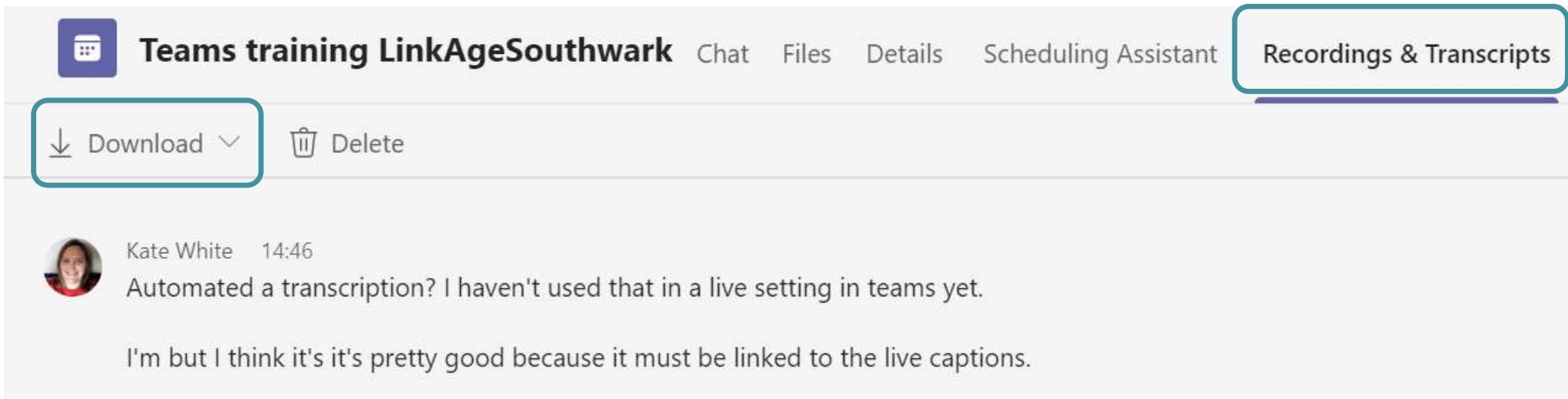
# Accessing recordings & transcripts

- ✓ 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

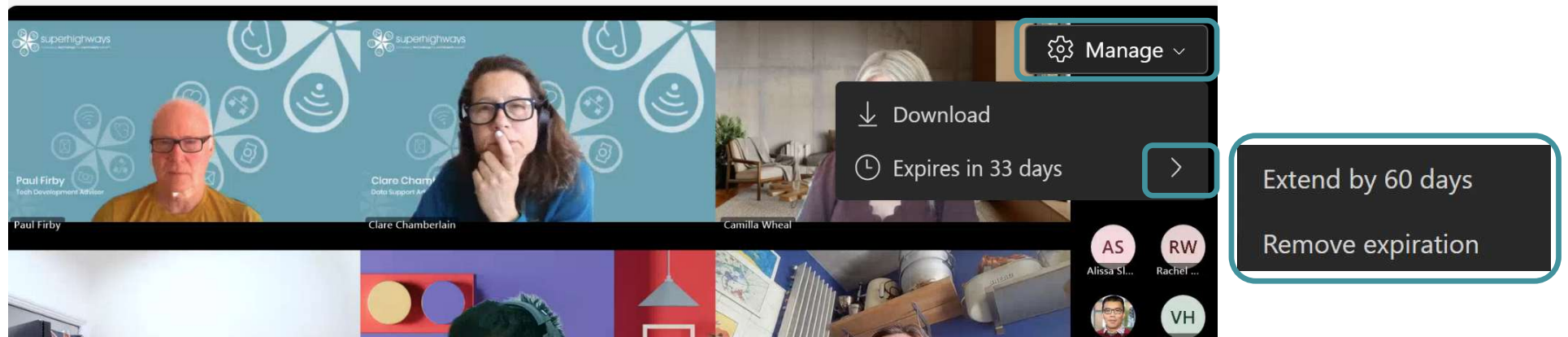


The screenshot shows the Microsoft Teams interface for a meeting titled "Teams training LinkAgeSouthwark". The top navigation bar includes "Chat", "Files", "Details", "Scheduling Assistant", and "Recordings & Transcripts", with the latter being the active tab. Below the navigation bar, there are two action buttons: "Download" (with a dropdown arrow) and "Delete". The main 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."



# Recordings – beware of expiry settings

- ✓ The default expiry for Teams meeting recordings is 60 days
- ✓ You can override this by hovering over the recording and selecting Manage



- ✓ You can download the video file and choose where to store it OR you can click on the arrow and Extend by 60 days or Remove expiration entirely



# AI Recap (with Teams Premium or Copilot Premium)

✓ If you turn on Transcription, an AI Recap will automatically be generated – giving a summary and actions list.

✓ Click on View recap in the Meeting chat

✓ Click on the arrow to expand / collapse sections

✓ Copy to share with others

✓ Have a listen to the Audio recap!

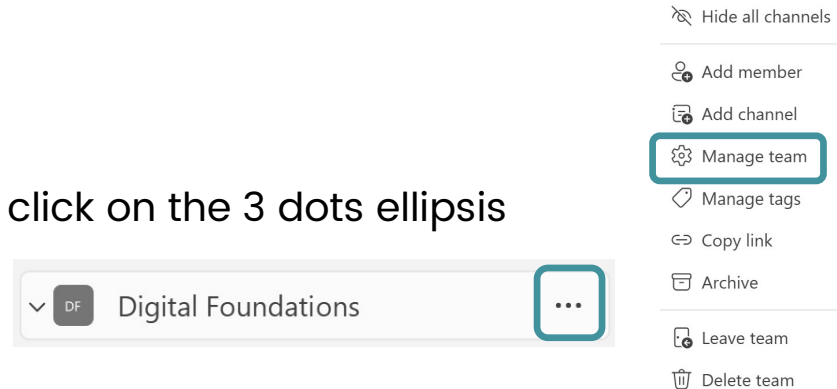
The screenshot displays the Microsoft Teams interface for a meeting titled "Microsoft Teams essentials training" on 03 June 2026 from 10:00 to 11:30. At the top right, a "View recap" button is highlighted with a red box. Below the meeting title, it shows "7 speakers" and "5 tasks", with buttons for "Transcript" and "Attendance".

The main chat area shows the meeting details and options for the AI recap. A red box highlights the "Audio recap" button. Below this, there are tabs for "Notes", "AI summary" (which is selected), "Custom summary", "Mentions", and "Transcript". A warning message states "AI-generated content may be incorrect".

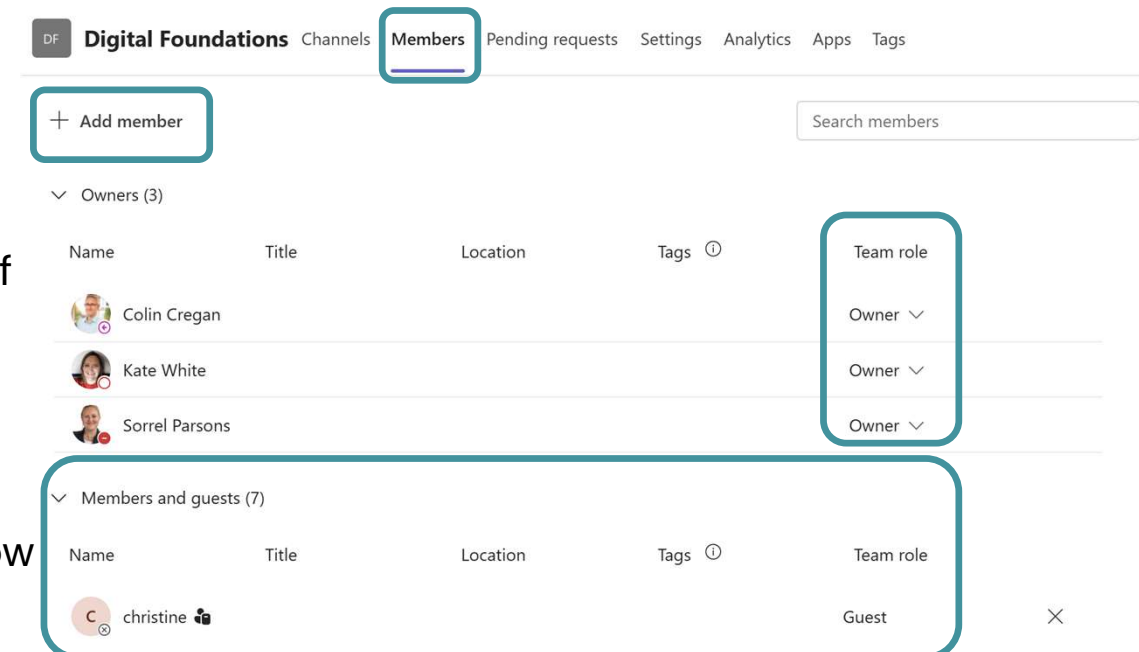
The "Meeting notes" section is visible, with an "Expand all" link on the right. The first note, titled "Overview and Structure of Microsoft Teams", is highlighted with a red box. The second note, "File Management and Collaboration in Teams", is also visible.

# Managing your Team

- ✓ Hover over your Team name and then click on the 3 dots ellipsis
- ✓ In the options list, click Manage team





- ✓ Click on the Members tab at the top
- ✓ If you are a Team owner, you can add Members and give Roles
- ✓ We'd suggest having more than one Owner for a Team (in case they are off sick or leave the organisation)
- ✓ If you invite an external person to your team (this may need to be enabled in your M365 Admin portal), they will show as a Guest



# Adding channels

- ✓ Click on the 3 dots ellipsis to the right of your Team name to Add a channel
- ✓ Give your channel a name (to add an icon – click the Windows key on your keyboard, usually to the left of your space bar, and the full stop key)
- ✓ Choose the appropriate access level. Private channels will be indicated by the padlock icon next to the name. You then choose which members of your team can access.

 Hide all channels

 Add member

 Add channel

## Create a channel

Channel name \*

 Test comms

Description

Help others find the right channel by providing a description

Choose a channel type \* ⓘ

Select



Standard

Everyone on the team has access.



Shared

People or teams in your org or outside your org can have access.



Private

Specific people on the team have access.





# Making full use of M365

## CoPilot

Paul Firby – Superhighways

#DigitalFoundations

# Getting started with MS Copilot



## What we will cover today

1. What is Copilot
2. Different 'versions'
3. Practical use cases
4. Some tips re 'prompts'
5. Hands on time throughout
6. Paid version demo

*\* We're including some slides from Microsoft's new 'Microsoft 365 Copilot QuickStart Training for Nonprofits: Learn to integrate Microsoft 365 Copilot in your work' and will share links to future sessions*



# 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) and Claude.ai (Anthropic, for some specialised coding tasks)



# Generative AI

Text based prompts to generate...

- ✓ More text!
- ✓ Images
- ✓ Video
- ✓ Speech (voice)
- ✓ Customer service chatbots
- ✓ Fixing code

And much more. Watch a brief video explainer [here](#).

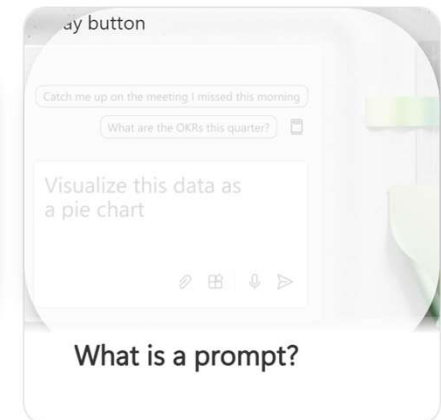
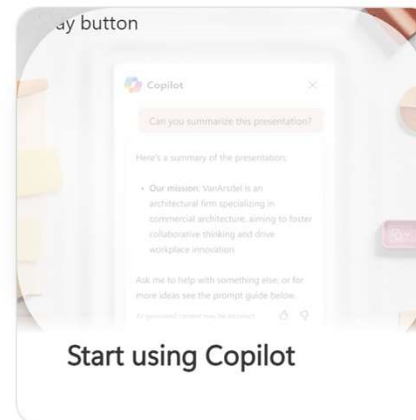
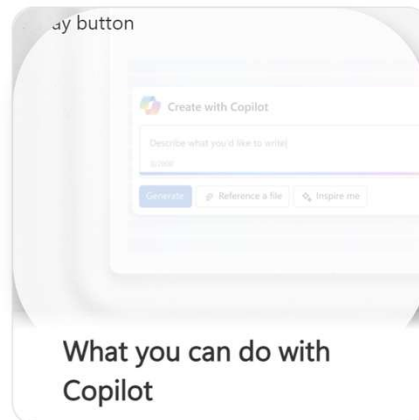
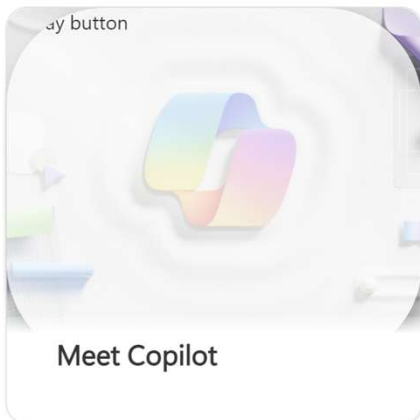


## [Start your Microsoft Copilot learning journey](#)

Explore in products ▾ Prompts to try Getting started ▾ What's new

# Copilot Lab

## Start your Copilot journey



# Different versions



# Copilot in Bing

The image shows a Bing search page with the search query "what is copilot in bing please explain". The search results include a top result from PCMag with the title "What Is Copilot? Microsoft's AI Assistant Explained | PCMag". Below this is a video section titled "Videos of What is Copilot In Bing Please Explain" featuring a video from PCMag titled "Microsoft Copilot Explained for Windows Copilot, Bing Copilot & Microsoft 365 Copilot (2023)". On the right side, there is a Copilot chat interface with a text box containing an explanation of Copilot's features: "Copilot in Bing is an AI-powered assistant designed to help you with a wide range of tasks and queries. It leverages advanced language models to provide information, answer questions, assist with productivity tasks, and even engage in meaningful conversations. Here are some key features: 1. Information Retrieval: Copilot can search the web to find up-to-date information on various topics. 2. Productivity Assistance: It can help with tasks like drafting emails, creating summaries, and managing schedules. 3. Conversational Engagement: Copilot can chat with you".

Microsoft Bing

what is copilot in bing please explain

SEARCH COPILOT WORK VIDEOS IMAGES MAPS NEWS SHOPPING MORE TOOLS

About 324,000 results

PCMag  
https://www.pcmag.com/explainers/what-is-microsoft-copilot

[What Is Copilot? Microsoft's AI Assistant Explained | PCMag](#)

WEB 18 Jun 2024 · Copilot is a conversational chat interface that lets you search for specific information, generate text such as emails and summaries, and create images based on text prompts you write.

Tags: What Is... Michael Muchmore Lead Software Analyst PC Magazine

Videos of What is Copilot In Bing Please Explain  
bing.com/videos

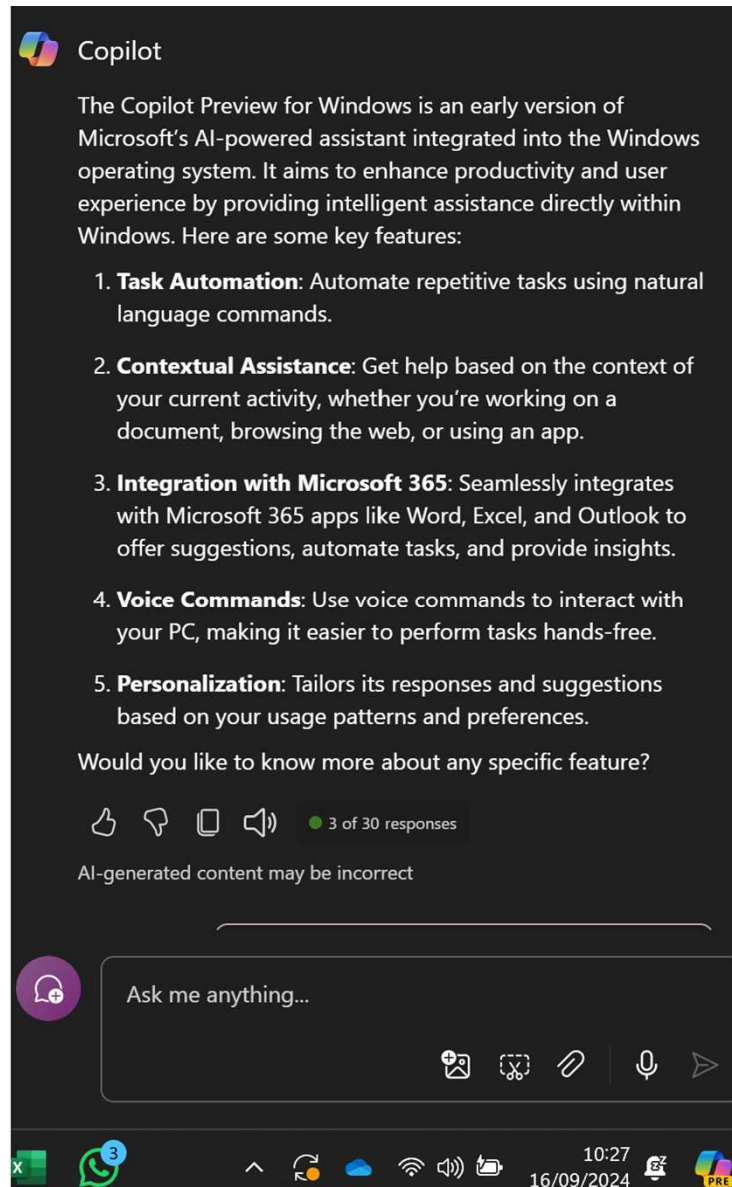
MICROSOFT COPILOT EXPLAINED!  
Microsoft Copilot Explained for Windows Copilot, Bing Copilot & Microsoft 365 Copilot (2023)  
12.4K views · 10 months ago

Copilot in Bing is an AI-powered assistant designed to help you with a wide range of tasks and queries. It leverages advanced language models to provide information, answer questions, assist with productivity tasks, and even engage in meaningful conversations. Here are some key features:

- Information Retrieval:** Copilot can search the web to find up-to-date information on various topics.
- Productivity Assistance:** It can help with tasks like drafting emails, creating summaries, and managing schedules.
- Conversational Engagement:** Copilot can chat with you

See more

# Copilot Windows preview – no longer available



**Copilot**

The Copilot Preview for Windows is an early version of Microsoft's AI-powered assistant integrated into the Windows operating system. It aims to enhance productivity and user experience by providing intelligent assistance directly within Windows. Here are some key features:

- 1. Task Automation:** Automate repetitive tasks using natural language commands.
- 2. Contextual Assistance:** Get help based on the context of your current activity, whether you're working on a document, browsing the web, or using an app.
- 3. Integration with Microsoft 365:** Seamlessly integrates with Microsoft 365 apps like Word, Excel, and Outlook to offer suggestions, automate tasks, and provide insights.
- 4. Voice Commands:** Use voice commands to interact with your PC, making it easier to perform tasks hands-free.
- 5. Personalization:** Tailors its responses and suggestions based on your usage patterns and preferences.

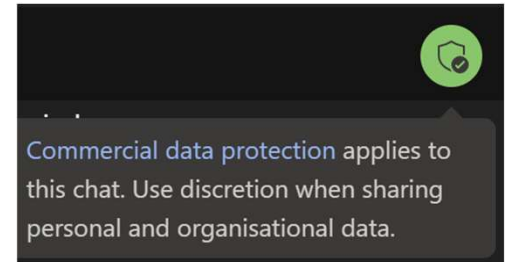
Would you like to know more about any specific feature?

👍 👎 📄 🔊 3 of 30 responses

AI-generated content may be incorrect

Ask me anything...

10:27  
16/09/2024



Commercial data protection applies to this chat. Use discretion when sharing personal and organisational data.



# Copilot Chat


(part of your M365 subscription)


+ New chat   


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


## Copilot


Your everyday AI companion


 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 M365

paid licence (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



# CoPilot (free) v CoPilot (paid)

Your plan: M365 Copilot (Basic) responds using web data, your uploads, and content you're viewing in the app. AI-assisted file editing included. Availability may be limited during peak demand.

LO

Lifelong Learner U  
M365 Copilot (Basic) ⓘ

...

Your plan: Microsoft 365 Copilot—answers are powered by Work IQ which reasons over your meetings, emails, chats, files and more.



Paul Firby

M365 Copilot (Premium) ⓘ

...





## Microsoft Copilot - Nonprofit Cloud Subscriptions

Donor Partner: Microsoft Cloud  
 Language: Multilingual  
 Software category: Cloud Computing  
 Media: Subscription  
 Product ID: G-58500

GET THIS OFFER

### What Products Are Available?

<p><b>Copilot for Microsoft 365</b></p>	<p>Copilot for Microsoft 365 integrates AI functionality into Microsoft 365 services, including Outlook, Excel, PowerPoint, Teams, OneNote, and Word.</p> <p>You can use Copilot for Microsoft 365 to summarize documents and meetings, draft written content, get suggestions and feedback for your work, and analyze data — all from within Microsoft 365 apps.</p> <p>An active Microsoft 365 or Office 365 license is required to add a Copilot for Microsoft 365 license.</p>
<p><b>Microsoft Copilot Studio</b></p>	<p>Microsoft Copilot Studio allows you to create custom AI assistants for employees, volunteers, and constituents.</p> <p>You can use premade content building blocks that contain topics, trigger phrases, and scripts for conversations. The AI assistants you create can generate answers drawing from internal and external sources.</p>

# Top 10 to "Try First"

## with Microsoft 365 Copilot

Foundational skills for new users

*\* Slide from 'Microsoft 365 Copilot QuickStart Training for Nonprofits: Learn to integrate Microsoft 365 Copilot in your work'*



1

### Recap a meeting

– let Copilot keep track of key topics and action items so you can stay focused during the meeting and avoid listening to the recording after.

- Draft an email with notes and action items from meeting



2

### Summarize an email thread

– get quickly caught up to a long, complex email thread.

- Click on the Summarize icon



3

### Draft email

– personalize the tone and length.

- Draft an email to [name] that informs them that Project X is delayed two weeks. Make it short and casual in tone.



4

### Summarize a document

– get right down to business by summarizing long documents and focusing on the relevant sections.

- Give me a bulleted list of key points from file



5

### Tell me about a topic/project

– provide insights and analysis from across multiple sources to get up to speed quickly.

- Tell me what's new about topic organized by emails, chats, and files?



6

### Give me some ideas for ...

– boost your creativity with ideas for your work such as agendas, product names, social media posts, etc.

- Suggest 10 compelling taglines based on file



7

### Help me write ...

– jumpstart creativity and write and edit like a pro by getting a first draft in seconds.

- Generate three ways to say [x]



8

### What did they say ...

– when you vaguely remember someone mentioning a topic, have Copilot do the research.

- What did person say about topic



9

### Revise this content

– when you've got a rough draft of an idea, turn it into usable text and then vary the length and tone.

- Rewrite with Copilot



10

### Translate a message

– with organisations becoming increasingly international, it's important to be able to read or write messages in other languages.

- Translate the following text into French:

For more prompts, visit Copilot Lab at: [aka.ms/CopilotLab](https://aka.ms/CopilotLab)

# Introducing prompts

## Define

1. Expertise you need
2. Your task
3. Objective
4. Relevant context
5. Output/format you want

[Copilot tutorial: What is a prompt? - Microsoft Support](#)

## Talk to it

- ✓ For this task act as an expert in...
- ✓ You will need to be...
- ✓ Your task is to...
- ✓ Be aware of...
- ✓ Our audience is...
- ✓ Include/exclude...
- ✓ Give me the output in this format...





# The art and science of prompting

**Prompts** are how you ask Copilot to do something for you — like creating, summarizing, editing, or transforming.

Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

*\* Slide from 'Microsoft 365 Copilot QuickStart Training for Nonprofits: Learn to integrate Microsoft 365 Copilot in your work'*

## 1. Tell Copilot what you need

### **Learn** about projects and concepts:

"What is [Project X] and who are the key stakeholders working on it?"

### **Edit** text:

"Check this product launch rationale for inconsistencies."

### **Transform** documents:

"Transform this FAQ doc into a 10-slide onboarding guide."

### **Summarize** information:

"Write a session abstract of this [presentation]."

### **Create** engaging content:

"Create a value proposition for [Product X]."

### **Catch-up** on missed items:

"Provide a summary of the updates and action items on [Project X]."

# The art and science of prompting



## 2. Include the right prompt ingredients

To get the best response, it's important to focus on some of the **key elements** when phrasing your Copilot prompts.

**Goal**

What response do you want from Copilot?

**Context**

Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on Email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

**Source**

How should Copilot respond to best meet your expectations?

**Expectations**

*\* Slide from 'Microsoft 365 Copilot QuickStart Training for Nonprofits: Learn to integrate Microsoft 365 Copilot in your work'*

# Suggested Copilot prompts

The screenshot displays the Copilot Prompt Gallery interface. At the top, there are three tabs: "Microsoft prompts" (selected), "Your prompts", and "Team prompts". Below the tabs are four filter dropdown menus: "App", "Task", "Job type", and "Copilot agent". The main area contains a grid of 12 prompt cards, each with a title, a description, and a small icon.

App	Task	Job type	Copilot agent
Stay informed	Name a product	Generate ideas	Get a to-do list
Create presentations	Write more confidently	Find specific information	Draft an email
Write a formula	Create an agenda	Draft an agenda	Find the right questions

**Stay informed**  
What's the latest from `person`, organized by emails, chats, and files?

**Name a product**  
Suggest a list of product names for a state-of-the-art toaster that is energy efficient and stylish.

**Generate ideas**  
Suggest inexpensive ways to optimize our website for organic search.

**Get a to-do list**  
Get a to-do list from my Fabrikam client meetings.

**Create presentations**  
Create a presentation from `file`

**Write more confidently**  
How can I more concisely describe `[time management]`?

**Find specific information**  
What does the document say about `[roles and responsibilities]`?

**Draft an email**  
Write an email congratulating my team on the end of the fiscal year.

**Write a formula**  
Write a formula `[for the average of each column]`

**Create an agenda**  
Add a meeting agenda based on my prior meeting notes with `[World Wide Importers]`

**Draft an agenda**  
Draft an agenda for `[the team retrospective meeting]`

**Find the right questions**  
Suggest common questions that can be asked to get a retrospective started with my colleagues

[Copilot Prompt Gallery](#)





# The art and science of prompting

**Following up** on your prompts helps you collaborate with Copilot, to gain more useful, tailored responses.

## 3. Keep the conversation going



### Generating content ideas

Lead with broader requests, then give specific details about the content.



### Gaining insights

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.



### Enabling insightful meetings

Request a meeting recap, then ask for more information about what you should know.



### Translating languages

Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.



### Storytelling assistance

Ask Copilot to write a story, then guide it by giving more specific, relevant details.



### Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

*\* Slide from 'Microsoft 365 Copilot QuickStart Training for Nonprofits: Learn to integrate Microsoft 365 Copilot in your work'*





# The art and science of prompting

[Copilot tutorial: What makes a good prompt? - Microsoft Support](#)

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Lead with broader requests, then give specific details about the content.



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### Solving technical problems

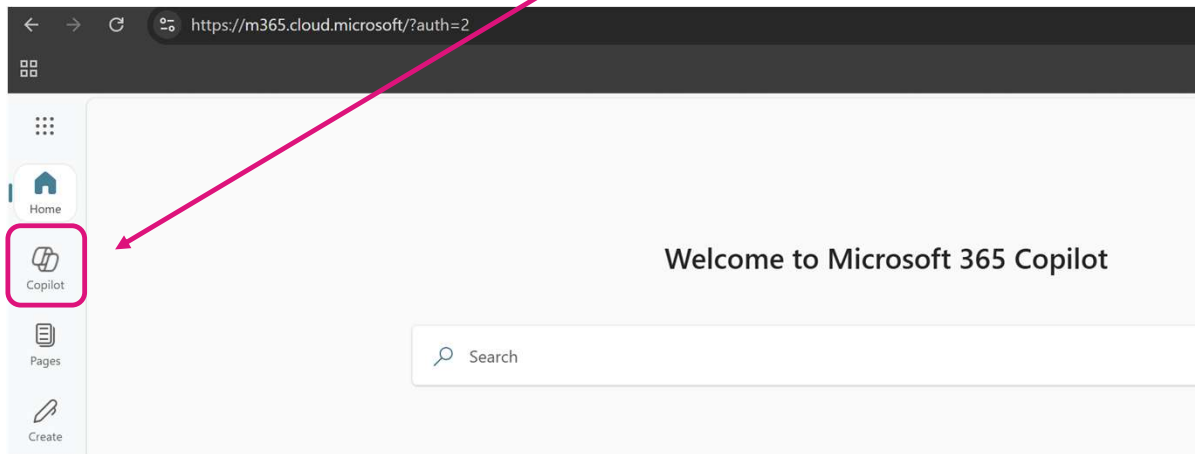
Present a technical problem, then narrow it down, or ask for step-by-step guidance.

*\* Slide from 'Microsoft 365 Copilot QuickStart Training for Nonprofits: Learn to integrate Microsoft 365 Copilot in your work'*

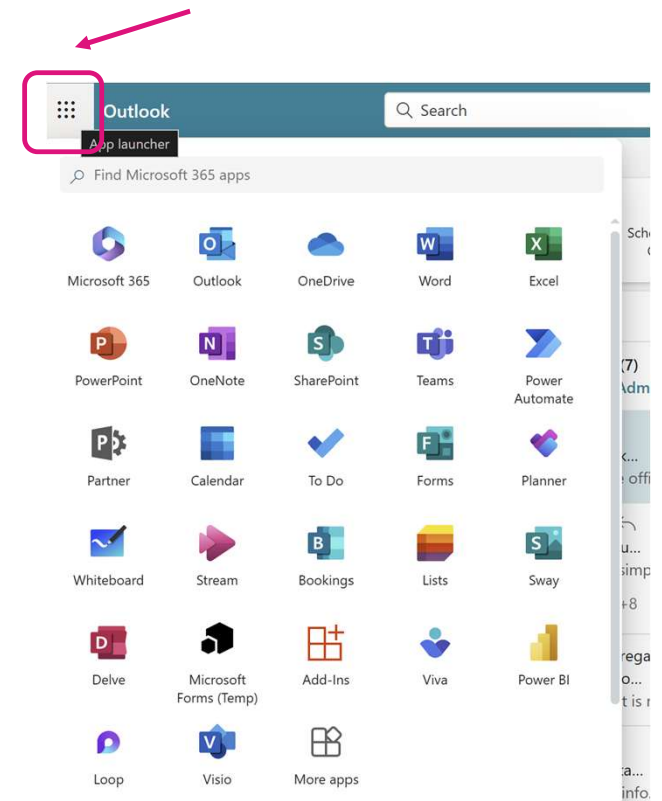
Let's all open  
Copilot (free version)



Either find Copilot from your M365 landing page ([www.office.com](https://www.office.com)) once signed in



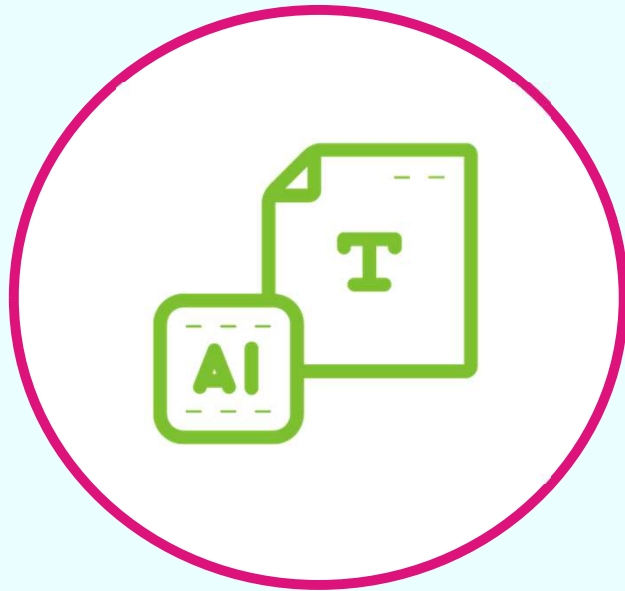
Or if using any of your M365 apps in the browser – click on the App launcher and select or search for Copilot



Let's have some  
hands on time  
looking at a  
range of use  
cases



# 1



## Drafting an email



**Exercise:** Draft an email to an invite to an upcoming AGM (or similar event). Ask for two different versions for different audiences e.g. members and partners.



# Free version response

h me asap.

Sun 07/06/2026 15:58

**Copilot**

I've drafted an email for you to [Paul Firby](#) and populated it with his work address (paulfirby@superhighways.org.uk). [office](#)

**Subject: Request for help with my WordPress project**

**Email body**

Hi Paul,

I hope you're well.

I'm currently working on a WordPress project and was hoping to get your advice. I remember you having strong experience in this area, and I'd really value your input.

I'm particularly looking for guidance on a few aspects I'm finding challenging, and even a short discussion would really help me move things forward.

Please let me know if you might have some time in the coming days for a quick chat.

Thanks in advance, and I'd really appreciate your help.

Best regards,  
Lifelong Learner 01

You can use this draft as a starting point and edit it before sending.

**Tip:** If you want a higher response rate, I can tailor a version that:

- Mentions the exact WordPress issue (themes, plugins, SEO, hosting, etc.)
- Suggests specific times to meet

Message Copilot

+

AI-generated content may be incorrect

and data skills



# Paid version response

Send

To

Cc

Help with my WordPress project Draft saved at 1:08 PM

Hi,


I hope you're well. I'm working on a WordPress project at the moment and was wondering if you'd be able to help me.

I could use some support with setup and development, and I'd really value your advice and expertise. If you're available, I'd be happy to share a bit more detail about what I'm trying to achieve and discuss how we might work together.

Thanks very much for considering this, and no worries at all if your schedule is too full right now.

Paul Firby  
Tech Development Advisor  
Superhighways  
I work part-time, Tue, Wed & Thu

Tel 020 8152 8825  
[Superhighways | Datwise London](#)  
[LinkedIn](#) | [Bluesky](#)  
[Book our digital & data training](#)  
[Sign up to our eNews](#)  
[Explore our 2025 Impact Report Highlights](#)



Copilot

Today

Help me write an email to Ill, asking for elp with my wordpress project

Copilot

✓ Your email draft has been written and saved.

If you'd like, I can:

- Personalise the tone (more casual or more formal)
- Address it directly to a specific person
- Add brief details about the WordPress issue (theme, plugins, fixes, build, etc.)
- Tighten it up to be shorter and more direct

Just tell me what you want to adjust.

Make it more casual

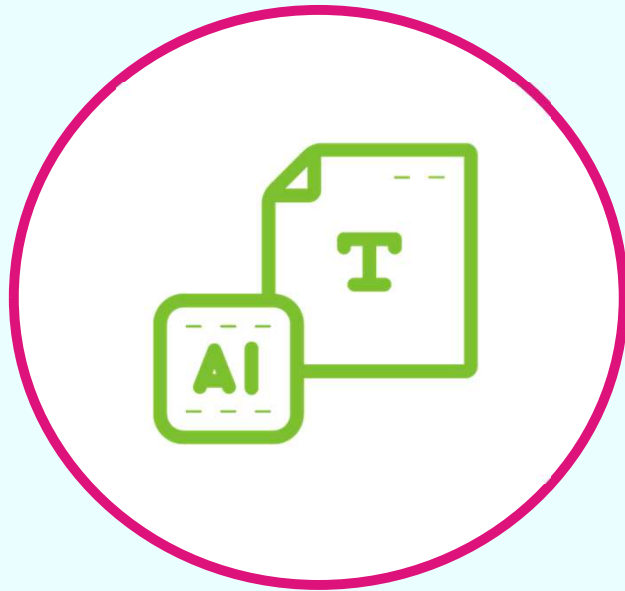
Add details about the WordPress issue

Shorten and tighten the email

What do you want this email to say?

+ ✎ ×

# 2



**Summarising  
a report or  
web article**



Please summarise the KVA strategy attachedpdf-version-kva-strategy.pdf



Copilot

The **Kingston Voluntary Action (KVA) Strategy 2025-2028** document outlines a comprehensive plan aimed at fostering stronger organisations and healthier communities. Here are the key points:

### Foreword and Introduction

- **Foreword by the Chair:** Nigel Newby, the Chair of Trustees, introduces the strategy, emphasizing KVA's commitment to supporting community groups, charities, and not-for-profit organisations in Kingston and across London <sup>1</sup>.
- **Our Story:** KVA's journey began in 1968, evolving to meet the changing needs of the community and the voluntary sector <sup>1</sup>.

### Vision, Mission, Values, and Strategic Aims

- **Vision:** Empower communities and individuals to drive social change towards a fairer, more inclusive, healthier, and happier society <sup>1</sup>.

Can you provide more details on the funding strategy?

What are the main challenges KVA anticipates?

How will KVA support mental health initiatives?

View prompts

Message Copilot

Add content

0 / 16000



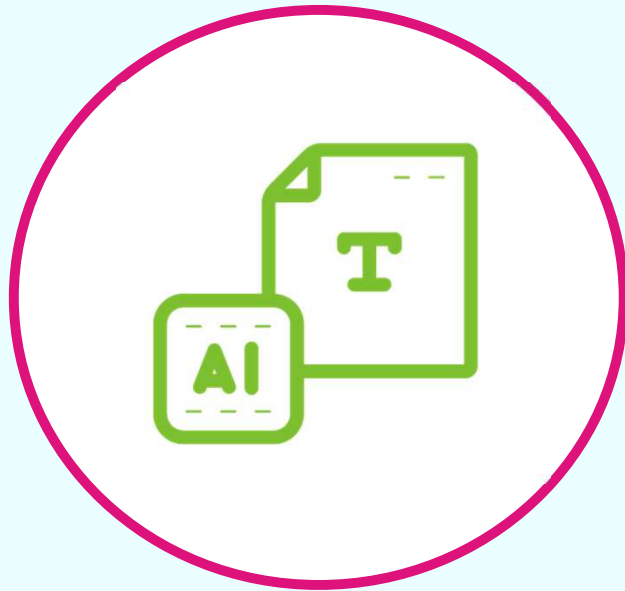
Upload your document to summarise



**Exercise:** Upload a report of your choice and / or paste a link to a specific web page and ask Copilot to summarise for you.



# 3



Creating  
copy for  
social media  
posts



# Promoting a website page via Social Media

We asked CoPilot to read a recent Superhighways website entry and suggest a series of Social media posts for Facebook, X, etc

## Our prompt:

**For this task act as an expert in:** UK charities, Social media in the UK, best practice in UK charities social media use, the demographics of different users for each Social media platform

**You will need to be:** detailed, honest, creative, articulate

**Please read the** blog post uploaded from the Superhighways web site and then:

**Your task is to:** create a series of social media posts that will encourage readers to visit the blog post on the superhighways website. The social media posts will be for the charities account on Facebook, LinkedIn, Twitter/X, Instagram, Snapchat and TikTok.

**For each:** create a post that targets the most likely demographic to respond to the post and that will then read the blog post.

**For each result:** please give 5 appropriate hashtags that should be attached to the post, a different image or graphic for each and explain which demographic is being targeted

**Give the output in the format** of a series of different social media posts that can be quickly copied and pasted to the appropriate platforms.



# Promoting a website page via Social Media

We asked **Chat GPT** and **Copilot** to read a recent Superhighways blog and suggest a series of Social media posts.

**For this task act as an expert and teacher in:**

Teaching technology to staff and volunteers at small charities and community organisations in London, user experience on simple websites, charity marketing, graphic design

**You will need to be:**

Warm, approachable and talk in plain, conversational English, avoiding technical jargon. Be aware of charity speech such as 'make a difference'.

**Your task is to:**

Generate text for social media posts that share this blog post about website-accessibility: <https://superhighways.org.uk/latest/website-accessibility/>

**Our audience is** staff and volunteers for small charities and community organisations who are often pressed for time and have limited capacity to learn. Small charities and community organisations also have little or no budget for technology, so this blog is focused on free and affordable tools.

**The objective** is ultimately to motivate our audience to click on the link to read the full blog.

**Give me the output in this format:**

Posts for each of these channels: X (Twitter), LinkedIn, Facebook, Instagram. Include relevant hashtags, emojis and symbols. Include call to action. Keep posts brief and within character limit.



## When prompted CoPilot said



Here's a set of social media posts tailored for each platform, aimed at staff and volunteers in small charities and community organisations, promoting the blog on website accessibility:

**X (Twitter):** "Making your website accessible doesn't have to cost the earth! Check out our simple tips and free tools to improve your site for everyone. 🚀 Read more: [link] #AccessibilityMatters #SmallCharities #MakeADifference"

**LinkedIn:** "Website accessibility is crucial to reaching everyone in your community. This blog highlights free, easy-to-use tools that small charities can use to make their sites more inclusive. Explore colour contrast checkers, alt-text tips, and more! 🌟 Read the full guide here: [link] #WebsiteAccessibility #CharityTech #DigitalInclusion"

**Facebook:** "Does your website welcome everyone? Our new blog offers practical, free tools to improve accessibility—making a big difference to your community! 📄 Simple, effective changes like alt-text and design tweaks can make all the difference. Take a look: [link] #InclusiveWeb #SmallCharities #TechForGood"

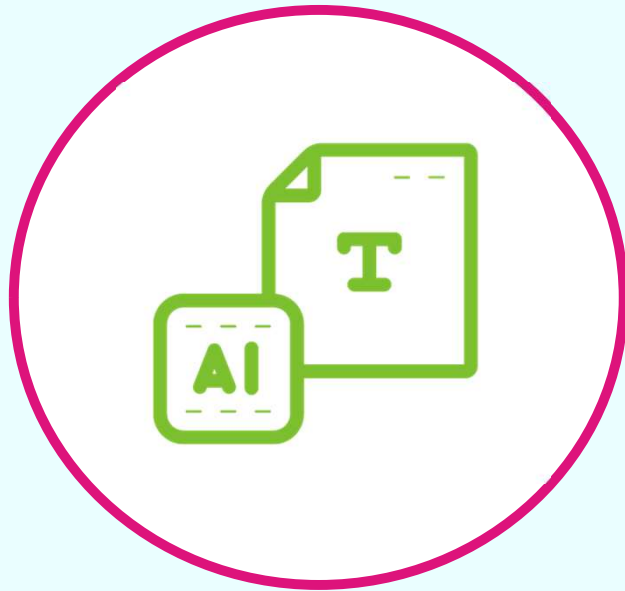
**Instagram:** "Your website should be accessible to *everyone*! We've gathered free, easy-to-use tools to help small charities improve their sites—without the cost. 💡 Start making your website more inclusive today. Head to the link in bio to learn more! #AccessibilityMatters #CharityTech #MakeADifference #DigitalInclusion"



**Exercise:** Ask Copilot to construct a social media post to promote a service or event on your website (paste the link to that page in your prompt)



# 4



Researching  
/ information  
gathering



# Tell me about children living in poverty in London?

## My prompt to Copilot after first return

This data is a bit out of date. Are there more recent statistics from 2023 and 2024?

Certainly! Here are some more recent statistics on child poverty in London:

[As of 2023, around 700,000 children in London are living in poverty after housing costs<sup>1</sup>.](#)

[The poverty rate for children in London remains high, with 33% of children aged 5-9 living in poverty<sup>2</sup>.](#)

[Certain boroughs, such as Tower Hamlets, continue to have particularly high rates of child poverty<sup>3</sup>.](#)

[The cost of living crisis has further impacted families, making it increasingly difficult for many to afford basic necessities<sup>45</sup>.](#)

If you need more detailed information or have specific questions, feel free to ask!

Learn more

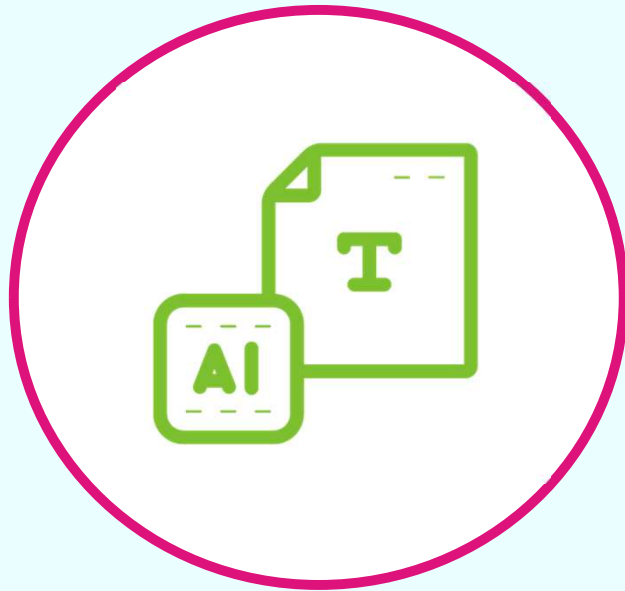
- 1  london.gov.uk
- 2  trustforlondon.org.uk
- 3  trustforlondon.org.uk
- 4  jrf.org.uk
- 5  researchbriefings.files.parliament.uk [— see less](#)

    AI-generated content may be incorrect

**Exercise:** Ask Copilot to tell you about a specific topic – e.g. evidencing need for a funding bid



# 5



## Analysing data



# An example: Getting a quick summary of our course attendee survey results

- ✓ Downloaded the survey data
- ✓ Removed any personal information
- ✓ Uploaded to AI (CoPilot and Claude so far)
- ✓ Detailed Prompt:
  - For this task act as an expert in: online training, uk charities, data analysis, technology available to charities in the uk for free. you will need to be: creative, honest. Your task is to: Give me a detailed summary of the attached survey data which is feedback from attendees on our online courses held in the UK between May 24 and July 24. We want to know the summary of the replies, what can be improved, what attendees liked, what they didn't like, which courses seemed popular, which seemed unpopular, what courses we should consider running next. for each result, please give the number of survey responses that have help you come to that conclusion. Give the output in the format of a table



# CoPilot analysis of survey data

## Summary of Survey Responses

Table

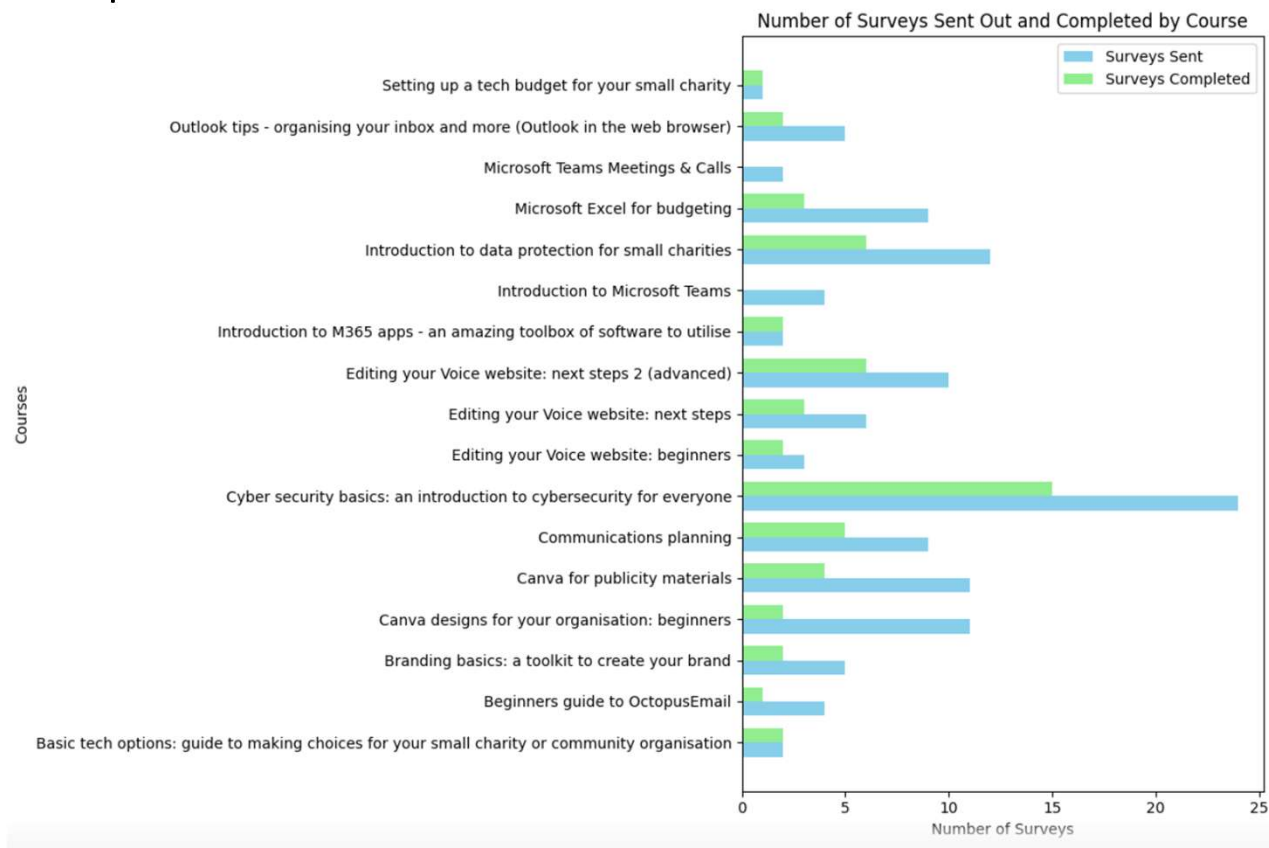


Aspect	Summary	Number of Responses
Overall Satisfaction	Most attendees rated the sessions highly, with many giving a score of 4 or 5 out of 5.	50
Popular Courses	“Cyber Security Basics” and “Editing your Voice Website: Next Steps” were particularly popular, receiving high ratings and positive comments.	20
Unpopular Courses	“Communications Planning” had mixed reviews, with some attendees feeling it did not meet their specific needs.	5
Liked Aspects	Attendees appreciated the practical nature of the sessions, the knowledgeable trainers, and the opportunity to apply what they learned immediately.	30
Disliked Aspects	Some attendees felt the sessions were too short and suggested extending the duration to cover more material.	10
Suggestions for Improvement	Attendees suggested more time for Q&A, providing session recordings, and offering more advanced topics.	15
Future Course Suggestions	Topics like advanced cybersecurity, digital marketing, and data analysis were frequently mentioned as areas of interest for future training.	10



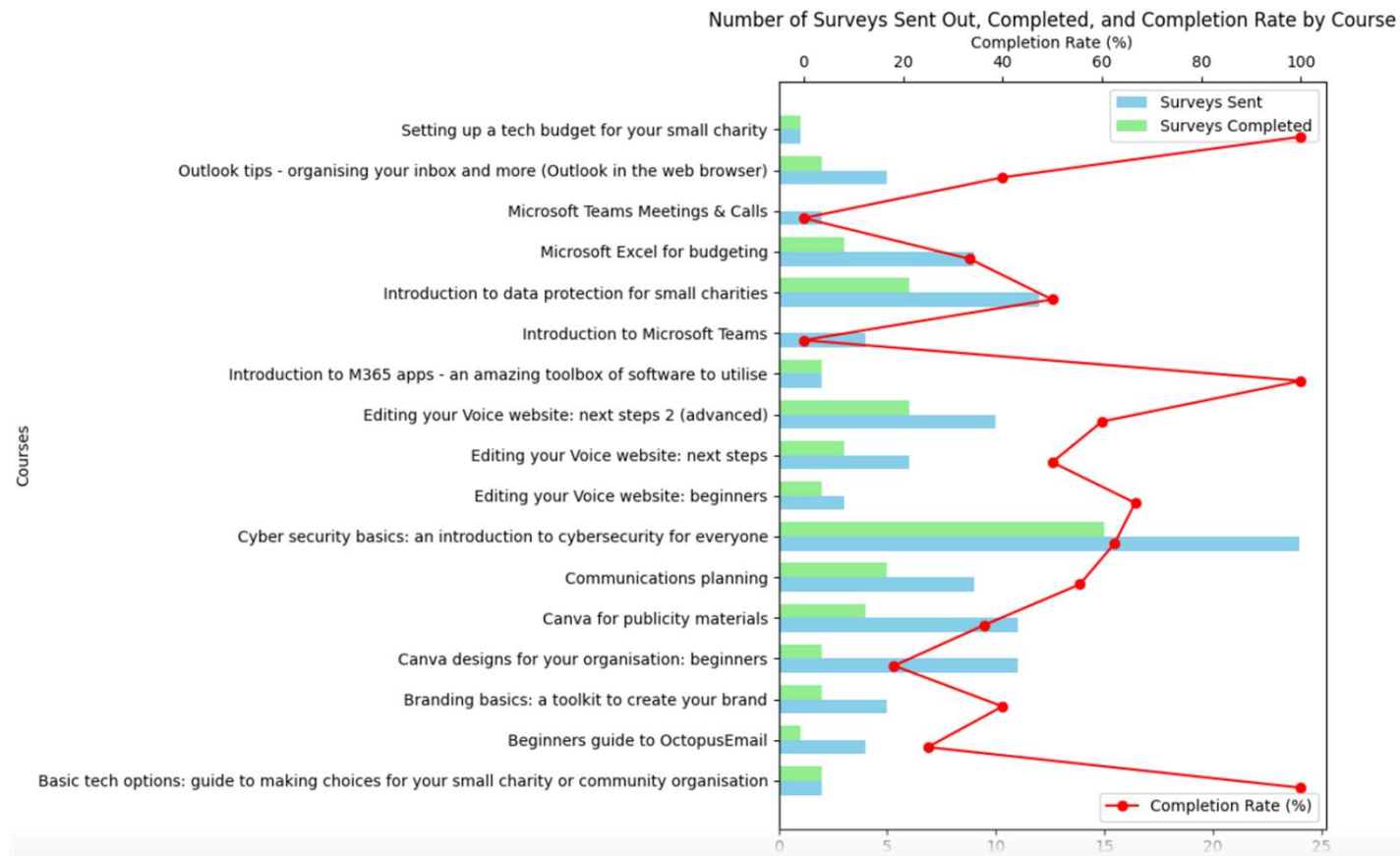
# CoPilot generated graph

Prompt: graph the courses showing the number of surveys sent out and the number of surveys completed

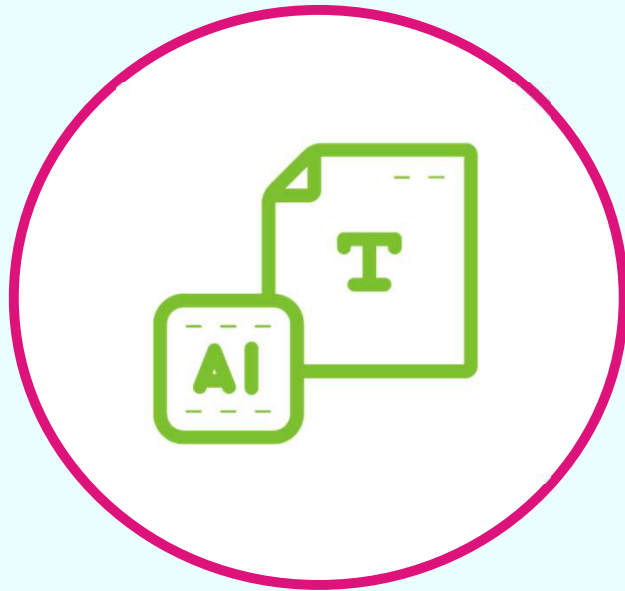


# CoPilot generated graph

Prompt: and can you add the percentage completion rate for each



# 6



**Idea  
generation /  
brainstorming**



**Exercise:** Ask Copilot to give you ideas for e.g. a new service you're planning or e.g. an agenda for an event or questions for an evaluation survey?



# 7



**Teams meetings  
summaries &  
actions: 2  
options**



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

# 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 M365 paid Copilot

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.

Microsoft Teams interface showing a meeting recap for "Celebrations on the 5th December". The meeting took place on 29 October 2024 from 13:30 to 14:00 UTC. The recap is recorded by Sue Doherty and organized by Eneida Capaldi. The interface includes a navigation sidebar on the left with icons for Teams, Calls, Activity, Chat, Calendar, OneDrive, and Apps. The main content area features a video player with the title "Celebrations on the 5th December" and a play button. Below the video player are tabs for "Speakers", "Topics", and "Chapters". The "Speakers" tab is active, showing a list of participants: Leeni Szalay Winter, Sue Doherty, and Sorrel Parsons, each with a progress bar indicating their speaking time. On the right side, there is a "Content" section with files "Planning doc.docx" and "KVA 50 years 1.jpg". Below this is a "Notes" section with tabs for "Notes", "AI notes", "Mentions (2)", and "Transcript". The "AI notes" tab is highlighted with a pink box. The AI notes section includes a warning: "Generated by AI. Make sure to check for accuracy." and a "Copy all" button. Below the AI notes is a "Meeting notes" section with a list of key points:

- > **Event Schedule:** Sorrel, Leeni, and Eneida discussed the event schedule, focusing on the opening remarks and presentation strategy. They agreed on a 30-minute slot for the opening speeches and presentation.
- > **Order of Activities:** Sue, Leeni, and Sorrel debated the order of activities, suggesting that speeches should come before food to keep attendees engaged. They considered the logistics of having food and drink after the formal speeches.
- > **Engagement Activities:** Sorrel and Leeni proposed having engagement activities like singing or networking tasks to keep attendees lively after lunch. They emphasized the need for activities to prevent boredom and maintain engagement.
- > **Event Logistics:** Camilla and Eneida discussed the practicalities of setting up the event space, including the timing of lunch and the need for a clear transition between activities. They considered the constraints of having everything in the same space.
- > **Food and Refreshments:** Sue and Leeni reviewed the catering options.



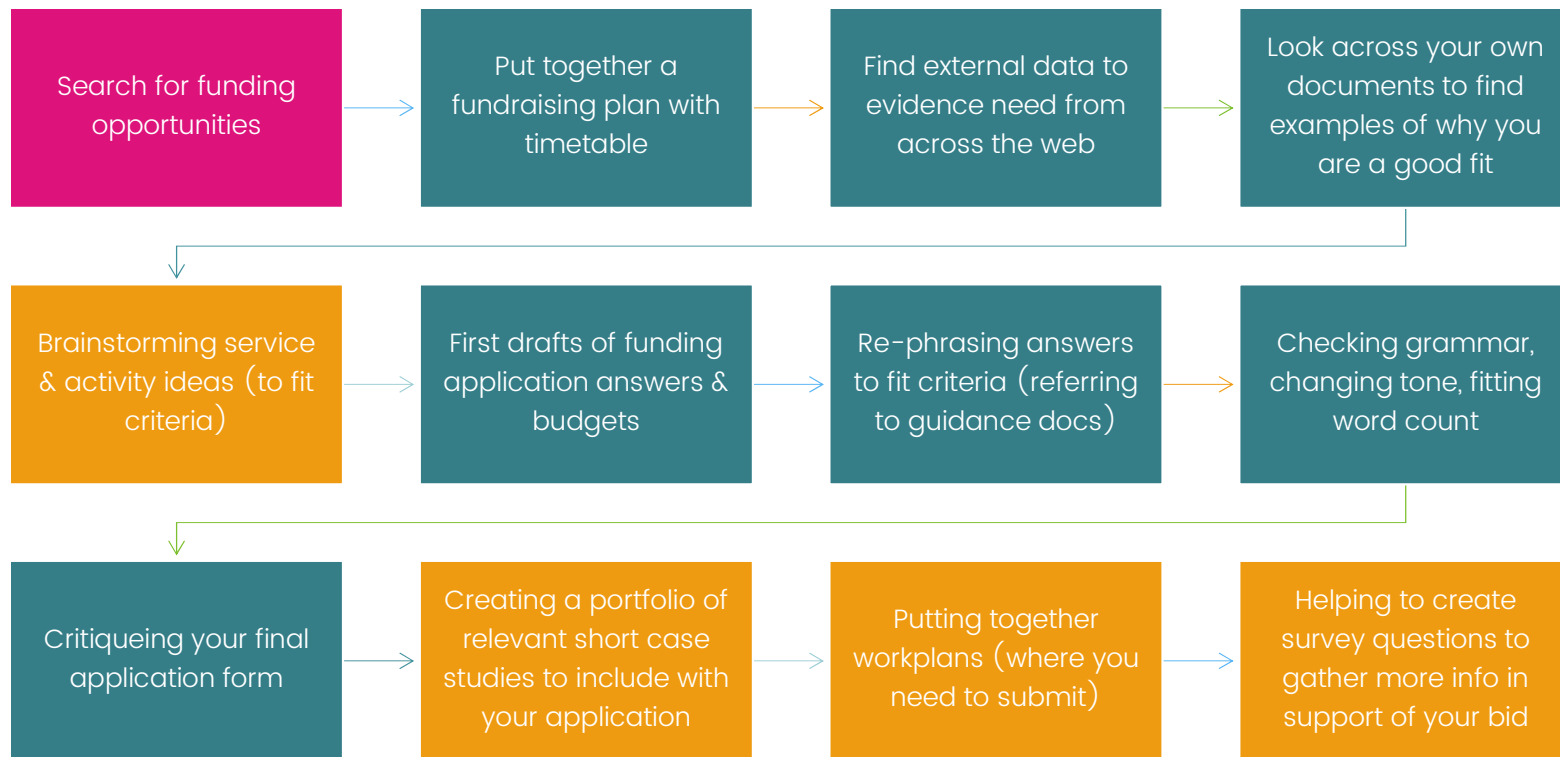
# 8



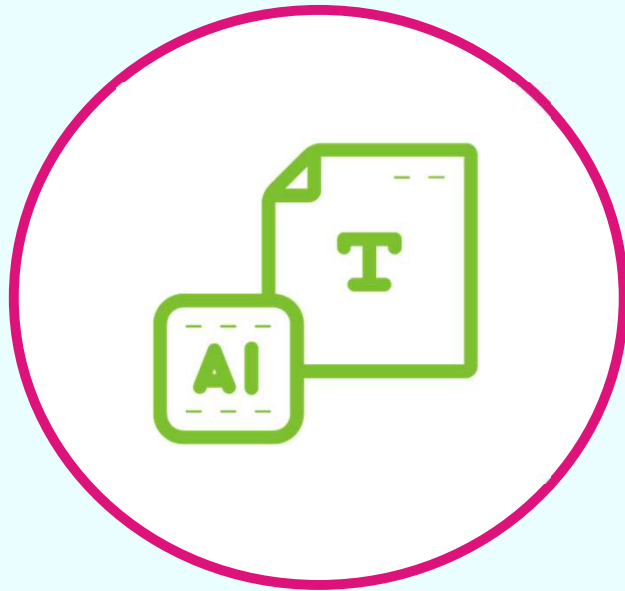
**Funding  
applications  
based on  
organisational  
docs**



# How could you be using AI for fundraising?



# 9



Using with Excel  
(free)



# Free version - Excel

G15    =SUMIFS(tblExpenses[Amount],tblExpenses[Category],F15)

Monthly Market Expense Summary			
Total Expenses	£915.00		
Unpaid Expenses	£120.00		
Average Cost per Stallholder	£18.30		
Number of Expense Lines	4		

Month	Total Expenses	Unpaid Expenses	Cost per Stallholder
2026-07	£855.00	£120.00	£17.10
2026-08	£0.00	£0.00	£0.00
2026-09	£0.00	£0.00	£0.00
2026-10	£0.00	£0.00	£0.00
2026-11	£0.00	£0.00	£0.00
2026-12	£60.00	£0.00	£1.20
2027-01	£0.00	£0.00	£0.00
2027-02	£0.00	£0.00	£0.00
2027-03	£0.00	£0.00	£0.00
2027-04	£0.00	£0.00	£0.00
2027-05	£0.00	£0.00	£0.00
2027-06	£0.00	£0.00	£0.00

Category	Total Expenses
Venue hire	£650.00
Licences & permits	£0.00
Insurance	£0.00
Marketing & printing	£85.00
Equipment hire	£0.00
Security	£60.00
Waste collection	£120.00
Utilities	£0.00
Staff/volunteers	£0.00
First aid	£0.00
Transport	£0.00
Other	£0.00

Expenses by Market Month

Expenses by Category

I'd like to create a simple excel spreadsheet to track expenses for a small charity that organises a monthly market with 50 stallholders in London

Copilot

Reasoned in 3 steps >

Created the charity market expense tracker with:

- Expense Log table with dropdowns for categories, payment methods, stallholders, VAT, and paid status.
- Monthly Summary with KPIs and charts.
- Setup sheet with 50 stallholders and editable lists.

Current sample totals: **£855.00** expenses, **£120.00** unpaid, **£17.10** average cost per stallholder.

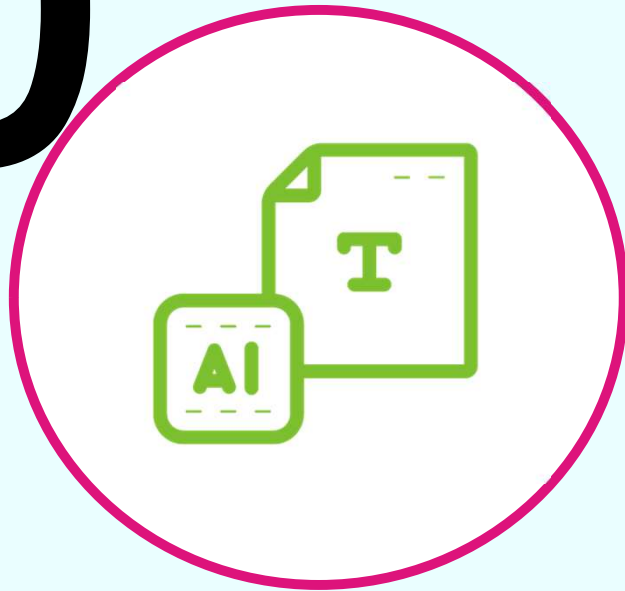
Market Month now calculates automatically from the Date field.

Done

Describe what you'd like to edit



# 10



Using with  
Forms (paid)



# Paid version – Forms

Forms Untitled form - Saved

[Style](#) [Settings](#) [Preview](#) [Collect responses](#) [View responses](#)

**Remove the questions you don't want**

**Kew Village Market Visitor Survey**  
Thank you for visiting Kew Village Market! We would love to hear your thoughts about volunteering and your awareness of our charitable work. Your feedback helps us improve and continue supporting good causes.

1. How did you hear about Kew Village Market?  
(Enter your answer)

2. Did you know that all monies raised at the market go to charity? \*



Yes  
 No

3. Would you be interested in volunteering at future markets? \*

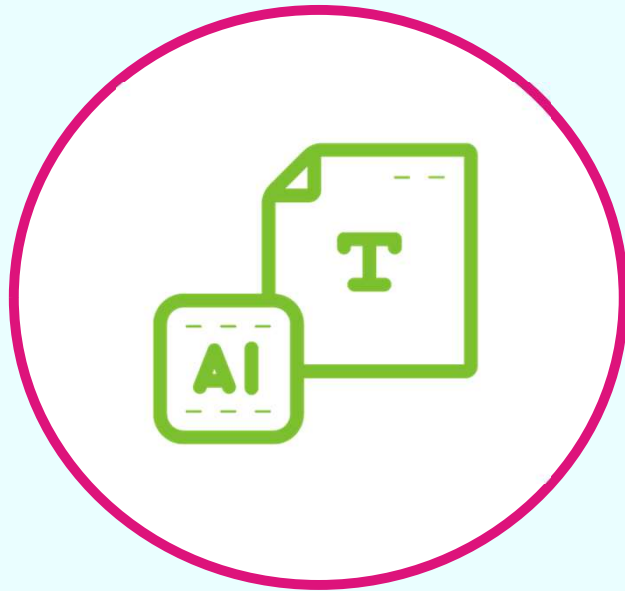
Yes  
 No

< 1 of 1 > [Edit prompt](#) AI-generated content may be incorrect

✓ Keep it ↻ 🗑️ Add more details for Copilot to fine tune the draft. →



# 11



## Using with PowerPoint



# Free version – PowerPoint

**1** Kew Village Market needs people like you

**2** A friendly market with a village heartbeat

**3** Your morning between breakfast and lunch

**4** Where volunteers create the magic

**5** Come for a morning. Leave with a village.

**VOLUNTEER INVITATION**

## Kew Village Market needs people like you

Help keep a friendly, volunteer-run market at the heart of Kew Village.

First Sunday of the month · 10am–2pm · outside Kew Gardens Station

Sources: Kew Village Market website; VisitRichmond listing. Visuals are generated imagery based on the market setting.

Create a 5 slide presentation about Kew Village Market using the information and images found here. Target the presentation to attracting volunteers - <https://kewvillagemarket.org/>

**Copilot**  
Reasoned in 3 steps >

1 question answered

What visual direction should help Kew Village Market attract volunteers?  
Editorial Local Heritage

**Copilot**  
Reasoned in 4 steps >

2 questions answered

1. Should I use the Kew Village Market website as the main source for the deck?  
Website plus web

2. Which message should be strongest for prospective volunteers?  
Community connection

Edit v

Describe what you'd like to create or edit

+

AI-generated responses may be incorrect



# 12



**CoPilot Create  
(paid)**



# Create – images, video, posters



**Exercise:** Upload the meeting transcript shared to Copilot and ask it to summarise and identify key actions



# M365 Copilot (paid version) demo



**Copilot M365 Pro** paid licence  
(circa £30 per month ex VAT  
– 15% discount for non  
profits)

**Looks across your work files  
as well as the web**

The screenshot displays the Microsoft Copilot interface. At the top, there are tabs for 'Work' and 'Web', and a 'New chat' button with a shield icon. The main heading is 'Copilot' with the tagline 'Your AI assistant for work'. Below this, there are six suggestion cards:

- 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?

At the bottom right, there is a 'View prompts' button. Below the suggestions is a text input area labeled 'Message Copilot' with a placeholder: '+ Add people, files and more for better results'. The character count '0 / 16000' is shown at the bottom left of the input area, and icons for edit, share, and send are at the bottom right.

**Copilot** is also  
integrated within  
your M365 apps

Use Copilot to get more done in the tools you use everyday

Create

Summarize

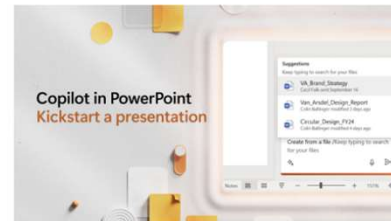
Communicate

Catch up

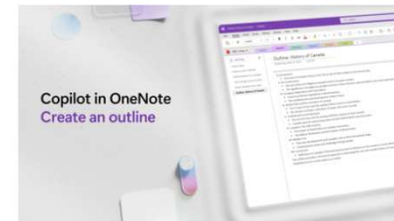
Ask and chat



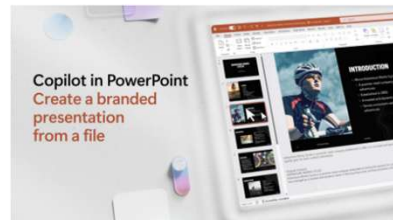
Write faster



Kickstart a presentation



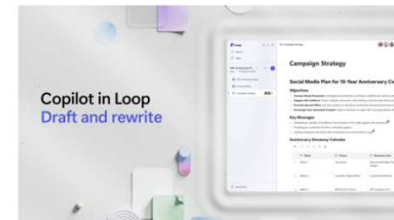
Create an outline with Copilot in OneNote



Create a branded presentation from a file



Create a presentation with a prompt



Draft and rewrite



# Chat prompts

Prompts from Copilot Lab

Saved prompts Task

- Catch up
- Learn
- Create
- Ask

Jump-start a draft  
Create an FAQ based on...

Draft an introduction  
Write a compelling intro paragraph to doc

Check Teams mentions  
Summarise Teams messages where I...

Catch up fast  
What's new in my inbox?

Maximise your time!  
What's on my calendar tomorrow

See all prompts

Message Copilot

+ Add people, files and more for better results

0 / 16000

**Plug-ins** Preview

Plug-ins allow Copilot to reference apps on your behalf. Copilot may share some of your Microsoft 365 enterprise data with plug-ins you've turned on.

Web content

# Small charity example – creating presentations

The screenshot displays the Microsoft PowerPoint application window. The title bar reads "Presentation1 - PowerPoint". The ribbon includes tabs for File, Home, Insert, Draw, Design, Transitions, Animations, Slide Show, Record, Review, View, and Help. The Home tab is active, showing options for Paste, Cut, Copy, Format Painter, New Slide, Reuse Slides, Section, Layout, Reset, and Slides. The Font section includes options for Bold, Italic, Underline, Strikethrough, Text Color, Font Color, and Font Size. The Paragraph section includes options for Text Direction, Align Text, and Convert to SmartArt. The Drawing section includes options for Shape Fill, Shape Outline, and Shape Effects. The Editing section includes options for Find, Replace, Select, and Dictate. The Voice section includes options for Sensitivity and Add-ins. The Add-ins section includes options for Designer and Copilot. The Copilot pane is open on the right, showing a draft of the presentation deck. The main slide area shows a photograph of a brick building with a playhouse structure. The text on the slide reads: "THE BOAR'S HEAD PLAYHOUSE AND BOAR'S HEAD HERITAGE TRAIL" and "A Walk Through History in Aldgate, London". The status bar at the bottom indicates "Slide 1 of 14" and "Accessibility: Investigate".

AutoSave Off Presentation1 - PowerPoint Search

File Home Insert Draw Design Transitions Animations Slide Show Record Review View Help

Paste Cut Copy Format Painter New Slide Reuse Slides Section Layout Reset Slides

B I U S ab Aa Font Paragraph Text Direction Align Text Convert to SmartArt

Shape Fill Shape Outline Shape Effects Arrange Quick Styles Drawing

Find Replace Select Dictate Sensitivity Add-ins Editing Voice Sensitivity Add-ins Designer Copilot

Record Present in Teams Share

1 THE BOAR'S HEAD PLAYHOUSE AND BOAR'S HEAD HERITAGE TRAIL

2 PRESENTATION OVERVIEW

3 THE BOAR'S HEAD PLAYHOUSE

4 HISTORY OF THE BOAR'S HEAD

5 ARCHITECTURE OF THE BOAR'S HEAD

6 THE BOAR'S HEAD HERITAGE TRAIL

7 THE BOAR'S HEAD HERITAGE TRAIL

THE BOAR'S HEAD PLAYHOUSE AND BOAR'S HEAD HERITAGE TRAIL

A Walk Through History in Aldgate, London

Copilot

about "The Boar's Head Playhouse" and "Boar's Head Heritage Trail" has been created with facts and images.

AI-generated content may be incorrect.

Create a presentation for me about the Elizabethan outdoor playhouse called the The Boar's Head playhouse and the boar's head heritage trail based in Aldgate London. keep it informative with facts and images.

Here's a draft of your deck.

If you'd like, **Designer** also has other layout options to consider.

AI-generated content may be incorrect.

Okay, here you go. A presentation about the Elizabethan outdoor playhouse "The Boar's Head" and the Boar's Head Heritage Trail in Aldgate, London has been created. It includes facts and images.

AI-generated content may be incorrect.

Ask me anything about this presentation

Slide 1 of 14 Accessibility: Investigate

Notes Display Settings 98%



# Small charity example – completing funding bids

The screenshot displays a Microsoft Word document titled "New Deal for Young People STEAM MENTORING Funding Application Form". The document is open to page 6 of 14, containing 3218 words. The interface includes the standard Word ribbon (File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, Help) and a Copilot AI sidebar on the right.

The document content includes the following sections and questions:

- supporting** For example, young people aged 12-14 in Bethnal Green who are at risk of exclusion (max 50 words)
- Section D: Experience and Track Record (this section will be scored)**
- 5. Tell us about the organisation/s delivering your project.** Include: (max 100 words)
  - how you involve the communities you are serving
  - and/or how you represent the communities you are serving
- 6. Please provide examples of when you have delivered mentoring with young people from your chosen cohorts (including examples from partners if applicable).** Include: (max 300 words)
  - your impact
  - how you met the draft mentoring quality statement principles
- 7. Please provide examples of when you have supported employers to deliver volunteer mentoring (including examples from partners if applicable).** Include: (max 300 words)
  - your impact
  - details of any quality marks that you or your partners have
- Section E: Project Need (this section will be scored)**
- 8. Describe the characteristics and needs of the young people that you will support through mentoring.** (max 250 words) Please:
  - identify a clear demand for your project including relevant evidence, research and knowledge of young people's needs locally
  - explain how you have and will involve these groups in the design, delivery and evaluation of your mentoring model

The Copilot sidebar on the right provides AI assistance:

- A blue prompt box: "help me complete this form by using data from the [Summary Report Sept 2023 to March 2024.pdf](#). make sure to include vital information into the correct fields"
- A response box: "Sure, I can help with that. Let's start by identifying the key sections of the form and matching them with the relevant information from the [Summary Report Sept 2023 to March 2024.pdf](#)."
- Section B: About your organisation**
  - Name of your organisation: [REDACTED]
  - Website: *An external link was removed to protect your privacy.*
  - Address: Tower Hamlets, London
  - Name of the main contact person: [REDACTED]
  - Position: Programmes Director
  - Phone number: *An external link was removed to protect your privacy.*
  - Email address: *An external link was removed to protect your privacy.*
- Buttons: "Add more details to the budget", "Summarize the project outcomes"
- Input field: "Ask me anything about this document"

At the bottom of the page, there is a footer with "Page 6 of 14 3218 words" and "Accessibility: Investigate".



## In app Copilot - Outlook



To

Bcc

Cc

Add a subject

Draft saved at 16:08

Type / to  Draft with Copilot



## Email thread summary



### Summary by Copilot



Kate White asked [redacted] to confirm the 2024 tech support membership invoice details and offered a membership review session (1).

[redacted] confirmed the invoice details and agreed to the membership review session (2).

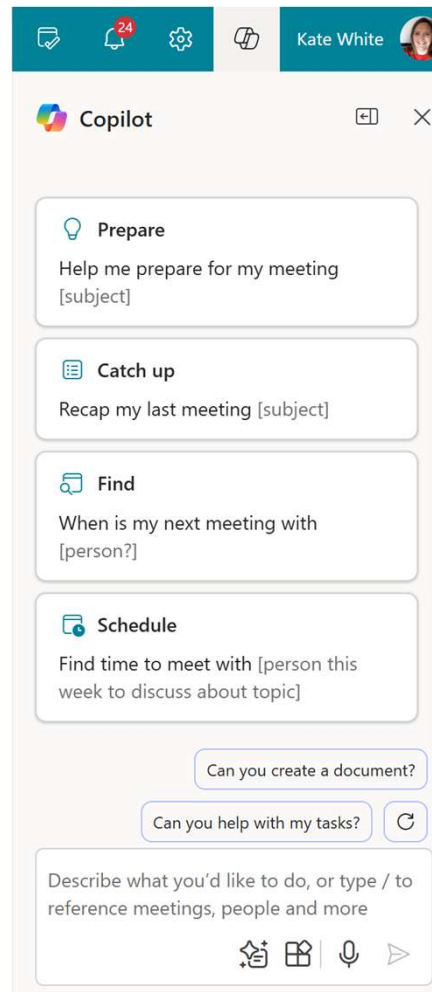
Kate White inquired about updating the domain to kbscharity.org.uk and linking it directly to the website (1).

[redacted] confirmed the domain change and requested assistance with linking the new domain directly to the website (2).

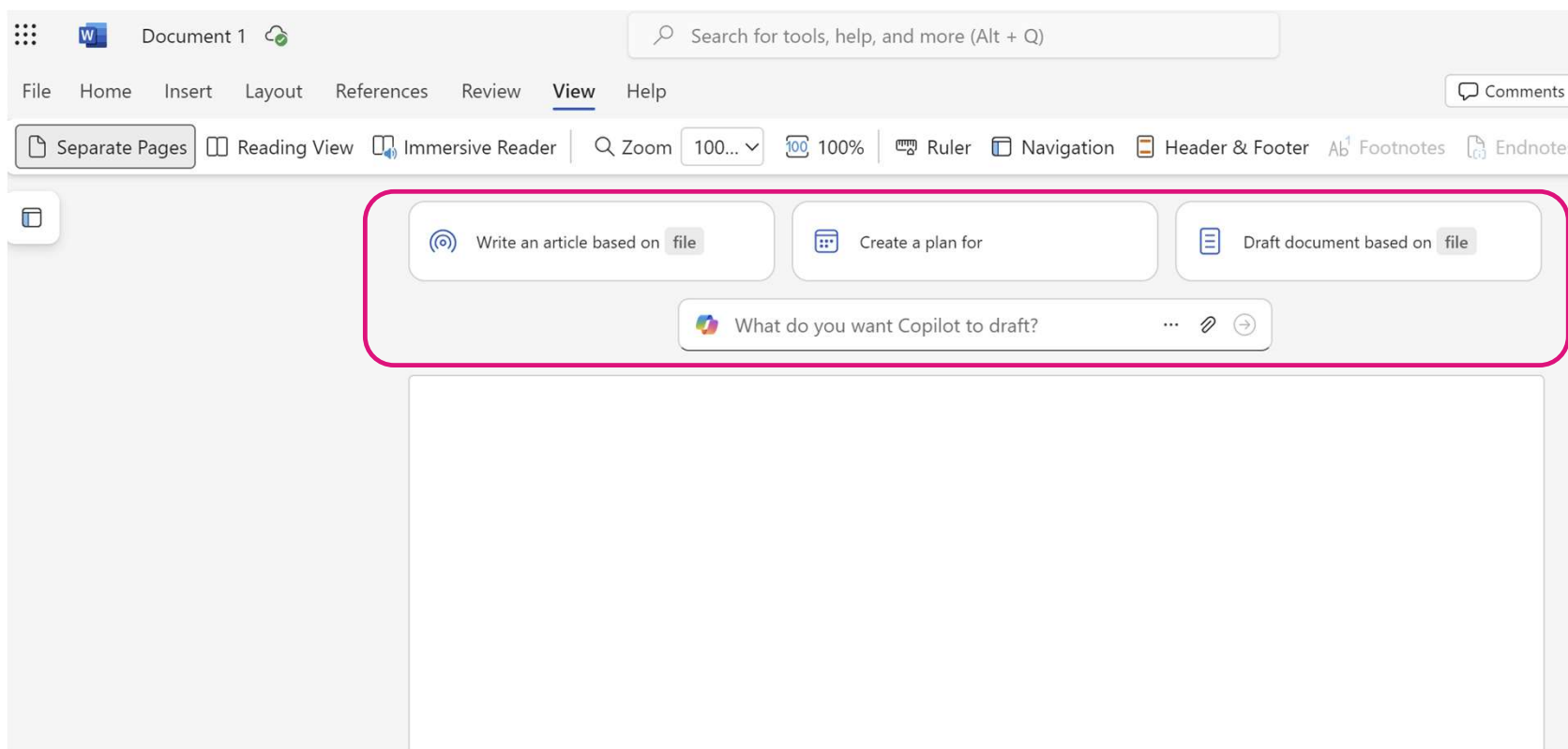
 Ask Copilot



# In app Copilot - Calendar



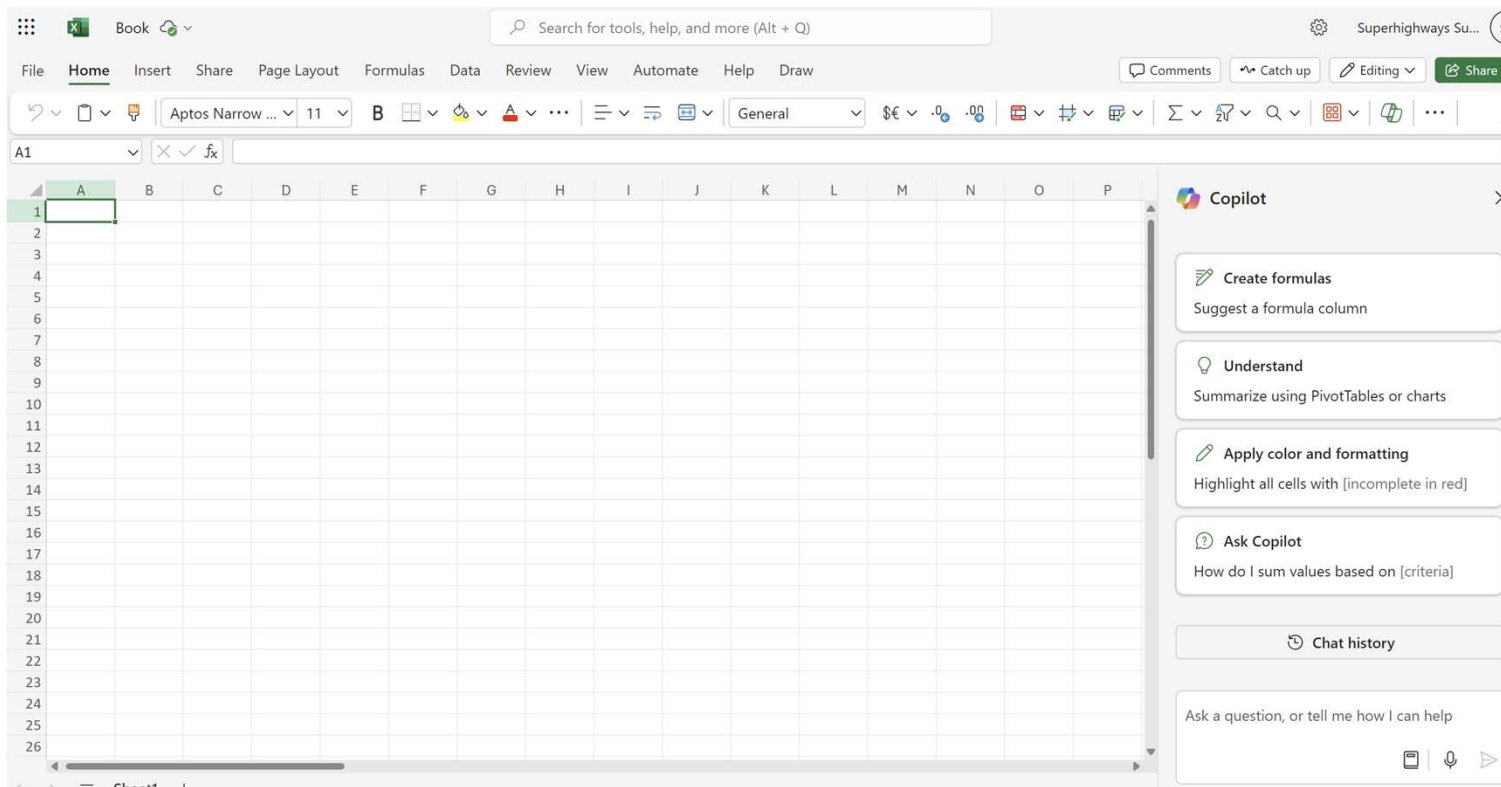
# In app Copilot - Word



# In app Copilot – PowerPoint

The image shows the Microsoft PowerPoint application interface. At the top, the title bar reads "Presentation" with a search bar containing "Search (Alt + Q)" and a "Superh" button. The ribbon includes tabs for File, Home, Insert, Draw, Design, Transitions, Animations, Slide Show, Review, View, and Help. The Home ribbon is active, showing options like Undo, Copy, Paste, and various text and layout tools. The main slide area contains a slide with a red border and a large text box with the placeholder "Click to add title" and a subtitle "Click to add subtitle". A context menu is open over the Copilot icon, listing "Create a presentation about...", "Create a presentation from file", and "Ask Copilot". On the right, the Copilot sidebar is visible, featuring a "Create" section with two options: "Create a presentation from [file]" and "Create a presentation about [the benefits of meditating every day]". Below this is an "Understand" section with two prompts: "What are the dates or deadlines in this presentation?" and "Show key slides in this deck". At the bottom of the sidebar is a text input field "Ask me anything about this presentation" with icons for chat, gallery, voice, and play.

# In app Copilot - Excel



The image shows a screenshot of the Microsoft Excel application interface. The top ribbon includes tabs for File, Home, Insert, Share, Page Layout, Formulas, Data, Review, View, Automate, Help, and Draw. The Home tab is active, showing various font and formatting options. The main workspace is a blank spreadsheet with columns A through P and rows 1 through 26. On the right side, the Copilot sidebar is open, featuring several interactive options:

- Create formulas**: Suggest a formula column.
- Understand**: Summarize using PivotTables or charts.
- Apply color and formatting**: Highlight all cells with [incomplete in red].
- Ask Copilot**: How do I sum values based on [criteria].
- Chat history**: A button to view previous interactions.
- Ask a question, or tell me how I can help**: A text input field with a microphone and send icon.



# In app Copilot – Forms

The screenshot displays the Microsoft Forms application interface. At the top, there is a header with a hamburger menu icon, the word "Forms", and the text "Untitled form - Saved" with a dropdown arrow. Below the header, there are four action buttons: "Style" (with a paint palette icon), "Settings" (with a gear icon), "Preview" (with an eye icon), and "Collect responses" (with a play button icon). On the left side, there is a "Templates" button with a grid icon. The main content area is a light blue gradient. A "Draft with Copilot" dialog box is open in the center, featuring a text input field with the placeholder text "Describe what form you'd like to create, including its context, purpose, intended audience and any specific requirements to be considered." and a character count "0 / 2000". Below the input field are two buttons: "Generate" and "View prompts". The "View prompts" button is active, showing a dropdown menu with the title "Examples to help you create" and four example prompts:

- Design a volunteer sign-up form to know [volunteers' available days and times for volunteering, and any relevant skills...
- Draft an in-take form for a fitness centre to collect [new members' personal information, fitness goals, and health...
- Propose a townhall feedback survey to collect employees' feedback on [clarity of communication, relevance of topics,...
- Create an employee feedback survey for the HR department to assess [employees' job satisfaction and find areas...



# Concerns

Do you have any concerns about your organisation using Copilot?



# Copilot basics – did you know...

*\* Slide from 'Microsoft 365 Copilot QuickStart Training for Nonprofits: Learn to integrate Microsoft 365 Copilot in your work'*



## Your private files are not accessible

Files on your personal OneDrive and your computer are always secure and never accessible by Copilot.



## Strong content management and data governance practices

Sharepoint files are only accessible through Copilot prompt if you have access to that specific Sharepoint site anyways. The same is true for Teams Channels. (Please view [here for more information about Data and Security](#))



## Advanced security with Restricted SharePoint Search

We're now offering [SharePoint restrictions](#). With that it is easier than ever to restrict content and files in SharePoint to the right people.



## Company data is never used to train the model

While using Copilot, your company's data is never being used to train the Copilot model. None of your prompts or files feed into the model. Every prompt uses the standard public algorithm and adjusts for your data locally.



## You are in the Pilot seat – Copilot is here to help

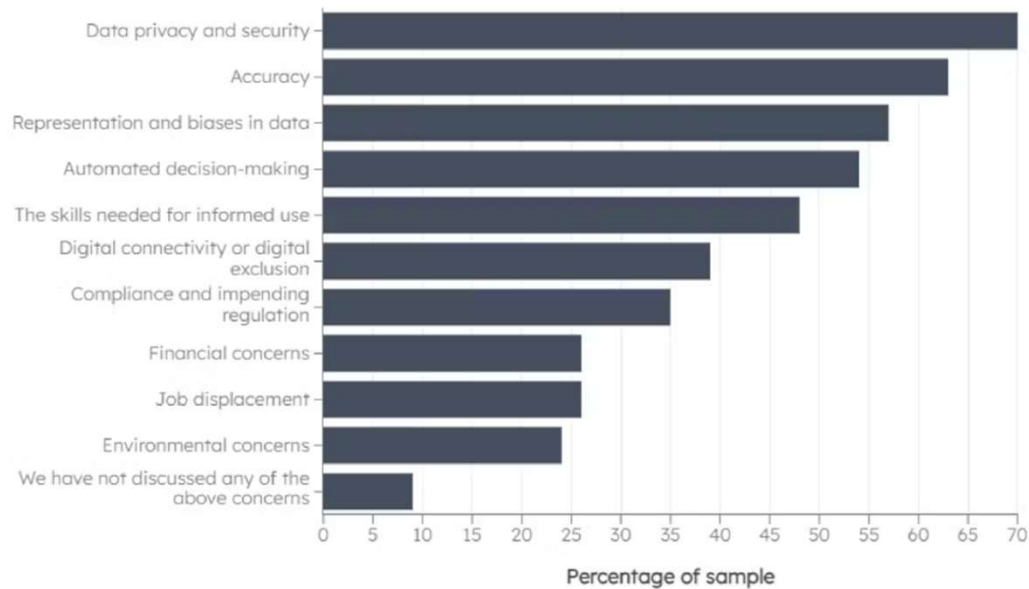
The fundamental benefit of AI lies in its ability to enhance our work rather than substitute for human workers. Copilot is your virtual assistant to help reduce mundane tasks, find the information to get your job done quickly thus increasing your productivity. Rather than fearing replacement, employees who embrace AI skills can enjoy a cascade of career benefits.

## 2. Generative AI Governance Issues



**Figure 6: Has your organisation discussed or identified any concerns relating to generative AI?**

Organisations can select more than one option





# Tips and Resources

To help you plan your use of AI and follow best practice



# Training and resources

## AI learning

1. [Superhighways' Resource round up](#)
2. [Superhighways' How can AI help your small charity work smarter training slides](#)

## Superhighways training

- ✓ [Full training programme](#)



# About Superhighways

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

- ✓ Support
- ✓ [Training](#)
- ✓ Consultancy
- ✓ Digital inclusion
- ✓ [Datawise London](#)
- ✓ [See all services](#)
- ✓ [E-news sign up](#)





# Thank you for listening

PAUL FIRBY

[info@superhighways.org.uk](mailto:info@superhighways.org.uk)

@SuperhighwaysUK

#DigitalFoundations