Making the most of M365 apps: tips & tricks

Charity Digital Academy

CHARITY DIGITAL

superhighways

harnessing technology for community benefit

What does Superhighways do?

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

What we'll cover today

Demo, Summary
Hands on time with exercise sheet

Session 1

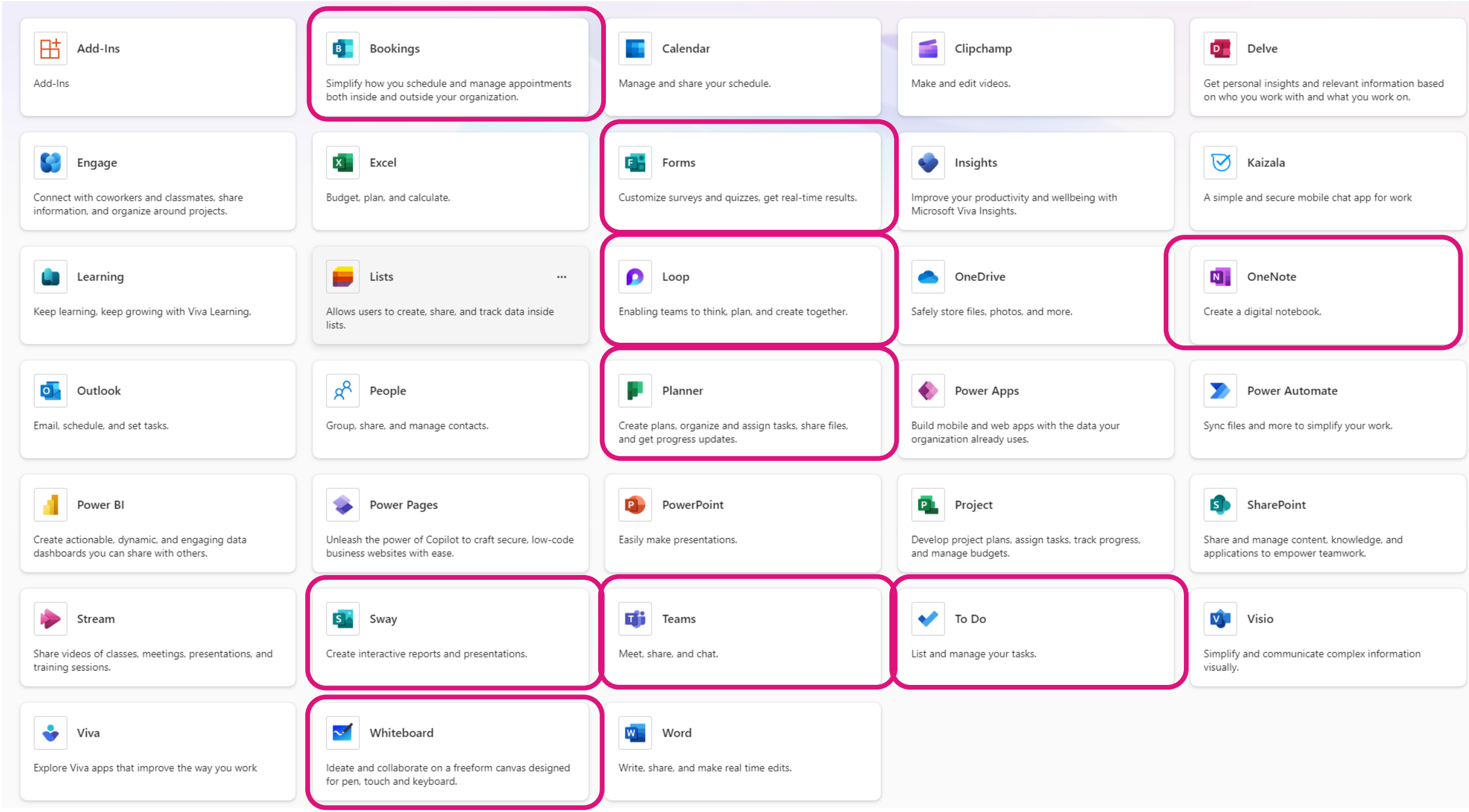
- ✓ Apps overview
- ✓ Web vs desktop applications
- ✓ Forms, Sway & One Note

Session 2

- ✓ To do & Tasks
- ✓ Bookings

Session 3

- ✓ Planner, Loop & Whiteboard


Add-Ins
Add-Ins
Bookings
Simplify how you schedule and manage appointments both inside and outside your organization.
Calendar
Manage and share your schedule.
Clipchamp
Make and edit videos.
Delve
Get personal insights and relevant information based on who you work with and what you work on.
Engage
Connect with coworkers and classmates, share information, and organize around projects.
Excel
Budget, plan, and calculate.
Forms
Customize surveys and quizzes, get real-time results.
Insights
Improve your productivity and wellbeing with Microsoft Viva Insights.
Kaizala
A simple and secure mobile chat app for work
Learning
Keep learning, keep growing with Viva Learning.
Lists
Allows users to create, share, and track data inside lists.
Loop
Enabling teams to think, plan, and create together.
OneDrive
Safely store files, photos, and more.
OneNote
Create a digital notebook.
Outlook
Email, schedule, and set tasks.
People
Group, share, and manage contacts.
Planner
Create plans, organize and assign tasks, share files, and get progress updates.
Power Apps
Build mobile and web apps with the data your organization already uses.
Power Automate
Sync files and more to simplify your work.
Power BI
Create actionable, dynamic, and engaging data dashboards you can share with others.
Power Pages
Unleash the power of Copilot to craft secure, low-code business websites with ease.
PowerPoint
Easily make presentations.
Project
Develop project plans, assign tasks, track progress, and manage budgets.
SharePoint
Share and manage content, knowledge, and applications to empower teamwork.
Stream
Share videos of classes, meetings, presentations, and training sessions.
Sway
Create interactive reports and presentations.
Teams
Meet, share, and chat.
To Do
List and manage your tasks.
Visio
Simplify and communicate complex information visually.
Viva
Explore Viva apps that improve the way you work
Whiteboard
Ideate and collaborate on a freeform canvas designed for pen, touch and keyboard.
Word
Write, share, and make real time edits.

Which are you using already?

Answers in chat

M365 non-profit licensing

Microsoft 365 Business Basic (Nonprofit Staff Pricing)

Grant

Free for up to 300 users

Get started

Learn more >

- Chat, call, and meet up to 300 attendees with Microsoft Teams
- Web and mobile versions of Microsoft 365 apps[8]
- 1 TB of cloud file storage
- Business-class email
- Standard security
- Anytime phone and web support
- AI chat experience with web grounding, writing assistance, data analysis, and access to agents[7]
- Microsoft 365 Copilot available as an add-on[8]

Apps and services included [2]

Word, Excel, PowerPoint, Teams, Outlook, Exchange, OneDrive, SharePoint

Microsoft 365 Business Standard (Nonprofit Staff Pricing)

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

Price does not include VAT.

Get started

Learn more >

Everything in Business Basic, plus:

- Desktop versions of Microsoft 365 apps with premium features
- Webinar hosting in Teams
- Attendee registration and reporting tools
- Customer appointment management
- Microsoft 365 Copilot available as an add-on[8]

Apps and services included

Word, Excel, PowerPoint, Teams, Outlook, OneDrive, SharePoint, Exchange, Access (PC only), Publisher (PC only)

Best value

Microsoft 365 Business Premium (Nonprofit Staff Pricing)

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

Price does not include VAT.

Get started

Learn more >

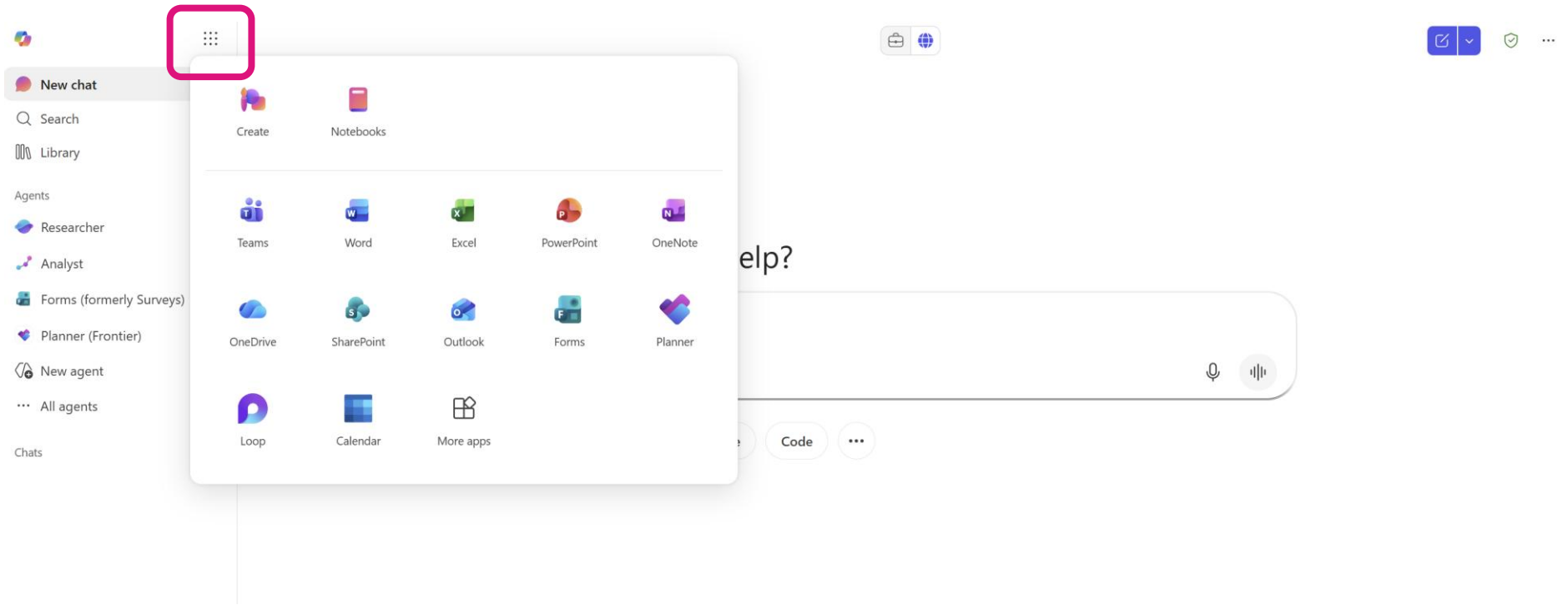
Everything in Business Standard, plus:

- Advanced security
- Cyberthreat protection
- Advanced device management
- Microsoft 365 Copilot available as an add-on[8]

Apps and services included

Word, Excel, PowerPoint, Teams, Outlook, OneDrive, SharePoint, Exchange, Access (PC only), Publisher (PC only), Intune, Microsoft Purview, Microsoft Defender for Business

New M365 landing page



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

Microsoft 365 help & learning

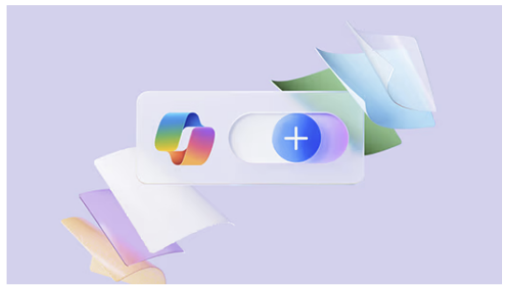
How can we help you?

Supercharge your day with Copilot



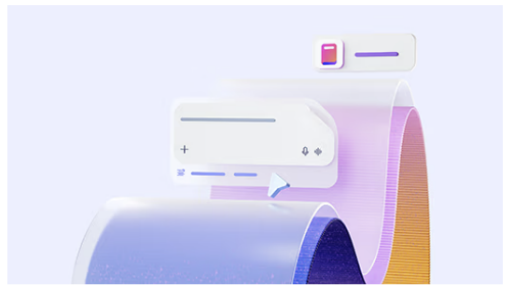
How to get Copilot

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



AI credits and limits

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



Turn ideas into action

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



Take productivity on the go

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

Get more done in your favorite apps

- Microsoft 365 Copilot app
- Outlook
- Word
- PowerPoint
- Teams
- Excel
- OneNote
- OneDrive
- Clipchamp
- SharePoint



MS Forms

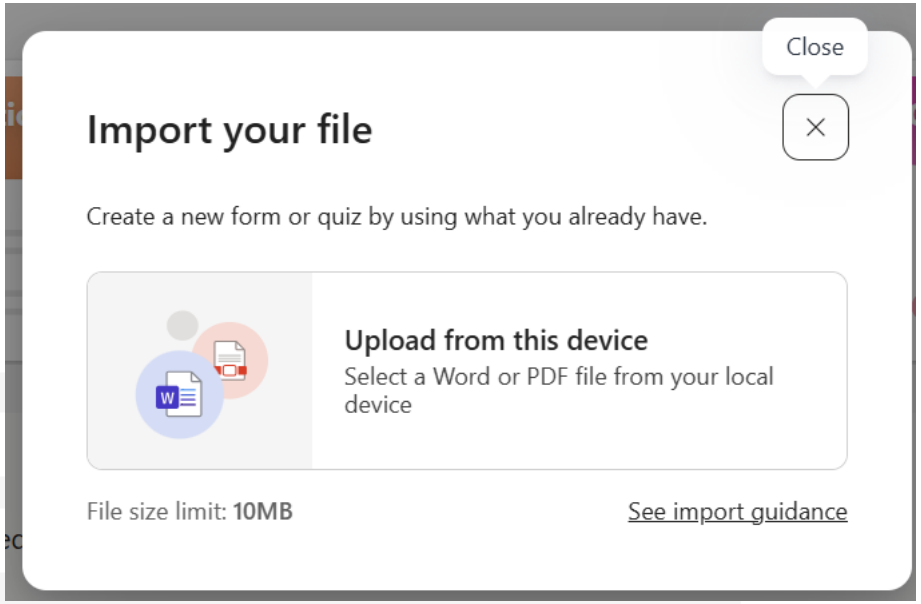
Forms

Forms

New Form | New Quiz | Quick import

Office 365 Training demo

Are you reading this as I'm talking - presentation hazard



Quick start with

- Choice
- Text
- Rating
- Date
- Ranking
- Likert
- Upload File
- Net Promoter Score®
- Section

Forms

Options for responses

- [x] Accept responses
- [ ] Start date
- [ ] End date
- [ ] Set time duration
- [ ] Shuffle questions
- [ ] Disable question number for respondents
- [ ] Show a progress bar
- [ ] Hide **Submit another response**
- [x] Customise thank you message

Thanks for letting us know your condiment choices.

- [x] Allow respondents to save their responses
  - [ ] Allow respondents to edit their responses
- [ ] Redirect edit link to response page

Response receipts

- [ ] Allow receipt of responses after submission
- [ ] Get email notification of each response
- [ ] Get smart notification emails to track the response status

Send and collect responses

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

Feedback

https://forms.office.com/Pag... [ ] Shorten URL [Copy link]

To: People name, Teams group or channel...



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

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

Rewrite with Copilot

Start now

[x] Outlook [ ] Teams (Message only)
Invitation will be sent via Outlook

Send

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

Forms

Responses Overview

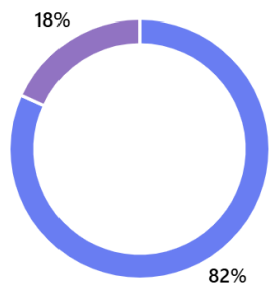
Active

Responses	Average Time	Duration
12	00:46	215 Days

1. How do you feel about Marmite?

More details

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



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

More details

Insights and actions

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

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

Check individual results

Delete all responses

Print summary

Share a summary link

M365 Forms – a summary

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

Demo time



Hands on time

✓10 mins for you to play!





Sway

Sway – What is it?

A simple way to create and share interactive, web-based stories, reports and presentations.

Think of Sway as:

✓More visual than Word
✓Easier than building a website
✓Less formal than PowerPoint

Typical Uses

✓Newsletters, Event reports, Project updates, Training guides, Volunteer and community stories, Digital portfolios

Key Benefit: Create professional-looking content without design or technical skills.

Sway – Lets have a look

Cyber Security Basics- Introduction

An Introduction to cybersecurity **awareness** for everyone

- Staff
- Volunteers
- Trustees

of all Small Charities, Community Groups etc.

superhighways
harnessing technology for community benefit

Why is this important for Charities?

Sway

Details | Emphasize | Accent | Link | Focus Points

Kingston Data Hack

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

Background

Heading 1 Card

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.

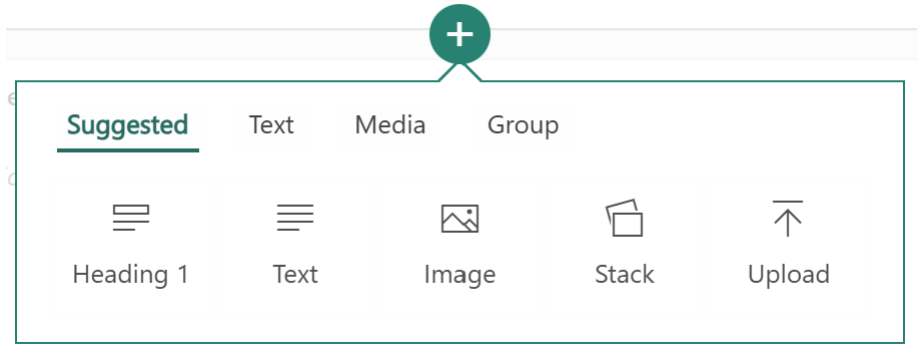
Data is something that every small charity and community group has, such as information about the numbers of people attending activities or personal information from clients.

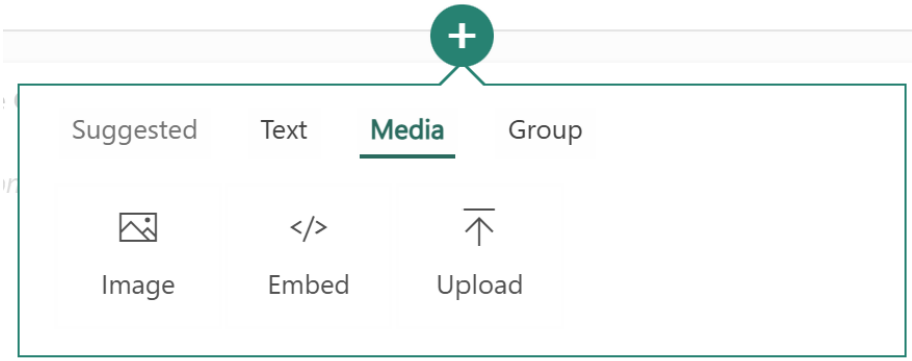


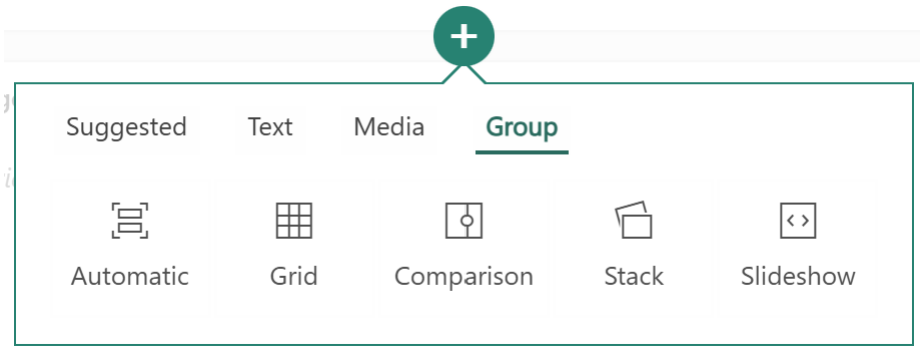
Image Card: Kingston Data Hack smiling.jpg

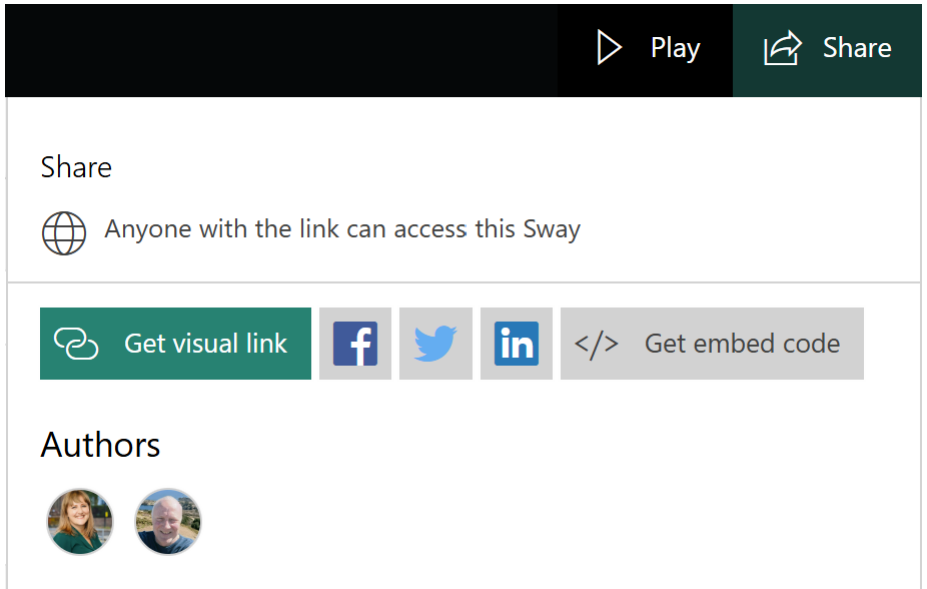
Caption

Sway


Suggested
Text
Media
Group
Heading 1
Text
Image
Stack
Upload


Suggested
Text
Media
Group
Image
Embed
Upload


Suggested
Text
Media
Group
Automatic
Grid
Comparison
Stack
Slideshow

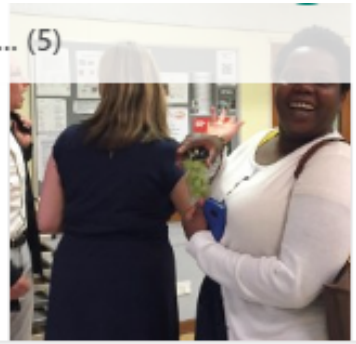

Play
Share
Share
Anyone with the link can access this Sway
Get visual link
Get embed code
Authors

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

</>

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.

M365 Sway – a summary

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

Demo time



Hands on time

✓10 mins for you to play!



Take a break

Back in 10 minutes





OneNote



OneNote – your digital notebook

OneNote gives you a flexible place to:

- ✓ Capture notes and ideas
- ✓ Make checklists
- ✓ Save useful links
- ✓ Add pictures, screenshots and files
- ✓ Keep meeting and project notes together
- ✓ Search across your notes later

Think of it like a paper notebook, but searchable, shareable and connected to Microsoft 365.

How is OneNote organised?

Notebook → Sections → Pages

For example:
📓 Community Café Hub

Sections
✓Meetings
✓Café & Activities
✓Volunteers
✓Communications
✓Useful Information

And within Meetings, you might have pages for: Café planning meeting, Volunteer meeting, Trustee meeting

What to use OneNote for?

OneNote is your working notebook

Great for:
- ✓Meeting notes
- ✓Ideas and brainstorming
- ✓Research
- ✓Notes about projects
- ✓Checklists
- ✓Useful information
- ✓Links to documents and websites
- ✓Things you want to remember

Capture first. Organise later.

Where does OneNote fit within M365?

Different Microsoft 365 tools do different jobs

✓OneNote – Keep notes, ideas, research and reference information
✓Loop – Work together live on ideas, lists and shared content
✓Word – Create formal documents
✓SharePoint / OneDrive – Store and share organisational files
✓Microsoft To Do – Manage my own tasks
✓Planner – Manage team tasks and plans
✓Outlook / Teams – Communicate with people

OneNote = keep and build knowledge over time
Meeting notes • research • reference • ideas • organisational memory
Loop = work on something together right now
Brainstorming • collaborative lists • shared agendas • content that changes quickly

Welcome to Community Café Hub

Imagine a small community organisation running:

- ✓a community café
- ✓weekly activities
- ✓a digital drop-in
- ✓Volunteers
- ✓community events
- ✓trustee and staff meetings

They have lots of useful information, ideas and conversations, but it is ending up in emails, scraps of paper and people's heads.

Demo time

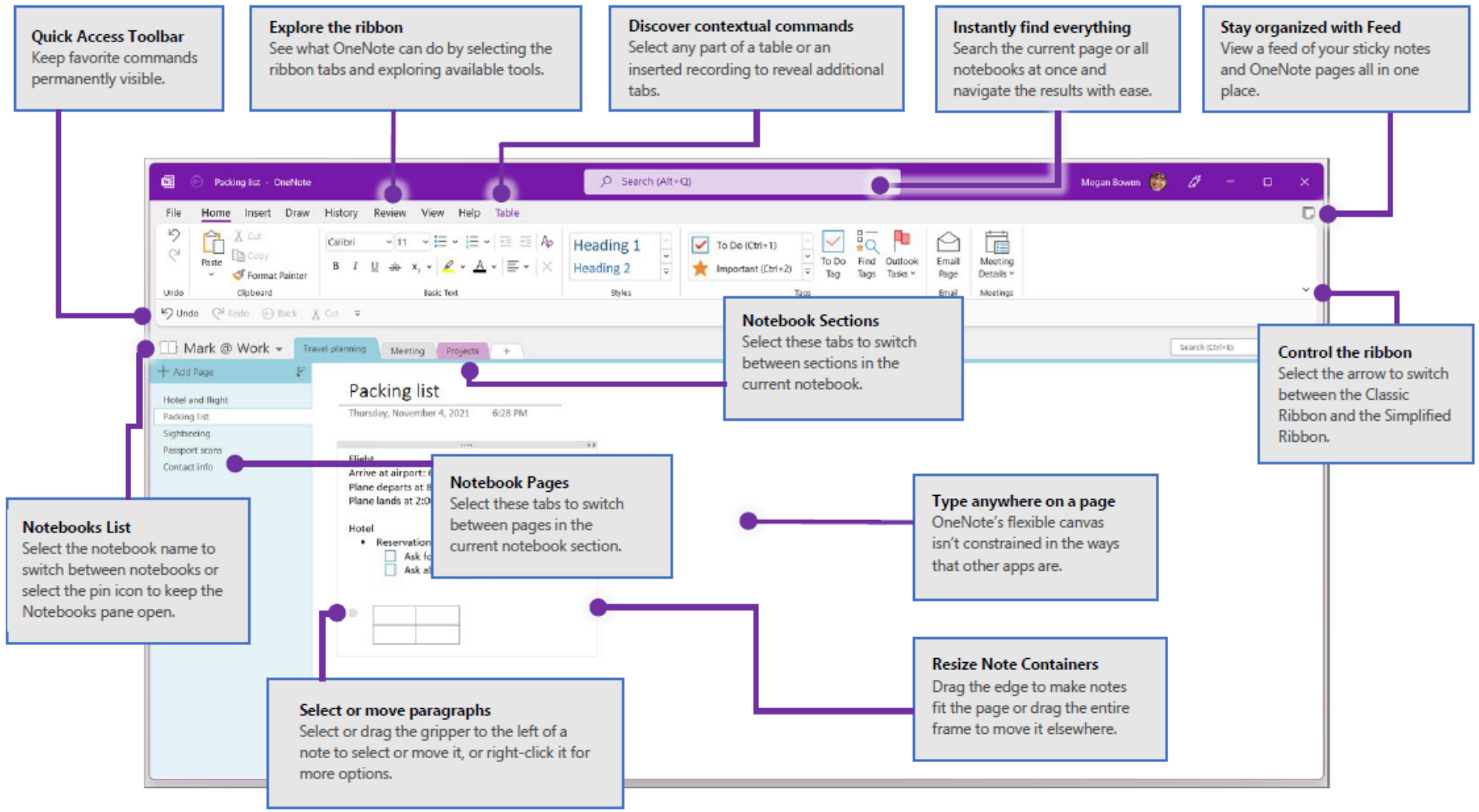


OneNote

Microsoft

Quick Start Guide

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



M365 OneNote

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

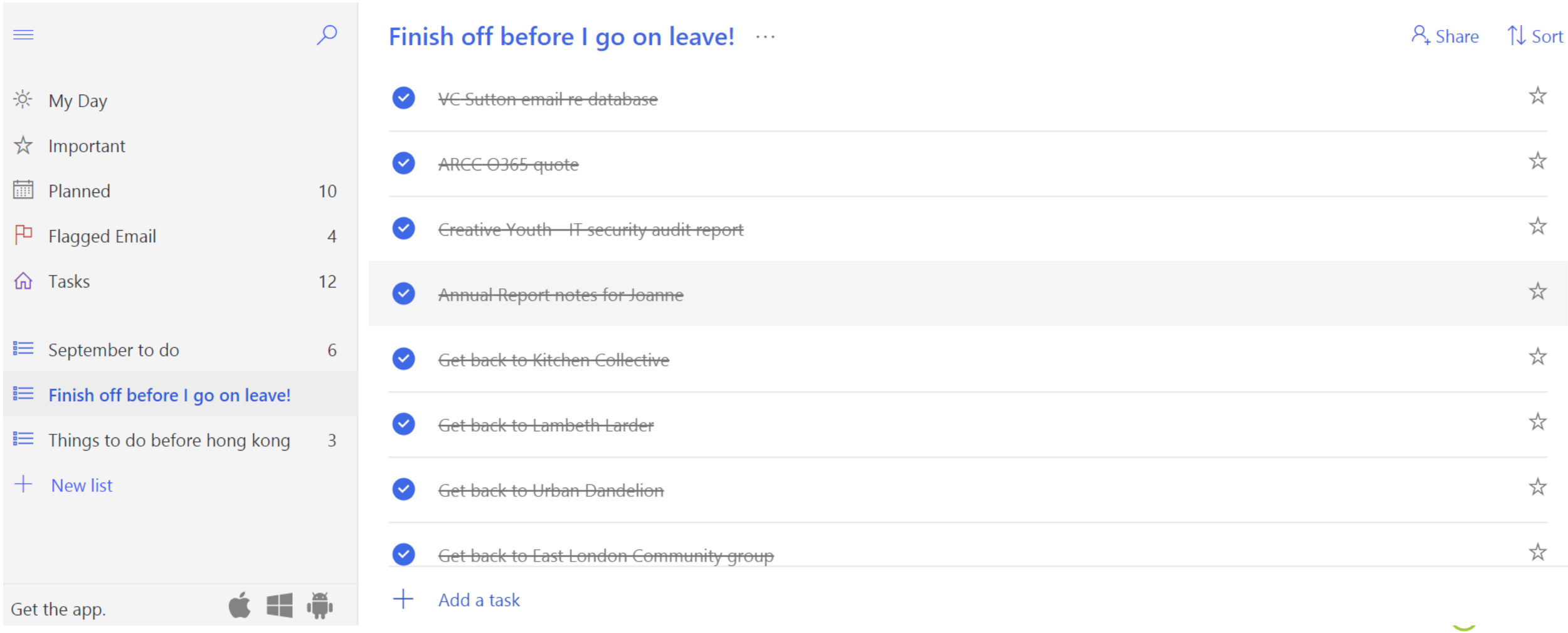
- ✓Further info
- ✓Cheat sheet download



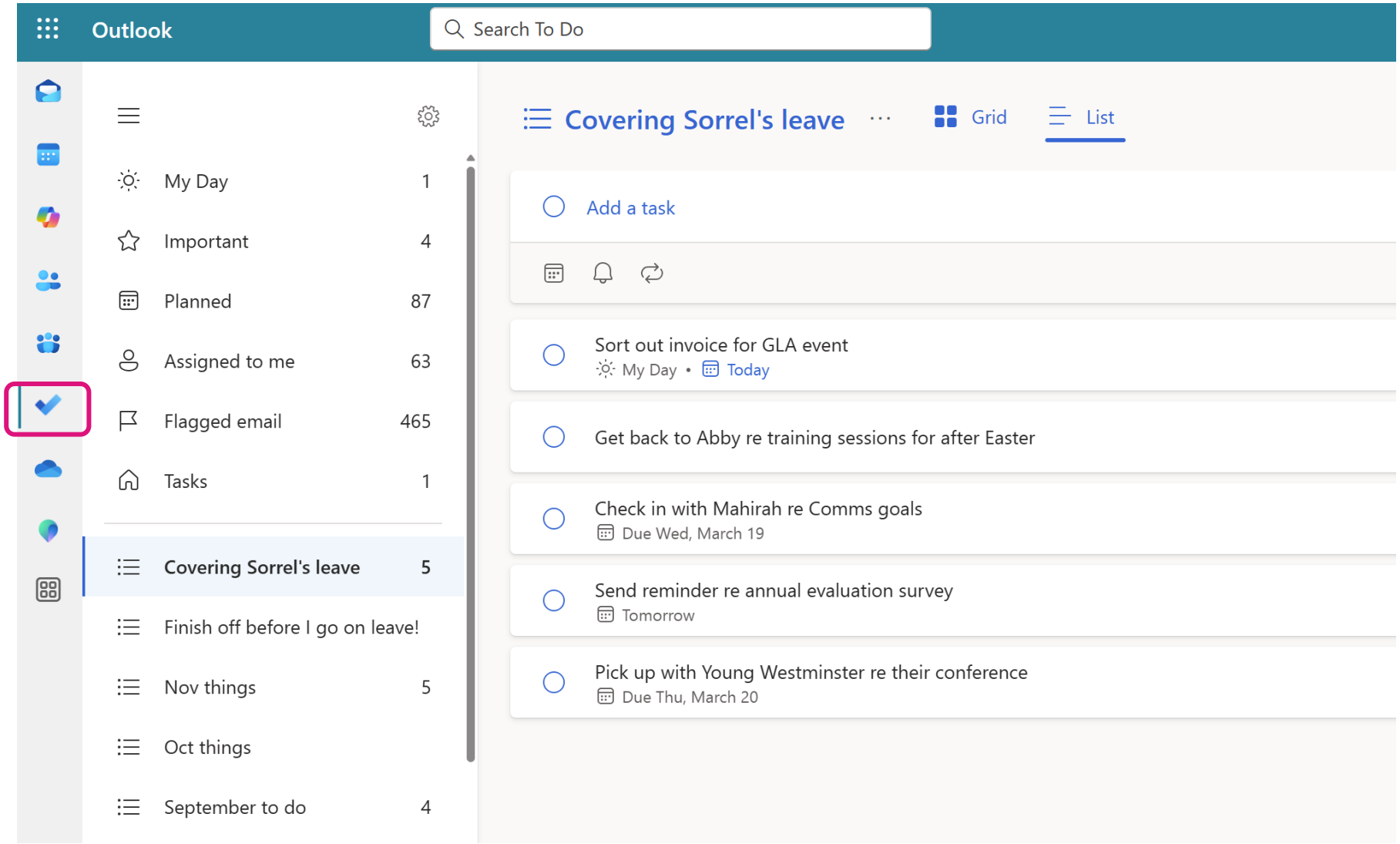
To Do



To Do – Your personal tasks list

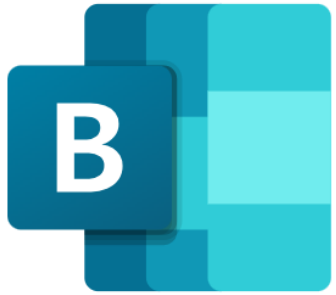


View within Outlook too



Demo time





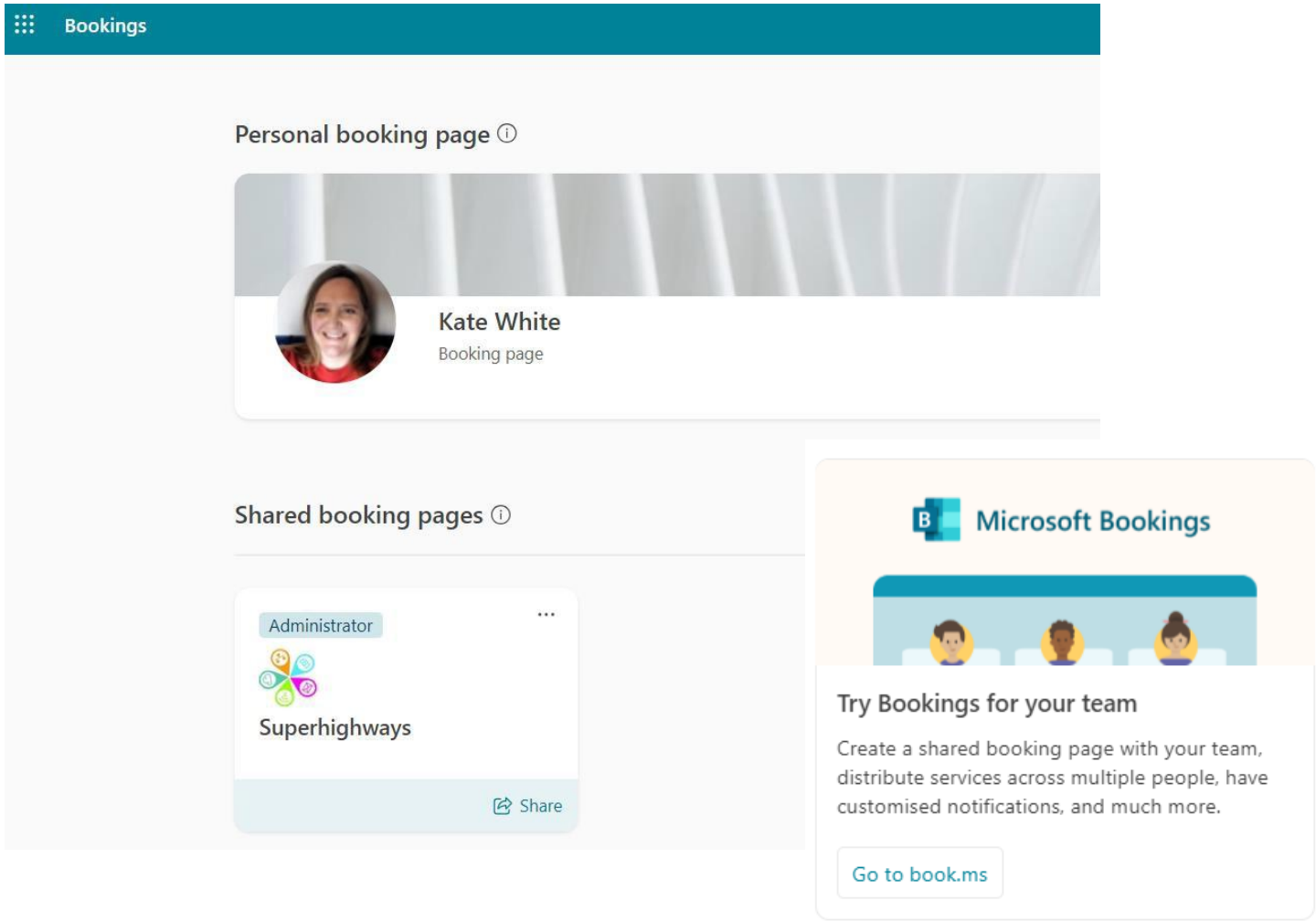
Bookings



M365 Bookings - two options

- ✓ Create your own **personal booking page** to share with others so they can book a slot in your calendar

- ✓ Create a **Shared booking page** with Services allowing booking across multiple staff's availability (via calendar integrations)



Two components

1. **Bookings admin app**

2. **Booking web page**
   - ✓ **Personal**
   - ✓ **Shared**



Two components

Bookings admin app
Customise the Bookings page for your needs:

- ✓define appointment types and details
- ✓manage staff schedules and availability
- ✓set business hours
- ✓customise how appointments are booked
  - ✓E.g. add extra questions to the standard booking form



Two components

Booking web page

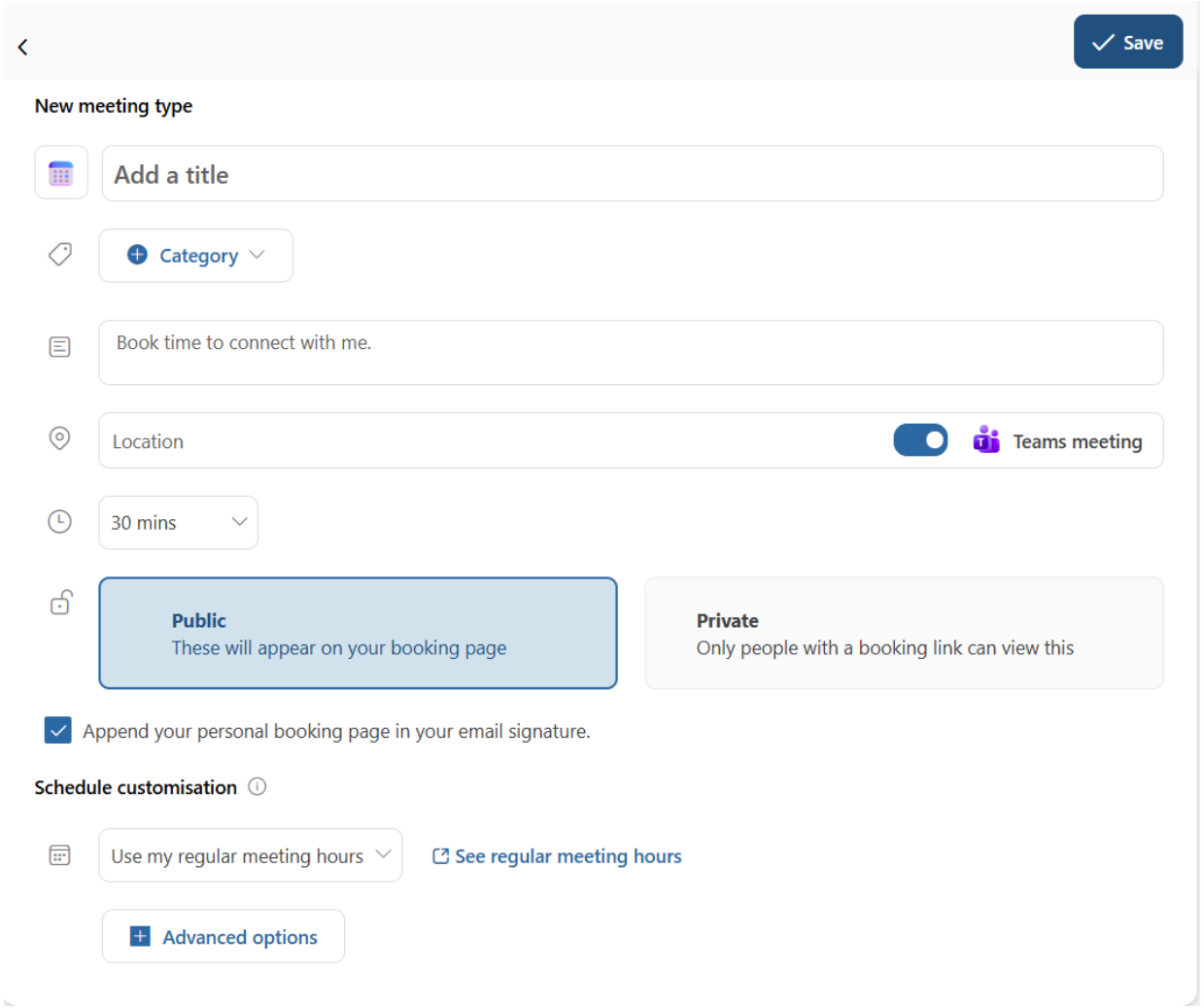
- ✓ share a direct link to any booking time or page
- ✓ Add to your email signature (must be a public booking time available)

Shared page additional settings:

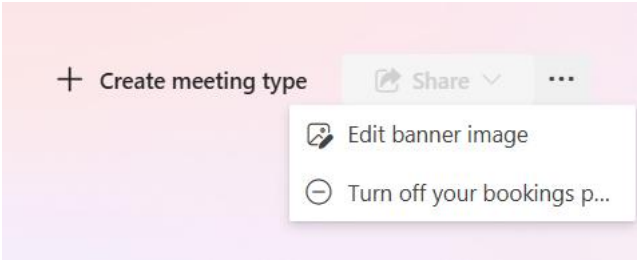
- ✓ embed in a web page so people can book appointments for a specific service and / or with a specific person

Add info and choose options

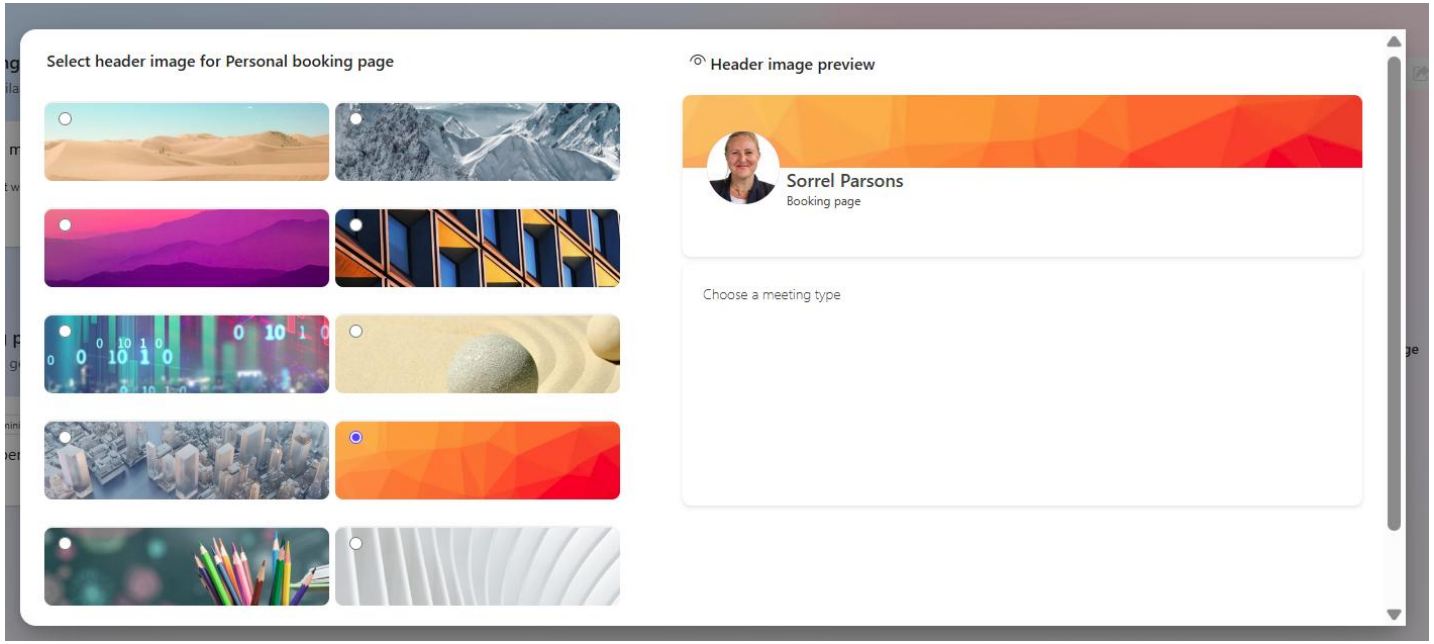
1. Add a title and description e.g. Book time to connect with me
2. Select Teams meeting (as appropriate)
3. Select appointment duration
4. Choose whether you want to share Publicly or Privately
5. Schedule customisation: change your availability



Edit banner image

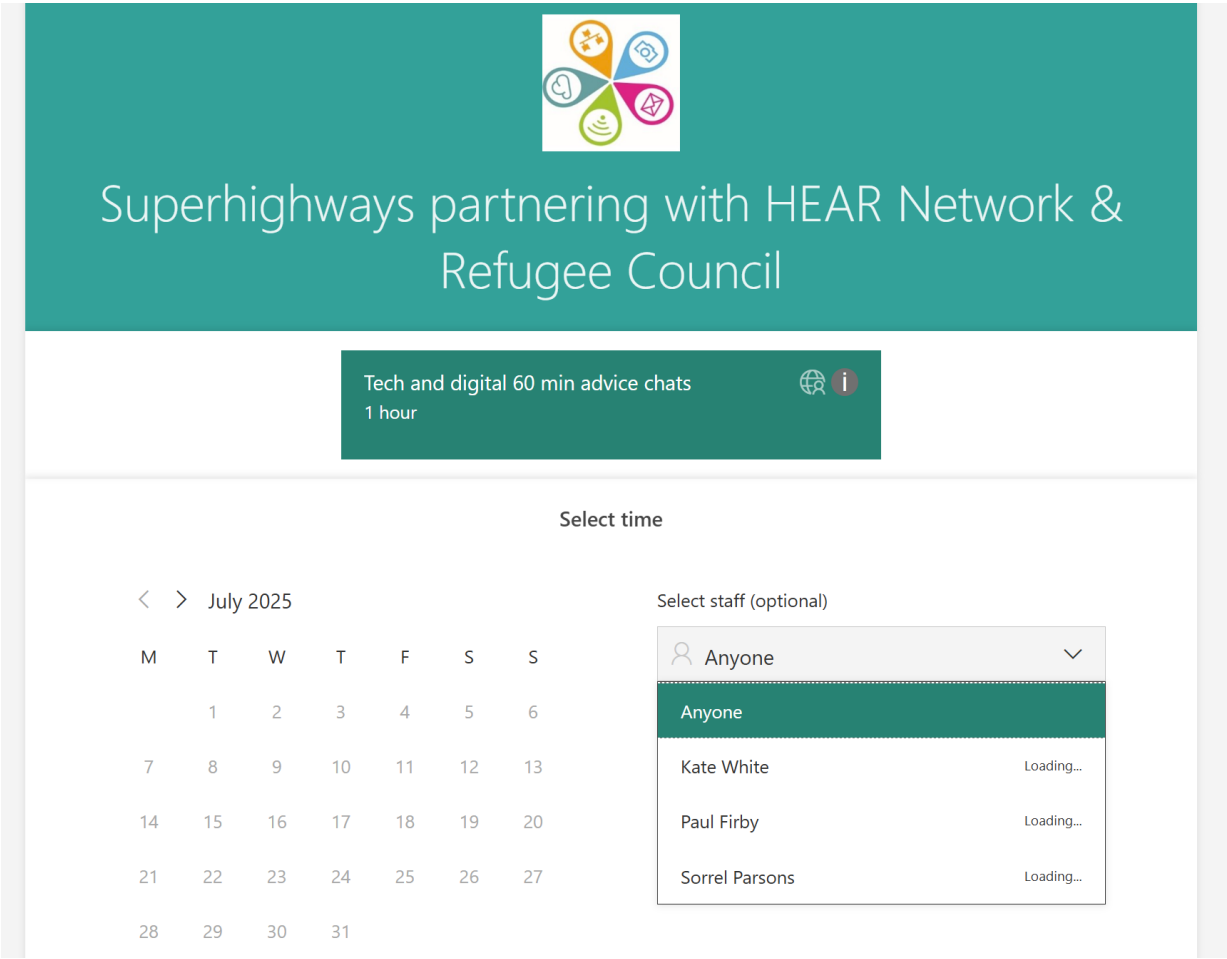


- ✓ Go the Bookings app
- ✓ You can *Edit banner image*
- ✓ Note you can also *Turn off your bookings page* here (this takes all Bookings offline)



Service booking page

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



M365 Bookings – a summary

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

Demo time

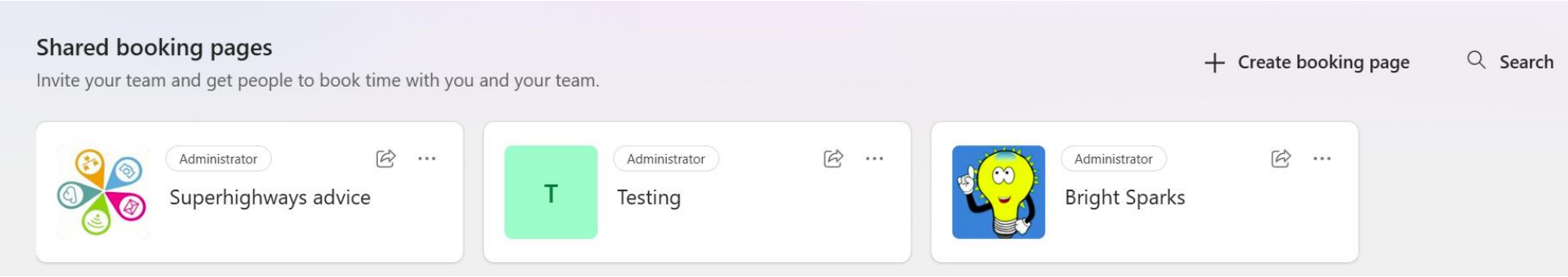


Hands on time

✓10 mins for you to play!

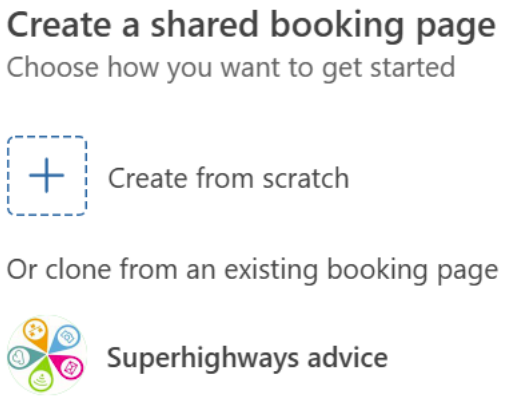


Shared bookings page with services

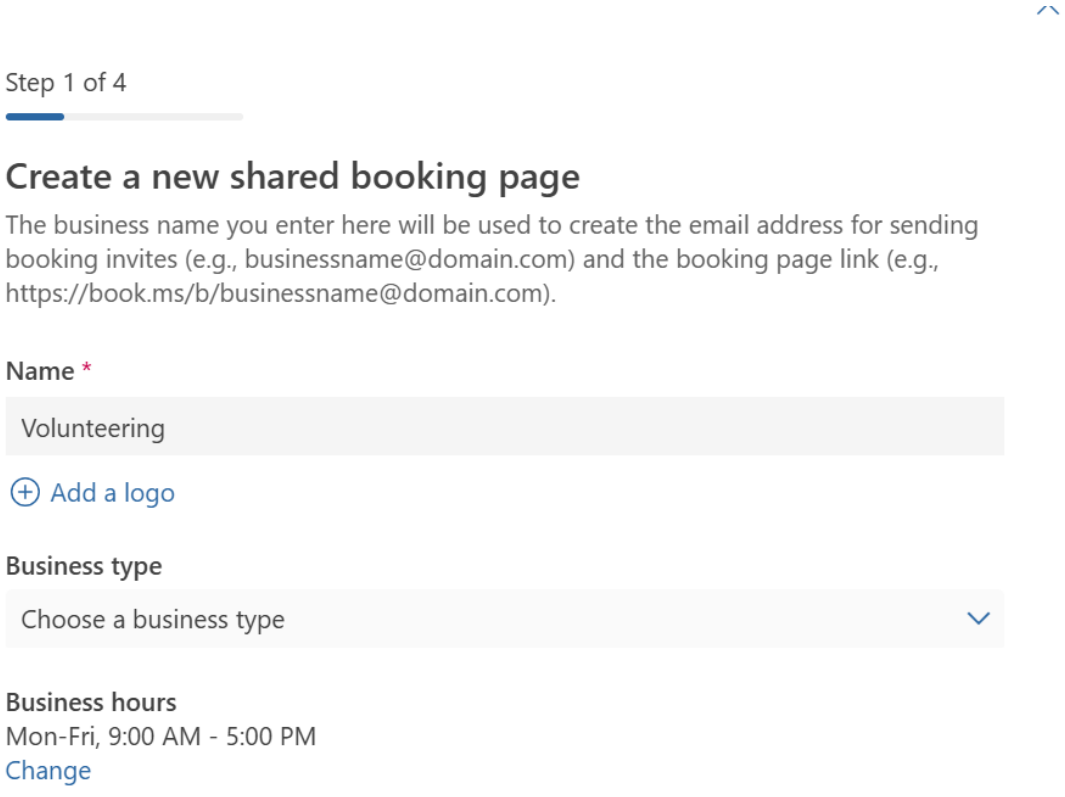


Go to the Bookings app and click on Create booking page.

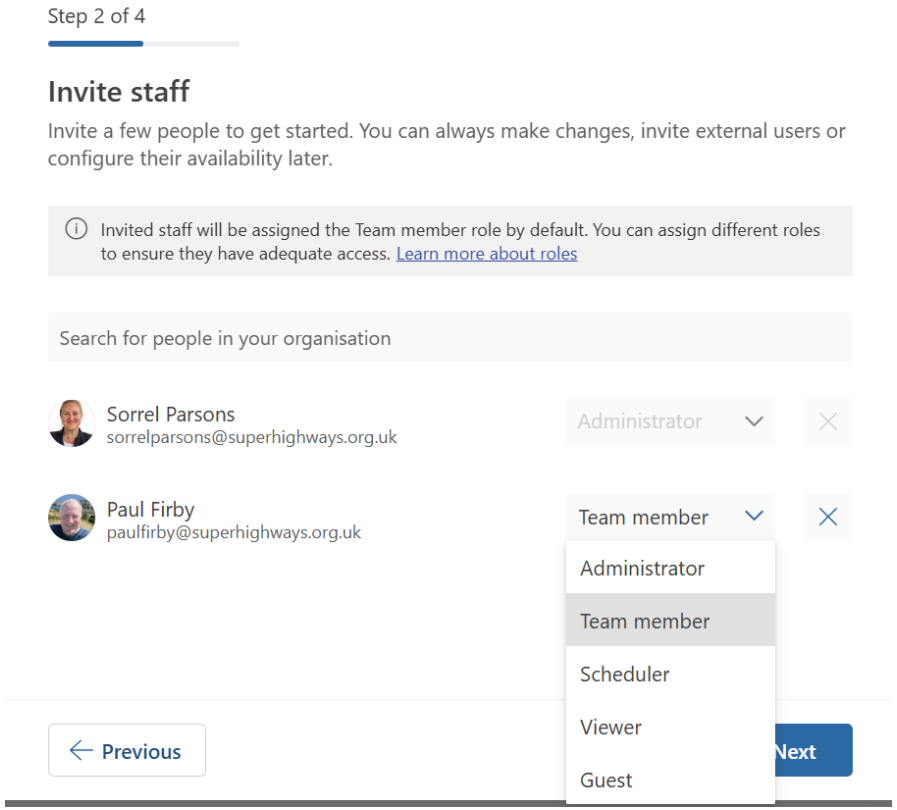
Then choose to Create from scratch.



Shared bookings page with services

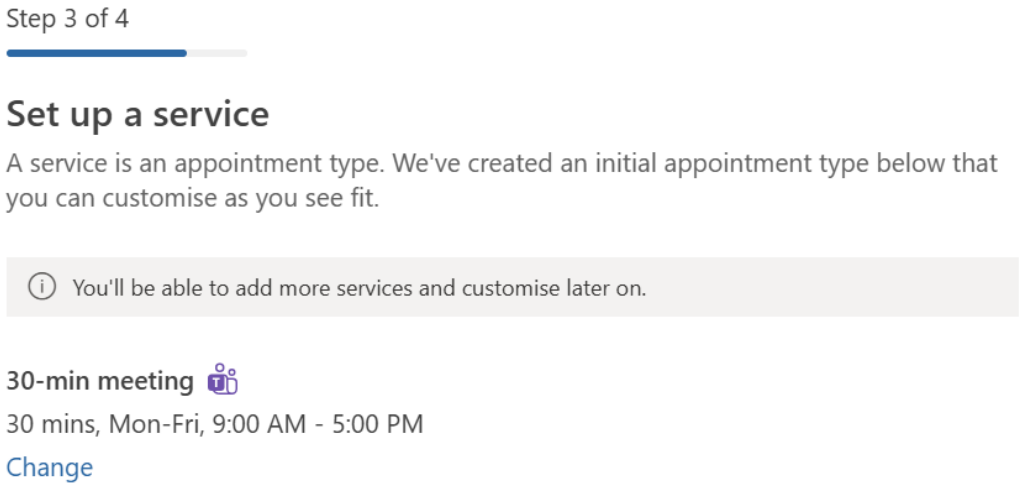


Step 1: Choose a name and business hours.

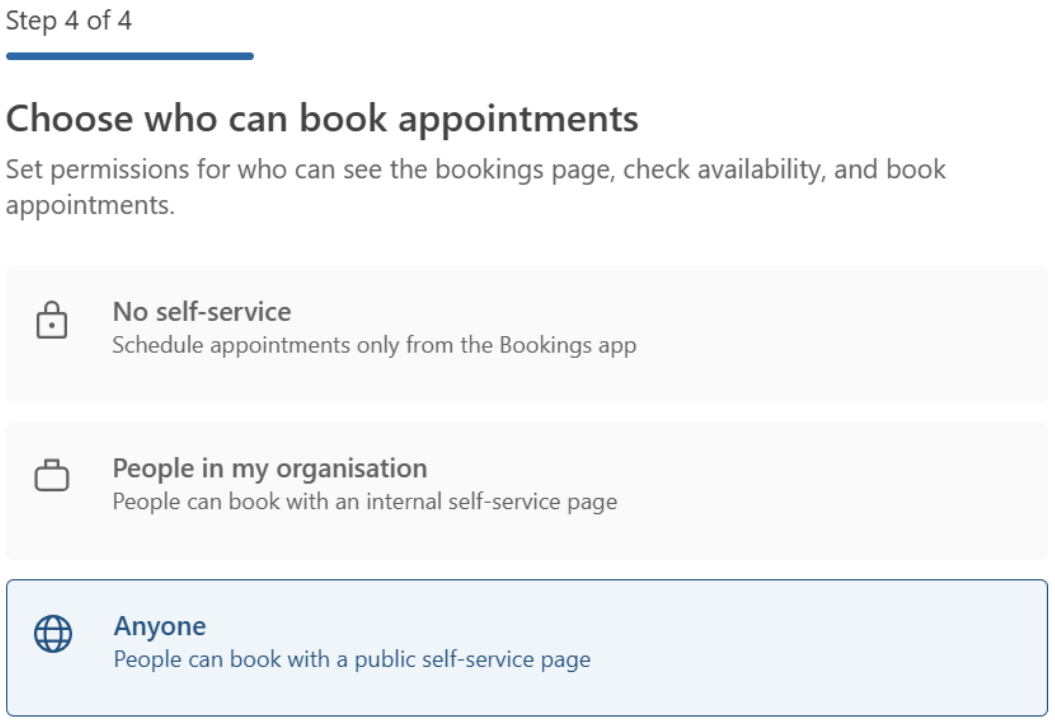


Step 2: Invite your staff

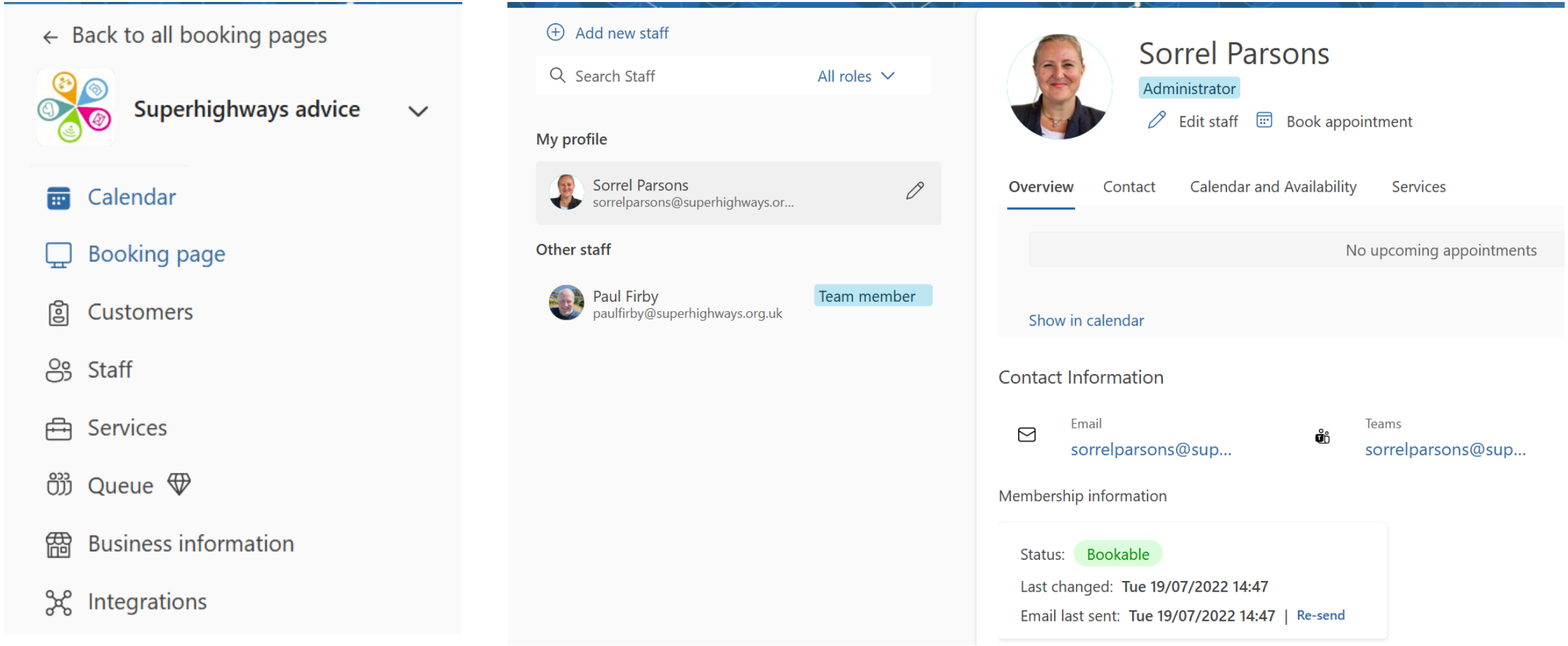
Shared bookings page with services



Step 3: Set up a service (your appointment type)



Step 4: Make sure anyone with the link to the page can book an appointment.



Add as many staff as are required for any services you add to your booking page.

Demo time



Take a break

Back in 10 minutes





Planner



KD

Planner ☆

··· > General

Board Charts Schedule ···

KW AR SP PT +1 Members

To do

+

In progress

+

Evaluation

15/06 ···

KW Kate White

Done

+

Book venue ···

Contact all speakers ···

Finalise agenda ···

Order lunch ···

Hide completed 2

~~Create Sway round up~~

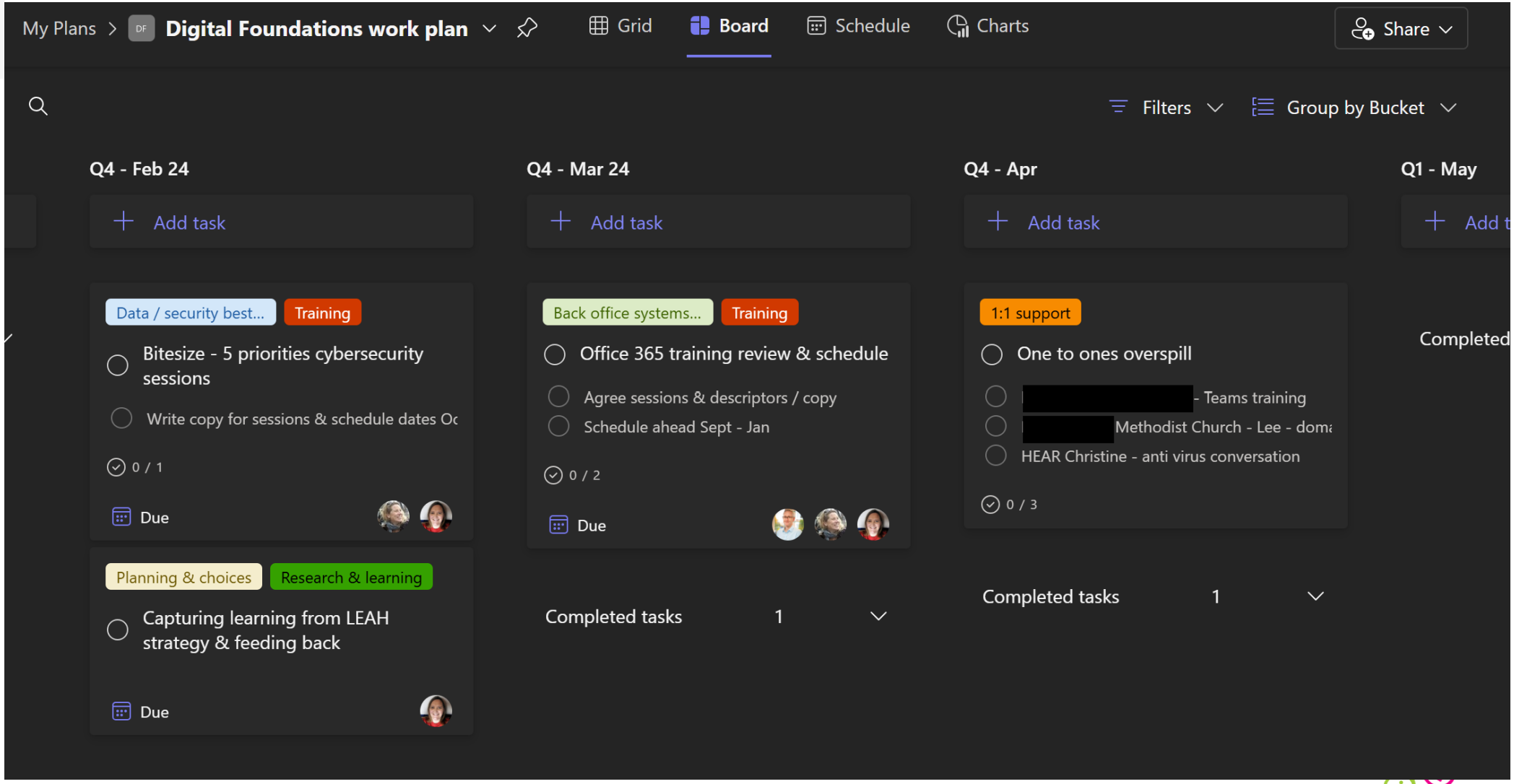
22/06 ···

SP Completed by Sorrel Parsons on 21/06

~~SWAY~~

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

Add new bucket


My Plans
Digital Foundations work plan
Grid
Board
Schedule
Charts
Share
Filters
Group by Bucket
Q4 - Feb 24
Add task
Data / security best...
Training
Bitesize - 5 priorities cybersecurity sessions
Write copy for sessions & schedule dates Oc
0 / 1
Due
Planning & choices
Research & learning
Capturing learning from LEAH strategy & feeding back
Due
Q4 - Mar 24
Add task
Back office systems...
Training
Office 365 training review & schedule
Agree sessions & descriptors / copy
Schedule ahead Sept - Jan
0 / 2
Due
Completed tasks
1
Q4 - Apr
Add task
1:1 support
One to ones overspill
[redacted] - Teams training
[redacted] Methodist Church - Lee - dom
HEAR Christine - anti virus conversation
0 / 3
Completed tasks
1
Q1 - May
Add t
Completed

Demo time



M365 Planner – a summary

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

Demo time





Loop



What is Microsoft Loop?

A shared space for working together

Microsoft Loop helps people create and edit information together, without passing different versions of a document around.

- ✓ Components: live tables, lists, notes and checklists
- ✓ Pages: flexible spaces for bringing related information together
- ✓ Workspaces: collections of pages for a project or team
- ✓ Changes appear wherever the Loop content has been shared

Works across: Loop, Teams, Outlook, OneNote and Whiteboard.

What could we use Loop for?

Useful for work that is still developing

For a small charity or community group:

- ✓ Plan an event or activity
- ✓ Gather ideas from staff or volunteers
- ✓ Build a meeting agenda together
- ✓ Take shared meeting notes
- ✓ Create a simple checklist
- ✓ Collect availability
- ✓ Track actions and decisions
- ✓ Create a project or campaign planning page

The benefits of Loop

One shared version

No need to email spreadsheets or lists backwards and forwards.

People can contribute where they already work

A Loop component can appear in an Outlook email or Teams conversation.

Updates stay synchronised

Change the component in one place and the updated information appears in the other places where it has been shared.

Quick and flexible

Start with a small list or table and expand it as the work develops.

Good for participation

People can add ideas, update information and respond directly rather than sending separate replies.

Limitations and things to consider

Loop is useful, but it is not the answer to everything

- ✓It can be hard to remember where a component originally came from
- ✓Permissions and sharing need to be managed carefully
- ✓Some colleagues may be unfamiliar with the Loop interface
- ✓It is less suitable for formal reports, policies and finished publications
- ✓Important content still needs clear ownership
- ✓External sharing depends on your organisation’s Microsoft 365 configuration
- ✓External volunteers normally need to authenticate rather than contribute anonymously
- ✓It is not a full replacement for Planner, Forms, OneNote or SharePoint

Demo time



Hands on time

✓10 mins for you to play!



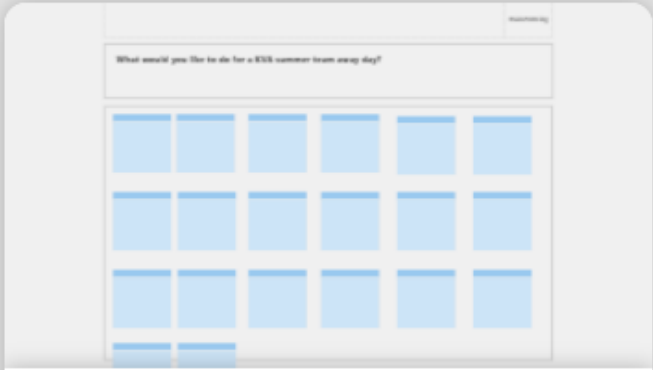


Whiteboard

Whiteboard

New Whiteboard

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



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



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



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



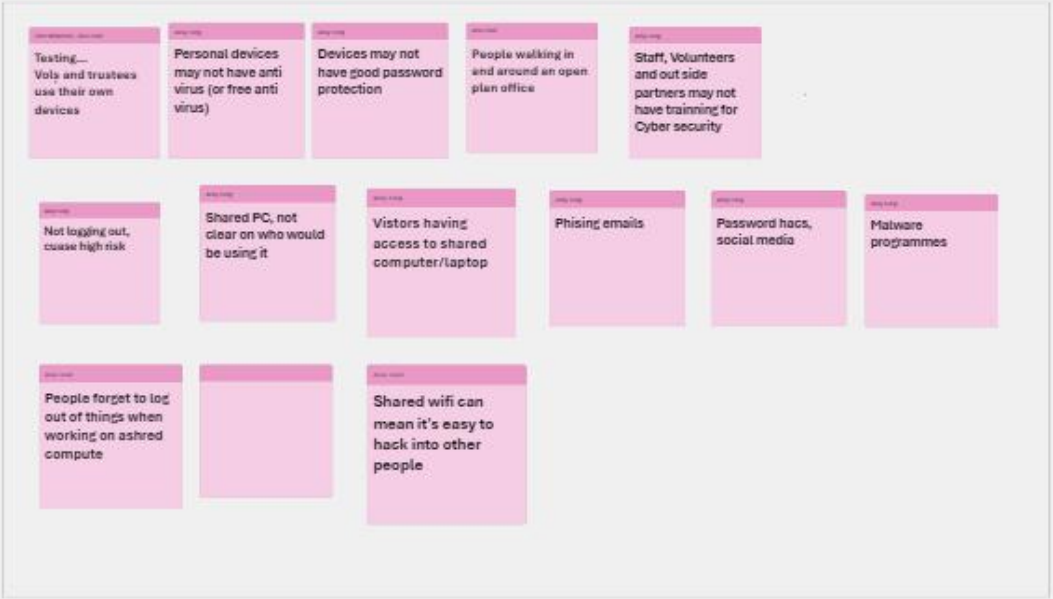
Support supervisin...
Edited: 09/03/2023 18:...

Cyber Security Training for the KVA Team

Room 1 - Jacky, Leeni,
Alison & Alice

ATTACK the charity

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





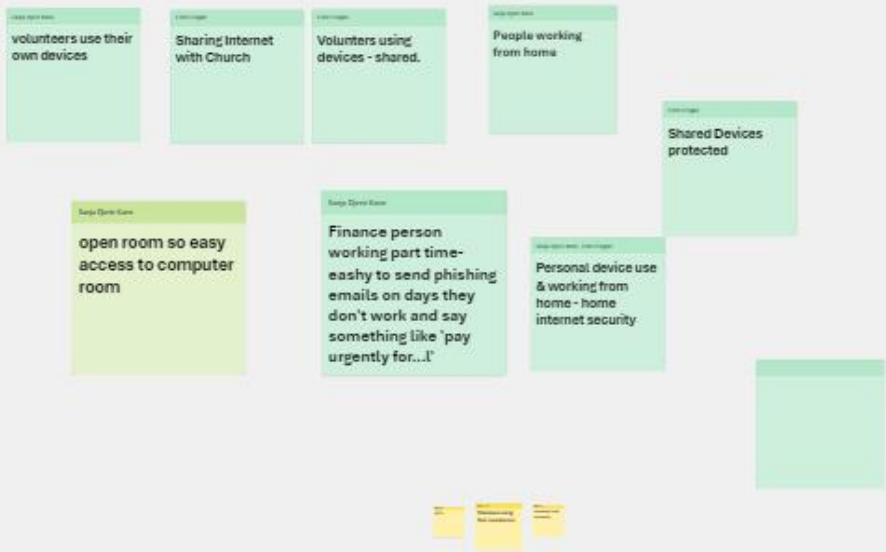
Help the Homeless cyber security case study video

youtu.be

Room 2

ATTACK the charity

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





Help the Homeless cyber security case study video

youtu.be

Templates

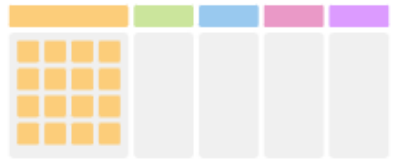
Search all templates

- Recommended
- My templates
- Shared with me
- Brainstorming
- Problem solving
- Design and research
- Strategy
- Project planning
- Retrospective
- Games

Show for new whiteboards

Recommended

Start with blank canvas



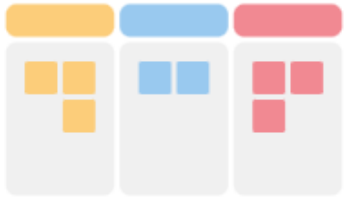
Affinity diagram



Topic Brainstorm



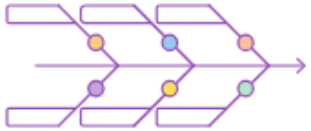
Where in the world



Daily stand-up



Moodboard

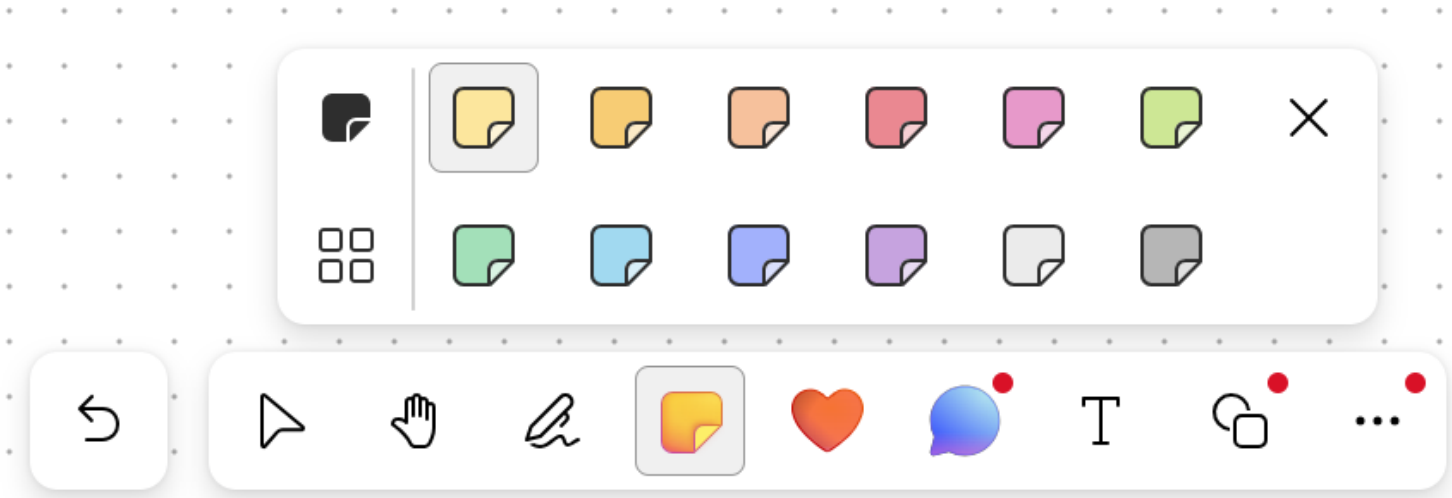


Cause and effect diagram

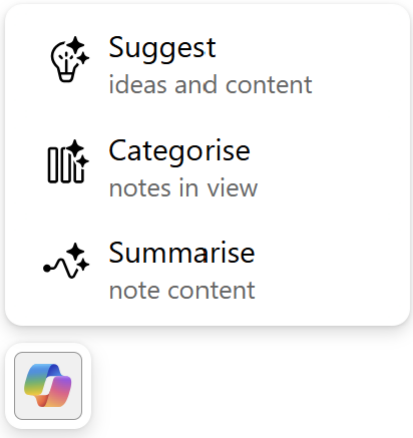


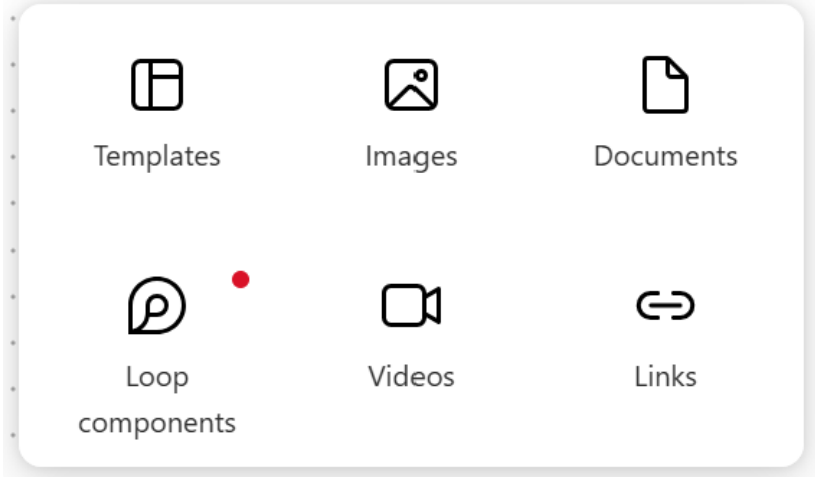






- ✓ Copilot licensed gives you options to help analyse board content





Demo time





M365 Whiteboard summary

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

✓Further info

Hands on time

✓10 mins for you to play!



About Superhighways....

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

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



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Thanks for listening



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