Making the most of M365 apps: Tips and tricks

for Charity Digital Academy (Nov 2026)

Exercise sheet

Follow our step by step instructions or alternatively use an app with your own materials.

Topic 1: Forms

Community event feedback example.

1. Open Forms, select **New Form** and name it **Community café feedback**.
2. Add a **Rating** question: "How did you find today's session?"
3. Make this Required (so the person must complete this before moving onto the next question)
4. Add a **Choice** question: "What activity would you like us to provide next?" Use the following options:
    - *Craft activities,*
    - *Card and games morning*
    - *Community lunch*
5. Add a **Text** question: "What could we improve?"
6. Make it a Long answer
7. Select **Preview**, complete your form and select **Submit**. Return to editing afterwards.
8. Go to Settings and choose Anyone can respond

Follow on task

If you complete the task, why not try the following:

9. Edit your form
10. Add a Choice question: "Would you like to help at our community garden?" with Yes and No.

11. Add another Choice question: “Which session suits you?” with Weekday and Weekend as options.
12. On the first question, select **More settings for question → Add branching**. Set *Yes* to go to question 2 and *No* to **End of the form**.
13. Go back out of the branching options (top left arrow)
14. Select **Preview**, complete your form and select **Submit**.
15. If you have completed the task, please look at other questions or settings available to you.

Topic 2: Sway

Create a simple welcome guide for new volunteers.

- From your Microsoft 365 **App launcher**, open **Sway**.
- Select **Create New**. (you might have to sign into sway, use your M365 account)
- Give your Sway the title **Welcome to our community café**.
- Add a **Heading** called **What we do**.
- Add some text underneath:
  We bring neighbours together over affordable food and friendly conversation.
- Add another **Heading** called **Your first shift**.
- Add some text underneath:
  Meet the coordinator. Take a tour. Find out how you can help.
- Go to **Design** and try one of the different styles.
- Select **Play** to see what your Sway looks like to someone viewing it.

Follow on task

If you complete the task, why not try the following:

- Add an image to your Sway.
- Add another section called **What to bring** and add some text of your own.
- Try moving one of your cards to a different position.
- Explore **Design → Styles** and try a different layout.
- Try **Remix!** and see what Sway does with your design.

- Select **Play** again. Which version do you prefer?

Topic 3 – One Note

Create a mini notebook for your community café.

- From your Microsoft 365 **App launcher**, open **OneNote**.
- Create a **new notebook** called **Community Café Hub**.
- Add a section called **Meetings**.
- In the **Meetings** section, create a new page called **Community café planning meeting**.
- Add these notes:

Decision: Run a monthly community café.
Action: Check hall availability.
Action: Draft a volunteer invitation.
Question: Can we borrow an urn?

- Apply a **To Do** tag to the two actions.
- Apply a **Question** tag to the question.
- Add a fictional name and deadline next to each action.
- Look at your page. Can you quickly distinguish the decisions, actions and questions?

Follow on task

If you complete the task, why not try the following:

- Add another section called **Volunteers**.
- Add a page called **First shift**.
- Type:
  Ask the coordinator where to find the refreshments cupboard.
- Add another page called **Useful information** and paste in a link to your organisation's website.
- Add an image or screenshot to one of your pages.
- Use **Search** to search for **refreshments**. Can OneNote find the information for you?

Topic 4 – To Do and Outlook

Create and organise your own task list.

- From your Microsoft 365 **App launcher**, open **To Do**.
- Create a new list called **Community café**.
- Add these three tasks:

Prepare the room
Check refreshments
Draft the volunteer reminder

- Open **Prepare the room** and add two steps:

Arrange tables
Put up welcome signs

- Give **Draft the volunteer reminder** a due date.
- Add it to **My Day**.
- Mark **Arrange tables** as complete.
- Have a look at **My Day**, **Important** and **Planned** to see how To Do helps you find and organise your tasks.

Follow on task

If you complete the task, let's see how **Outlook and To Do work together**:

- Open **Outlook**.
- Find a suitable non-sensitive email in your own Inbox.
- **Flag** the email.
- Open **To Do** within Outlook, or return to the To Do app.
- Select **Flagged email**. You may need to enable this list in To Do's settings.
- Find the email you just flagged.
- Open the task and give it a due date.
- Add it to **My Day**.
- See if you can use the task to get back to the original email.

When you've finished, remove the flag if you don't need to follow up the email.

Topic 5 – Bookings

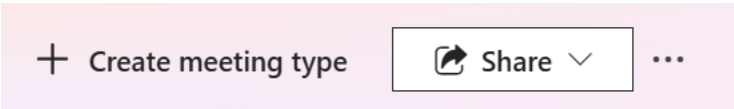
You can set up both personal and shared booking pages using the M365 Bookings app. For the following exercises you will be setting up a personal page

1. Open Bookings app and find Personal booking page.
2. Select Create meeting type.
3. Name it Practice: volunteer welcome chat.
4. Add the description: A short introduction to volunteering at our fictional community café.
5. Set the appointment duration to 15 minutes and choose an appropriate meeting location.
6. Choose Private and choose 'Customised availability hours' from the drop down.
7. Adjust your availability to a suitable practice window of time e.g. one week and remove days you do not work.
8. Save the meeting type.
9. Copy its individual link, paste into your browser and open it yourself to review the visitor experience.
10. Check the title, duration and available slots; do not distribute it publicly or make a booking for this exercise.

Follow on task

If you complete the task, why not try the following:

11. On your Bookings app, go the three dots beside Share;



12. Click on Edit banner image
13. Choose an alternative option
14. Open your Volunteer welcome chat bookings
15. Make it Public
16. Save

17. Copy its individual link, paste into your browser and open it yourself to review the visitor experience.
18. Make it Private again and save.

Topic 6 - Planner

Create a simple plan for a community café event.

- From your Microsoft 365 **App launcher**, open **Planner**.
- Select **New plan** and call it **Community café event**.
- Open the plan in **Board** view.
- Create two buckets:

Before the event
On the day

- Under **Before the event**, add:

Confirm the venue
Draft the volunteer briefing

- Under **On the day**, add:

Set up the welcome desk

- Open **Draft the volunteer briefing**.
- Give it a due date.
- Add two checklist items:

Explain arrival arrangements
Include the shift timetable

- Change its progress to **In progress**.
- Return to the Board and see how your mini project is taking shape.

Follow on task

If you complete the task, why not try the following:

- Add another task called **Prepare the refreshments area**.
- Decide which bucket it should go in.
- Give it a due date.

- Add a description and a couple of checklist items of your own.
- Try dragging a task from one bucket to another.
- Explore the other **Planner views** available to you.
- If you see options for assigning tasks, have a look at how they work, but **don't assign your practice tasks to real colleagues**.

Topic 7 – Loop

Create a live checklist for your community café.

- From your Microsoft 365 **App launcher**, open **Loop**.
- Create a new **workspace** called **Community café**.
- Create a new page called **Café opening checklist**.
- Add a **Checklist** to the page. (type / to see options)
- Add these items:

Put out welcome signs
Check the refreshments table
Brief the welcome volunteers
Check the accessible entrance is clear

- Add another item of your own.
- Tick one item as complete.
- Try dragging the items into a different order.
- Add a heading or some text above the checklist explaining what it is for.

Follow on task

If you complete the task, why not explore what makes **Loop different** from a normal document:

- Add another type of content to your page, such as a **table** or **bulleted list**.
- Add a table with these headings:

Task | Who | When

- Add a couple of fictional tasks to it.
- Explore the **Share** options, but don't actually invite anyone unless you want to.

- Have a look at the other templates and components available in Loop.
- Think about one real activity in your organisation where a shared, constantly updated page or list might be useful.

Topic 8 – Whiteboard

Have fun with this one. Have you got a staff meeting or team planning session coming up where you could get everyone involved on a Whiteboard.

If you haven't got something in mind, call your Whiteboard 'Community garden ideas' and play.

1. Go to Whiteboard in your apps
2. Click on New whiteboard
3. Add a template
4. Add a link to a webpage
5. Add a link to a video
6. Go to Share
7. Click on the cog icon beside Copy link and look at your sharing options.