~~Office~~ Microsoft 365 – a refresher of the basics & a look at a range of apps

About Superhighways

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

- ✓ Tech support
- ✓ Training – see our current offer
- ✓ Consultancy
- ✓ Digital inclusion
- ✓ Datawise London
- ✓ Websites
- ✓ eNews – sign up here

What we'll cover

- What is Office 365?
- Email – some tips with Outlook
- File storage - OneDrive Business, Sharepoint & Teams
- Files – some tips with Sharepoint
- Security measures
- Teams
- Other Office 365 Apps – Forms, Sway, To Do, Planner, Power BI, Bookings, Flow / Power Automate & Approvals

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 >

Outlook demo

- Portal access www.office.com
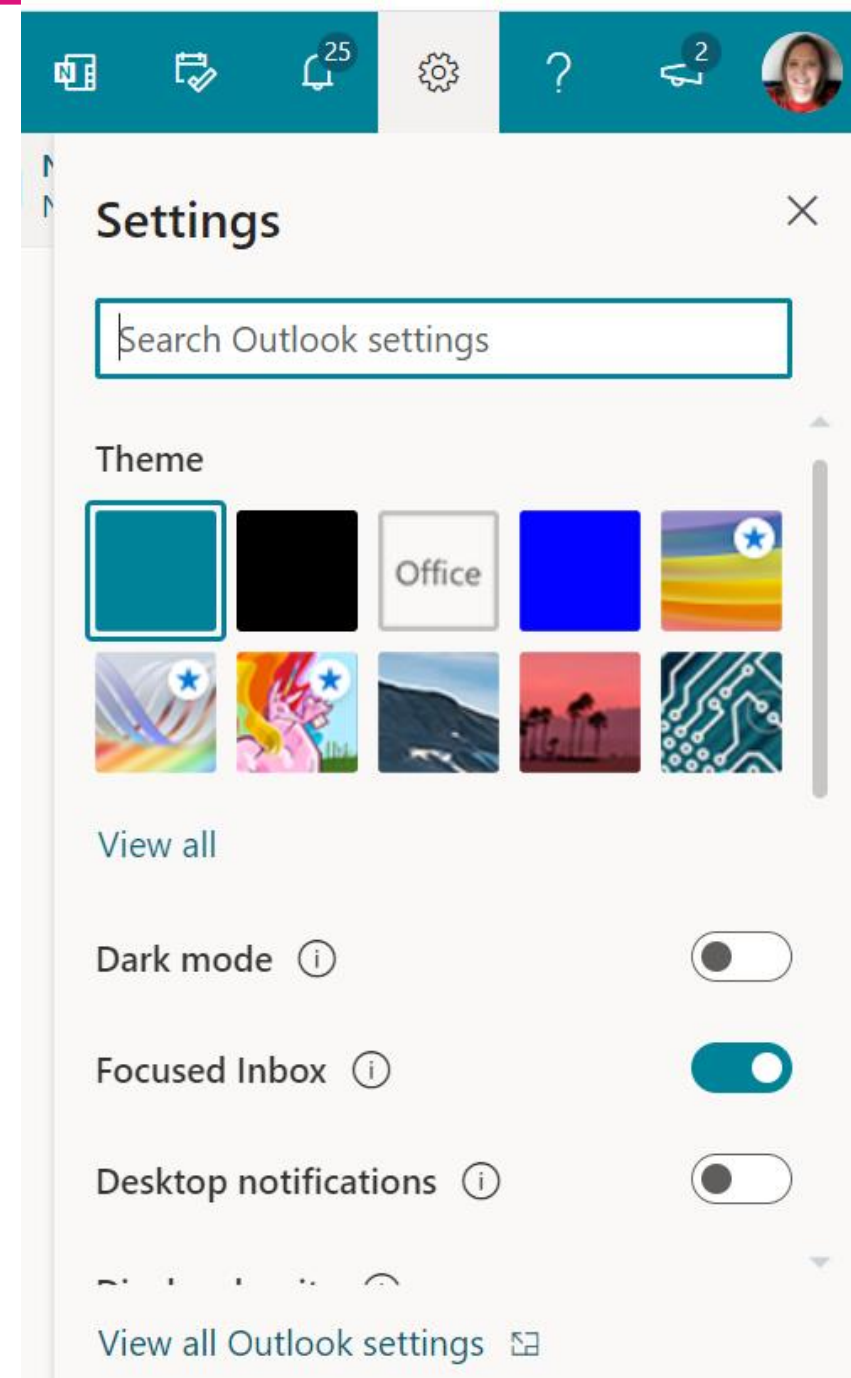- Opening another mailbox
- Outlook settings – out of office etc
- Encryption

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

Outlook settings

- Click on the cog wheel at the top left to access Settings

- Either scroll through or use the Search box e.g. 'Out of Office' will find you the Automated responses settings

Open another mailbox

- 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.
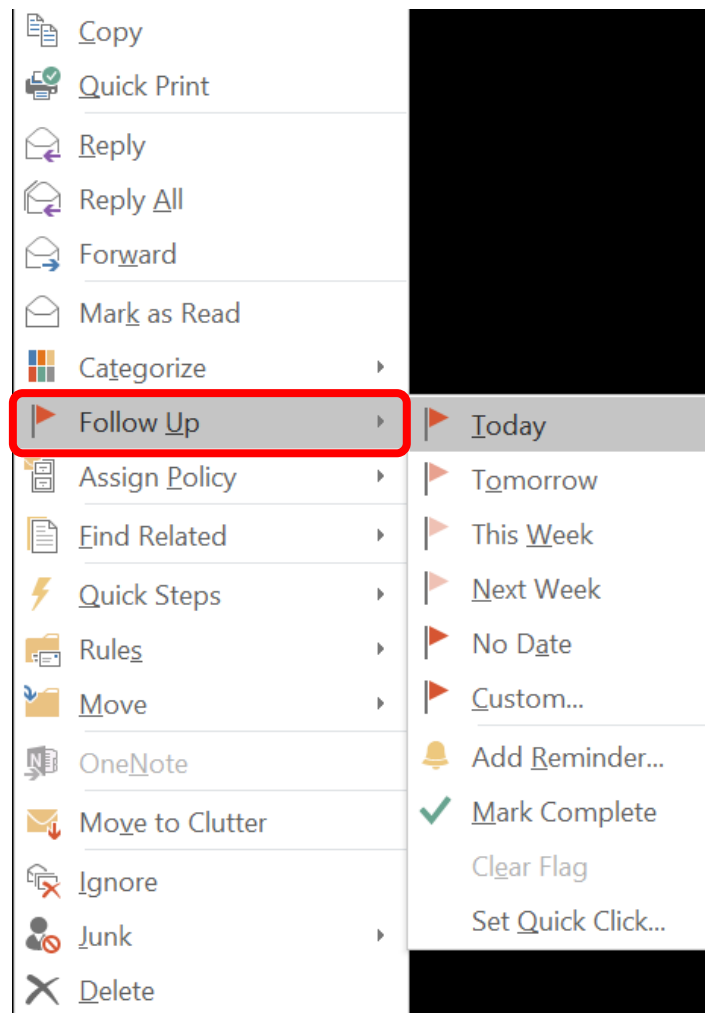
Open another mailbox

SI   Superhighways Info   ✕

Open   Cancel

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 Follow up

- Choose a time frame or No Date

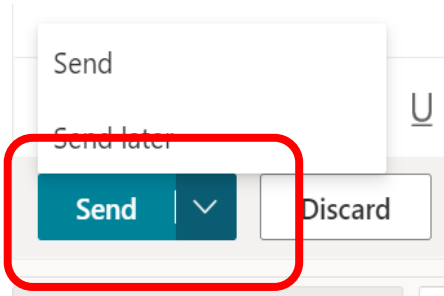- You can then search on Flagged emails

Categorising emails

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

- Right click on an email
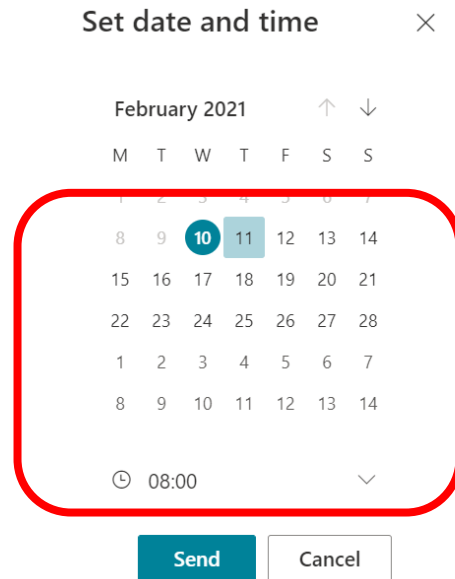- Select Categorise & select a Category
- To add a new Category, select New Category
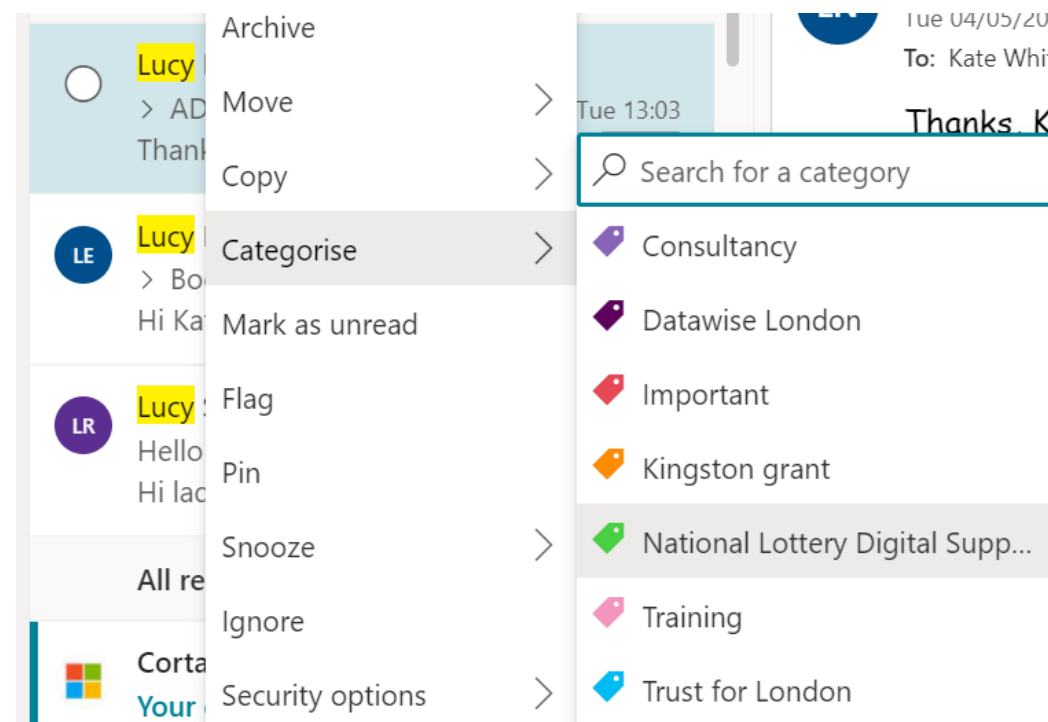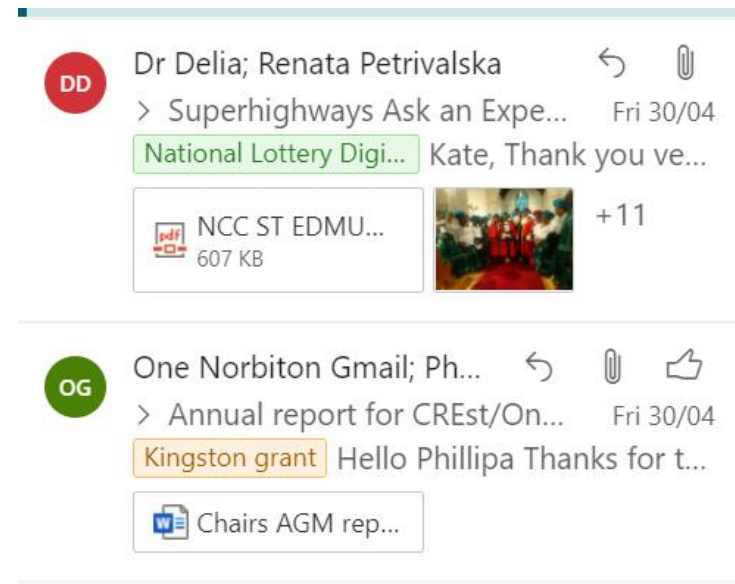
Send Later option

- Click the Down arrow next to Send and select Send later

- Now choose the date and time

Send

Send later

Send ⌄   Discard

U

Set date and time   ✕

February 2021   ↑ ↓

M   T   W   T   F   S   S

8   9   10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

1   2   3   4   5   6   7

8   9   10 11 12 13 14

🕐 08:00   ⌄

Send   Cancel

Data storage

Office 365

My documents — Word, Excel, PowerPoint, other — Team documents

Business documents
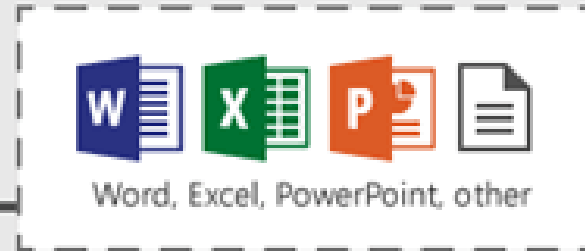
OneDrive for Business

Store **business** documents for your own use in OneDrive for Business.

You can find and edit your documents, or you can share them with specific people. And you can sync them to your computer or device.

Business documents

SharePoint

Store **business** documents for a team in a *Team site*. For example, store team plans that everyone updates, or publish meeting agendas.

All members of the team can find and edit documents. And team members can work on them from their own computer or device.

Team site

Things to consider

- Ownership

- Permissions management

- Collaboration

- Access

- Privacy

- Sharing

- Exit

SharePoint demo

- Navigating your folders and files
- Editing & collaborating on documents
- Sharing files with others
- Version history

- [SharePoint download guide](#)

Navigating & managing files

Search

People

Philippa Leary

Jacky Fung

Sorrel Parsons

Philippa Leary

Alice Linell
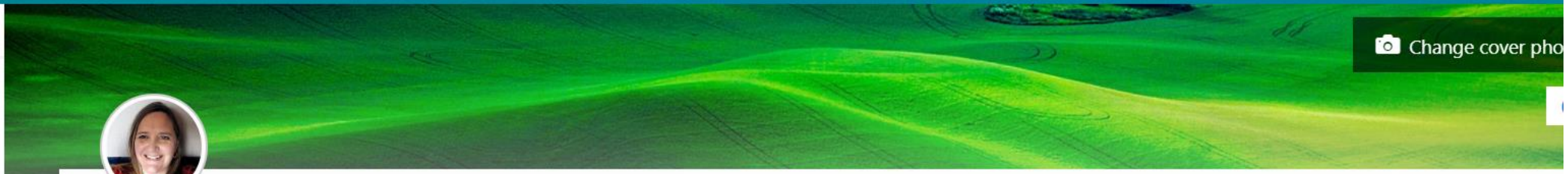
Kate White > Your recent documents

Documents and attachments   Attachments only   Documents only

These are documents you've authored or modified, or sent to others as email attachments. Other people will only see documents that they have access to. Learn more about why you can trust Delve

You Emailed • Yesterday	You Emailed • Yesterday	You Emailed • Yesterday	You Modified • Yesterday
W Word	W Word	W Word	P PowerPoint
Main Terms of Employment - ...1).docx	Superhighways SLL Monitoring F...gital.docx	VCSEP LIN SLL Grant Agreement.docx	Data 4 Good Festival
STATEMENT OF MAIN TERMS OF EMPLOYM ENT ... Part Time This Statement, together wi	VCSEP Subject Liaison Leads Monitoring - Di gital Name(s) Kate White MAC Region Lond	VCSEP Local Intelligence Network (Subject Li aison Leads) Following confirmation of exte	Cornerstone 34 views
Alice's contract.	Re: VCSEP Digital Subject Liaison Le...	Re: VCSEP Digital Subject Liaison Le...	

Are my documents safe in Delve?

Sharing docs

Share Options will depend on Account settings

Send link

People with existing access can use the link

Sorrel Parsons ✕

Add another

Message...

Send

Copy link   Outlook

Link settings

Who would you like this link to work for? Learn more

🌐 Anyone with the link ⓘ

💼 People in Kingston Voluntary Action with the link ⓘ

People with existing access ✓

Specific people

Apply   Cancel

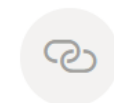## Send link

Requesting access for these specific people

K karen@bvsc.co.uk ✕

Add another

Your organization's p
you to share with the
contact your IT depa

Message...

✏️ **Can edit**
Make any changes

Can view
Cannot make changes

Send

Copy link   Outlook

Version history

GDPR & Cybersecurity

- Multi factor authentication

- Enterprise Mobility & Security - device management, encrypted emails, data loss prevention

- Discovery – right to be forgotten & Data Subject Requests

- Organisational policies and procedures – passwords, homeworking, byod, leavers

Microsoft Teams
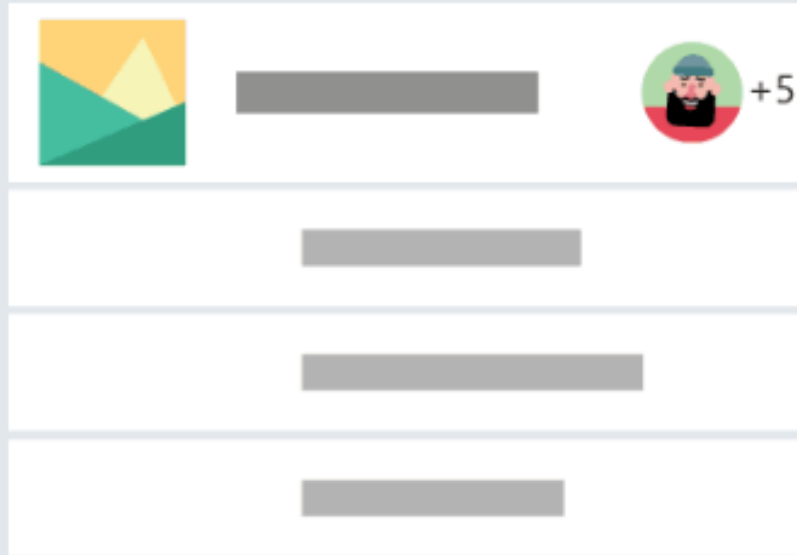
Bring your team together

Create an open, collaborative workspace for your team. Use channels to organize conversations by topic, area, or anything else.
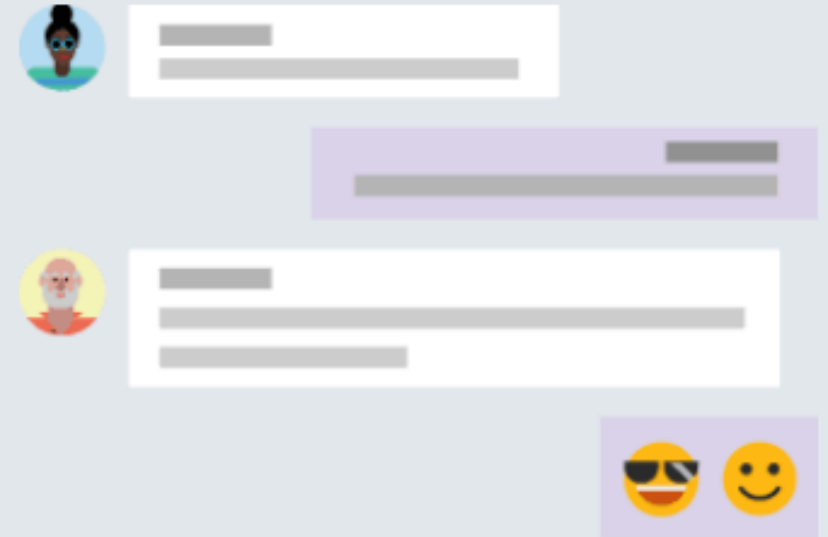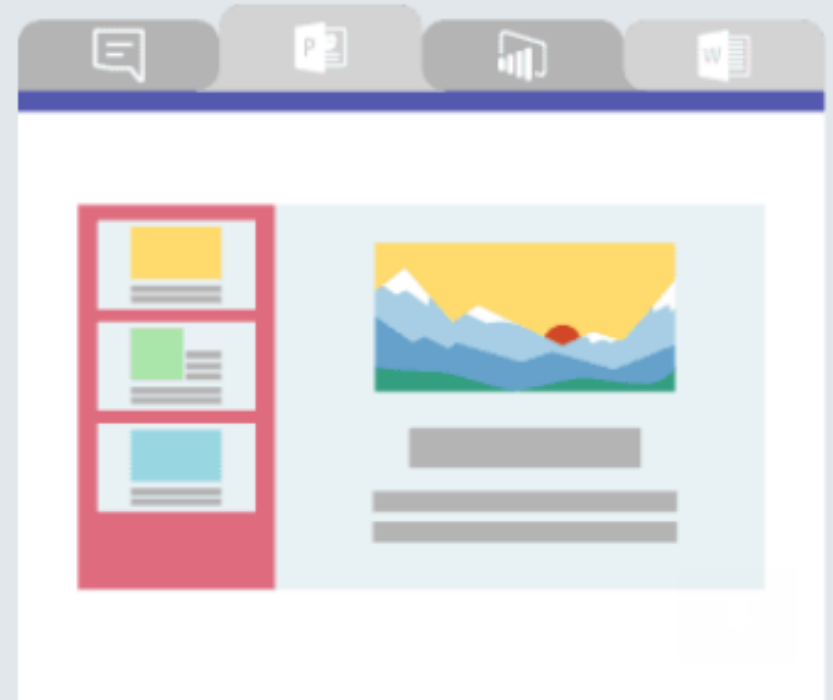
Chat 1:1 and with groups

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.

Teams quick reference card

Your Teams

Start a new chat

Command bar

Tabs

Your Profile

Apps

A chat

Join or Create a team

Write a message

Send your message

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

Structuring your Team with Channels

Team

KSH Support

Channels

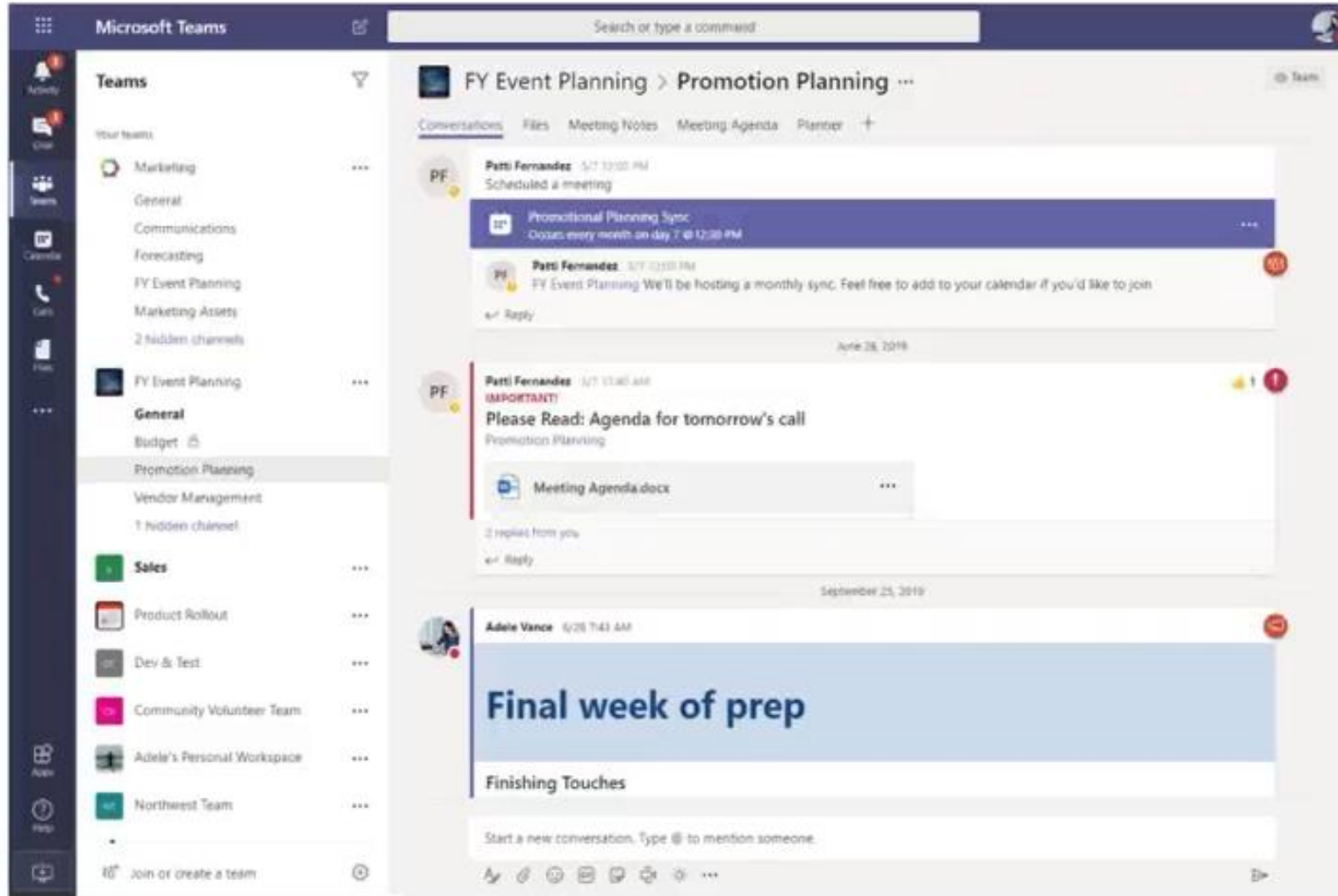| Fundraising | Marketing & Comms | Trustees | HR | Finance | Waverly House staff | The Lindens staff | Beverly Close Staff | Christmas party | London Marathon |
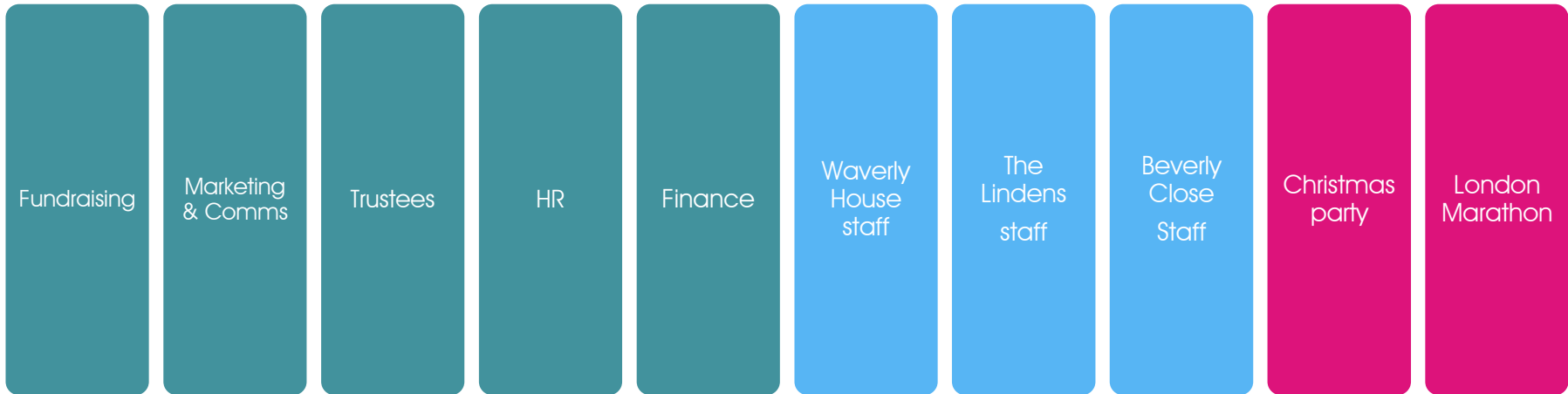
Areas of work   **Sub teams**   **Specific projects**

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

@mention – to flag a person or team when posting

Select the person or group of people you want to notify

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

Options for people to join a meeting / call

Microsoft Teams

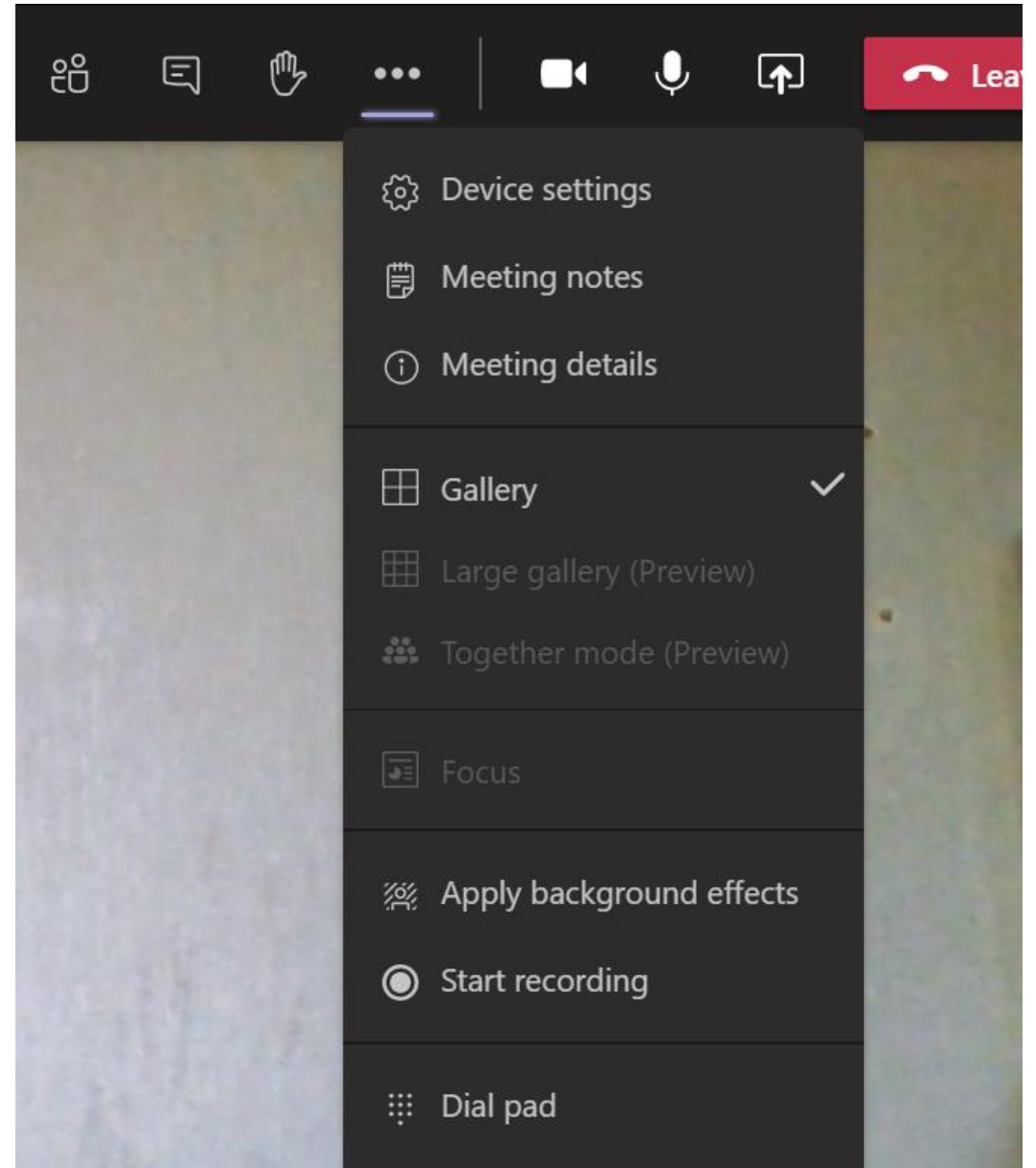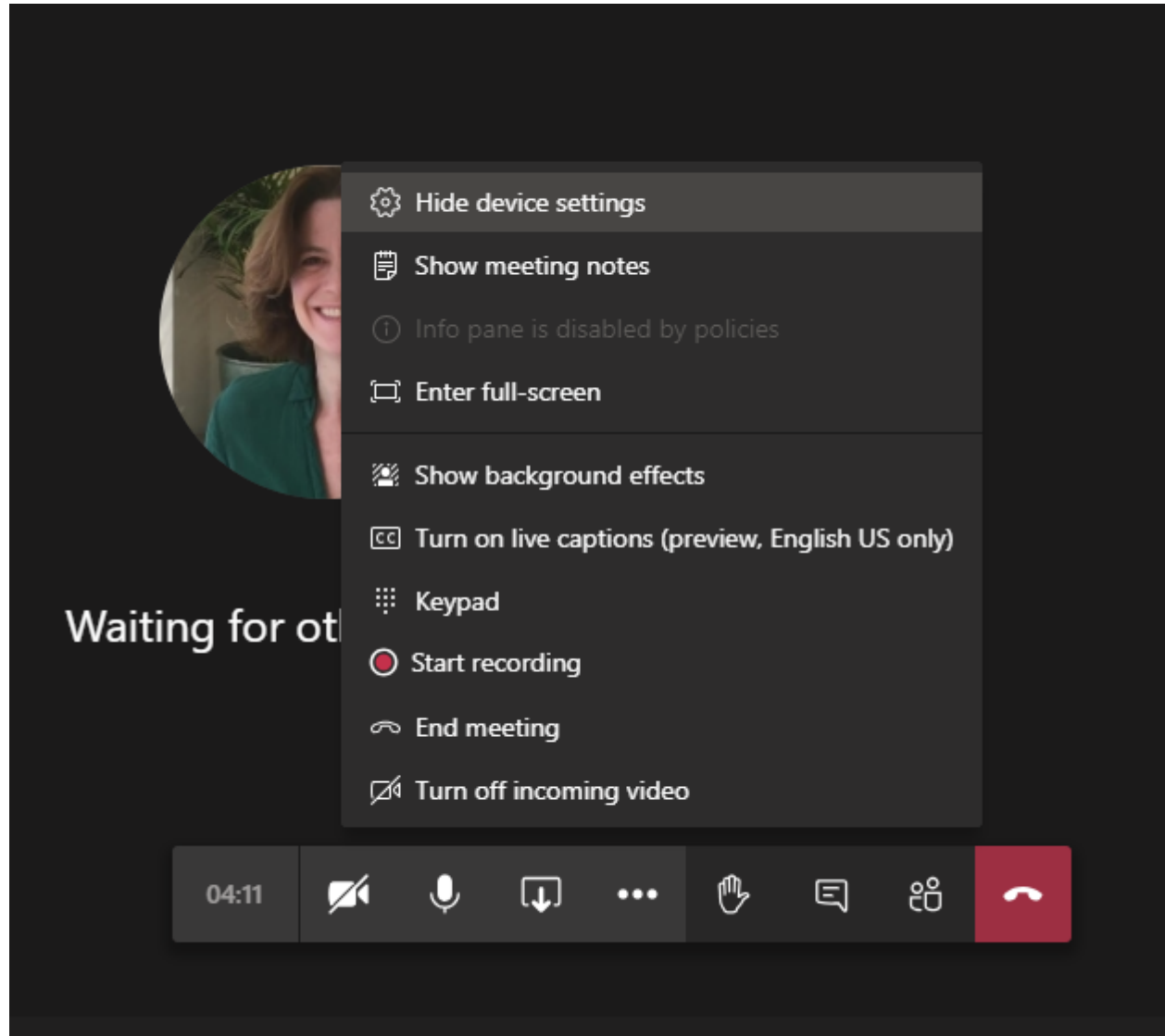## Stay better connected with the Teams desktop app

Download the Windows app   Use the web app instead

Already have the Teams app? **Launch it now**

Meetings / Calls tool bar (old & new)

Switch on the Lobby feature in Teams Admin

Teams settings

Click on profile pic / initials. You can also witch between accounts & check for updates to latest version

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

M365: all the apps

Bookings
Simplify how you schedule and manage ap...

Calendar
Schedule and share meeting and event tim...

Delve
Get personal insights and relevant informat...

Excel
Discover and connect to data, model and a...

Forms
Create surveys, quizzes, and polls and easil...

Kaizala
A simple and secure mobile chat app for w...

Lists
Allows users to create, share, and track dat...

MyAnalytics
Create better work habits with insights into...

OneDrive
Store, access, and share your files in one pl...

OneNote
Capture and organise your notes across all ...

Outlook
Business-class email through a rich and fa...

People
Organise your contact info for all your frien...

Planner
Create plans, organise and assign tasks, sha...

Power Apps
Build mobile and web apps with the data y...

Power Automate
Create workflows between your apps, files, ...

Power BI
Create actionable, dynamic, and engaging ...

PowerPoint
Design professional presentations.

Project
Develop project plans, assign tasks, track pr...

SharePoint
Share and manage content, knowledge, an...

Stream
Share videos of classes, meetings, presenta...

Sway
Create and share interactive reports, presen...

Teams
The customisable, chat-based team worksp...

ⓘ
To Do
Keep track of your tasks in one place with intelligence that helps you collect, prioritise, and get more done together.

Whiteboard
Ideate and collaborate on a freeform canva...

Word
Bring out your best writing.

Yammer
Connect with co-workers and classmates, s...

Forms

Send and collect responses

Anyone with the link can respond ⌄

| https://forms.office.com/Pages/Respon | **Copy** |

🔗 ⊞ </> ✉ ...

Share as a template

\+ Get a link to duplicate

Share to collaborate

\+ Get a link to view and edit

Questions   Responses **57**

Top tools...

57	00:51	Active
Responses	Average time to complete	Status

...

View results   📊 Open in Excel

1. Are you already using online forms to collect data?

   More Details

   🔵 Yes   25
   🟠 No   32

Office 365 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

- Set an email alert for each response

- Remember to copy link allowing anyone with link to respond

- See response summaries, or individual responses or download into Excel

- Further info

Sway

Details   **E** Emphasize   **A** Accent   ⌘ Link   ⊘ Focus Points

Kingston Data Hack

⊕

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

Heading 1 Card

🖼
Background

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

Text Card

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

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

Image Card: Kingston Data Hack smiling.jpg

Caption

Office 365 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 (adds thumbnail image), 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

To do

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

Sidebar

- ☀ 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.   🍎 ⊞ 🤖

Group by Bucket ⌄   Filter ⌄   List   **Board**

Aims

➕ Add task

⭕ **Objectives / activities**

The overall objective is to influence central and national thinking through the three areas of work. All this should be able to provide us with solid outputs that we (NAVCA/VCSEP/Partners) can use to

☑ 0/3

⭕ **Mapping**

Increase intelligence around what is happening at a local level in Digital Exclusion/Inclusion.
This could cover mapping gaps, desktop research pieces, what training is out

⭕ **Collecting**

We want to share information, expertise, knowledge and resources

May

➕ Add task

Networking

⭕ Attend GLA Engagement Collaborative Digital Inclusion Sprint

🗓 06/05

👤 Kate White

Mapping

⭕ Contact all CVSs and capture initiatives / good practice in each borough

👤👤

Networking

June

➕ Add task

Mapping   Collecting

⭕ Convene an event for London CVSs to share issues and best practice

Collecting   Networking

⭕ Attend Digital Inclusion in London Network

Networking

⭕ Create satellite website to present findings

👤 Philippa Leary

Office 365 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
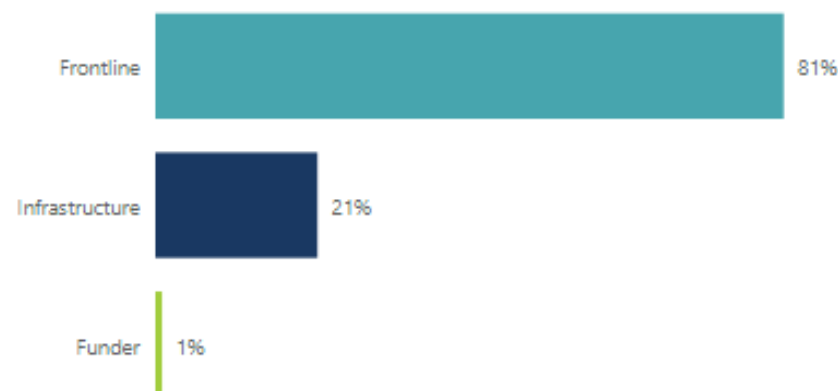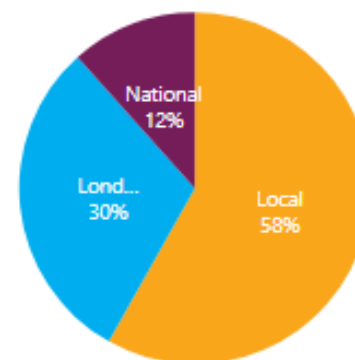
- Planner video training

www.datawise.london/aabout/impact
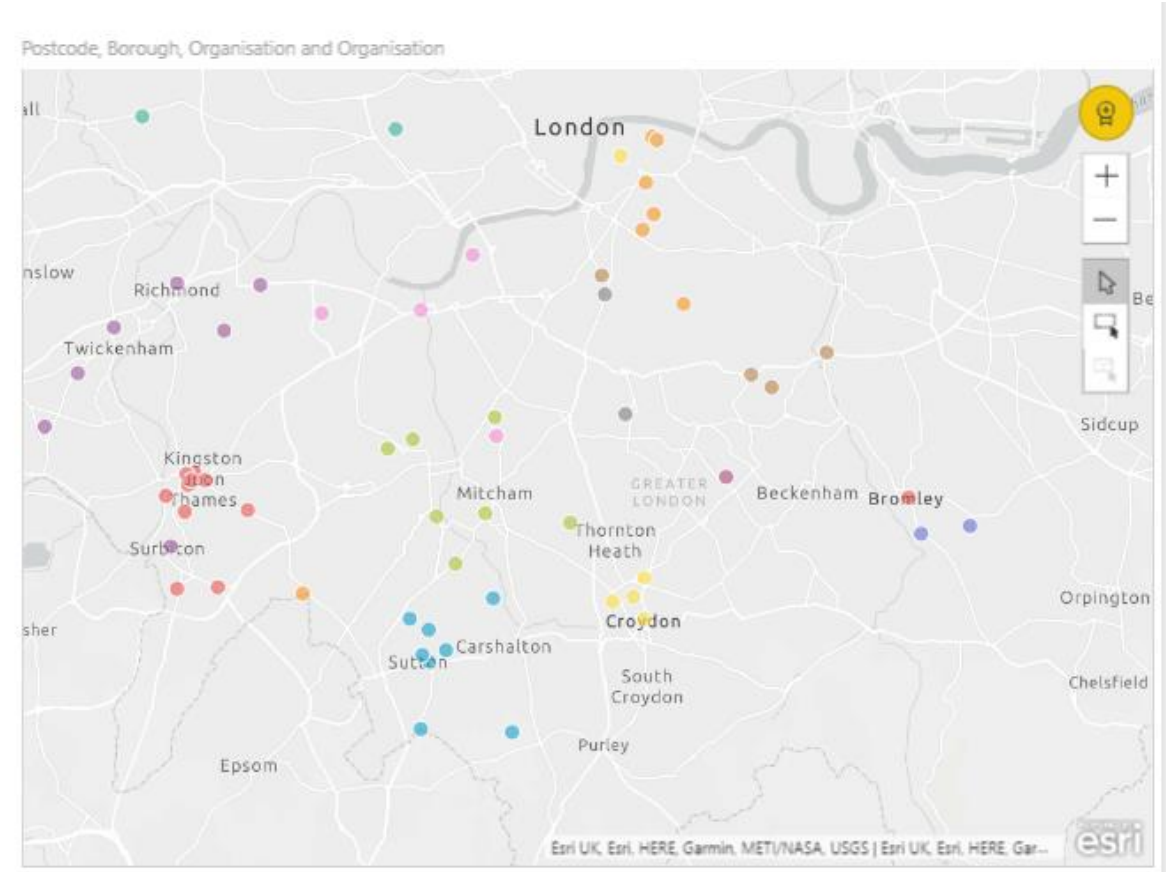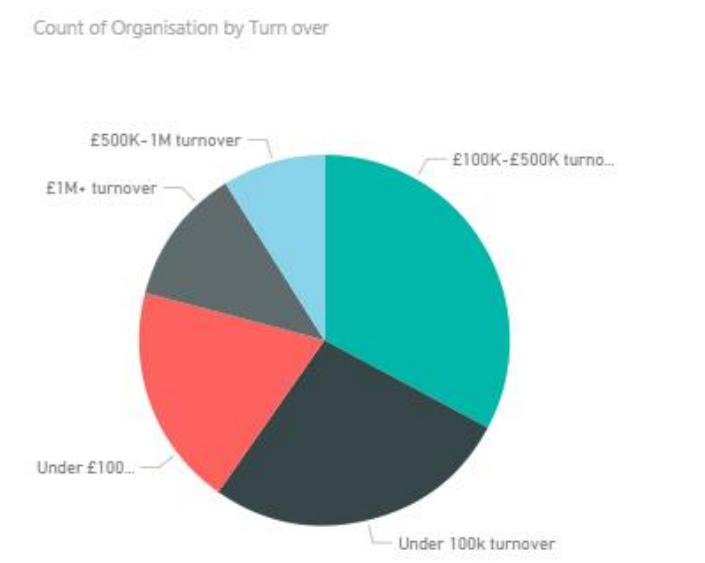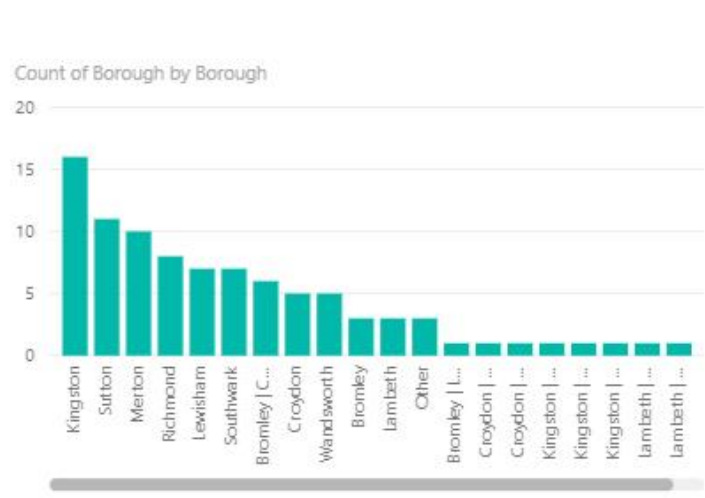
Discover which organisations started their data journey with us by attending our Data Essentials session
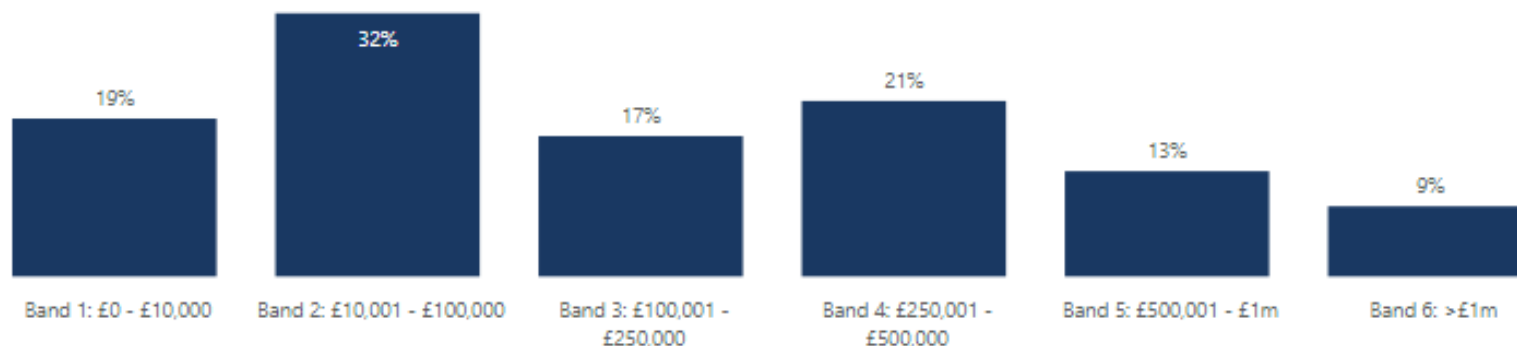
Primary Organisation Type*

Frontline	81%
Infrastructure	21%
Funder	1%

Geographical Coverage*

National 12%
Lond... 30%
Local 58%

116

Organisations attending

Income*

Band	%
Band 1: £0 - £10,000	19%
Band 2: £10,001 - £100,000	32%
Band 3: £100,001 - £250,000	17%
Band 4: £250,001 - £500,000	21%
Band 5: £500,001 - £1m	13%
Band 6: >£1m	9%

Organisation

Abbey Community Association Ltd.
Active Horizons
Advice4Renters
AFYAH ORGANISATION
Aim High Dance Academy
Amity Youth Development
Autism Forward Cio
Badu Community CIC
Bankside Open Spaces Trust
Bexley Voluntary Service Council
Bromley Third Sector Enterprise
Business Conduits
Business Launchpad
Calthorpe London Infinity Elite
Camden Giving
CAPE
Carers Network Westminster
Carnival Village Trust
Citizens Advice Haringey
Citizens Advice Lewisham
Citizens Advice Richmond
Clear Community Web
Coalition for Efficiency
Community Action Sutton

* These three optional questions were only introduced in year 2 of the Datawise London programme. The above data is from participants answers to these questions on registration.

Superhighways

Digi surgery 1:1
1 hour 15 minutes
Free

25 September

< > September 2020

Mo	Tu	We	Th	Fr	Sa	Su
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27

Select staff (optional)

👤 Anyone ⌄

| 10:00 | 11:00 | 12:00 |
| 13:00 | 14:00 | 15:00 |

Approvals – via chat or a work flow

[Find out more here](#)

Approvals							+ New approval request

☰   ▽ Filter   Kingston Voluntary Action (default) ⌄

Received 30+

Sent 0

Received

Request title	Status	Created	Requested by	Sent to
Please approve 'IN233713531'	Approved	30/04/2021 16:26:41	JF Jacky Fung	
Please approve 'Receipt-2334-3585'	Approved	20/04/2021 10:30:16	JF Jacky Fung	
Please approve 'ivcuOEMJPLzZ0pC7Y'	Approved	20/04/2021 10:19:42	JF Jacky Fung	
Please approve 'ivcxjKrcy7aTcgvWP'	Requested	20/04/2021 09:47:00	JF Jacky Fung	
Please approve 'OneBoxOut ltd 01 Apr 2	Approved	08/04/2021 09:12:06	JF Jacky Fung	
Please approve 'Journal'	Cancelled	29/03/2021 16:51:24	JF Jacky Fung	

Office 365 automation

Power Automate
Create workflows between your apps, files, and data to automate time-consuming tasks.

Three ways to make a flow

Start from blank ⓘ

Automated flow
Triggered by a designated event.

Instant flow
Triggered manually as needed.

Scheduled flow
You choose when and how often it runs.

Business process flow
Guides users through a multistep process.

Build an automated flow
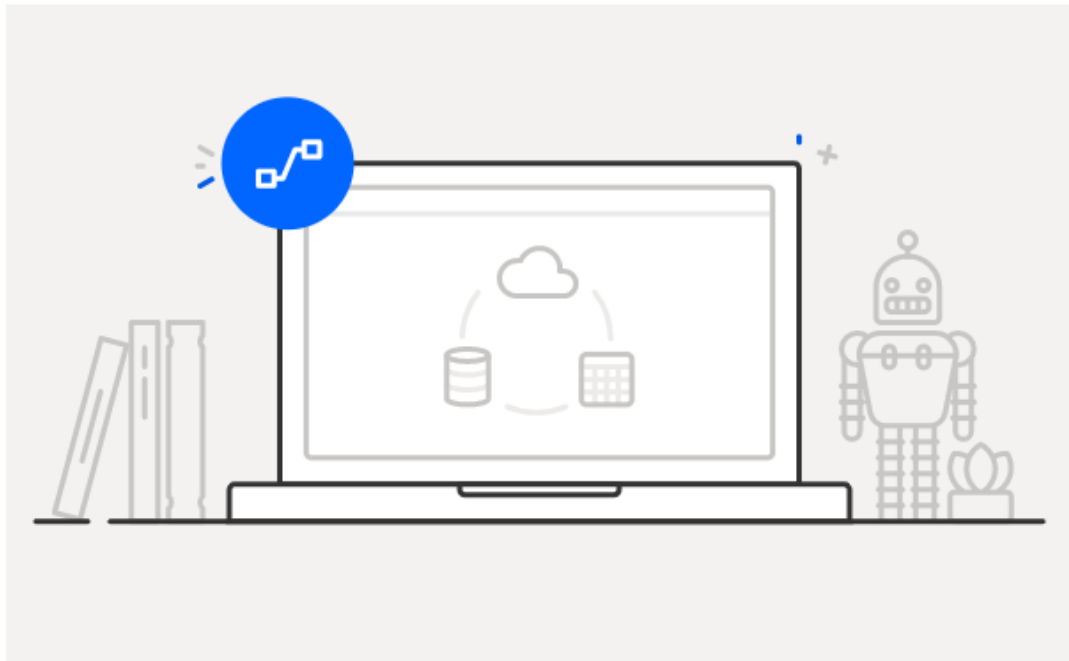
Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.

Examples:
- Automatically collect and store data in business solutions
- Generate reports via custom queries on your SQL database

Choose your flow's trigger *

🔍 Search all triggers

When a new response is submitted
Microsoft Forms

When an item is created
SharePoint

When an item is created or modified
SharePoint

When a file is created in a folder
SharePoint

When a file is created
OneDrive for Business

When a task is assigned to me
Planner

When a feed item is published
RSS

5 Top Tips for making best use of accessibility options of Office 365

Superhighways blog post

Thank you for listening!

Kate White
katewhite@superhighways.org.uk

www.superhighways.org.uk
@SuperhighwaysUK