

A Crash Course in Office 365:

Quick tips to save you time for
your growing business





Introduction

You and your employees are likely some of the 1.2 billion people worldwide who have used Microsoft Office. You're familiar with the standard apps like Word, Excel, Outlook, and PowerPoint, and you may have even explored the cloud offerings behind the collective set of leading productivity apps that make up Office 365.

But there's more to Office 365 than meets the eye. From communication and collaboration tools, to storage options and compatibility with business intelligence programs, there is something for every member of your organization.

In this eBook, you'll learn how you can best make use of specific Office 365 apps across 6 critical areas of your growing business: mobility, collaboration, communication, security, productivity, and insights.

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Chapter 1

Mobility breaks down business walls



As a business leader, you need to be available when your team needs you, and vice-versa. Mobility gives you and your employees the ability to get work done when you are away from the office, your desk, or even your computer.

Your Office 365 subscription includes versions of the Word, Excel and PowerPoint mobile apps. Your workers will be able to perform the same way they would in the office—productively and effectively—in a familiar user interface optimized for their Android or iOS phone or tablet.



How to add a comment in Word via your Android or iPhone

On your way to a meeting, but need to give some feedback to a colleague while on the commute? You can use Word mobile app to edit a Microsoft Word document sent to you via email— straight from your phone.

To add a comment:

Tap anywhere in a document, then click “Edit,” and tap a word or elsewhere in the document.

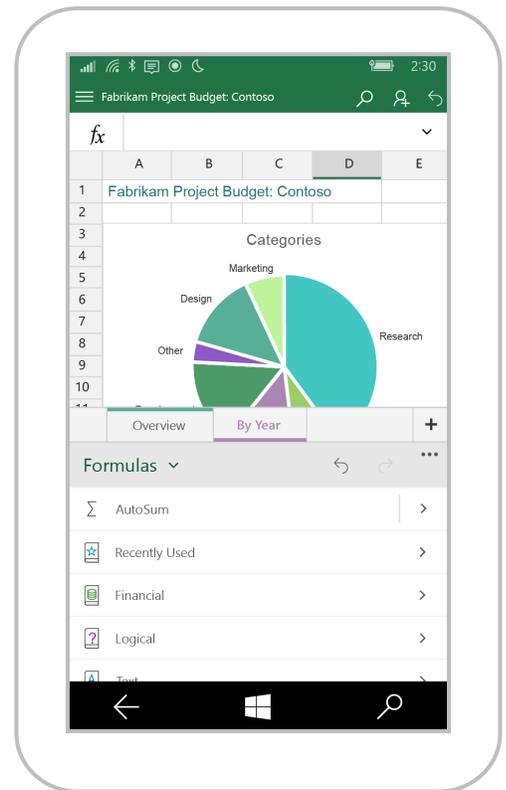
Type your comments. If this is the first time you’re adding a comment, you’ll be asked to enter a username so that other people will know who edited the document.



3 Excel shortcuts your workforce will love

Think Excel is a desktop-only program? Think again. Your employees can do just about everything in Excel directly from their smartphone or tablet.

1. **Formulas.** Your employees can calculate formulas using their mobile app by tapping the “Formulas” tab.
2. **Easy access to your files.** They can save an Excel file to OneDrive and access it quickly and easily on their mobile device.
3. **Built-in keyboard.** Their tablet’s onscreen keyboard has common functions built right in, so they can add formulas with ease.
4. **Recommended charts.** Excel’s Recommended Charts feature is perfect for smaller screens, enabling them to quickly visualize data with a few taps of a finger.





The perks of going mobile with PowerPoint

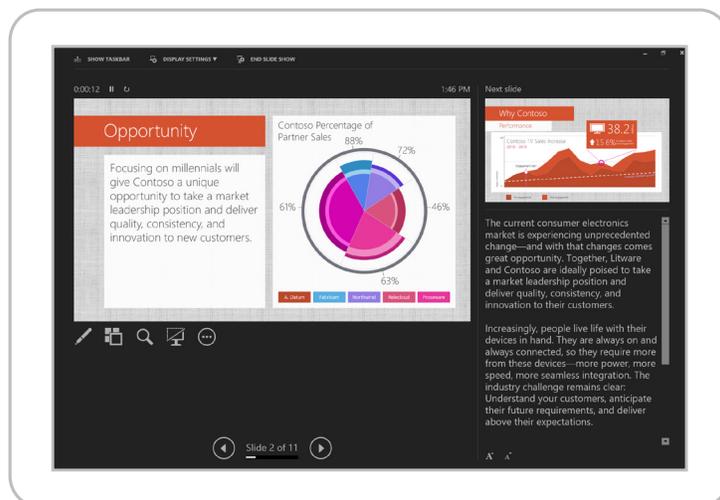
Prep and present on the go.

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



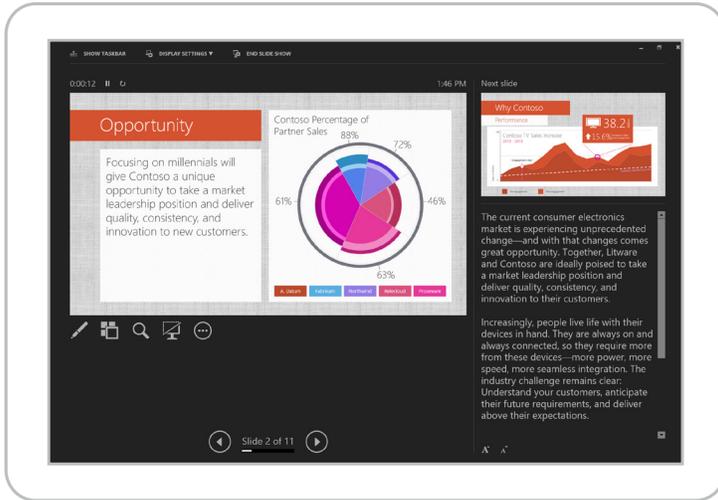
Notes at your fingertips.

Read your presentation notes directly from your phone.



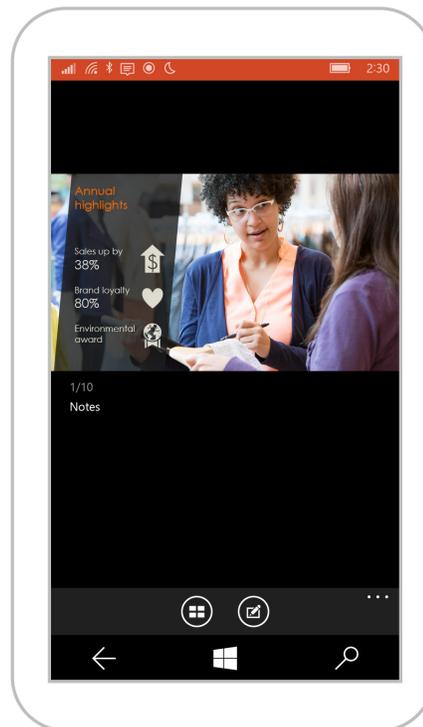
Cut the cables.

Without the need for bulky cords and cables, you'll be able to quickly get the presentation up-and-running. The 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 also let you emphasize key concepts as you present.



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Know your talking points.

Ink your notes in order to help emphasize key points.



Sharing's never been easier

Save files to the cloud on OneDrive for Business or SharePoint; then send everyone a single link to the same file, along with viewing and editing permissions. Everyone on your team will have the latest version of the file—eliminating version control hassles.

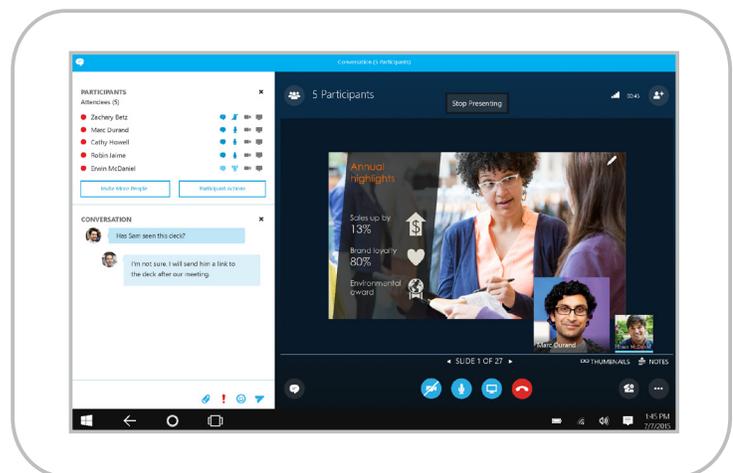




Use Skype to collaborate with coworkers on a document in real time

Use Skype for Business's "Chat" feature while the team works in a shared document:

- Click the "Chat" button to begin chatting over Skype with everyone working in the document.



- Even if you exit the Office document, you'll be able to continue the conversation via Skype for Business on your desktop or mobile device...



“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

Chapter 2

Collaboration drives business success



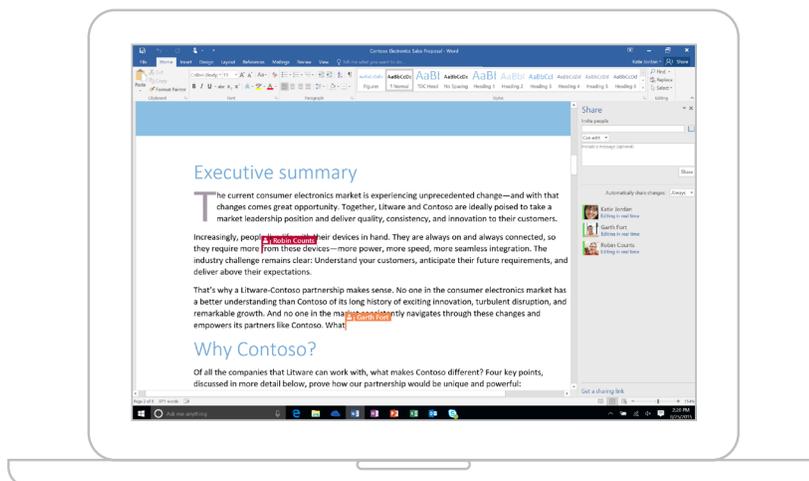
Your employees can outperform in their roles when they can work together as a team. As a business leader, you want to make it easy using technologies that are proven to work.

Office 365's apps can enable your teams to collaborate from start to finish. Employees can share meeting notes, co-author documents in real-time, get updates, and access files—so nobody ever misses a beat.



Tips for co-authoring in Word Online

Collaboration is a key component of Word Online, and the real-time co-authoring feature gives team members the chance to easily share ideas and give direct comments in the doc.



Get up and running.

To get started using real-time co-authoring, save your Word Online document to OneDrive for Business*. Next, click the "Share" button, located in the upper right of the window.

Invite colleagues.

Using the Share pane, invite others using their email addresses. They'll receive an email invite to edit or view the document.

Enable real-time co-authoring.

Once they sign on, you'll see a notification in the upper-right of your screen. Clicking "Yes" will enable sharing changes and allow everyone to automatically see changes made in the document.

Work together seamlessly.

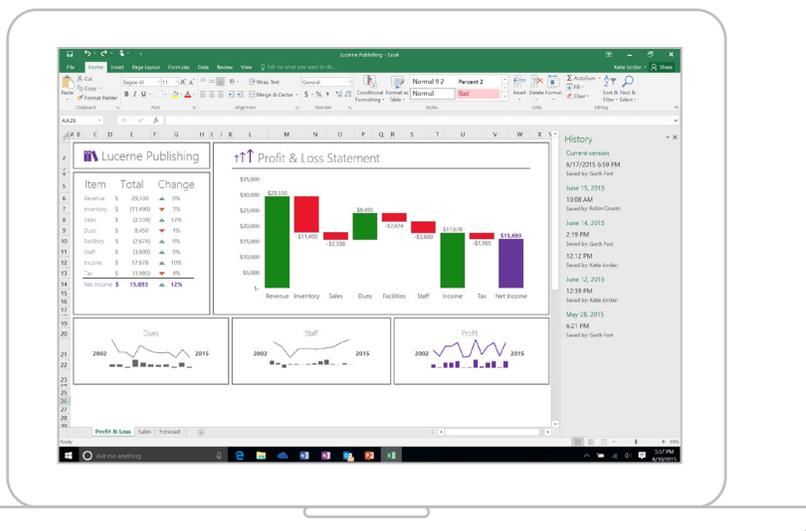
With everyone in the same document, you and your team can draft, comment, and edit your work in real time. Add or reply to comments right next to the text you're discussing, so your colleagues can follow the conversation.

*Co-authors must be using Office 2016 or Office Online.



Use history to collaborate with confidence

With multiple team members editing spreadsheets in real time, the risk of someone accidentally making a mistake or deleting important data is real. Office 365's improved version history lets you see and revert changes to ensure nothing is lost.



See document history at a high level.

Open up the History pane by clicking File > History. Quickly 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 show the name of people who made those revisions, so you can follow up with anyone regarding their changes.

See how files evolve over time.

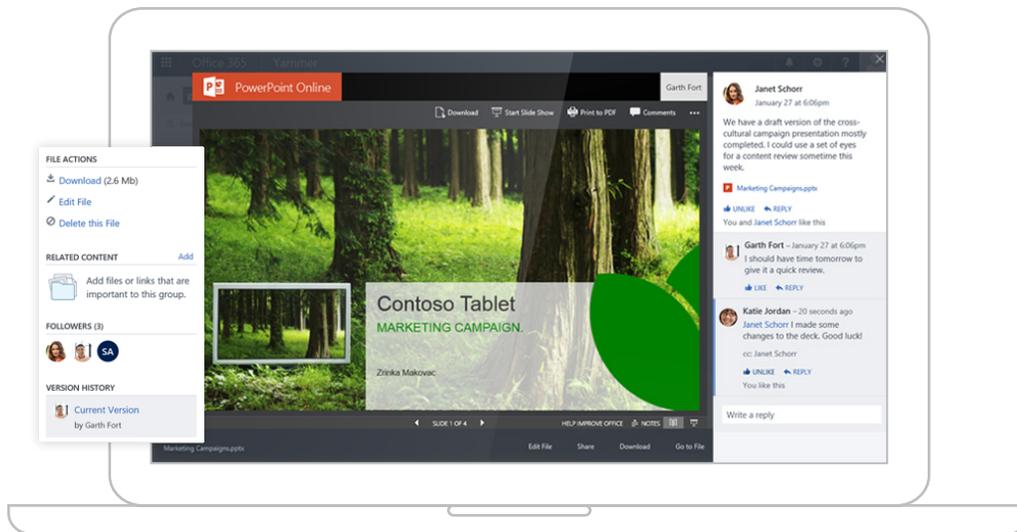
Click on a version to open it and examine how it differs from later versions of the same file.

Restore previous versions.

If you want to revert back to an older version that you find, just hit "Restore" and the document will revert back to the file as it appeared at that point in time.



Putting teamwork front and center



Get collaborative with PowerPoint Online in Office 365.

New features improve the experience of working together on a presentation in real time with multiple team members.

Get team visibility.

The upper-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 slides they're working on.

Initiate video chats.

By clicking on a person's thumbnail image and the Skype for Business logo, you can start a group chat to discuss the project 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 let you quickly reply or resolve comments.



New attachment feature tips

Gone are the days of digging around for a file you want to attach to an email. With Outlook Online, sharing files is better with a new and seamless attachment experience.

Choose from recently accessed files.

When attaching a file to an email, all documents that you recently accessed across any of your devices will appear in a list—from your hard drive and from OneDrive, OneDrive for Business, and SharePoint.

Grant permissions before sending.

Doc permissions can be viewed and/or changed at the same time you attach a file.

Search easily for files from multiple locations.

With files in various locations, the attachment feature places them all at the same level. Now it's easier than ever to search for files you've previously attached from OneDrive, OneDrive for Business, or SharePoint just like you would any other file.

*Skype for Business is not yet available for Mac. Lync for Mac 2011 is the latest version. Lync for Mac is compatible with Skype for Business Server and Skype for Business Online.



2 ways to communicate smarter in Skype for Business

Now with Skype for Business*, you can simplify the communication experience by providing a tool that is both familiar and functional for calling, group conferencing, video, and sharing.

1. Chat with all project collaborators at once.

Need to ask a quick question or clarify a point on a project? While working in Office Online, just click on the Skype icon in the upper-right corner of your screen to initiate a quick group call or video chat with one or more people.

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

Now, you can invite customers or even prospects who are non-Skype users to join a meeting or webcast from their browsers or smartphones.



2 things you probably didn't know about SharePoint

1. Never overwrite an edit.

When a document is “checked out,” no other person can make edits to that document until it is checked back in. To enable the “check out” feature on all documents, follow these instructions:

- Go to your document library.
- In the ribbon bar, click Library > Library Settings.
- Under General Settings, select Versioning Settings.
- Under Require Check Out, select “Yes.”

2. Only reveal changes when you're ready.

When collaborating on a document, you don't have to share half-formulated ideas or edits. Your changes or those of another collaborator won't be released and viewable until the author saves them.



Co-authoring features are perfect for brainstorming

During a meeting, several contributors can quickly capture their collective brainstorm ideas into a shared OneNote document at the same time. Need to follow up with someone on an idea? Edits are always attributed to a writer, making it easy to find out who wrote what.



3 Yammer tips for superior collaboration



1. Want to bring together your team in one virtual location?

With Yammer, you can create a Group with the necessary project stakeholders and @mention team members in messages to communicate updates as needed.



2. Want to make sure your team is up-to-date all the time?

With Groups, all conversations, people, and content is available in a single location.



3. Want to make better decisions based on the knowledge across your organization?

The Discovery feed and a smarter search feature helps you stay on top of what matters most.

Chapter 3

Communication empowers employees



An effective communications strategy is at the heart of successful collaboration. As a business leader, you want to empower your employees to initiate discussions and share ideas for optimal efficiency and success in their roles. Communications tools can do just that—and so much more.

From initiating a one-on-one dialogue to presenting ideas to a group to posting announcements to the entire company, Microsoft Office 365's suite of communications-centric tools gives your employees control over their conversations so they feel connected wherever they are.



Skype for Business really puts the presenter in the driver's seat

Control your communications.

New features make it a single platform for every type of meeting, from instant one-on-one connections with colleagues to large virtual meetings of up to 250 people.

Get intuitive status control.

Want others to know when you're busy? With Outlook calendar integration, Skype for Business recognizes when you're busy, automatically changing your status to "in a meeting" or "do not disturb."

Let attendees choose their view.

Meeting attendees can enjoy the freedom to pick from 4 views:

- Gallery View: Everyone's video streams
- Speaker View: Presenter's streams
- Content View: Meeting content
- Compact View: All participants in a small window

Give and take control settings.

Open up or close down the floor for feedback and ideas with the "Give Control" and "Take Back Control" features. With the click of a button, presenters can select whether users can flip through content, contribute ideas, or make changes to a whiteboard, OneNote, or PowerPoint file.

Access from anywhere.

Public Switched Telephony Network (PSTN)* conferencing lets attendees dial into a meeting from a landline or with a single click on a computer or mobile device.

*PSTN Conferencing requires Skype for Business Online Plan 2—either as a standalone service or as part of an Office 365 Enterprise plan that includes the service (E1, E3, and E5). PSTN conferencing is not available in all countries or regions.



Connect and share from Outlook using Groups

The Groups feature elevates team communications 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.



6 tips and tricks for using Groups

1. **Bring your team together** around a topic or project in just a few clicks.
2. **Facilitate quick referencing** and easy communication by accessing messages organized by 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 Skype for Business plug-in.
6. **Access conversations offline** for groups marked as a "favorite."



Sway

Communicate your ideas with beautiful visuals using Office 365's newest version of Sway

4 visuals to add to your Sway



1. **Flickr images:** Embed high-resolution photos from Flickr's vast database of imagery into your Sway storyline, complete with Creative Commons copyright information.



2. **Before-and-after photos:** Showcase a transformation by dragging a "comparison" card into your storyline. An interactive feature will let the viewer see the comparative images in a stunning visual display.



3. **Maps, time lapse videos, or GIFs:** Let an animation tell part of your story by selecting the "embed" card and pasting the original file's IFRAME code into your Sway.



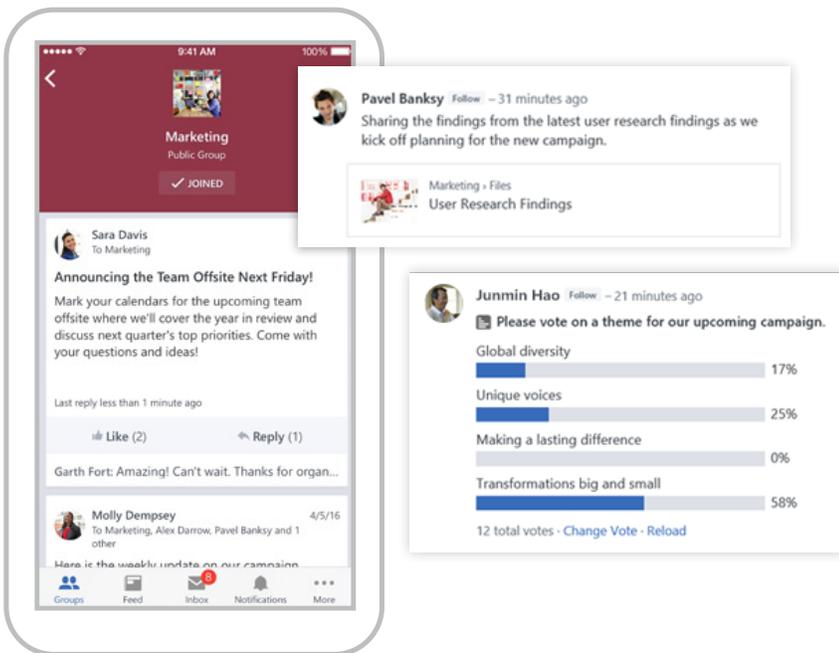
4. **PowerPoint presentations:** Integrate a finished presentation by selecting the PowerPoint file in OneDrive and clicking "Embed." Then, copy the HTML code and paste it into your Sway. Hit "Preview" to watch and interact with the presentation.



3 ways to communicate across Office 365's internal social network

1. Announce to the group.

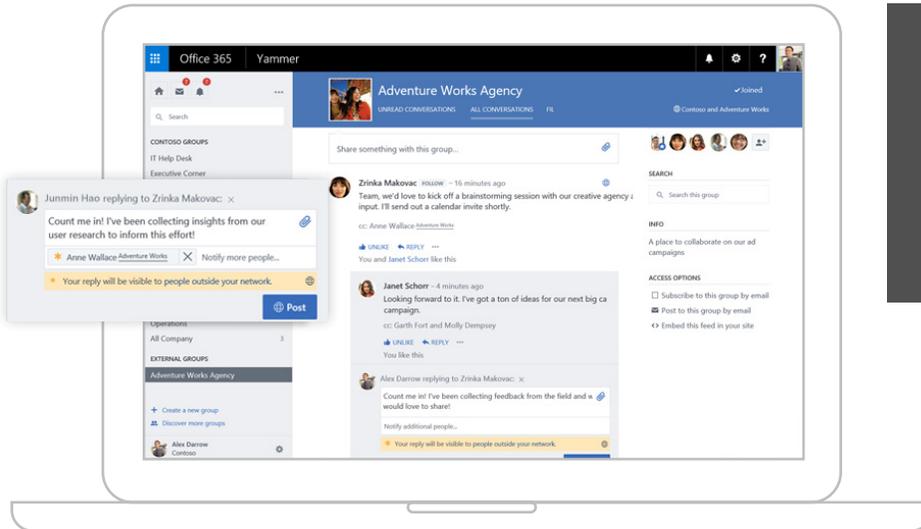
The "Announcement" feature is a perfect way to share information with a wide range of people at once. By posting an announcement, group members will see it in two places: their Home Feeds and Inboxes.



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

2. Share files with your team.

From Yammer, you can upload a file from your computer or link to a Note or file already located within the app.

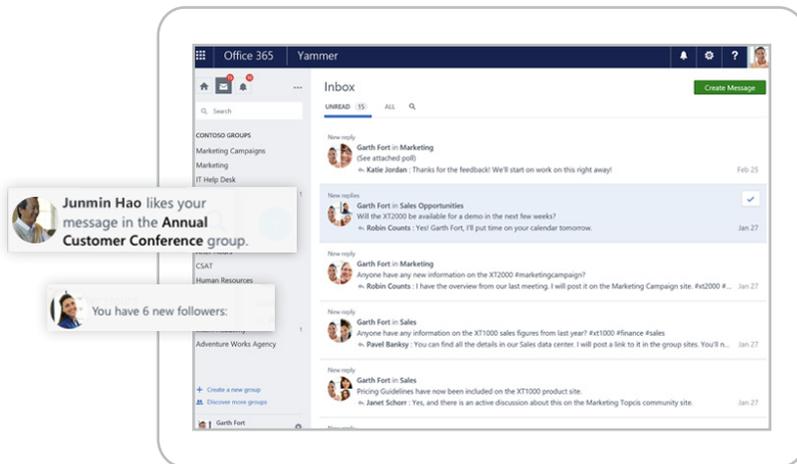


 **PRO TIP**

Avoid duplication by choosing the link option for files already in Yammer.

3. Send private messages.

Private messages are delivered straight to the user's inbox.



 **PRO TIP**

Your inbox is a single place for you to view, prioritize, and manage all of your messages, conversations, and announcements—including any @mentions.

“With the new meeting and voice services, Skype for Business Online in 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

Chapter 4

Security is a business imperative



What does it mean to be the most secured and confidential Office 365 ever? Whether you're a team of 5 or a Fortune 500, enterprise-level security and compliance standards are non-negotiable for managing your company's data.

Data security matters for every business, and it's hard to know if you're implementing the measures needed for a strong security posture.

Office 365 helps to keep hackers and viruses out of your business and ensures confidential data is seen and accessed only by those you permit. Office 365's security benefits can be divided into 3 buckets: compliance, data privacy, and data security.

**Industry compliance:**

Office 365 email adheres to 10 privacy compliance standards in various industries, including the requirements specified in medical (HIPAA), government and homeland security (DPAS & FISMA), education (FERPA), and banking. 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, and it applies as soon as customers accept the Microsoft license agreement.

**Data privacy and access visibility:**

Microsoft's commercial online services do not capture, maintain, scan, index, share, or use customer data stored or transmitted by the service or otherwise use any data-mining technology. The only time we touch your data is to provide and maintain the services you use. This means your email will not 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. In addition to Office 365's built-in security features, customers also benefit from fully customizable controls that enable them to tailor enterprise-grade security service to best meet your company needs. For example, administrators or help desk staff can receive access to a subset of administrative settings appropriate to their roles.

**Security against hackers and viruses:**

Even if your company has a growing security team, it's nearly impossible to assemble a team 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 our data centers, the logical security level applied to hosted machines, and the data security level protecting your data through encryption enabled at rest and during data transmission.



Eliminate the need for virus-scanning software

Email is the gateway in and out of your organization. Prioritize 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 neutralized 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 unauthorized 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 mail flow.





Share files easily in the cloud

SharePoint lets you and your employees store, access, and share files on-premises (through SharePoint Server) or from outside your office walls (with SharePoint Online). Purchase SharePoint Online as a standalone offering or as part of an Office 365 suite, allowing the same powerful features of SharePoint without the associated overhead of managing the infrastructure on your own. With SharePoint Online in the cloud, you receive the same best-in-class security and administrative controls and provisions you rely on.

3 important features of SharePoint security



1. Differentiated access:

Administrators can set policy-based access controls based on a user's role in the company, the data access location, and the sensitivity of the data requested.



2. Unified auditing logs:

Administrators can review file- and folder-sharing and synchronization histories, based on a shared file's owners and users.



3. Sensitive content classification:

SharePoint has more than 80 pre-built definitions of sensitive content, and companies can create customized policies for their SharePoint sites.

Office 365 mobile device management

Smartphones and tablets give your employees the freedom to work from virtually anywhere, but what happens if a device loaded with company data is lost or stolen?

Mobile Device Management from Office 365 allows administrators to prevent unauthorized user access by setting up policies that ensure company email and documents can be accessed only 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, regardless of whether it was owned by an employee or by the company. Furthermore, employee-owned devices can be wiped only of company information, leaving their personal information intact.

Use MDM for Office 365 to secure and manage the following types of devices:

- Android 4 or later versions
 - iOS 7.1 or later versions
 - Windows 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:



“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

Chapter 5

Technology drives a productive workforce



Productivity happens when your apps and teams are able to work together seamlessly and effortlessly. When you're working across files and sharing them with the rest of the team, you face the risk of losing files or experiencing version issues.

As a business leader, you need an organized way for you and your employees to edit and share files with each other, in order to promote greater productivity and efficiency.

From editing in Word to sharing with your employees, you'll be able to manage and collaborate on shared documents without interruption. When all of your tools are talking to each other, it makes it easy for you to work on projects in real time with your team, from virtually anywhere.

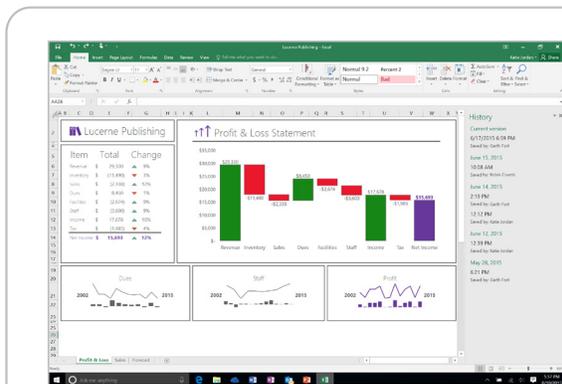
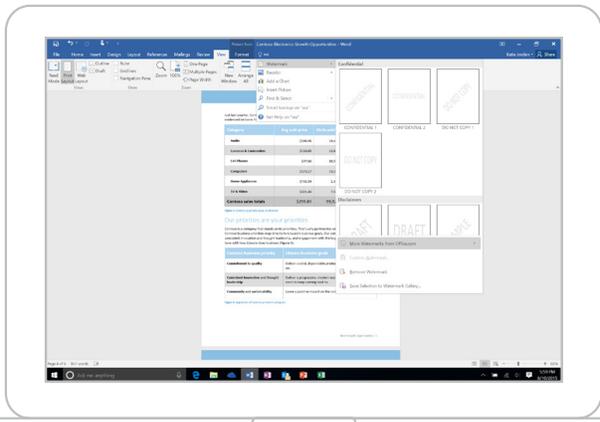
The top time-saving features in Word and Excel



Word

“Tell Me” feature

A text box on the ribbon in Word 2016 reads, “Tell me what you want to do.” Use this field to enter words and phrases about what you want to do next, and quickly navigate to features you want to use or actions you want to perform.



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

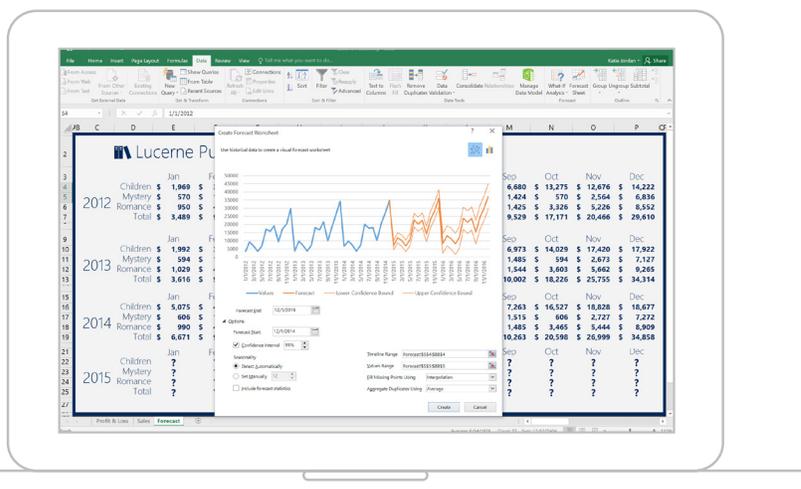


One-click forecasting

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

On the “Data” tab, click the “Forecast Sheet” button to create a forecast visualization 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 WORKFLOWS

Take the guesswork out of your enterprise's processes

SharePoint workflows are pre-programmed applications that streamline the company's processes—from collecting signatures and feedback to tracking employee onboarding status. SharePoint workflows bring consistency into organizational procedures. Running a SharePoint workflow is easy. Those using it may choose the workflow type they want, specify the options that will work best in the situation, and let the workflow take over.

There are 5 pre-programmed workflow types:

1. Approval workflow.

Route a document or other item to specified team members for approval or rejection.

2. Collect feedback workflow.

Route documents or other items to designated people for feedback, then consolidate it all for the workflow owner. Then receive a record of the total review process.

3. Collect signatures workflow.

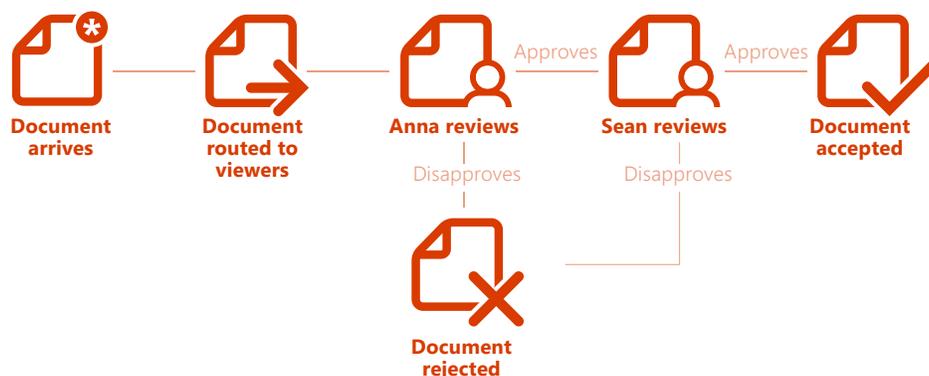
Route the Microsoft Office document to designated people for their digital signatures.

4. Three-state workflow.

Track the status of a list item through 3 states, or phases. Then use it to manage business processes that require you to keep track of a high volume of issues or items.

5. Publishing approval workflow.

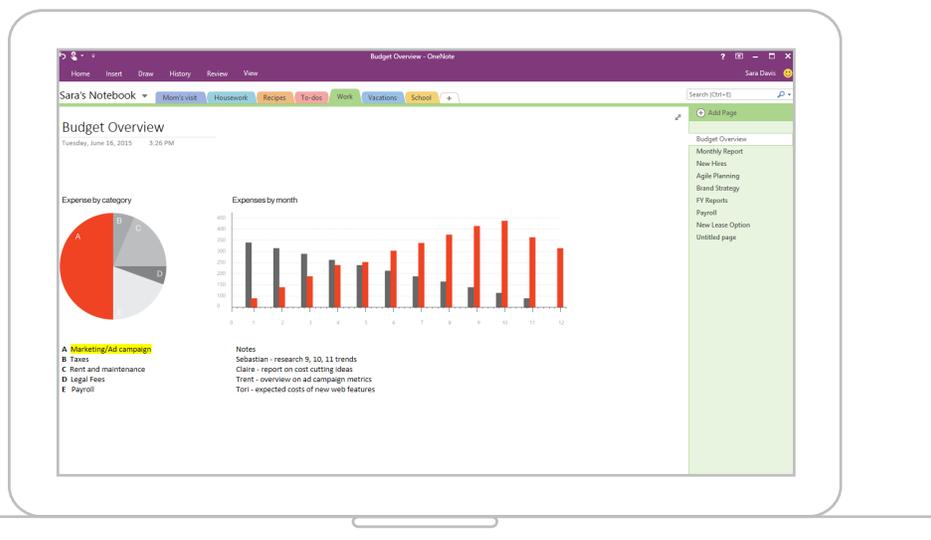
Specifically designed for publishing sites, this workflow automates content routing to subject matter experts and stakeholders for approval and review.





No one will miss a thing in the next meeting

Taking notes on every important part of a meeting can be difficult for your employees. How can you ensure they've caught everything?



The notetaker can place their OneNote 2016 notebook in a shared location, such as OneDrive or SharePoint.

They can invite others to their shared notebook, by choosing File > Share > Invite People.

In order for them to share a notebook during a meeting, they can choose File > Share > Share with Meeting.

After others open the notebook, anyone with permissions can add meeting notes—all at the same time. OneNote syncs automatically, with everyone's notes showing up.

Chapter 6

Insights unleash the power of data



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

With Microsoft Office 365's insight-centric apps, your employees can analyze, then visualize data in beautiful presentations and compelling visuals that can then be shared among your teams.

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 analyzing. From the menu of options, select “Quick Insights.” After a mere 15 seconds, your insights will be ready. Click “View insights.” From there, you may interact with your insights in the following ways:

- **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 visualizations from specific questions you ask.

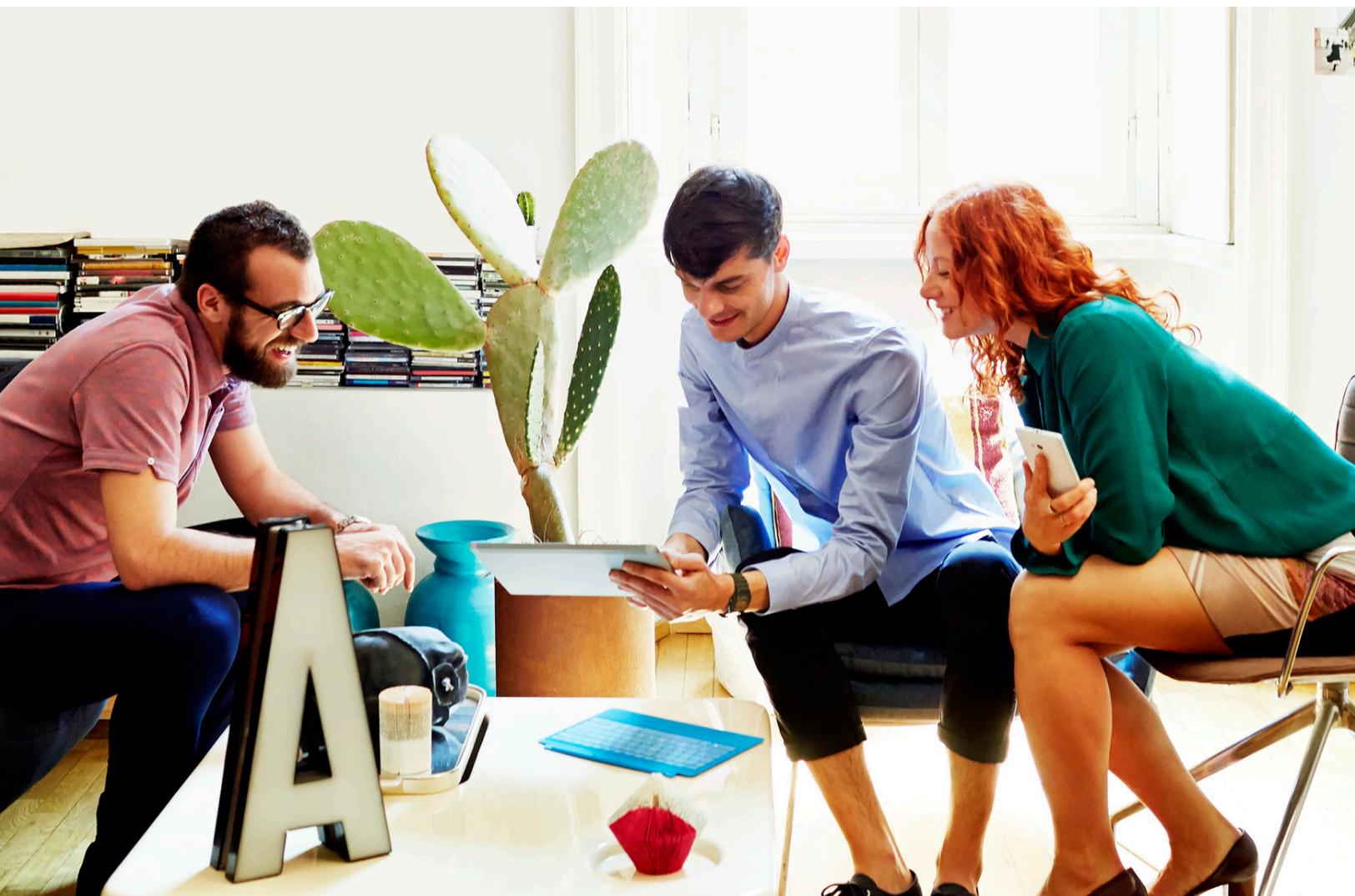
- **Start at the dashboard** for the dataset you wish to analyze.
- **Enter a question** using natural, conversational language (e.g., “What was our revenue in 2015?”). A list of suggested terms will appear based on your question.
- **Click on a term** to see results and a corresponding visual.
- **Save 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.



MICROSOFT MYANALYTICS

Personal insights help employees work smarter

Using Microsoft MyAnalytics, employees can see how they're spending time across 4 areas:

**Network**

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

**Emails**

- 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 2 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?

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

Now that you understand what various Office 365 products can do for your organization, it's time to take a guided tour now:

<https://resources.office.com/en-us-landing-guided-tour-test-drive.html>