



Crash course in Office 365

Quick tips to save you time for your
growing business





Introduction

You and your team are probably among the 1.2 billion people worldwide who have used Office 365. You're familiar with standard apps like Word, Excel, Outlook and PowerPoint. But when it comes to your business's ever-changing needs and challenges, there's more to Office 365 than meets the eye. From business intelligence programs to communication and teamwork solutions, advances in these productivity tools are changing the way we live and work. And whether your team's concerns revolve around topics like security, mobile device management or working remotely, a shift to the cloud can do more for your growing business than ever before.

In this e-book, you'll learn how to make the best use of specific Office 365 apps across six critical areas of your business: mobility, teamwork, communication, security, productivity and insights.

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Chapter 1

Mobility takes business out of the office

With premium versions of Word, Excel and PowerPoint, along with a user interface optimised for Android or iOS phones or tablets, Office 365 lets your team perform at their best, whether in or out of the office.

"We hear from millennials that flexible working is a high priority. And we believe that when you respect individuals for who they are and how they operate, it increases productivity significantly. By giving employees Office 365 cloud-based components, we're able to create a more fluid, flexible approach to the physical workplace."

Carl Dawson

IT Director, Marks & Spencer

Word

Add comments in Word via your phone

Need to give feedback to a colleague while commuting? Edit documents on your Android or iPhone with the Word mobile app.

To add comments.

Tap anywhere in a document, then click **Edit**.

Type your comments. If this is your first time adding a comment, you'll be asked to enter a username so other people know who has edited the document.



Excel

Four team-friendly Excel shortcuts

Think Excel is a desktop-only program? Think again. You can do just about everything in Excel on your smartphone or tablet.

1. Formulas

Calculate formulas on the mobile app by tapping the **Formulas** tab

2. Easy access to your files

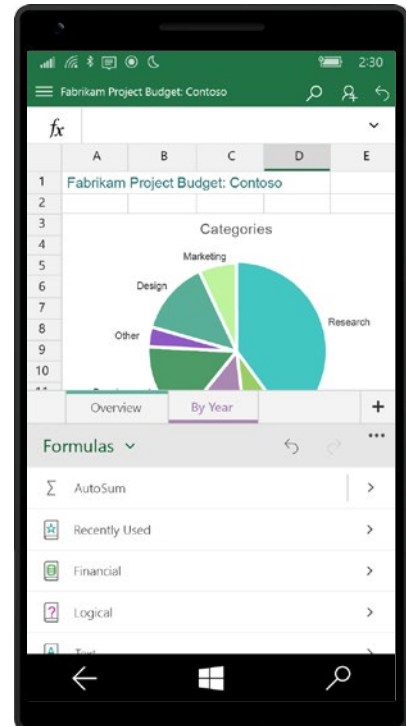
Save Excel files to OneDrive and access them quickly on any device.

3. Built-in keyboard

Add formulas with ease with your tablet's onscreen keyboard.

4. Recommended charts

Quickly visualise data with a few taps of a finger with the Recommended Charts feature – perfect for smaller screens.



PowerPoint

Mobile PowerPoint has its perks

Prep and present on the go

Need to fix something on the way to a presentation? Use the PowerPoint app to make changes from your smartphone or tablet.

Keep notes at your fingertips

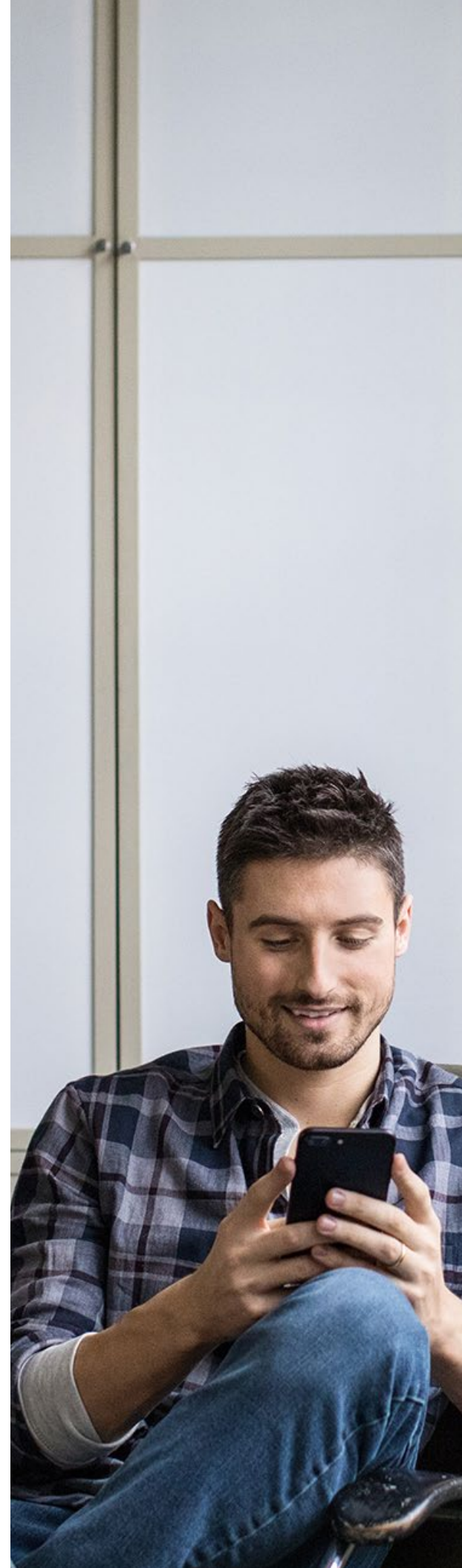
Read presentation notes directly from your phone.

Cut the cords

No need for bulky laptop cords and cables. Presenter View gives you full control over what your audience sees, only showing speaker notes on your tablet. New ink, laser pointer and highlighting features help to emphasise key concepts as you present.

Know your talking points

Ink your notes to help emphasise key points.

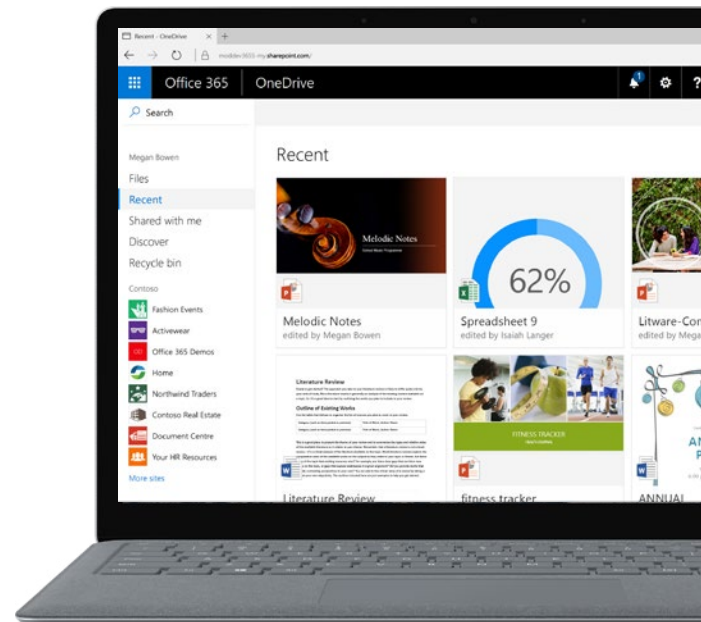


OneDrive

Sharing made easy

OneDrive enables effortless access to files, so you can work from anywhere and share your work with your team, wherever they are. Preview more than 270 common file types, including PDFs, Photoshop PSDs, Illustrator AIs, Visio files, DICOM medical images and more. You can even stream video on demand without waiting for it to download.

Confidently share your files, safe in the knowledge that others will be able to access them seamlessly and securely. Share a file or folder with specific people or send a link that gives access to anyone who needs it, inside or outside your organisation. In addition, you can control how long a link provides access for, and you can easily view and modify permissions you have granted.



Microsoft Teams

Communicate in real time

For the increasing number of organisations that can't always get everyone in the same room, Teams provides a rich and immersive meeting experience where workers can add Office files – such as PowerPoint documents with animations – via desktop or mobile for calls or chat.





Sway

Create beautifully on the go

Sway makes it quick and easy to create and share polished, interactive reports, presentations, personal stories, and more, all from your mobile device. Add your content, and Sway does the rest.

Create quickly

- Start a Sway from photos on your mobile device.
- Start a Sway by choosing a template.
- Access your content anywhere, and continue to edit your previous Sways while on the go.

Work on Sways with others with minimal effort

- Co-author with others near you using your iPhone.
- Share an edit link with anyone to give them access to the Sway on their mobile or desktop device.

Easily add content

Use any photos or videos from your mobile device.

Share with ease

Every Sway is integrated with mobile share options. Just send a link to someone – they'll be able to view your creation without signing up or downloading additional software.

Mobility takes business out of the office

Yammer

Connect top to bottom

Yammer allows you to bring your whole workforce together – from the CEO to the firstline – to engage, share and drive transparency, no matter where you are in the organisation or the world.



With Office 365, you and your team are ready to go wherever your work takes you.

A group of people in a modern office setting. In the foreground, a woman with curly hair is looking towards the right, engaged in conversation. To her right, another woman with long hair is partially visible. In the background, a man is looking down at a laptop. The office has a warm, industrial feel with exposed brick walls and modern lighting.

Chapter 2

Working together works

Teams enables workers to collaborate from start to finish. Employees can share meeting notes, collaborate with proximity sharing, co-author documents in real time, get updates and access files – so nobody misses a beat.

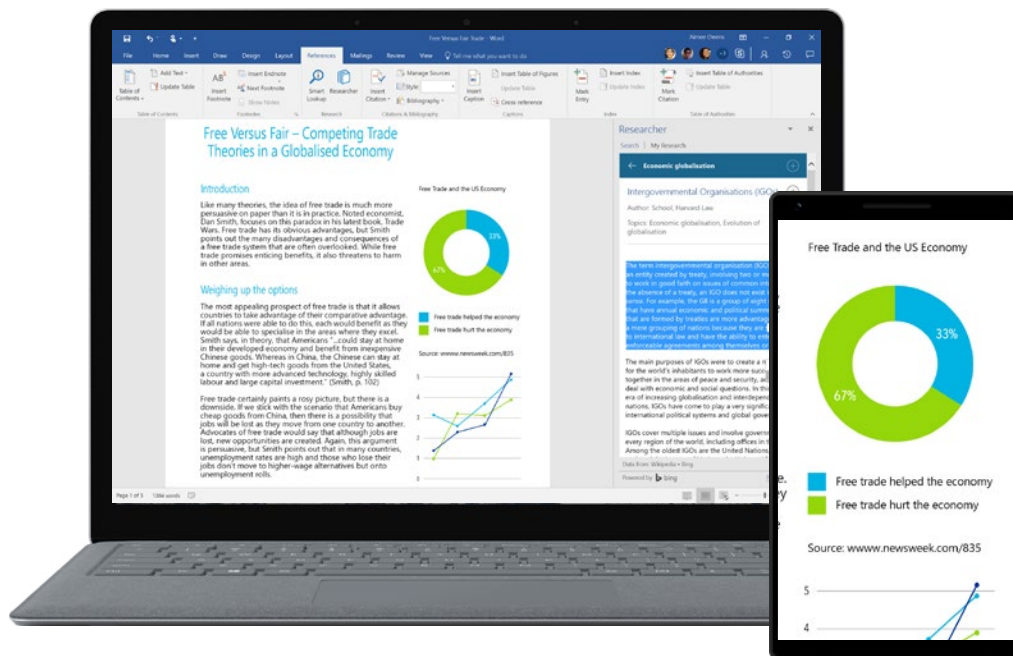


Co-authoring with confidence

Teamwork is a key component of Office 365, and the real-time co-authoring feature gives team members the chance to share ideas and add comments directly to a document with ease. Improved version history lets you see, accept or reject changes as well as revert to previous versions, ensuring nothing is lost. And new features improve the experience of working on a presentation in real time with multiple team members.

Word

Co-authoring with confidence



Get up and running

To get started using real-time co-authoring, save your Word document to OneDrive. Then, click the **Share** button, located in the top-right of the window. The sharing experience is the same whether you share on the web, in Explorer on Windows 10 or Windows 7, or in Finder on Mac.

Invite colleagues

You can share and collaborate on files with people inside and outside your organisation – even with people who don't have an Office 365 subscription.



Enable real-time co-authoring

When your teammates sign on and work in the document in Word or Word Online, you'll see their changes as soon as they're made.

Work together seamlessly

You and your team can draft, comment and edit work in real time. Add or reply to comments next to the text you're discussing so your colleagues can follow the conversation.

Excel

Co-authoring with confidence

See document history at a high level

Open the **History** pane by clicking **File > History**. See at a glance when the file was created and when it was last modified.

See who contributed to a file

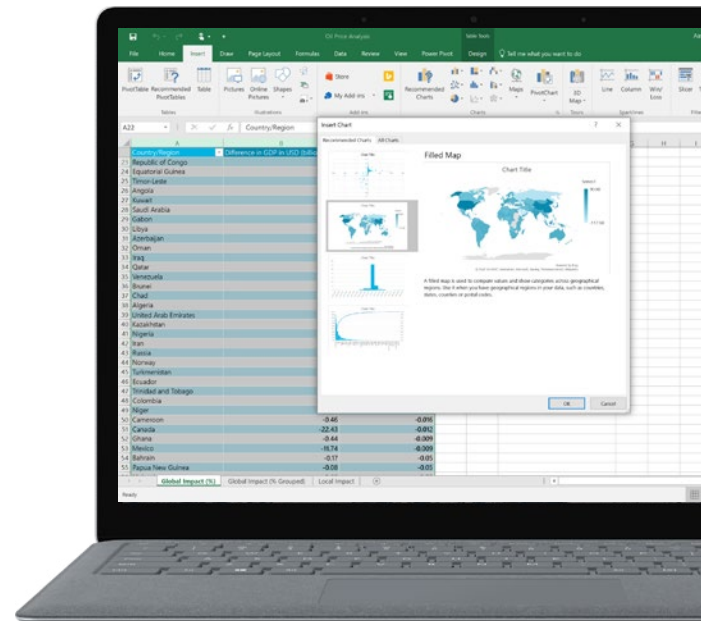
All revisions are listed by date and include the names of the people who made them, so you can follow up with anyone about their changes.

See how files evolve over time

Click on a version to open it and see how it differs from later versions of the same file.

Restore previous versions

If you want to revert to an older version of a file, just tap **Restore** and the document will revert to how it appeared at that point in time.



PowerPoint

Co-authoring with confidence

Get team visibility

The top-right corner of the screen shows you who is working in the file and where they are working. With one click, you can jump to the slide they're working on.

Initiate video chats

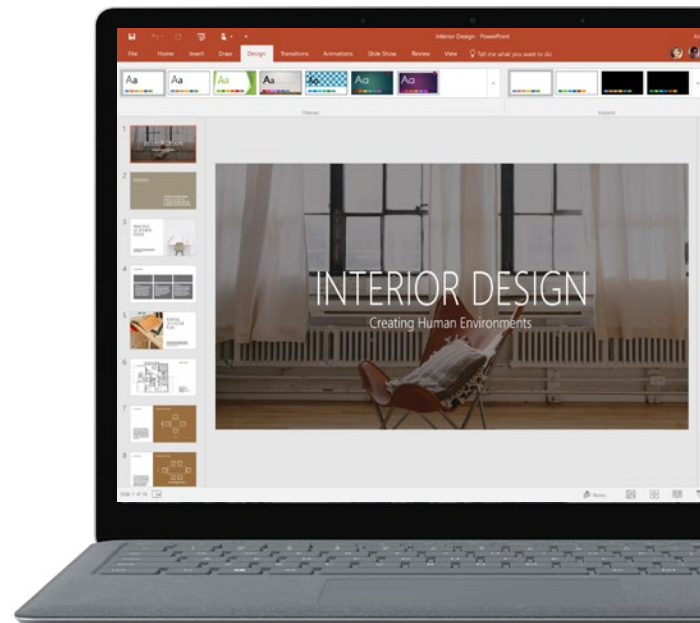
By clicking on a person's thumbnail image and the Skype logo, you can start a group chat to discuss whatever you're collaborating on.

View document activity

The activity feed shows you a full history of changes made to the document, letting you revert to prior versions if necessary.

Communicate through comments

Threaded conversations and quick-access buttons mean you can quickly reply to or resolve comments.



Outlook

Tips for sharing attachments

Outlook 2016 makes sharing files easier with an improved attachment experience.

Upload attachments for easy sharing

You can send files as traditional attachments or upload them directly from Outlook to OneDrive or a SharePoint team site, meaning everyone can access, view and edit the same version.

Choose from recently accessed files

When attaching a file to an email, you'll see a list of all the documents you've recently accessed – so you can spend less time searching for the right one to attach.

Microsoft Teams

Two ways to collaborate smarter with Teams

Teams simplifies communication, with calling, meetings and chat all in one place.

1. Chat with all project collaborators at once

You can initiate a call or video from Teams.

2. Don't miss an opportunity to chat with a guest

Now you can safely and securely invite guests to Teams and have them join a chat, join a meeting or participate in a call.

SharePoint

Two things to get you excited about SharePoint

Whether you're teaming up on a new product strategy, a sales presentation or a key company initiative, SharePoint keeps content at the heart of teamwork. Files, sites and content are easily shareable and accessible across teams and organisations.

1. Connect your workplace

SharePoint delivers connected experiences that empower people to share their expertise and work together with the files, data, conversations and notes they need.

Start your day on SharePoint's home page, where you can see your teams' recent activity at a glance. Get to work quickly with easy navigation to your sites, and get a view of what's important now.

2. Share and work together

When you add SharePoint pages as tabs in Teams, you can link news articles or your team site's home page. More integration between SharePoint and Teams means more accessibility options for your workforce.

How to add SharePoint with Teams

1. In your Microsoft Teams channel, click + to add a tab.
2. Select **SharePoint**.
3. Select the relevant site or use a SharePoint link.
4. If you use a SharePoint link, give it a user-friendly name for the Teams tab OneNote.



Co-authoring is brainstorming 2.0

During a meeting, contributors can type up brainstorming ideas in a shared OneNote document at the same time. Need to follow up on an idea with someone? Edits are always attributed to a writer, making it easy to find out who wrote what.

Sway

Co-author smarter with proximity sharing

With the Sways Near Me feature, two people who are together can instantly start co-authoring in the same Sway. Just invite a collaborator from a list of nearby Sway users and send a sharing invitation. Your team member can then edit that Sway along with you – all from within the Sway app. Together, you can easily incorporate mobile captures – such as photos and videos from your mobile device – for on-the-go co-authoring on conference trips, customer site visits and much more. Sways Near Me only requires a WiFi or Bluetooth connection, so it works from anywhere in the world.

With iOS sharing capabilities, you can also share your Sway directly from an iPhone or iPad to an email, text message, social media post or OneNote notebook, making your beautifully designed interactive presentations beautifully shareable.

Yammer

How Yammer brings your business together

Yammer is the best tool for connecting across your organisation to solicit ideas and share best practices for broader initiatives.

Want to bring your team together in one virtual location?

Create groups that can gather diverse ideas regardless of time zones, geographies or hierarchies.

Want to cross-collaborate and innovate?

Yammer provides a platform for empowering people to work together, use their collective knowledge to solve problems and make better decisions, faster.

Want to measure progress?

Track and evaluate the progress of your team to help build momentum with new members and gain additional executive support.

A man and a woman are in a modern office setting. The man, who is bald and wearing a dark jacket, is leaning forward and looking at a tablet held by the woman. The woman has long dark hair and is wearing a light grey dress. They are both looking intently at the tablet. The background shows a glass-walled office structure.

Chapter 3

Communication is king

Effective communication strategy is at the heart of any successful team. From initiating a one-on-one dialogue to driving a team meeting, Office 365 gives your workforce control over their conversations, so they feel connected wherever they are.

"With the new meeting and voice services, Office 365 becomes richer and more full-featured. It gives us a super-simple collaboration environment for interacting with one another across a globally dispersed company. The better we communicate, the better we perform as a company."

Jason Sele

IT Director, Zetec



Microsoft Teams

Teams puts you in the driver's seat

Before a meeting

Before a meeting, you can share files in the channel to prepare. The meeting itself can be held in a channel so the full context is brought into the meeting experience.

During a meeting

During a meeting, people can jump in and out of the discussion. Participants can chat, share their screens and share files. The meetings experience is rich and immersive, and team members can add PowerPoint files with animations whether they're joining via desktop or mobile. Teams also supports high-fidelity images of meeting participants.

After a meeting

After a meeting, the team can share a recap and follow-up actions in the channel either as part of the conversation thread or in the Wiki or OneNote.

Yammer

Four ways to use the Office 365 internal social network

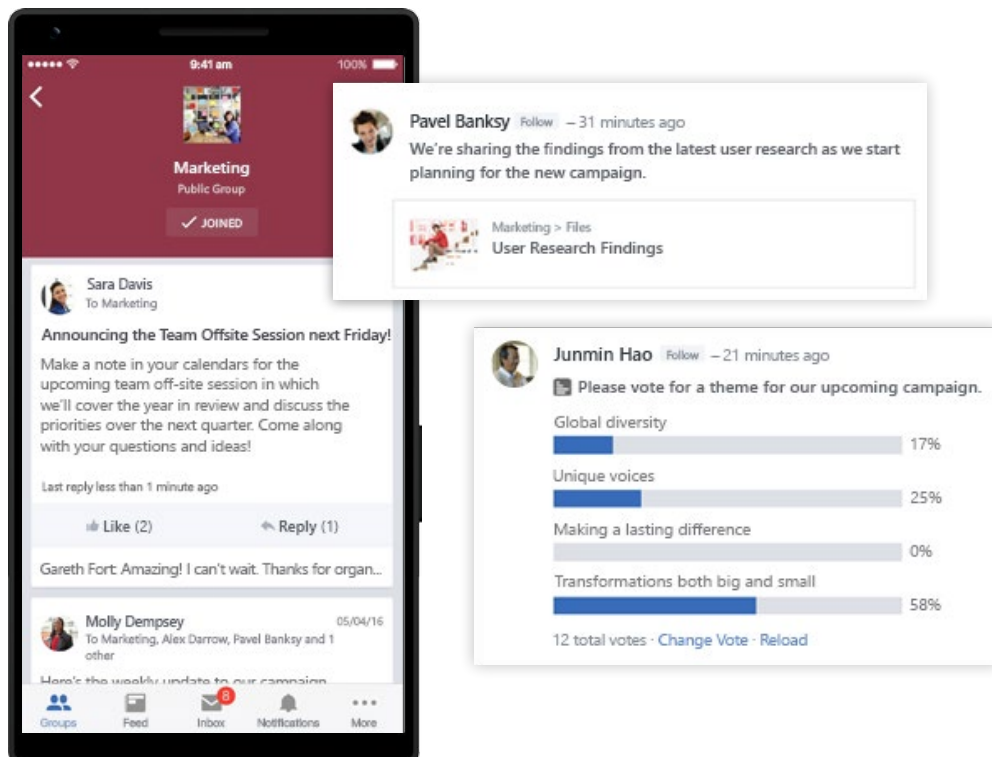
1. Announce to the group

The Announcement feature is a perfect way to share information with a wide range of people at once. Group members will see it in two places: in their home feeds and inboxes.



PRO TIP

Network administrators can email the entire company from the All Company group, a default aggregation that automatically includes everyone.



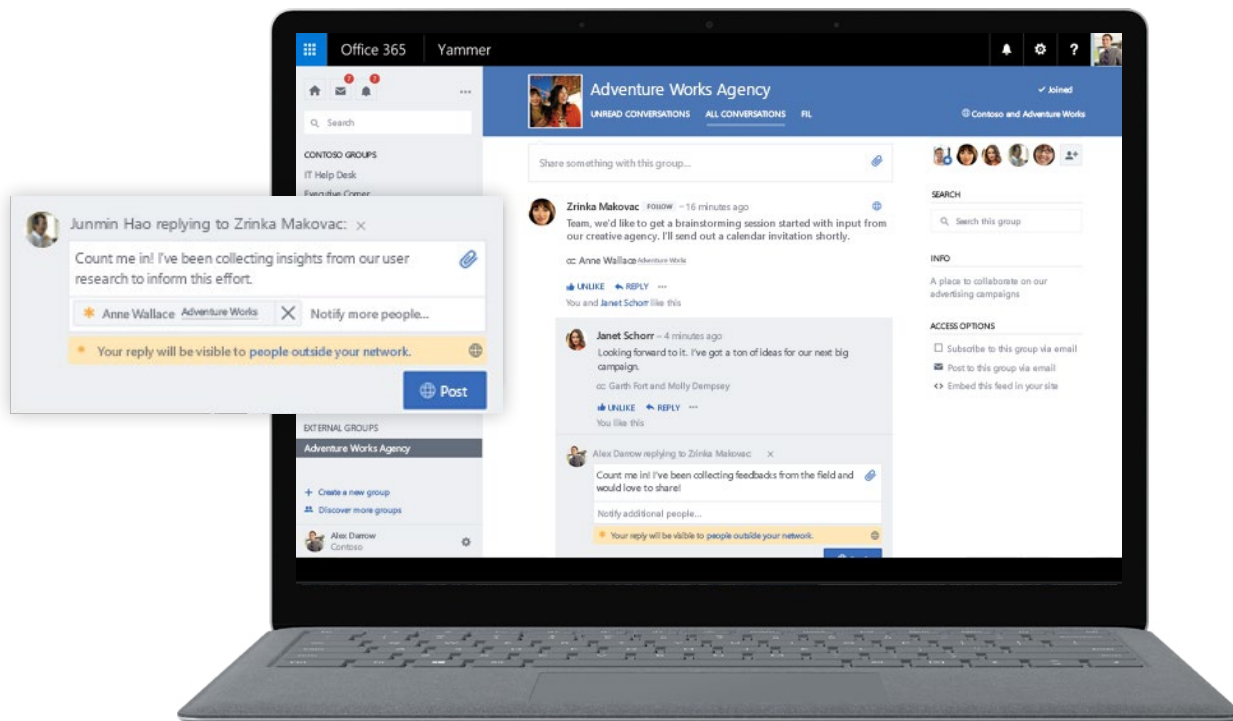
2. Share files across your organisation

From Yammer, you can easily upload or share files across the suite, including SharePoint, OneDrive, Outlook and Stream.



PRO TIP

When you share video straight from Stream to Yammer, it will play directly within your Yammer group feed.



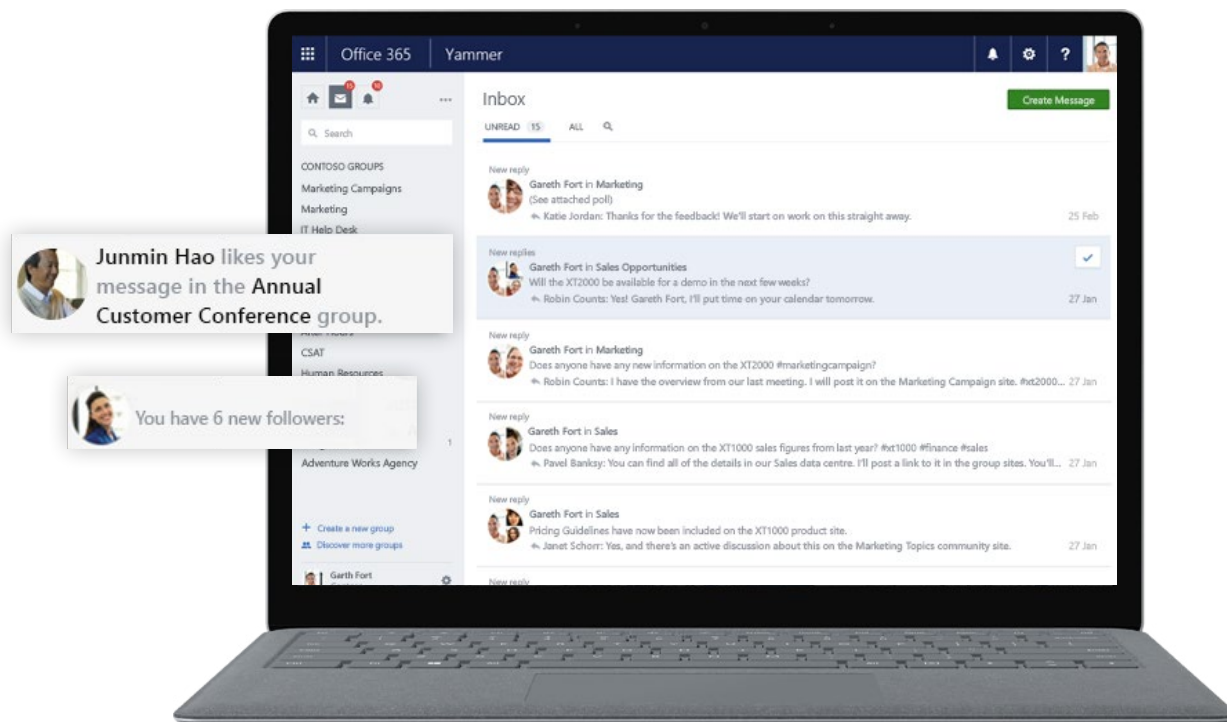
3. Share a conversation

When you want to embed a Yammer conversation in your live broadcast or SharePoint communication site, you can post it to a group or send it as a private message and bypass the group page altogether.



PRO TIP

At the top of the thread, Yammer displays the number of times the conversation has been shared.



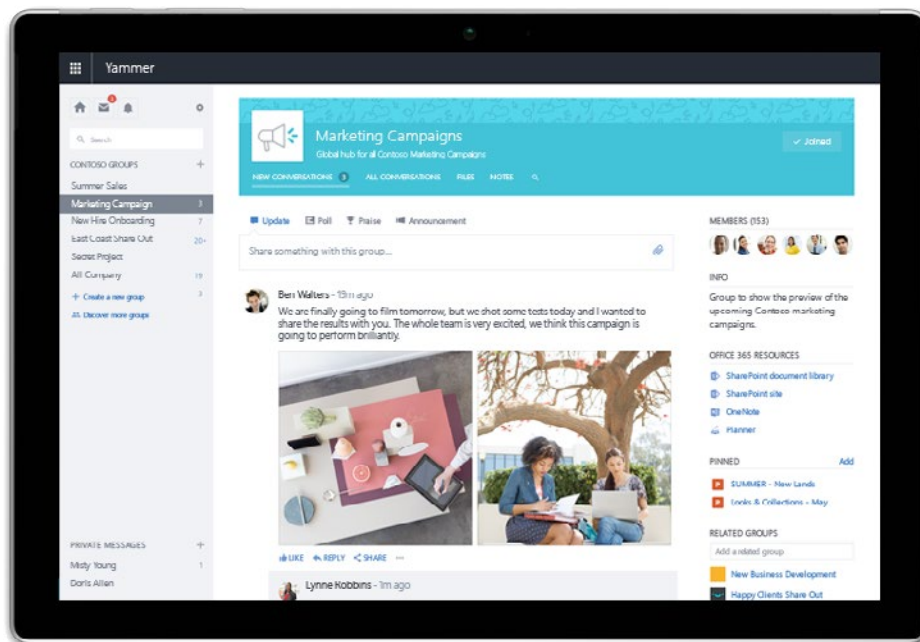
4. Create a poll

Use Yammer to crowdsource feedback or get a quick pulse on your business.



PRO TIP

Yammer recalculates the percentage of responses, so the numbers are updated every time the group page is refreshed.



Outlook

Connect and share from Outlook

The Groups feature elevates team communication by putting everything related to a project in one place. From Outlook, sets of users can connect, schedule meetings, share common calendars and files, and take notes.

Six tips and tricks for using Groups

1. Bring your team together around a project with a shared inbox, calendar, document library, OneNote notebook and planning tool, all with just a few clicks within Outlook.

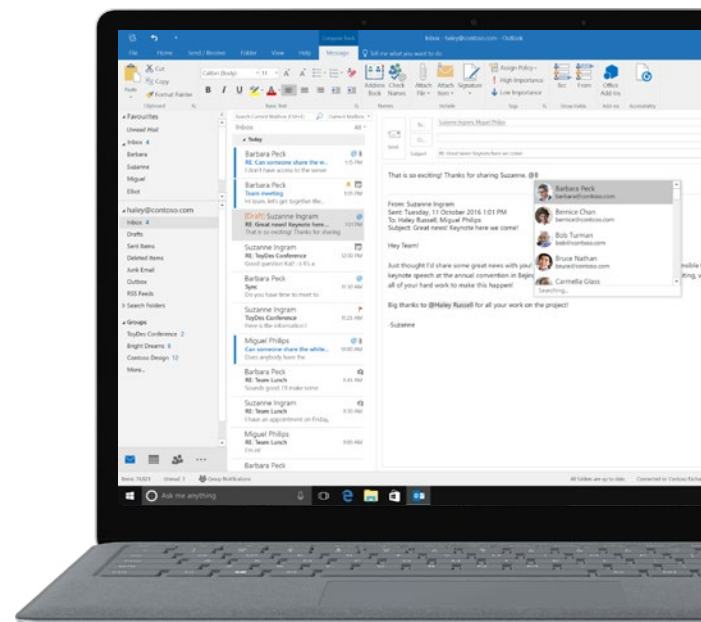
2. Facilitate quick referencing and easy communication by accessing messages organised in a thread.

3. Tag colleagues with the @mention feature when their input is needed.

4. Continue conversations on the go via Groups on the mobile app.

5. Initiate voice and video calls via the Teams plug-in.

6. Access conversations online for groups marked as a "favourite".





Sway

Communicate with style

Transform your presentations to communicate beautifully. With Sway's built-in design engine, you don't need to worry about having a design degree to make and share polished, interactive presentations and reports quickly that drive engagement and, ultimately, results.

Create quickly

- Start from a Word, PowerPoint or PDF file.
- Start by choosing a template.
- Start by typing a topic.

Add a variety of content from multiple sources

- Content: photos, videos, audio, embeds
- Sources: suggested, OneDrive, Flickr, Bing, Pickit, YouTube, your device and many more

Designs

Sway automatically designs beautiful outputs and allows you to build a style based on your company colours.

Easy to share

All you need is to send a link. Sways look great on any device size (mobile or desktop), without any additional effort on your part.

A woman with dark hair tied back is shown in profile, focused on a tablet. She is holding a white stylus in her right hand, poised to draw or write on the screen. The tablet displays a complex architectural or design drawing with various lines, shapes, and text. The background is softly blurred, showing a desk with some objects like a brass container. The overall lighting is warm and professional.

Chapter 4

Technology drives efficiency

Productivity happens when your apps and teams are able to work together seamlessly and effortlessly. From editing in Word to sharing with your colleagues, you'll be able to collaborate on and manage shared documents securely and without interruption. When all your tools are talking to each other, it makes it easy for you to work on projects in real time with your team, no matter where you are.



The top time-saving features in Word and Excel

Word

Tell Me feature

In Word 2016, use the **Tell me what you want to do** field on the ribbon to enter words and phrases about what you want to do next, then quickly navigate to features you want to use or actions you want to perform.

You can also use the Tell Me feature to help you find what you're looking for, or use Smart Lookup to research or define the term you entered.

Excel

One-click forecasting

The forecasting function now enables forecasting based on Exponential Smoothing (such as FORECAST.ETS).

In the **Data** tab, click the **Forecast Sheet** button to create a forecast visualisation of your data series.

From the wizard, you can also find options to adjust common forecast parameters, such as seasonality, which is automatically detected by default and confidence intervals.

SharePoint

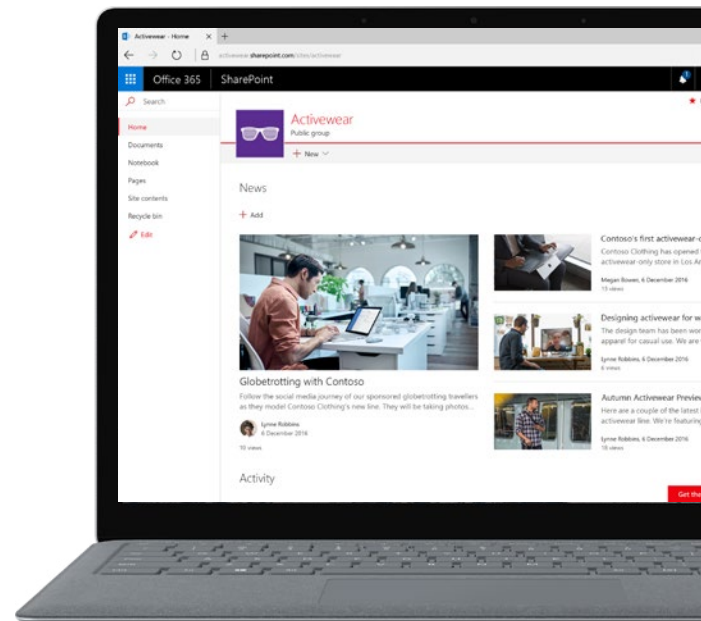
Streamline your process

Free yourself and your team from spending time on recurring manual processes. Now, you can build and launch Flows directly from OneDrive to automate processes for your files, or directly from SharePoint to power everything from simple alerts and approvals to the management of complex, mission-critical business operations. Simply click **Add Flow**, then select a flow template from a panel.

Start with features like these:

1. Gather and manage data and files

SharePoint lists collect data – just like you might in Excel – and are easy to share and manage on an intranet. More than 10 million custom lists are in use across Office 365 – from simple lists like contacts and tasks to lists that power mission-critical business operations for large enterprises. Use PowerApps to build custom forms to view, create, and modify data and files.





2. Automate repetitive tasks

Use the simple, visual designer in Flow to lay out the steps for recurring manual team and organisational processes. You can do everything in Flow – from configuring alerts and approvals to modelling complex, multistage processes.

3. Connect to and integrate data sources and services

When your process needs data from other sources and services, Flow lets you automate data exchange, synchronise files and more. For example, use Flow to copy information entered by a sales team in Microsoft Dynamics to a SharePoint list used by operations. Flow also integrates with on-premises and third-party services.

4. Build apps that transform your business

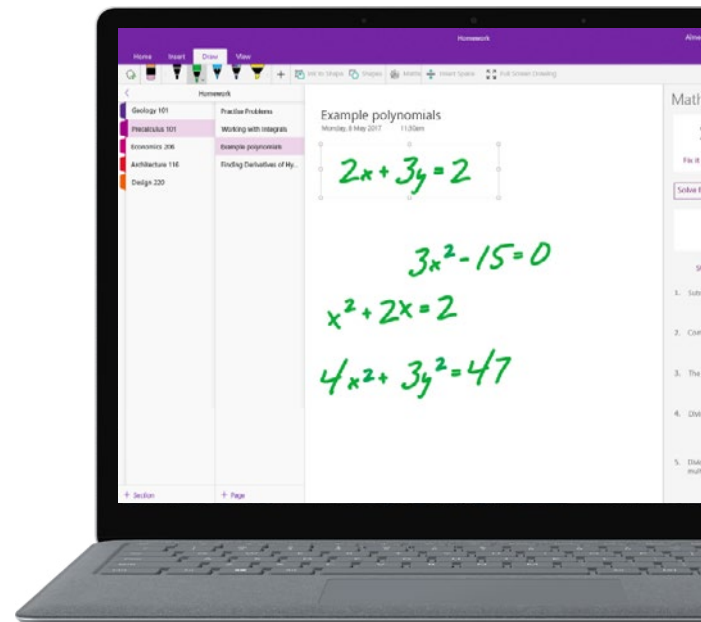
With PowerApps, without writing code, you can create apps that interact with data in SharePoint lists and libraries, as well as other cloud and on-premises sources. Use PowerApps to create digital experiences that take advantage of technology, like cameras on mobile phones, to work in innovative ways.

OneNote

Never miss a note

Taking notes on every important part of a meeting can be a little overwhelming. With OneNote 2016, you can invite others to a shared notebook by choosing **File > Share > Invite People**. To share a notebook during a meeting, choose **File > Share > Share with Meeting**.

After others in your team open the notebook, anyone with permissions can add meeting notes simultaneously, which then sync automatically.





Chapter 5

Protect your data

What does it mean to be the most secure Office 365 ever? Whether you're a team of five or a Fortune 500, you'll get enterprise-level security to keep out hackers and viruses and ensure your data remains confidential.

"We're making a huge leap forward in our ability to support global teamwork, without sacrificing security and data privacy, by adopting the Microsoft Office 365 suite of cloud productivity services. Office 365 meets both our mobility needs and our security standards."

Bryan Ackermann

Senior Vice President and Chief Information Officer,
Korn Ferry



Protect your data

Industry compliance

Office 365 email automatically adheres to 10 privacy compliance standards in various industries. Microsoft also offers robust contractual data privacy and security commitments by default to help customers comply with local regulations. The Online Services Terms contract document includes the EU Model Clauses, UK Data Protection Act and many other provisions. It applies as soon as customers accept the Microsoft Licence Agreement.

Data privacy and access visibility

Microsoft's commercial online services do not capture, maintain, scan, index, share or use any data-mining technology. This means that your emails will never be scanned for ad-serving

purposes, nor will the data you store with us be read or unknowingly shared with third parties in any way. You'll also benefit from fully customisable controls that enable you to tailor enterprise-grade security service to best meet your company needs.

Security against hackers and viruses

Even if your company has a security team, it's nearly impossible to assemble one large enough to uncover and protect against the hundreds of possible alerts that come through each day. With Office 365, an enterprise-level extension of your security team is focused on the physical security of your data centres, the logical security level applied to hosted machines and the data security level protecting your data at rest and during transmission.



Exchange

No need for virus-scanning software

Email is the gateway in and out of your organisation. Prioritise security across the board with protection from external threats, and defend with internal access controls.

- To deal with external threats and unknown risks, Exchange Online Advanced Threat Protection comes included in Office 365 and helps secure mailboxes against sophisticated attacks in real time, eliminating the need to install additional virus-scanning software. Every email attachment or link that passes through your Exchange server is automatically evaluated for suspicious activity, and malicious content is neutralised before an attack can occur.
- To protect internal information, Exchange allows your administrators to control email access permissions using information rights management (IRM) by keeping unauthorised people from printing, forwarding or copying sensitive information. Data loss prevention (DLP) through Office 365 enables administrators to control transport rules, actions and exceptions without affecting email flow.

SharePoint

A trusted platform for teamwork

SharePoint is designed to create a fluid teamwork experience that transcends boundaries while protecting your organisation, data and employees with enterprise-level security across Office 365 and devices.

Three aspects of SharePoint security

1. Industry-leading protection for your information

SharePoint and OneDrive make you confident about the security of your data by providing the safest space in the cloud. To help ensure your data is safe and your team is working in a secure environment, these services work to authenticate and authorise users, protect content, and secure the infrastructure.

2. Manage security more easily with intuitive and advanced controls

SharePoint and OneDrive include a set of controls to help keep your data safe no matter where mobile users access or share data, what device they're working on or how secure their network connection is.

3. Stay in the know with insights and intelligence

SharePoint and OneDrive offer advanced auditing capabilities to help you discover forensic information about specific activities conducted by a user or an administrator.



Mobile device management

What happens if a device loaded with company data is lost or stolen? That's where mobile device management from Office 365 comes in. It allows administrators to prevent unauthorised user access by setting up policies that ensure company emails and documents can only be accessed on phones and tablets within your Office 365 service. If a device loaded with Office 365 is lost or stolen, administrators can wipe the device clean.

Use mobile device management for Office 365 to secure and manage the following types of devices:

- Android 4 or later versions
- iOS 7.1 or later versions
- Window 8.1
- Windows Phone 8.1
- Windows 8.1 RT
- Windows 10
- Windows 10 Mobile

Mobile device management protects a range of Office 365 products, including:

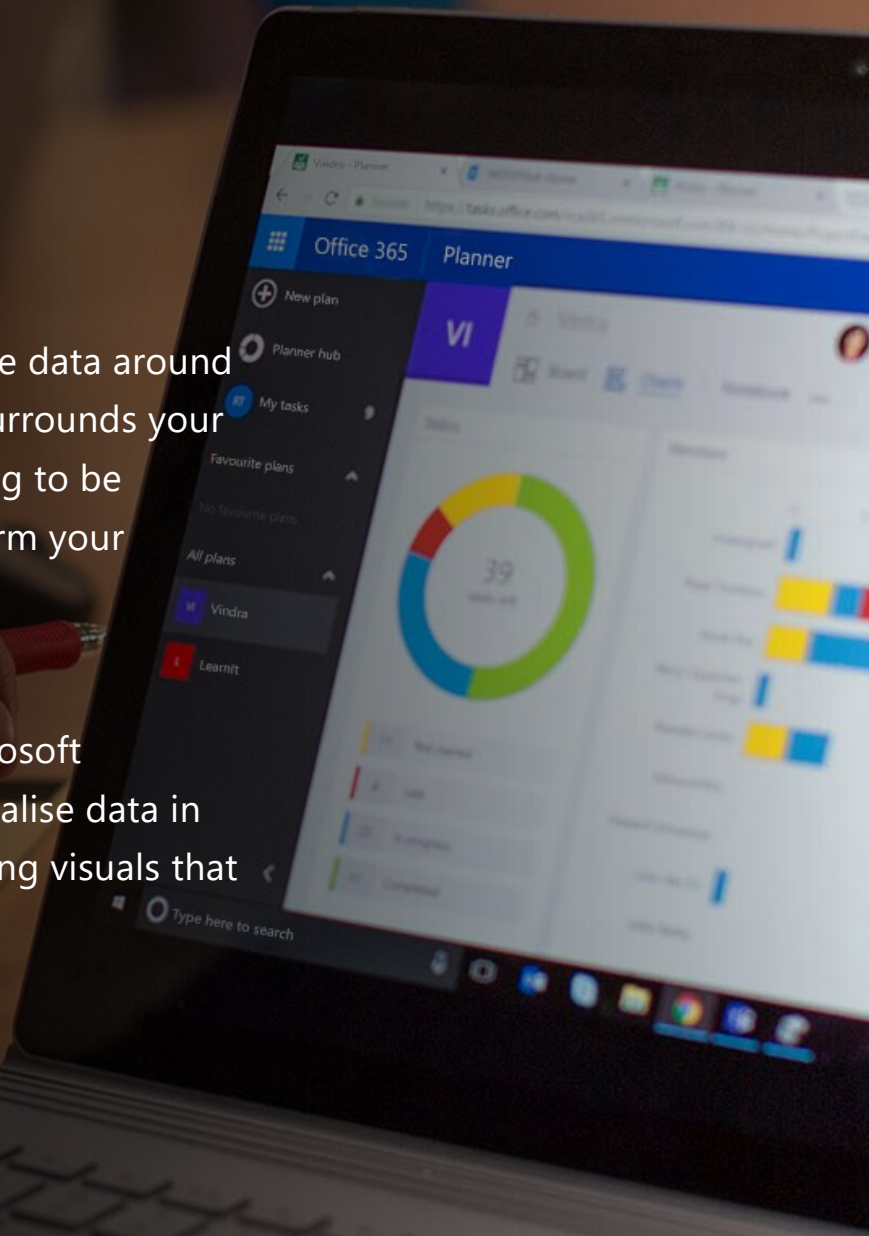
- Exchange
- Excel
- OneDrive
- Outlook
- PowerPoint
- Sway (iOS only)
- Word

Chapter 6

Unleash the power of data

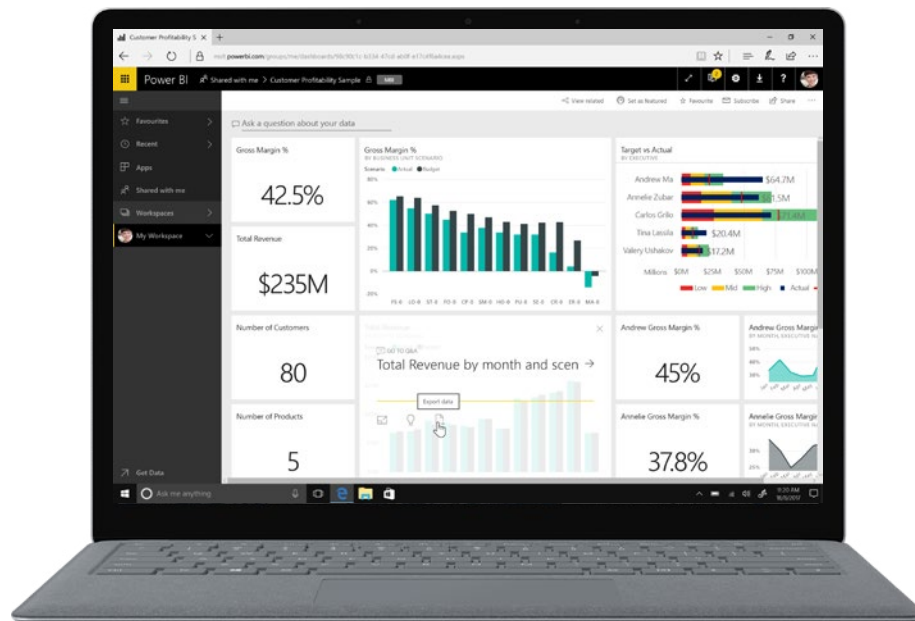
From customer-generated data to the data around how your team works, information surrounds your business. Within it are insights waiting to be discovered and harnessed to transform your business and your bottom line.

With the insight-centric apps of Microsoft Office 365, you can analyse then visualise data in beautiful presentations and compelling visuals that can be shared among your team.



Power BI

The potential of a single database



Gather results in 15 seconds or less

A single set of data is all you need to begin using Power BI. From the **Datasets** section in the left pane, select the ellipses you're interested in analysing. From the menu of options, select **Quick Insights**. After a mere 15 seconds, your insights will be ready. Click **View Insights**. From there, you have a couple of options:

- **Pin** visuals to a dashboard.
- **Filter** for additional insights.

Ask questions to glean insights

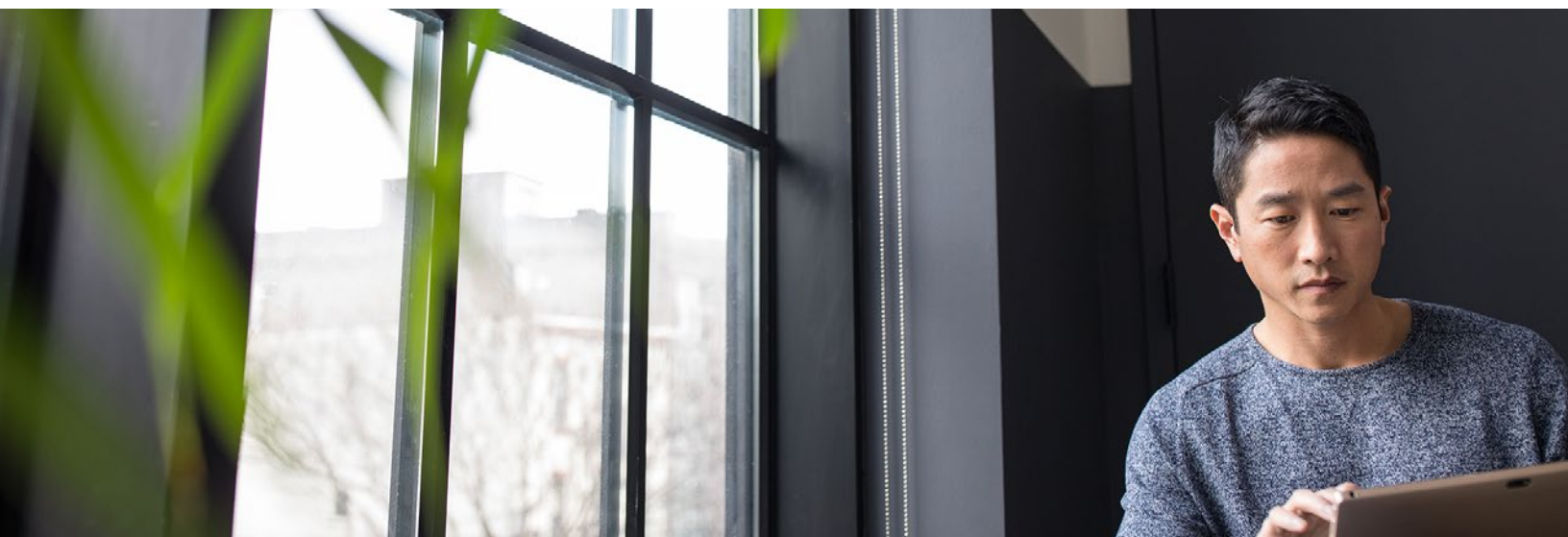
Power BI is equipped with a powerful language-recognition engine that will generate reports and visualisations from specific questions you ask.

- **Start at the dashboard** for the dataset you wish to analyse.
- **Enter a question** using natural, conversational language (e.g. "What was our revenue in 2016?").
A list of suggested terms will appear based on your question.
- **Click on a term** to see results and a corresponding visual.
- **Save the visual** to the dashboard by selecting the pin icon next to the question input box.

Collect your insights in a dashboard

It only takes one pinned visual to create a dashboard. Once you've started to build a dashboard full of insights around a particular dataset, you can rearrange the layout.

- **Resize a tile** by dragging its handles in or out.
- **Move a tile** by simply clicking and dragging it to where you want it to live on your dashboard.
- Change the title or subtitle by hovering over a tile, clicking the pencil icon and opening the tile details.



Delve

Smart insights help you work smarter

Delve Analytics shows you how you and your team can work more efficiently.

Network

- Which individuals do you interact with the most?
- How quickly do you respond to their emails?

Email

- How quickly do you read and respond to your emails?
- What are your average email read rates and response times?

Focus hours

- How often have you had at least two hours to focus?
- How can you find more time to focus?

Meetings

- How many hours have you spent in meetings this week?
- How effective are they?

Crash-course finish line

Scaling for success starts with the right business apps to get the work done. Better work is possible if you equip your business with apps that promote mobility, teamwork, communication, security, productivity and insights.

Now that you've completed the Office 365 crash course, it's time to take a closer look at exactly what Office 365 can do for your organisation.

[See plans and pricing for Office 365](#)

[Get started with a free trial of Office 365](#)

[Learn more about Microsoft 365](#)