A Brief Introduction to Microsoft 365

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#DigitalFoundations

Questions:

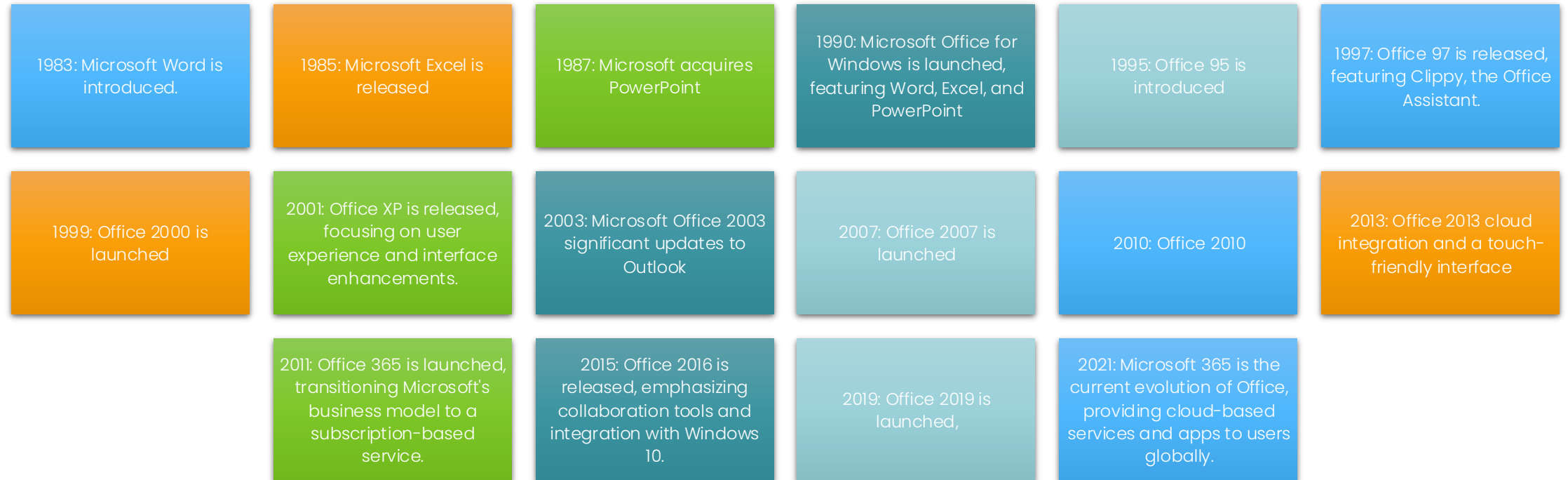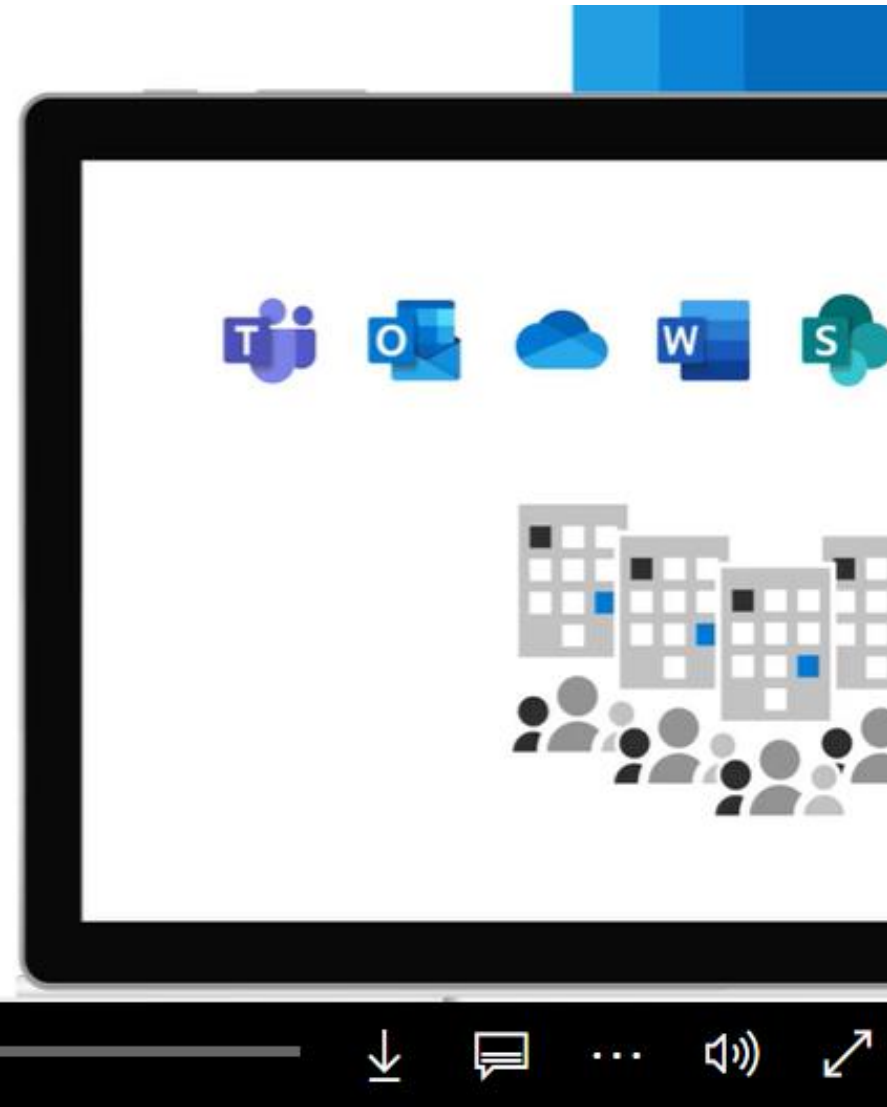- Put questions into chat
- I will try and answer them today
- Otherwise, I will get back to you
- We can arrange 1-1 chats about specific topics

#DigitalFoundations

From 1983 to Microsoft 365: The Evolution of Productivity Suites

1983: Microsoft Word is introduced.

1985: Microsoft Excel is released

1987: Microsoft acquires PowerPoint

1990: Microsoft Office for Windows is launched, featuring Word, Excel, and PowerPoint

1995: Office 95 is introduced

1997: Office 97 is released, featuring Clippy, the Office Assistant.

1999: Office 2000 is launched

2001: Office XP is released, focusing on user experience and interface enhancements.

2003: Microsoft Office 2003 significant updates to Outlook

2007: Office 2007 is launched

2010: Office 2010

2013: Office 2013 cloud integration and a touch-friendly interface

2011: Office 365 is launched, transitioning Microsoft's business model to a subscription-based service.

2015: Office 2016 is released, emphasizing collaboration tools and integration with Windows 10.

2019: Office 2019 is launched,

2021: Microsoft 365 is the current evolution of Office, providing cloud-based services and apps to users globally.

How to get M365 for free!

Register your Charity with Charity Digital

https://charitydigital.org.uk/

Apply via Microsoft Non-Profit Grants & Discounts

Microsoft 365 Nonprofit Solutions | Microsoft Nonprofits
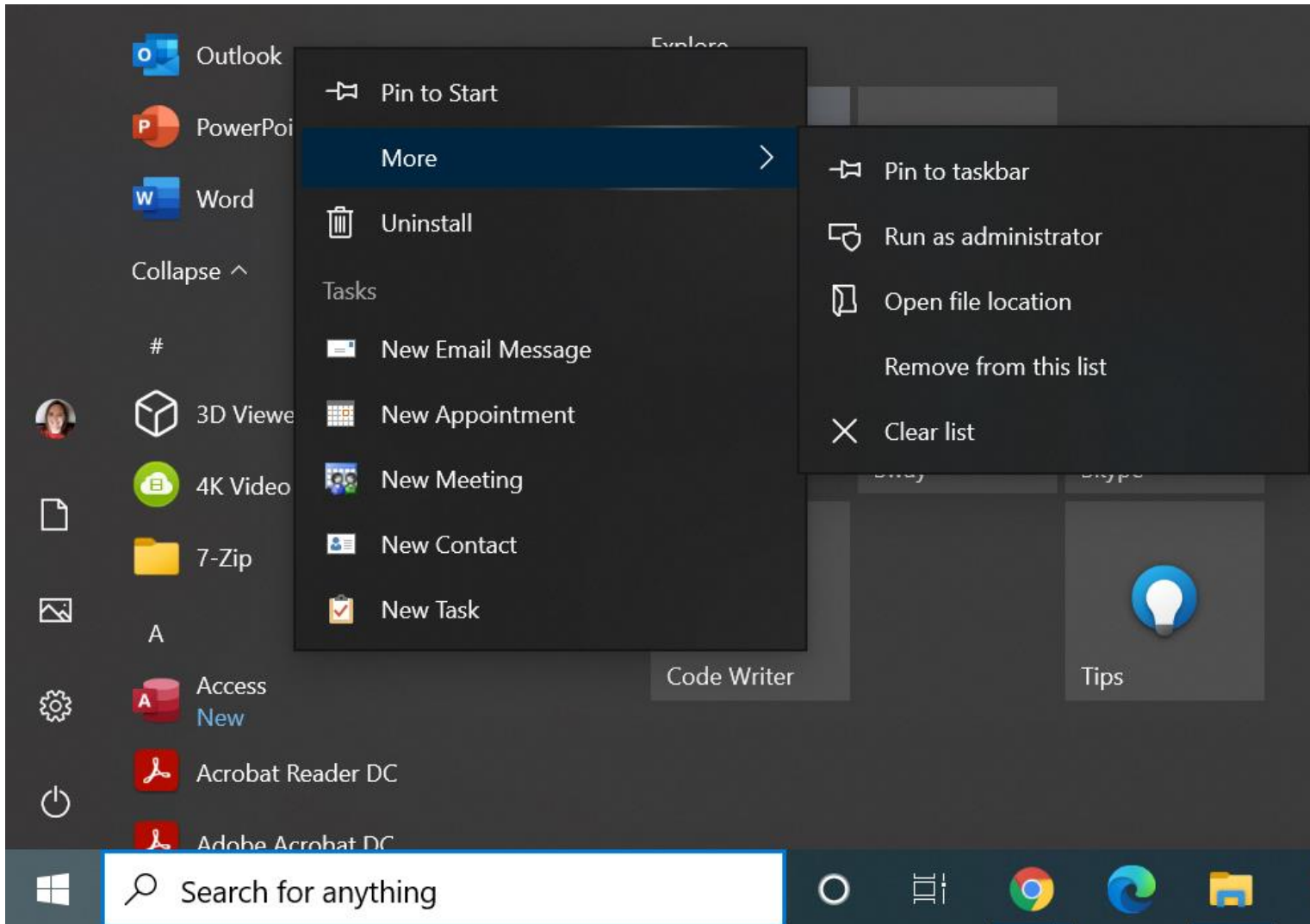
Accessing M365 via the web portal
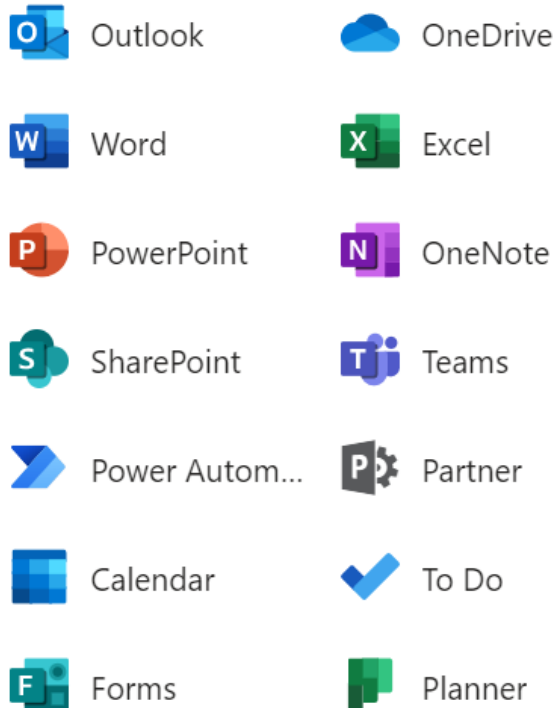
- Log in at www.office.com with your email and password

- Choose the apps from the landing page or the App launched grid of 9 squares always at the top right of your screen

Installing Microsoft 365 Desktop Apps

Seamless Productivity: Installing Office Apps Across Your Devices
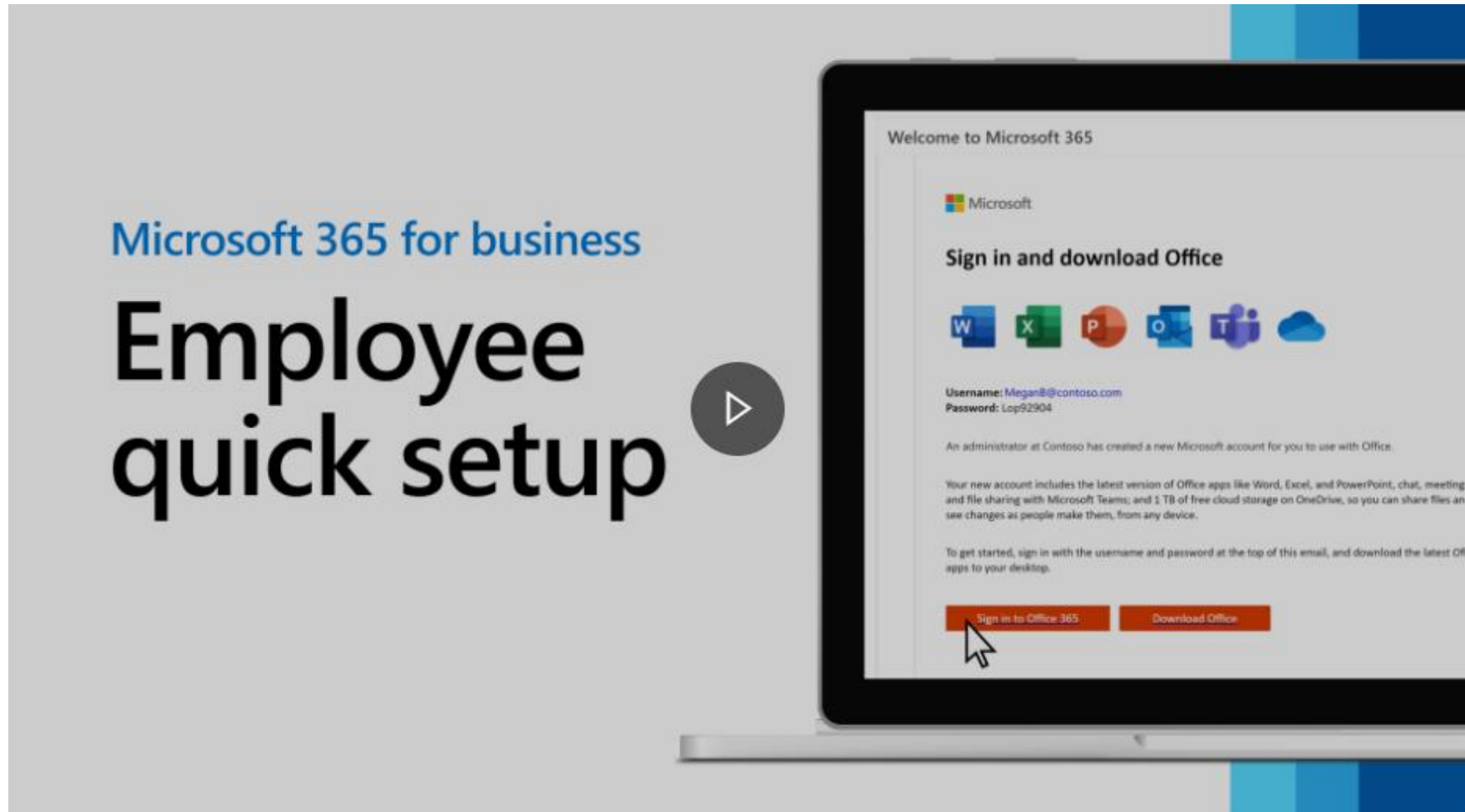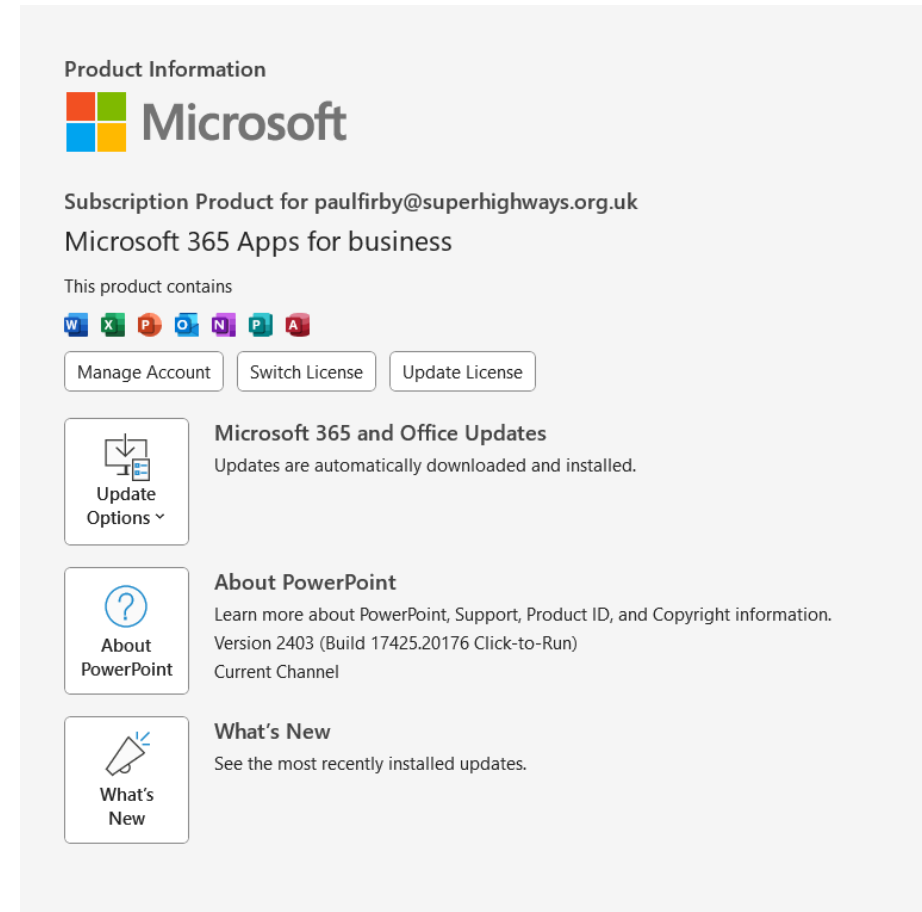
Launching local M365 apps

Using the Windows Start Menu, or Search for anything box.

Right click to **Pin to Start** or click **More** and also **Pin to taskbar**

Updating Desktop Apps

Staying Current: Updating Your Microsoft 365 Apps

Word, Excel, PowerPoint

File > Account > Update

Security with Microsoft Authenticator

Extra Layer of Security: Protects you from **over 99%** of hacking attacks.

You'll be asked for further information when logging in

Microsoft

More information required

Your organization needs more information to keep your account secure

Use a different account

Learn more

Next
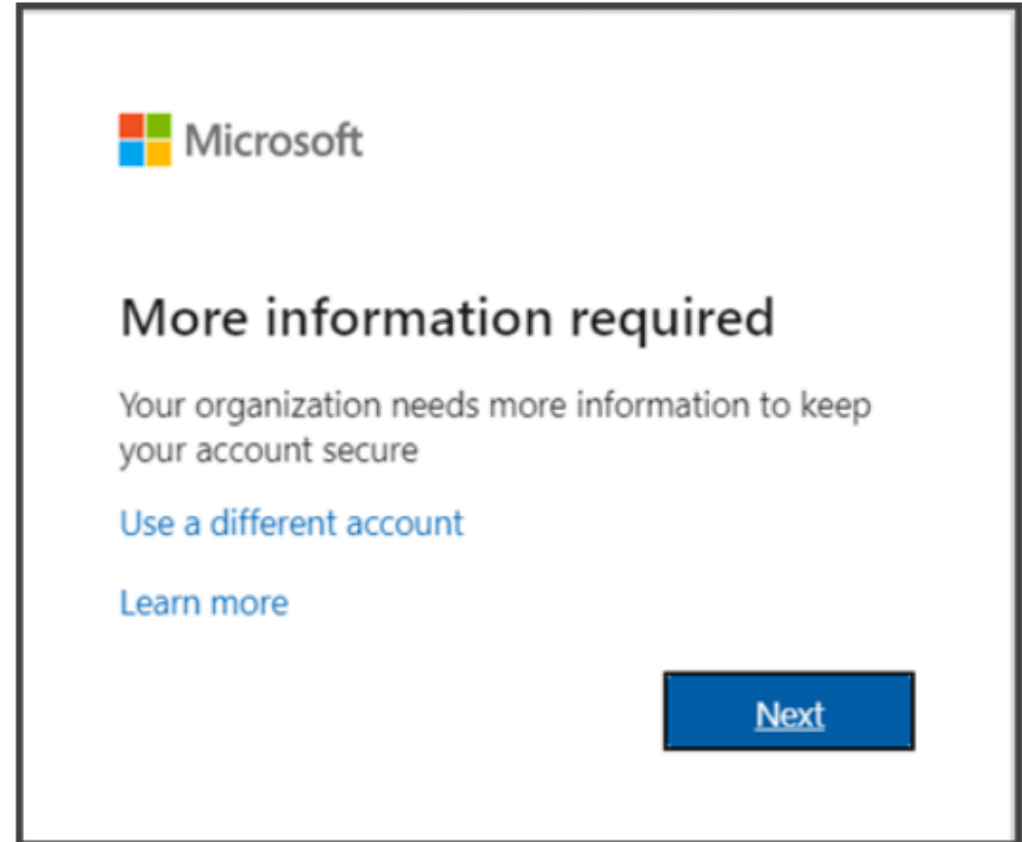
Security with Microsoft Authenticator

MFA methods include:

SMS

Phone Call

Authenticator

Security Key

Hardware Tokens

Set up multi-factor authentication with a mobile device

Additional security verification

Secure your account by adding phone verification to your password. View video to know how to secure your account

Step 1: How should we contact you?

Mobile app

How do you want to use the mobile app?

○ Receive notifications for verification

● Use verification code

To use these verification methods, you must set up the Microsoft Authenticator app.

Set up   Mobile app has been configured.

0:01 / 2:26

Cyber Aware – NCSC.GOV.UK

National Cyber Security Centre
a part of GCHQ

Cyber Security
Small Charity Guide

This advice has been produced to help charities protect themselves from the most common cyber attacks. The 5 topics covered are easy to understand and cost little to implement. Read our quick tips below, or find out more at **www.ncsc.gov.uk/charity** .

Backing up your data

Take *regular* backups of your important data, and *test* they can be restored. This will reduce the inconvenience of any data loss from theft, fire, other physical damage, or ransomware.

Identify what needs to be backed up. Normally this will comprise documents, emails, contacts, legal information, calendars, financial records and supporter or beneficiary databases.

Ensure the device containing your backup is *not* permanently connected to the device holding the original copy, neither physically nor over a local network.

Consider backing up to the cloud. This means your data is stored in a separate location (away from your offices/devices), and you'll also be able to access it quickly, from anywhere.

Keeping your smartphones (and tablets) safe

Smartphones and tablets (which are used outside the safety of the office and home) need even more protection than 'desktop' equipment.

Switch on PIN/password protection/fingerprint recognition for mobile devices.

Configure devices so that when lost or stolen they can be tracked, remotely wiped or remotely locked.

Keep your devices (and all installed apps) up to date, using the 'automatically update' option if available.

When sending sensitive data, don't connect to public Wi-Fi hotspots - use 3G or 4G connections (including tethering and wireless dongles) or **use VPNs.**

Replace devices that are no longer supported by manufacturers with up-to-date alternatives.

Preventing malware damage

You can protect your charity from the damage caused by 'malware' (malicious software, including viruses) by adopting some simple and low-cost techniques.

Use antivirus software on all computers and laptops. Only install approved software on tablets and smartphones, and prevent users from downloading third party apps from unknown sources.

Patch all software and firmware by promptly applying the latest software updates provided by manufacturers and vendors. Use the 'automatically update' option where available.

Control access to removable media such as SD cards and USB sticks. Consider disabling ports, or limiting access to sanctioned media. Encourage staff to transfer files via email or cloud storage instead.

Switch on your firewall (included with most operating systems) to create a buffer zone between your network and the Internet.

Avoiding phishing attacks

In phishing attacks, scammers send fake emails asking for sensitive information (such as bank details), or containing links to bad websites.

Ensure staff don't browse the web or check emails from an account with Administrator privileges. This will reduce the impact of successful phishing attacks.

Scan for malware and change passwords as soon as possible if you suspect a successful attack has occurred. **Don't punish staff** if they get caught out (it discourages people from reporting in the future).

Check for obvious signs of phishing, like **poor spelling and grammar,** or **low quality versions** of recognisable logos. Does the sender's email address look legitimate, or is it trying to mimic someone you know?

Using passwords to protect your data

Passwords - when implemented correctly - are a free, easy and effective way to prevent unauthorised people from accessing your devices and data.

Make sure all laptops, MACs and PCs use encryption products that require a password to boot. Switch on **password/PIN protection** or **fingerprint recognition** for mobile devices.

Use two factor authentication (2FA) for important websites like banking and email, if you're given the option.

Avoid using predictable passwords (such as family and pet names). Avoid the most common passwords that criminals can guess (like *passw0rd*).

Do not enforce regular password changes; they only need to be changed when you suspect a compromise.

Change the manufacturers' default passwords that devices are issued with, before they are distributed to staff.

Provide secure storage so staff can write down passwords and keep them safe (but not with the device). Ensure staff can reset their own passwords, easily.
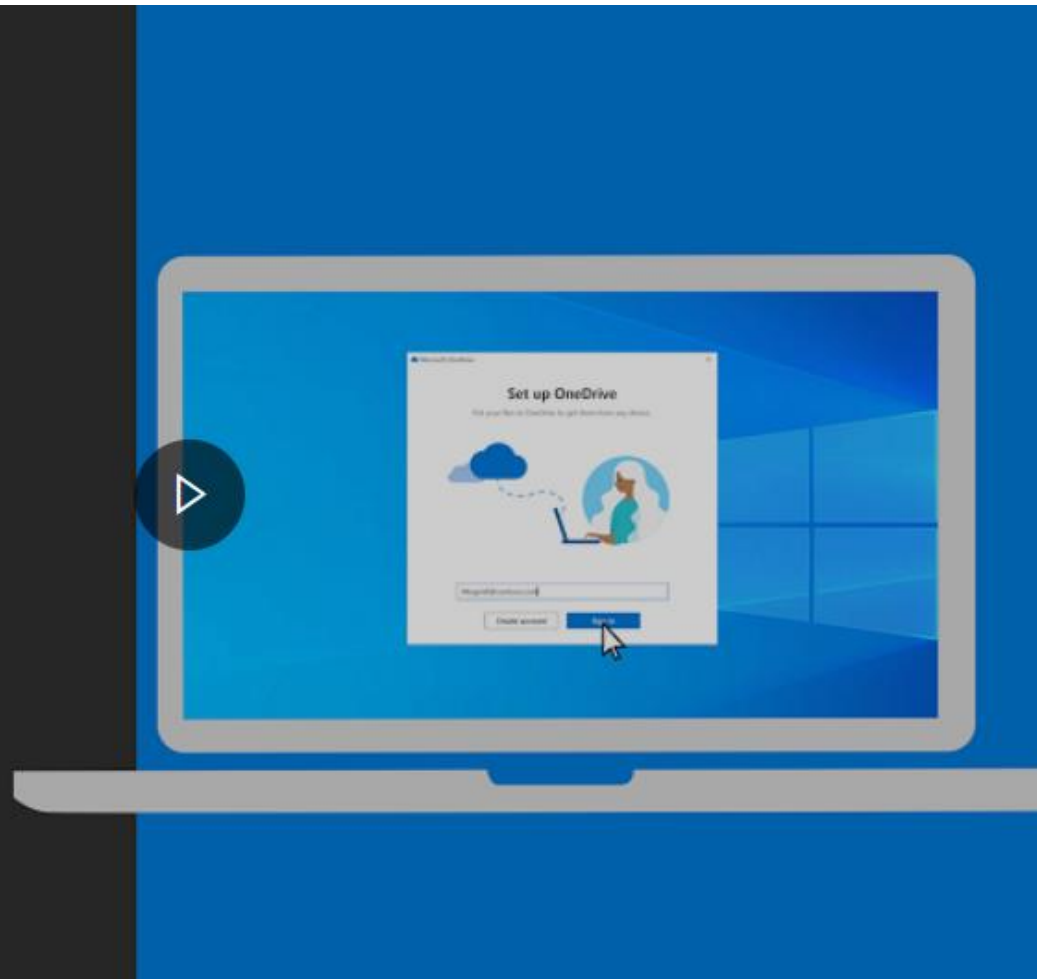
Consider using a password manager. If you do use one, make sure that the 'master' password (that provides access to all your other passwords) is a strong one.

For more information go to **www.ncsc.gov.uk** **@ncsc**

Syncing with OneDrive

OneDrive: Your Files, Synced and Accessible

Collaboration and File Sharing

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 OneDrive

- 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)

- Don't save files locally to your laptop (if your laptop fails or is lost or stolen – your files are lost)

Data storage

How do OneDrive, Teams and SharePoint work together?

SharePoint

Teams

One Drive

Personal files

Organisational files

Laptop
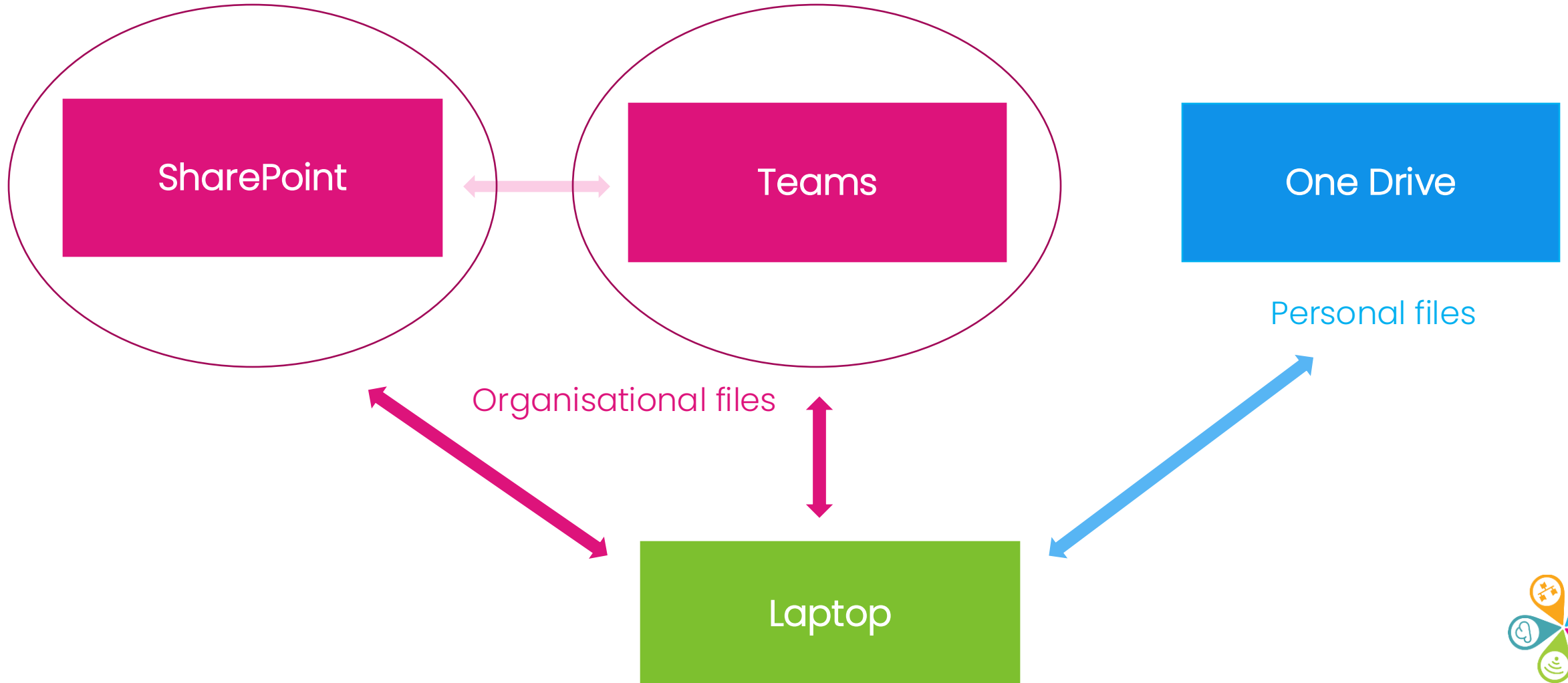
AutoSave

- If AutoSave is On at the top right of your screen, as indicated, changes to your document will automatically be saved

- If you want to create a new version of a document, remember to Save As and give the file a new name. Otherwise changes will overwrite the original

![Office 365 logo with application icons for Outlook, Word, Excel, PowerPoint, OneNote, OneNote, Access, and OneDrive]
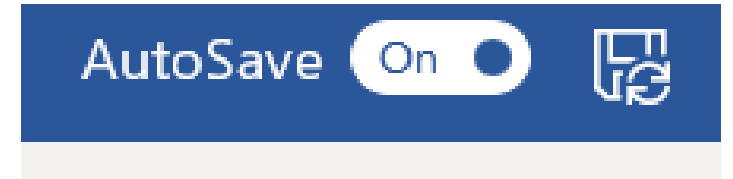
Tech Team meetings • **Saved** ⌄

File name

Tech Team meetings   .docx

Location

🖥 **Membership**
Superhighways » Shared Documents » 🖥 ...

🕑 Version History

Version History   ⌄   ✕

Yesterday, 14 March 2023

✏ Modified by: Kate White   20:38

✏ Modified by: Kate White   20:23
   Open version

✏ Modified by: Colin Cregan   19:46
   Open version

✏ Modified by: Colin Cregan and   19:34
   Kate White
   Open version

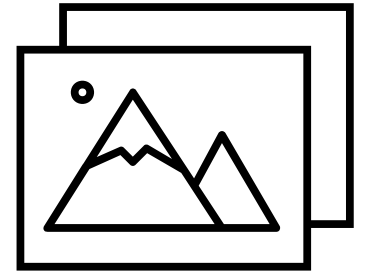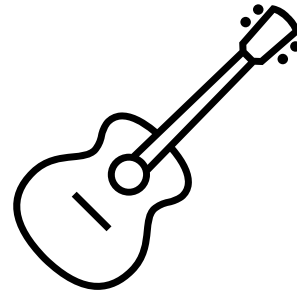✏ Modified by: Colin Cregan   19:21
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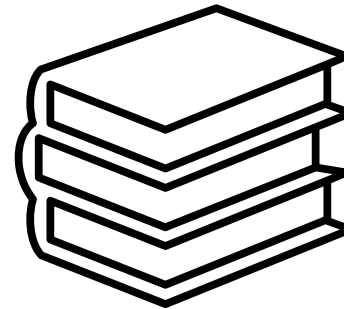
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What can a GB and a TB hold?

1 GB = 1,000 books or 250 songs or 500 photos

1 TB = 1,000,000 books or 250,000 songs or 500,000 photos

Some of the other M365 Applications

To Do – Your personal tasks list

☰	⚲

☀ My Day

☆ Important

▦ Planned   10

⚑ Flagged Email   4

⌂ Tasks   12

≣ September to do   6

≣ **Finish off before I go on leave!**

≣ Things to do before hong kong   3

+ New list

Get the app.   🍎 ⊞ 🤖

Finish off before I go on leave! ···

                                                              ⚇ Share   ⇅ Sort

✓ ~~VC Sutton email re database~~   ☆

✓ ~~ARCC O365 quote~~   ☆

✓ ~~Creative Youth - IT security audit report~~   ☆

✓ ~~Annual Report notes for Joanne~~   ☆

✓ ~~Get back to Kitchen Collective~~   ☆

✓ ~~Get back to Lambeth Larder~~   ☆

✓ ~~Get back to Urban Dandelion~~   ☆

✓ ~~Get back to East London Community group~~   ☆

+ Add a task

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

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
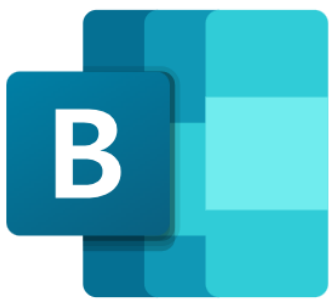
M365 Bookings – a summary

✓An online booking calendar which integrates with Outlook (& Teams), set up directly from Outlook on the web or the Bookings app

✓Saves time when arranging appointments giving flexibility for people to book a time that works best for them

✓Email (& SMS text) notifications can reduce no-shows

✓Choose a Personal booking page or a Team booking page linking to multiple calendars

✓Collect additional custom data via the booking form

✓Further info

✓Superhighways Step by step instructions for a Personal bookings page

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

OneNote training / Intro to OneNote / What is OneNote?

What is OneNote?
▷ Video

Start using OneNote
▷ Video

Next: Take notes

What is OneNote?

[Watch video here](#)

CoPilot for M365

£21 per user per month
1 year contract

Subscription and Account Management

Managing Your Microsoft 365 Experience

M365 Non-Profit Licencing

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

Apps and services included [2, 3]

Word Excel PowerPoint Teams

Outlook Exchange OneDrive SharePoint

Microsoft 365 Business Standard (Nonprofit Staff Pricing)

£2.50 user/month

(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
- ✓ Manage customer appointments

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)

Grant

Free for up to 10 users

£4.50 user/month

(Annual commitment)

Price does not include VAT.

Get started

Learn more >

Everything in Business Standard, plus:

- ✓ Advanced security
- ✓ Cyberthreat protection
- ✓ Advanced device management

Apps and services included

Word Excel PowerPoint Teams

Outlook OneDrive SharePoint Exchange

Intune Azure Information Protection Access (PC only) Publisher (PC only)

Microsoft 365 Business Basic

✓ Free for up to 300 users (**not volunteers**)

✓ Web and mobile versions of Microsoft 365 apps

✓ 1 TB of cloud file storage per user

Microsoft 365 Business Standard

- ✓ £2.50 per user/per month (min 1 year commitment)

- ✓ Web, mobile & desktop versions of M365 apps

- ✓ 1 TB of cloud file storage per user

- ✓ License to use for **volunteers**

Microsoft 365 Business Premium

✓ Free for up to 10 users (**not volunteers**)

✓ Costs £4.50 per user per month for additional users.

✓ Web, mobile and desktop versions of M365 apps

✓ Plus advanced security features, cyber threat protection, and advanced device management.

Which M365 Licences do I have?

After your organisation signs up for Microsoft 365, the Admin can assign different Microsoft 365 licenses to each user account.

- 300 Business Basic are granted/free

- 10 Business Premium are granted/free

How to view licensing info

✓ To see how many licenses you have assigned and unassigned, in the admin centre, go to the Billing > Licenses page.

✓ To see who is licensed, unlicensed, or guest, in the admin centre, go to the Users > Active users page.

Microsoft 85% policy for nonprofits

✓ Nonprofits must use 85% of granted licenses

✓ Licenses must be assigned to active users

    ✓ Active users must use cloud services in 90 days

✓ Non-compliance may result in subscription loss

✓ Microsoft do monitor usage and will contact you if you fall below 85% usage

Office 365 Training Center

START WITH 6 SIMPLE STEPS >

Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Microsoft Teams	Yammer	Access

Learn the basics

Get going quickly and easily with Office 365 video training.

START NOW >

Try it with templates

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

TRY IT >

Work better together

Share, co-author, communicate, and collaborate as a team.

SEE HOW >

Save time with tips

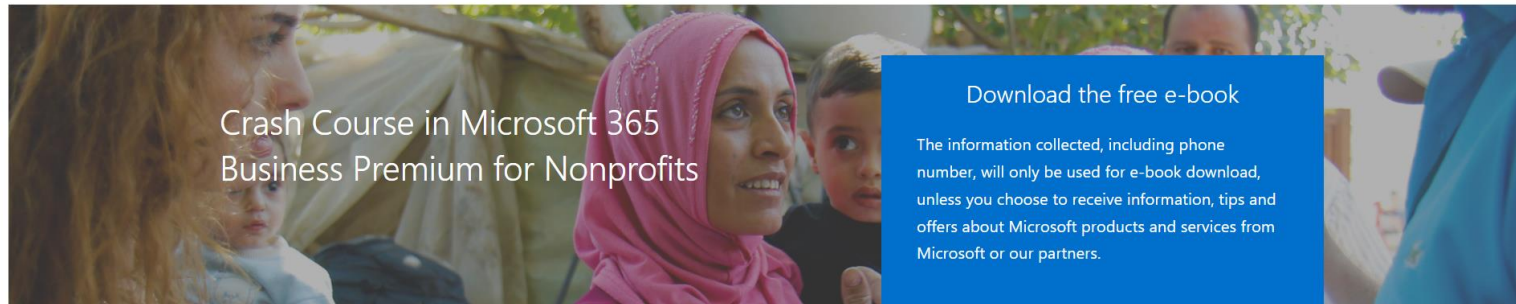Work smarter and get more out of your Office apps.

GET TIPS >

See great ways to work

Get inspired with cool new infographics for Word, Outlook, and PowerPoint — custom signatures, language translation, voice dictation, collaboration, mobile options, and more.

LEARN NOW >

Further Information

Crash Course in Microsoft 365 Business Premium for Nonprofits

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
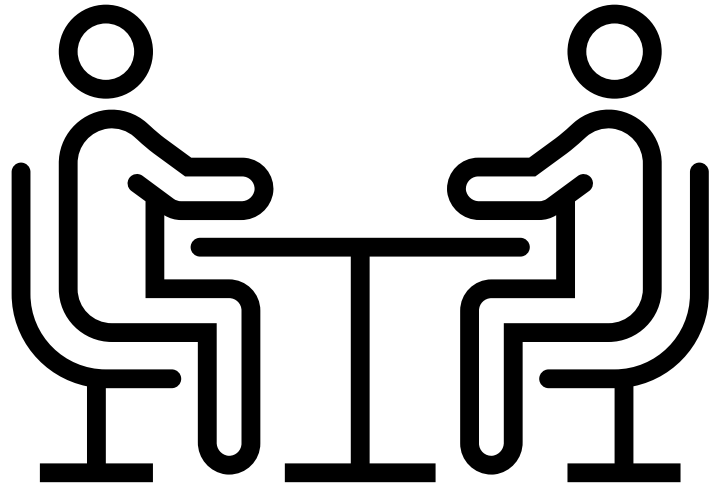
Read more »

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

About Superhighways

Providing tech support to small local charities in London for over 25 years

- ✓ Support
- ✓ Training
- ✓ Consultancy
- ✓ Digital inclusion
- ✓ Datawise London
- ✓ See all services

- ✓ E-news sign up

Get the help you need

Book some 1-1 time with us or [sign up for our regular e-news](#) to find out about new opportunities and training.

Thank you for listening

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