

~~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

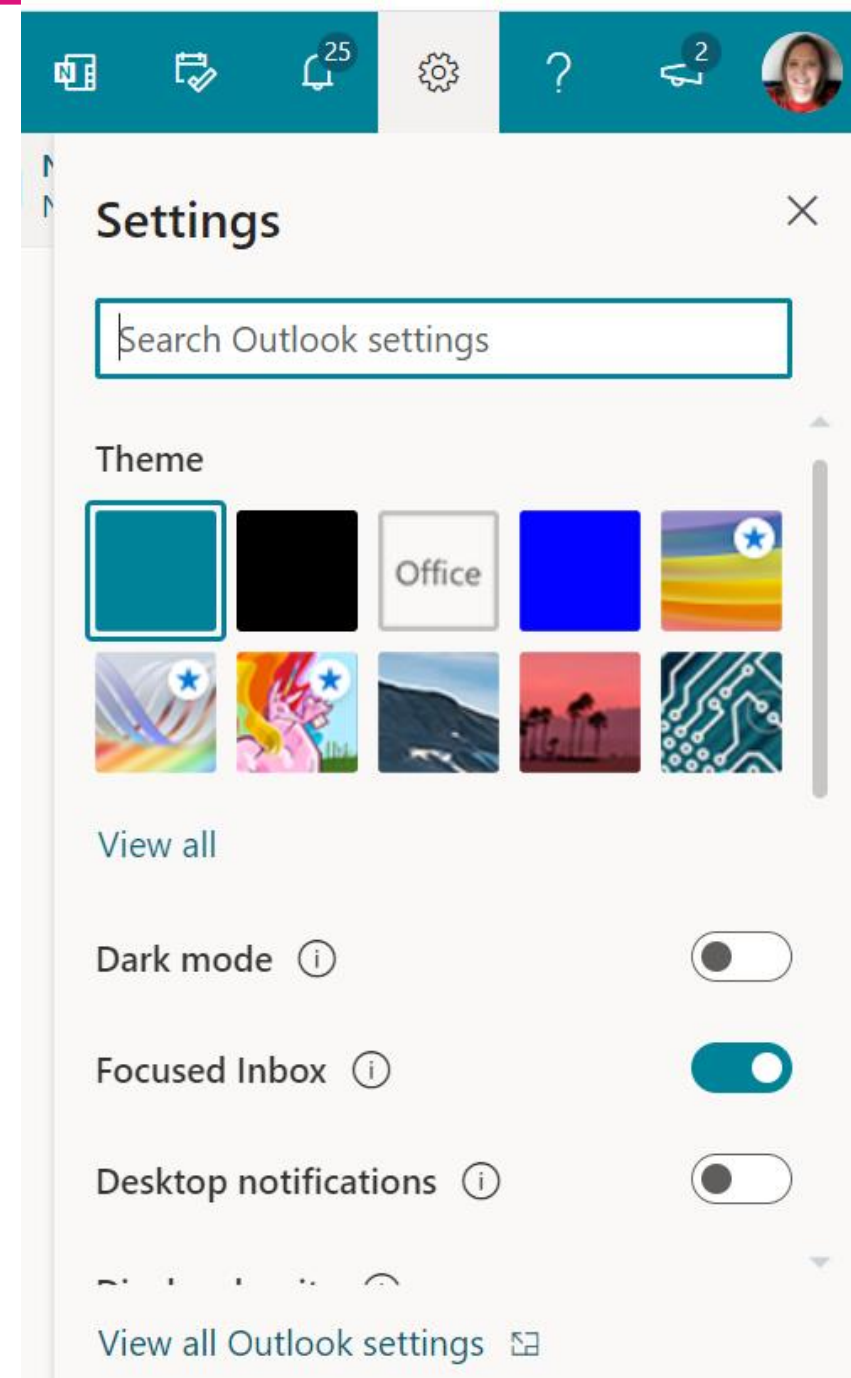
- Portal access www.office.com
- Opening another mailbox
- Outlook settings – out of office etc
- Encryption

- [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

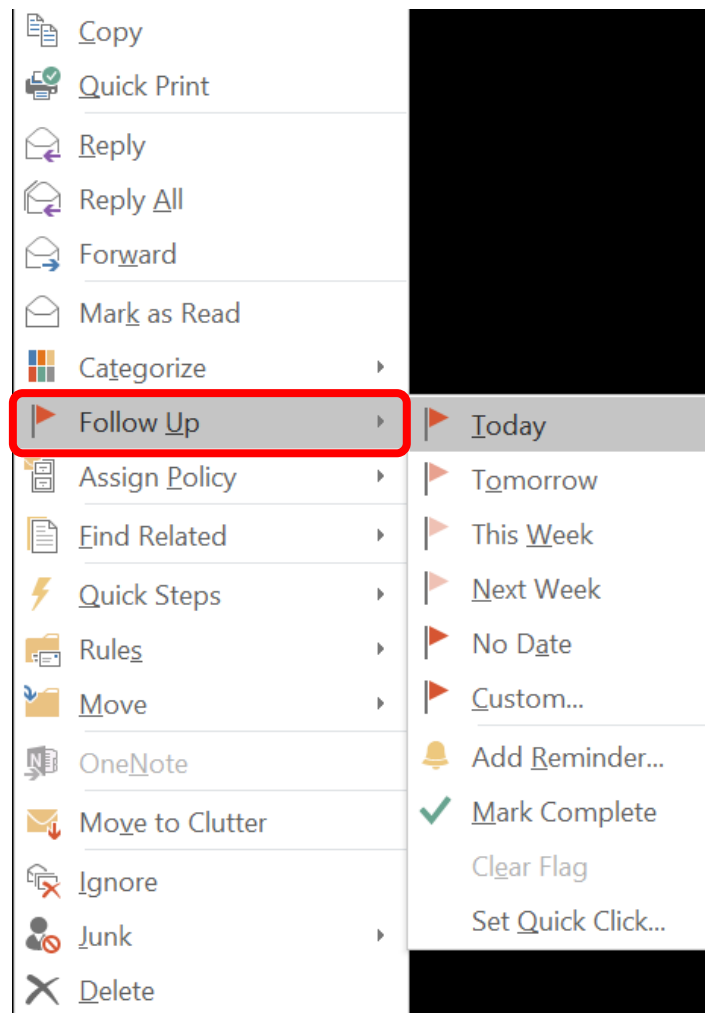
Open

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...

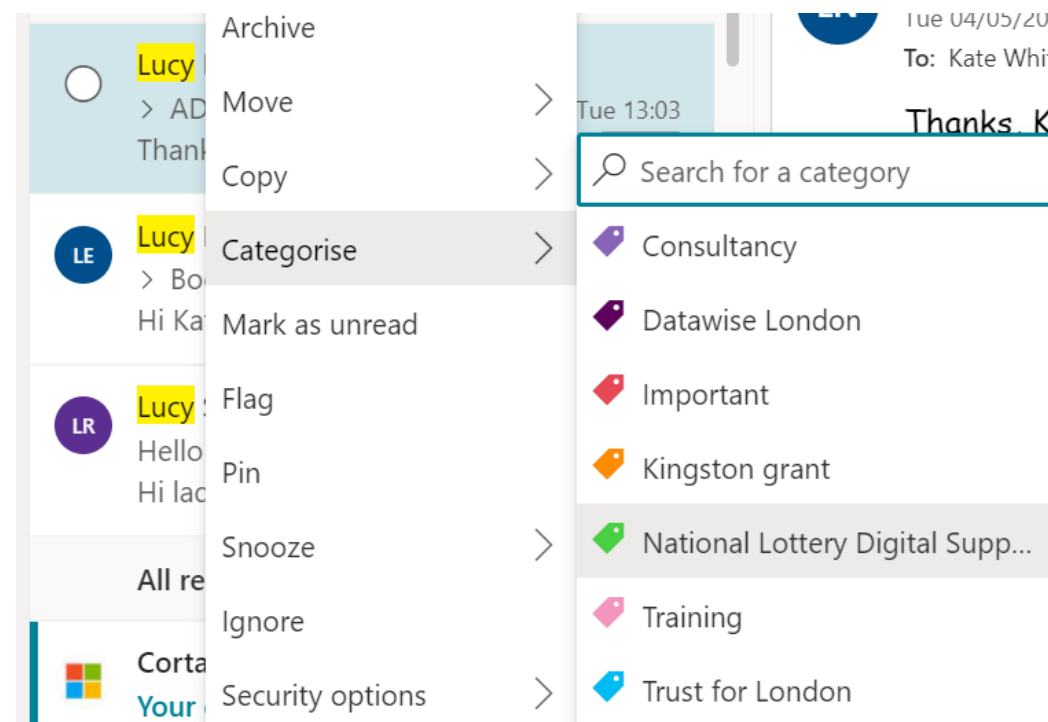
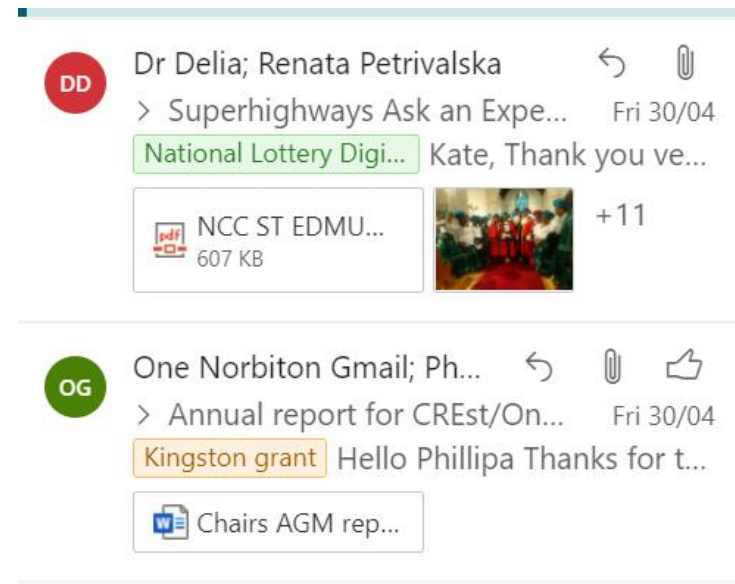
- Right click on an email
- Select Follow up
- Choose a time frame or No Date
- You can then search on Flagged emails



Categorising emails

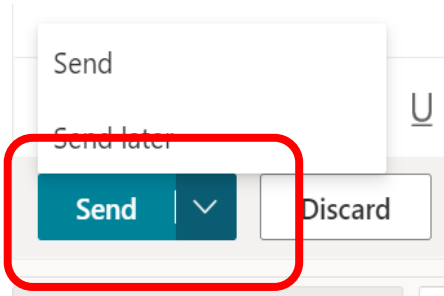
Categorise your emails against standard or custom themes – you can then search and filter for quick access

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

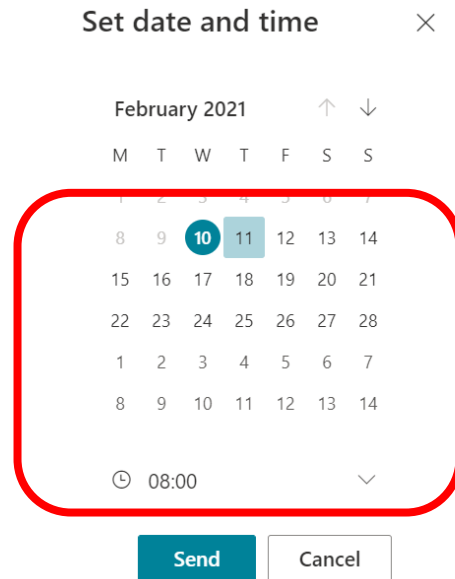


Send Later option

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



- Now choose the date and time





Send Attach **Encrypt** Discard ...

Encrypt: This message is encrypted. Recipients can't remove encryption. **Change permissions** Remove encryption

To

Cc

Bcc

Add a subject

Change permissions

Choose how recipients can interact with this message

- Encrypt
- Confidential - All Employees
- Do Not Forward
- Encrypt**
- Highly Confidential - All Employees

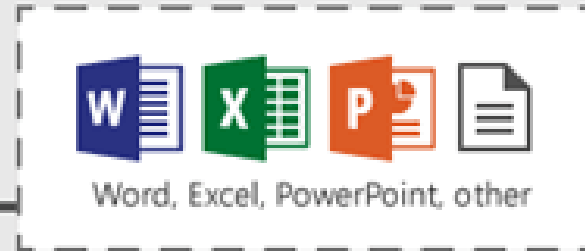
Kate White
Superhighways Manager

Send | Discard

Data storage



Office 365



Business documents



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



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



Team site

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

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

The screenshot displays the SharePoint interface for a site named "Superhighways". The top navigation bar includes the SharePoint logo, a search bar, and user profile information. The left sidebar shows navigation options like Home, Documents, and Subsites. The main content area shows a list of files in a "Collaboration" folder. One file, "Collaboration tools training se...", is selected, and a context menu is open, showing options like Delete, Pin to top, Rename, Automate, Move to, Copy to, Properties, Version history, Alert me, Manage my alerts, and Check out.

SharePoint

Search

Admin Development GKV Info & Comms Management Networks and Partnerships Superhighways

Superhighways

Following Share

Home

Notebook

Documents

Subsites

Pages

Site Contents

Edit

Return to classic SharePoint

Edit in grid view Open Share Copy link Download

1 selected All Documents

Training and Resources > Collaboration

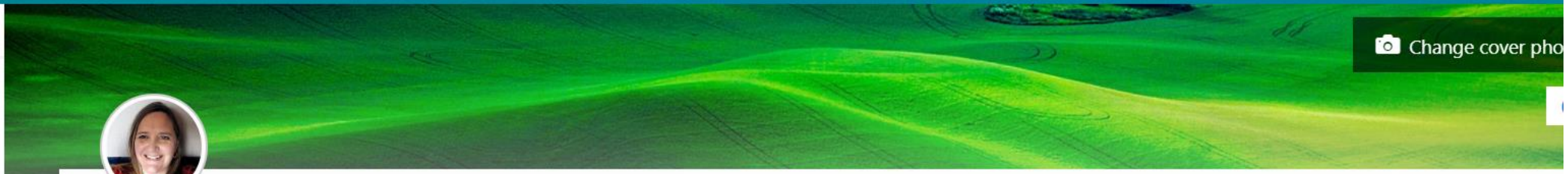
Name	Modified
Collaboration tools for small charities.pdf	9 December, 2020
Collaboration tools for small charities.pptx	29 April
<input checked="" type="checkbox"/> Collaboration tools training se...	29 April
Collaboration tools training session plan.do...	8 December, 2020
Document.docx	25 April
Heritage Divital x 3 session bookings.xlsx	29 April

- Delete
- Pin to top
- Rename
- Automate
- Move to
- Copy to
- Properties
- Version history
- Alert me
- Manage my alerts
- Check out

+ Add column

🔍 Search

- 🏠 Home
- 👤 Profile
- 📖 Bookmarks
- 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

Main Terms of Employment - ...1).docx

STATEMENT OF MAIN TERMS OF EMPLOYMENT ... Part Time This Statement, together with Alice's contract.

You Emailed • Yesterday

Superhighways SLL Monitoring F...gital.docx

VCSEP Subject Liaison Leads Monitoring - Digital Name(s) Kate White MAC Region London
Re: VCSEP Digital Subject Liaison Le...

You Emailed • Yesterday

VCSEP LIN SLL Grant Agreement.docx

VCSEP Local Intelligence Network (Subject Liaison Leads) Following confirmation of extension
Re: VCSEP Digital Subject Liaison Le...

You Modified • Yesterday

Data 4 Good Festival

Cornerstone 34 views

Sharing docs



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 >

karen@bvsc.co.uk ✕

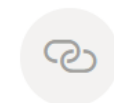
Add another ✓

Your organization's policy may require you to share with the contact your IT department

Can edit
Make any changes

Message... **Can view**
Cannot make changes

Send

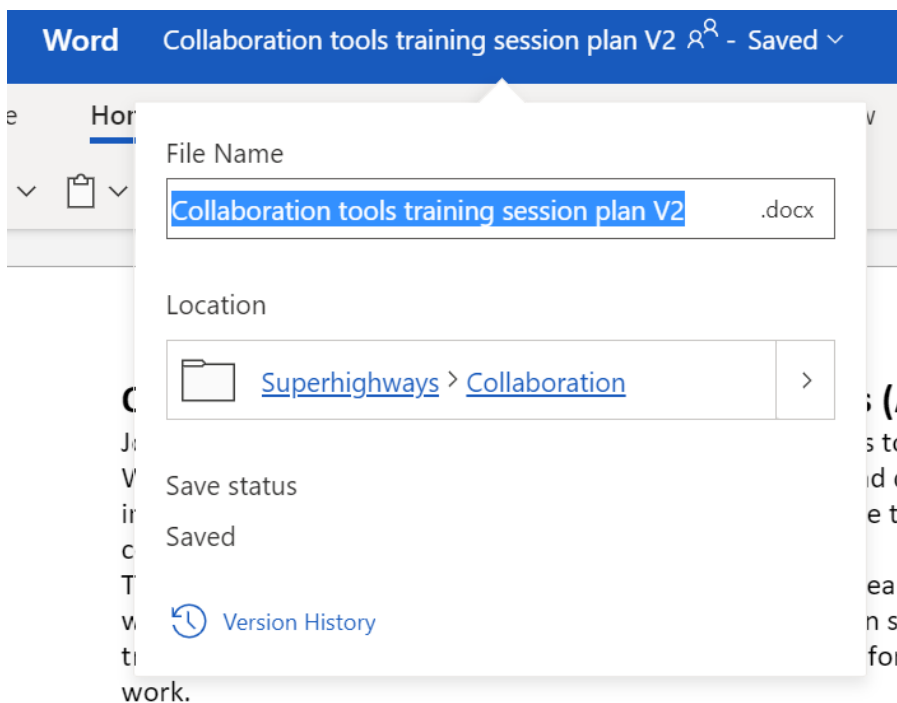


Copy link



Outlook

Version history



Save a Copy Restore

Bexley & Heritage Digital)

ration with your team, stakeholders, or audiences.

es online, how can we continue to effectively collaborate both
izz of a face to face meeting, post it note exercise or water

editing, chat and conversation, data collection and interactive
interactive time throughout the session so you get a chance to
rganisation and gain the confidence to implement in your own

[3k/edit?usp=sharing](#)

[inDp31/edit?usp=sharing](#)

Version History

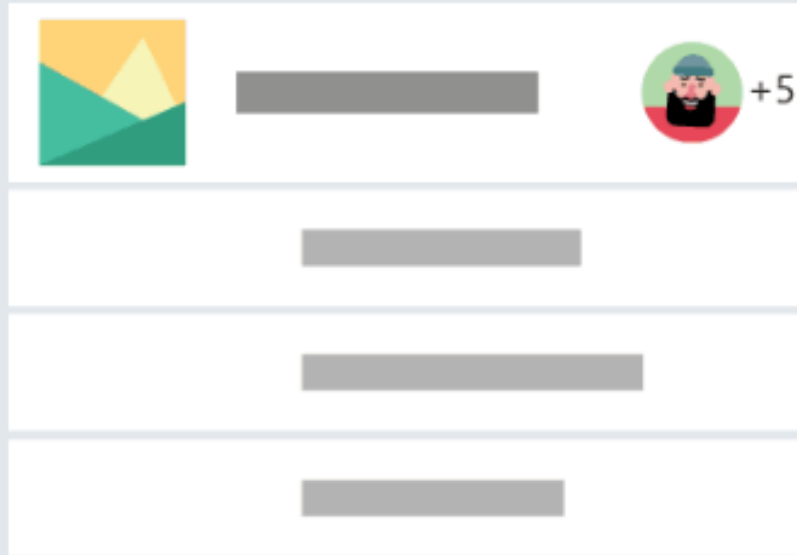
Show Changes

- > April 29, 9:04 AM
Current Version
■ Kate White, ■ Sorrel Parsons
- > April 27, 11:24 PM
■ Kate White
- > April 25, 7:26 PM
■ Kate White
- > April 21, 11:24 AM
■ Kate White, ■ Sorrel Parsons
- > April 21, 11:19 AM
■ Sorrel Parsons

GDPR & Cybersecurity

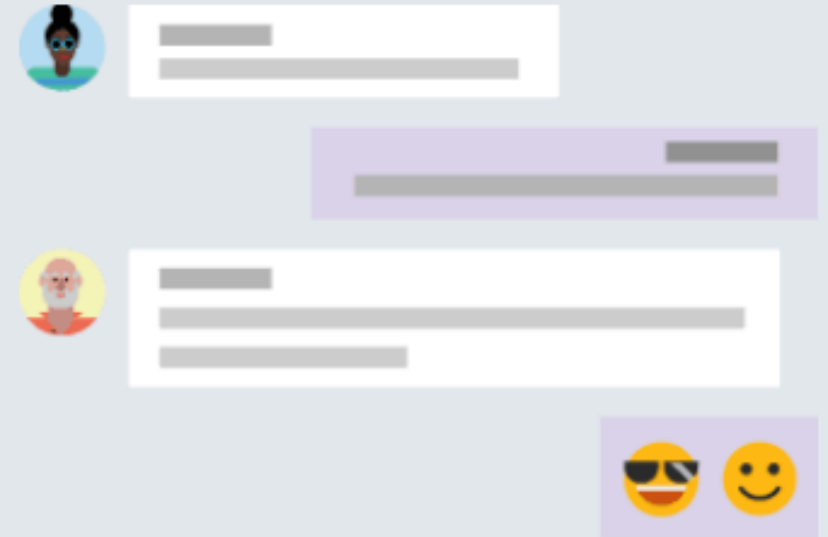
- Multi factor authentication
- Enterprise Mobility & Security - device management, encrypted emails, data loss prevention
- Discovery – right to be forgotten & Data Subject Requests
- Organisational policies and procedures – passwords, homeworking, byod, leavers





Bring your team together

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



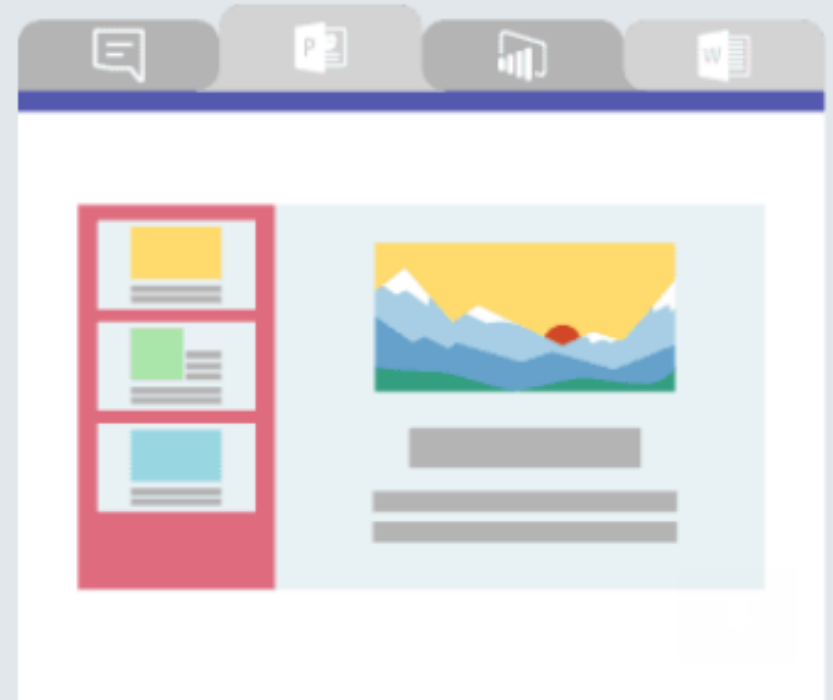
Chat 1:1 and with groups

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

The screenshot shows the Microsoft Teams interface with several red boxes and lines pointing to specific features. The labels and their corresponding features are:

- Your Teams**: Points to the 'Teams' section in the left-hand navigation pane.
- 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 'Apps' section in the left-hand navigation pane.
- 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.
- A chat**: Points to the main chat area containing messages and attachments.
- General**: Points to the 'General' channel tab in the top navigation bar.
- Activity**: Points to the 'Activity' icon in the left-hand navigation pane.
- Chat**: Points to the 'Chat' icon in the left-hand navigation pane.
- Teams**: Points to the 'Teams' icon in the left-hand navigation pane.
- Calendar**: Points to the 'Calendar' icon in the left-hand navigation pane.
- Calls**: Points to the 'Calls' icon in the left-hand navigation pane.
- Profile**: Points to the user profile picture in the top right corner.



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

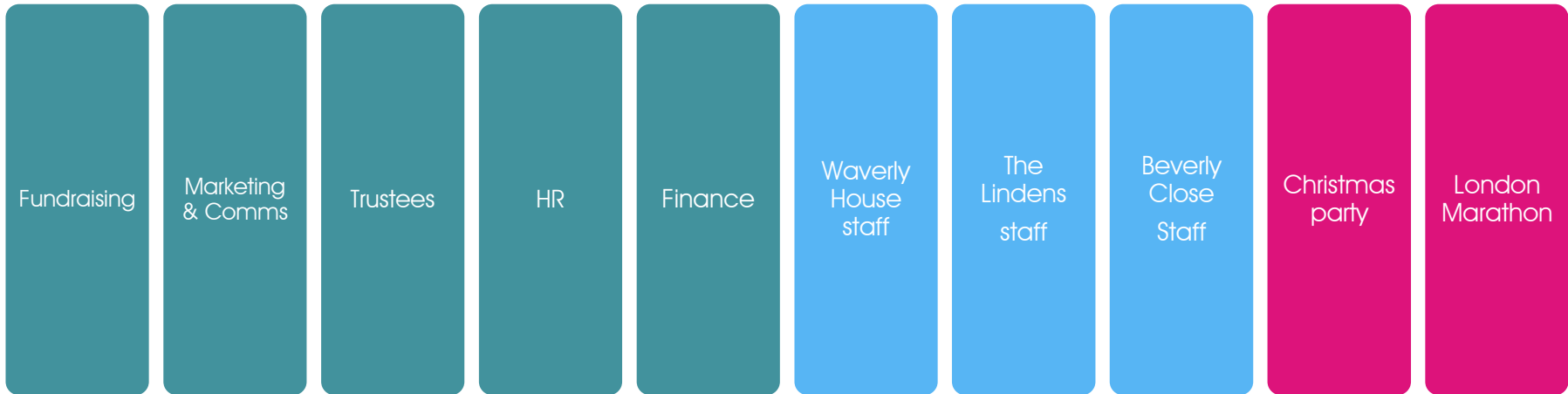


Structuring your Team with Channels

Team



Channels



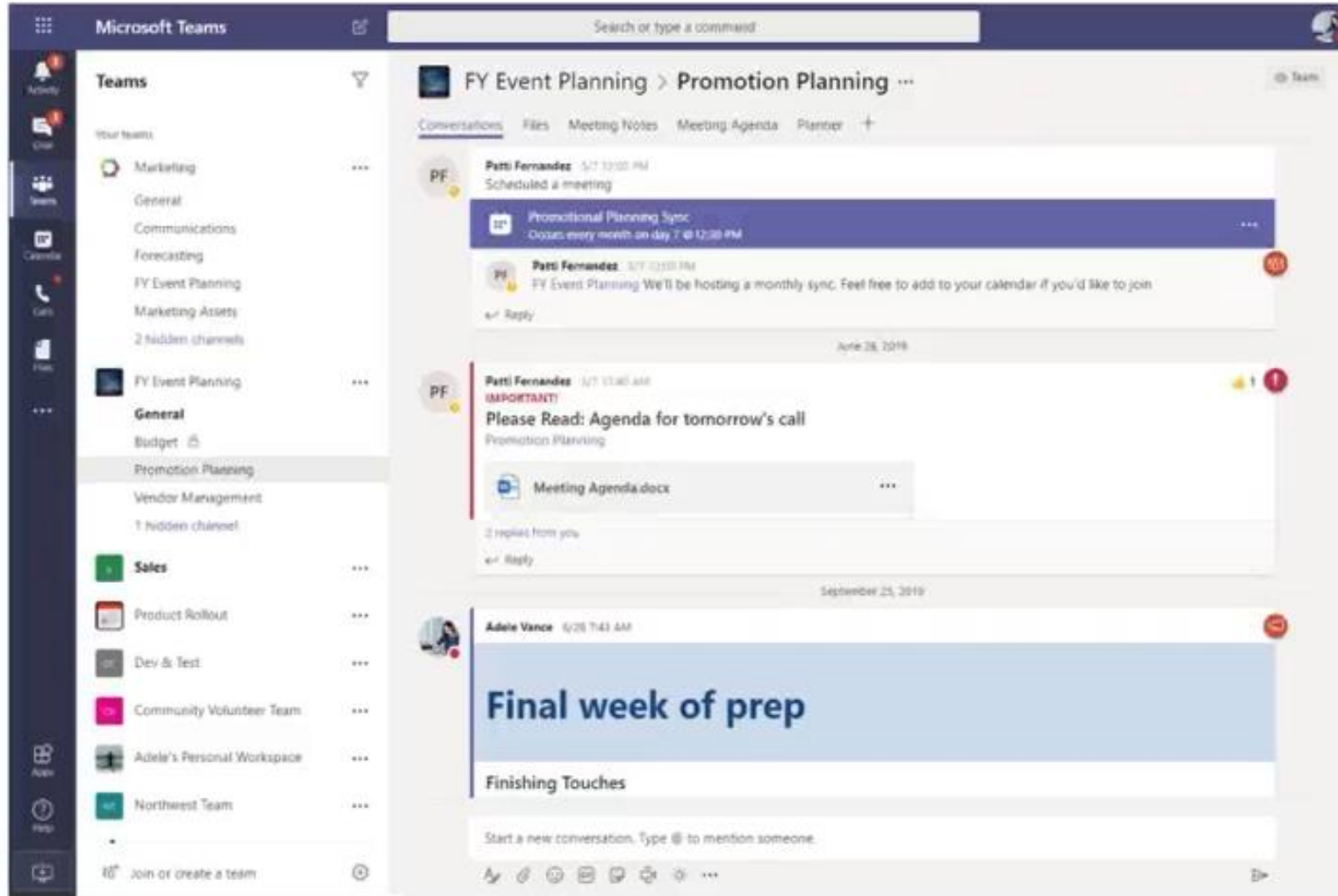
Areas of work

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

@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 na-29

Suggestions

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

on website
/naa Aparajit Alison Ewart There's

the data protection during this
the pandemic continues. The IC...

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



Options for people to join a meeting / call

Microsoft Teams



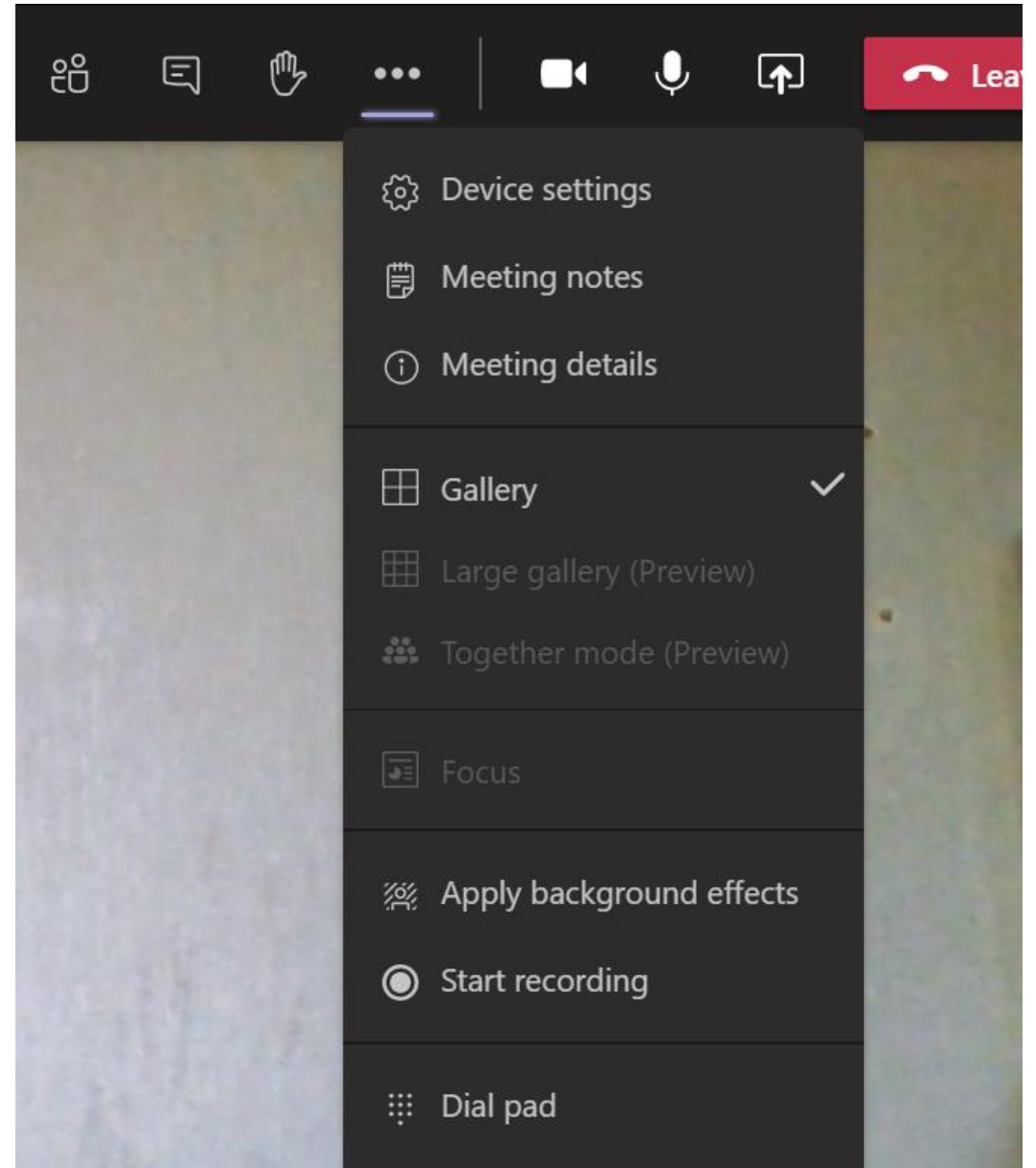
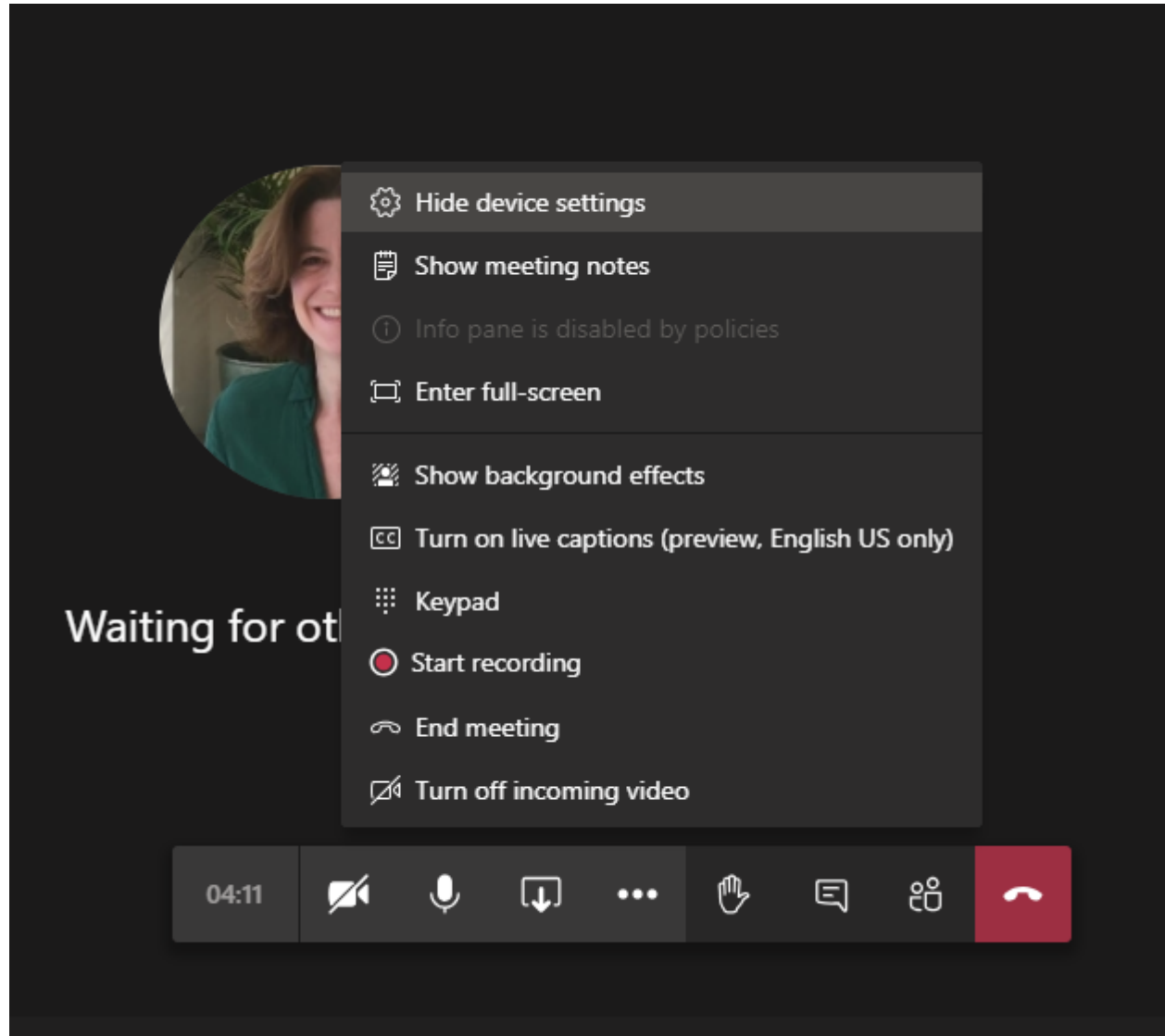
Stay better connected with the Teams desktop app

[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

The screenshot displays the Microsoft Teams interface during a meeting. The top navigation bar includes a search bar with the text "Search for or type a command", the organization name "Kingston Voluntary Ac...", and a user profile icon. The left sidebar contains navigation options: Activity (with a notification badge), Chat, Teams, Calendar, Calls, Files, and a menu icon. The main area shows a video feed of a woman with brown hair. A dark blue notification bubble is overlaid on the video, displaying a yellow circle with the letter 'Y', the name "yogarani", and the message "is waiting in the lobby". Below the notification are two buttons: "View Lobby" (with a person icon) and "Admit" (with a checkmark icon). At the bottom of the video feed is a control bar with icons for a warning, a timer at "02:36", video off, microphone off, screen share, a menu, chat, a lobby icon with a notification badge, and a red end call button. The Windows taskbar is visible at the very bottom, showing various application icons and the system tray with the date "20/04/2020" and time "15:01".

Teams settings

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

The screenshot shows the Microsoft Teams application interface. On the left is a dark sidebar with navigation icons for Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main area displays a chat window for 'Sorrel Parsons'. The chat history includes messages from Sorrel Parsons, Engagement Collaborativ..., Philippa Leary, Colin and Nine, Sanja Djeric Kane, Sanja and Sorrel, Jacky Fung, Nine Htet, Alice Linell, and Datawise London chit-chat. A message from Tuesday 18:13 mentions 'Looks OK on Padlet maps' and includes a Padlet link. A message from Yesterday 15:47 says 'It's me looking for the surveymonkey code'. A message from Today 13:24 asks about a password change. A settings menu is open over the profile of 'Kate White' (katewhite@superhighways.org...), showing options: Accounts & orgs, Add personal account, Saved, Settings, Zoom (100%), Keyboard shortcuts, About, Check for updates, Download the mobile app, and Sign out.

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...



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



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



OneNote
Capture and organise your notes across all ...



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



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



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



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



Word
Bring out your best writing.



Calendar
Schedule and share meeting and event tim...



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



MyAnalytics
Create better work habits with insights into...



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



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



PowerPoint
Design professional presentations.



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



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



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



Delve
Get personal insights and relevant informat...



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



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



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



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



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



Sway
Create and share interactive reports, presen...



Whiteboard
Ideate and collaborate on a freeform canva...



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

Responses

00:51

Average time to complete

Active

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](#)






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

- ☰
- 🔍
- ☀️ 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 0365 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





Planner



Tasks



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



Planner

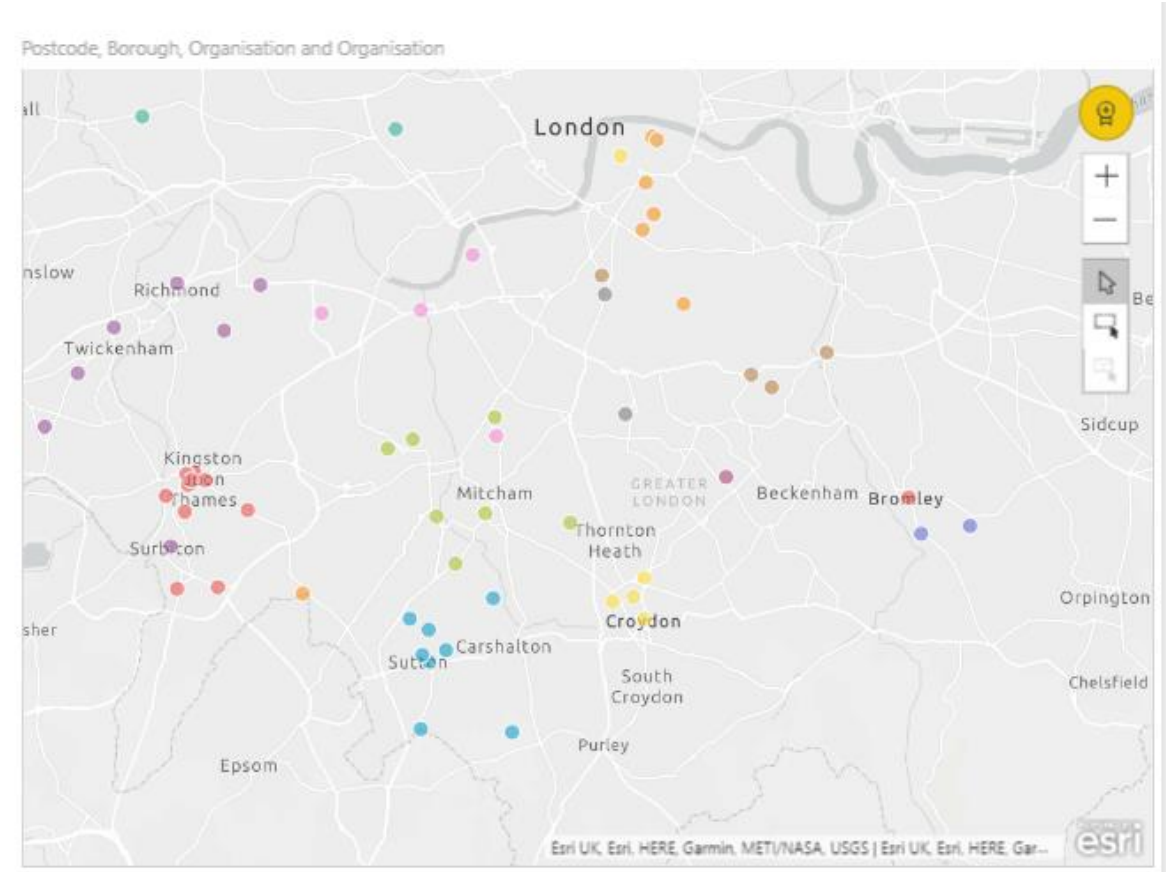
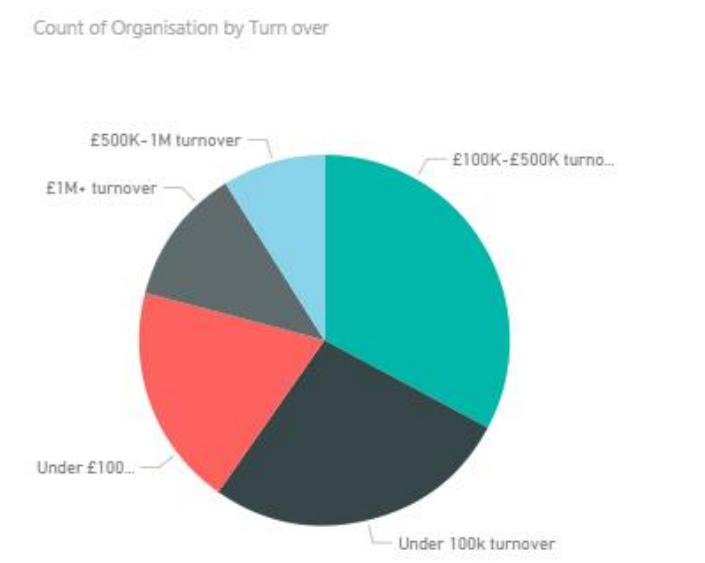
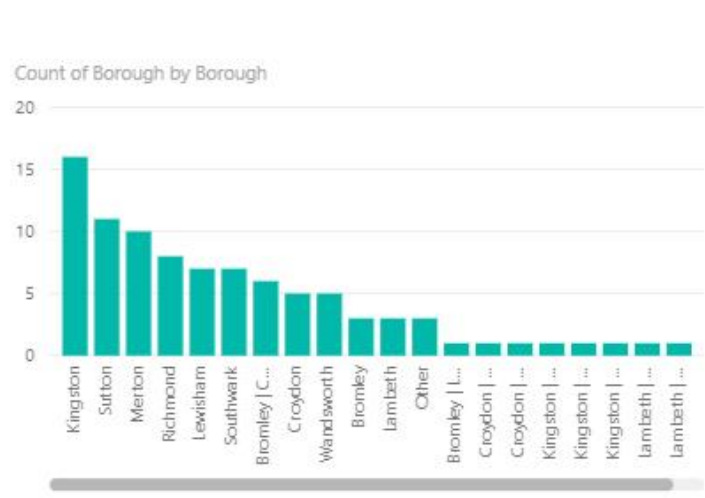
Office 365 Planner – a summary

- 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](#)



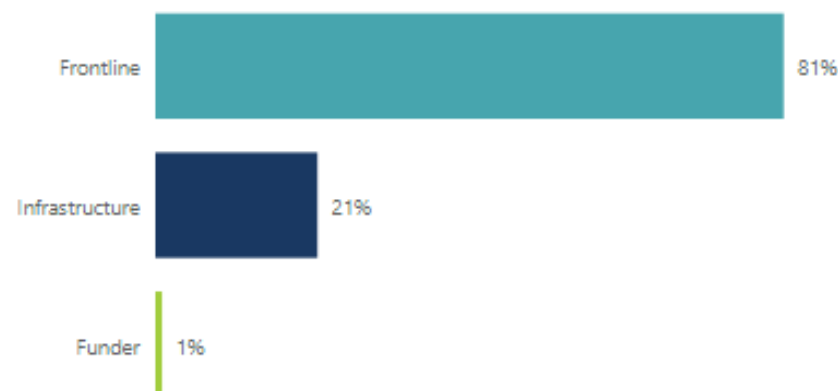


Data analysis & visualisation tool



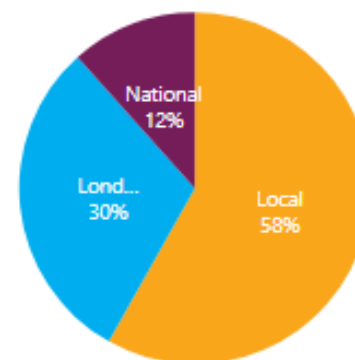
Discover which organisations started their data journey with us by attending our Data Essentials session

Primary Organisation Type*

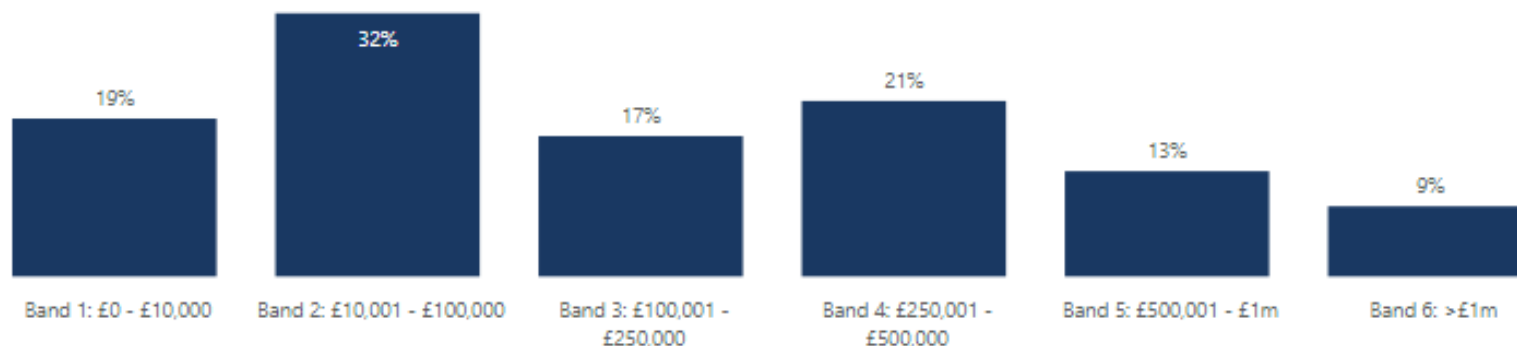


116
Organisations attending

Geographical Coverage*



Income*



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

Select staff (optional)

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







 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+	Received				
Sent	0	Request title	Status	Created	Requested by	Sent to
		Please approve 'IN233713531'	Approved	30/04/2021 16:26:41	JF Jacky Fung	 JF
		Please approve 'Receipt-2334-3585'	Approved	20/04/2021 10:30:16	JF Jacky Fung	JF 
		Please approve 'ivcuOEMJPLzZ0pC7Y'	Approved	20/04/2021 10:19:42	JF Jacky Fung	 JF
		Please approve 'ivcxjKrcy7aTcgvWP'	Requested	20/04/2021 09:47:00	JF Jacky Fung	 JF
		Please approve 'OneBoxOut ltd 01 Apr 2'	Approved	08/04/2021 09:12:06	JF Jacky Fung	JF 
		Please approve 'Journal'	Cancelled	29/03/2021 16:51:24	JF Jacky Fung	JF 

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

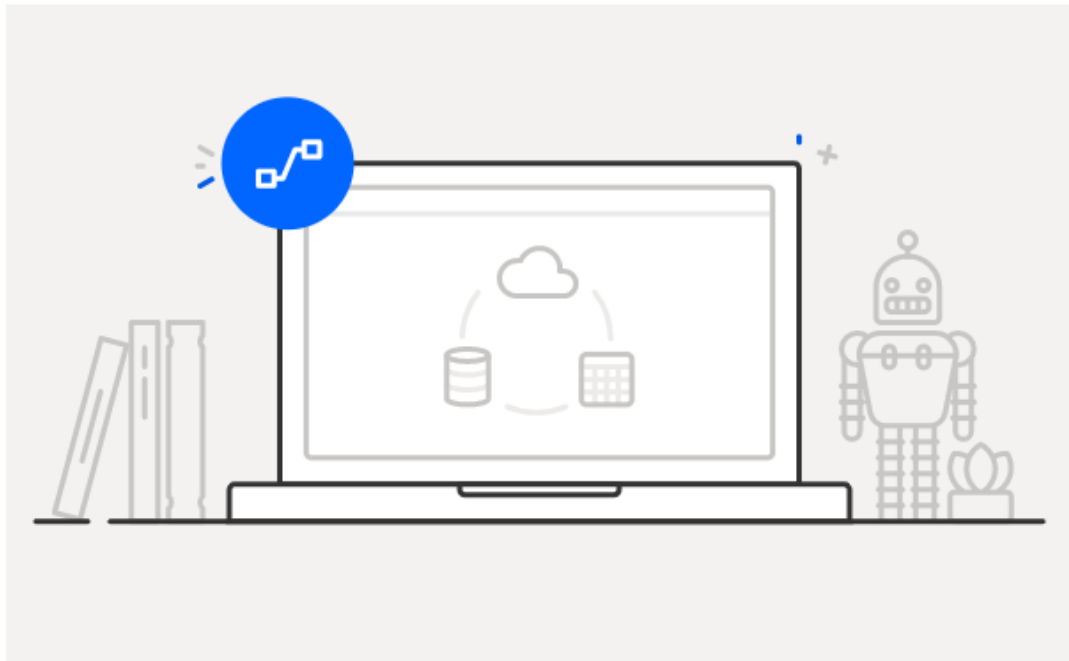
You choose when and how often it runs.



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!

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