

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 such as 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 business intelligence programs to communication and collaboration tools and storage options for every member of your organisation, a shift to cloud-based Office 365 can mean a lot for your growing business.

In this eBook, you'll learn how you can best make use of specific Office 365 apps across six 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 premium 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 that's optimised for their Android or iOS phone or tablet.



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

If you're on your way to a meeting but need to give some feedback to a colleague while commuting, you can use the Word mobile app to edit a Microsoft Word document sent to you via email directly from your phone.

To add a comment:

Tap anywhere in a document, then click "Edit" and tap a word or anything else in the document.

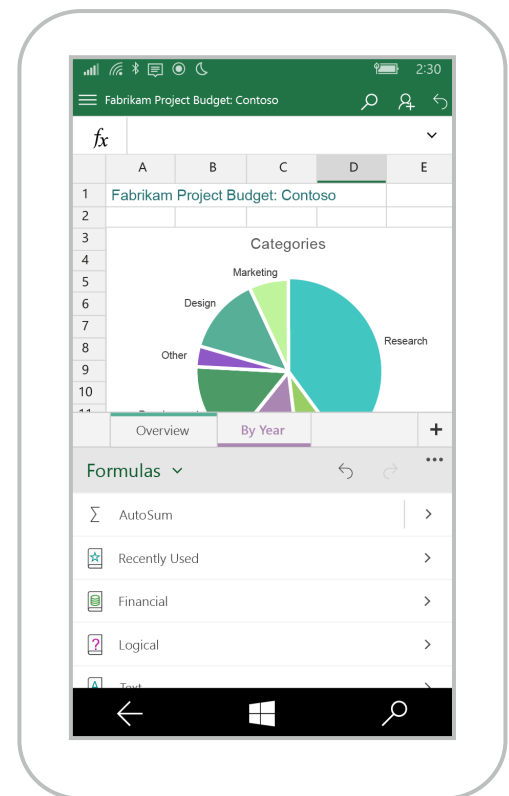
Type your comment. If you're adding a comment for the first time, you'll be asked to enter a username so that other people will know who edited the document.



Three Excel shortcuts that your workforce will love

Think that 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. Easily access 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 on-screen keyboard has common functions built in, so they can add formulas with ease.
- 4. Recommended charts.** Excel's Recommended Charts feature is perfect for smaller screens, enabling users to quickly visualise data with a few taps of a finger.





The perks of going mobile with PowerPoint

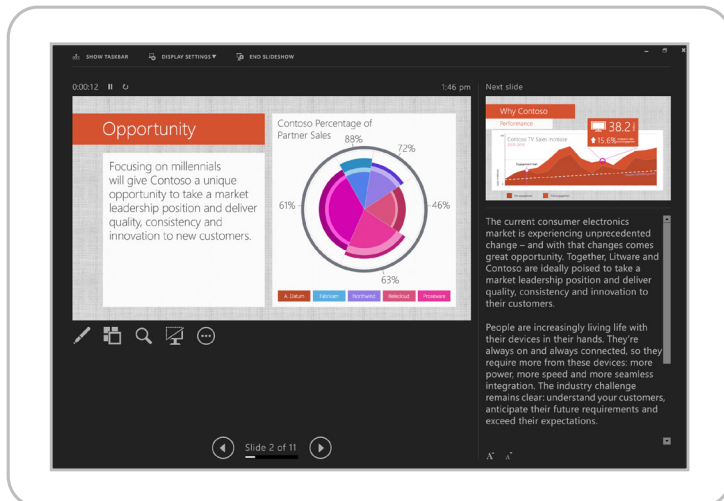
Prepare and present on the go.

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



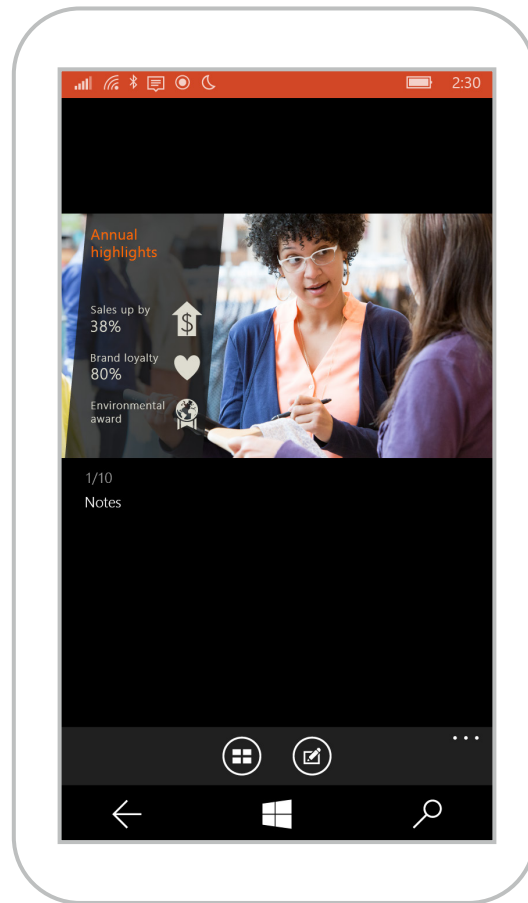
Notes at your fingertips.

Read your presentation notes directly on your phone.



Cut the cables.

Without needing bulky cables and wires, you'll be able to quickly get your presentation up and running. The Presenter View gives you full control over what your audience sees and only displays speaker notes on your tablet. New ink, laser pointer and highlighting features also let you emphasise key concepts as you present.



Know your talking points.

Ink your notes in order to help emphasise 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 in your team will have the latest version of the file, eliminating version control hassles.

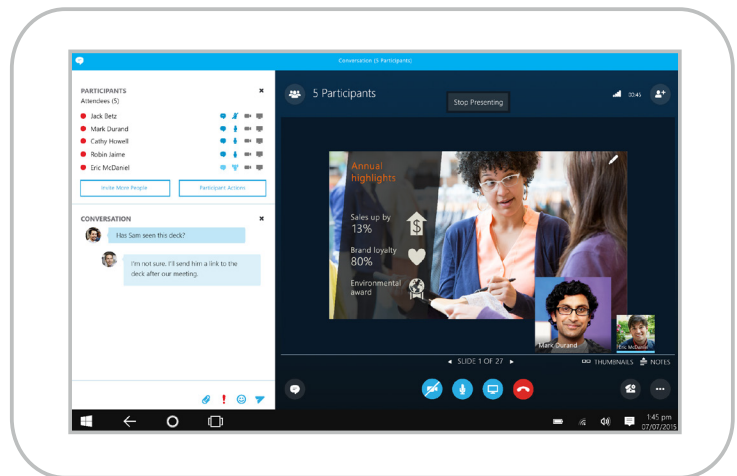




Skype and collaborate with colleagues on a document in real time

Use Skype's "Chat" feature while the team works on a shared document:

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



- Even if you exit the Office document, you'll be able to continue the conversation via Skype on your desktop or mobile device, so you can keep talking to the team as they make edits.



"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



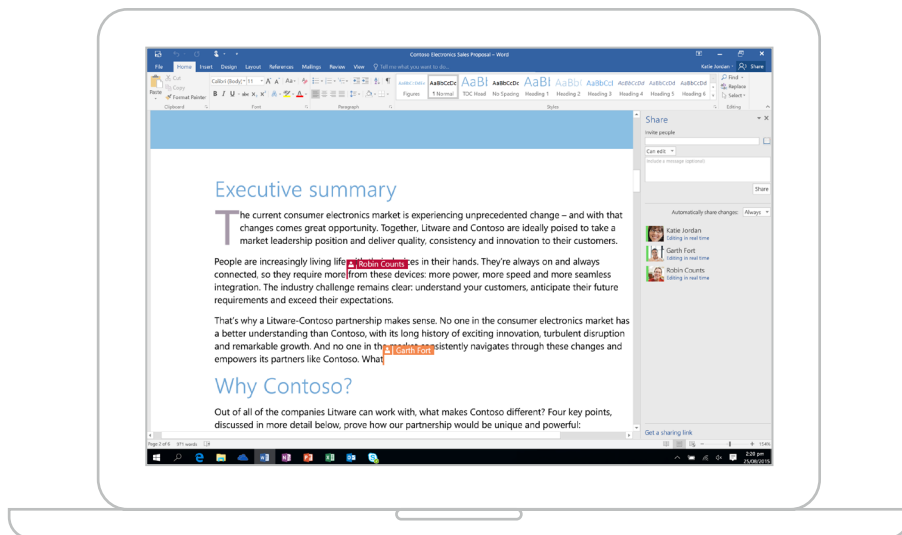
Your employees can outperform in their roles when they can work together as a team. As a business leader, you want to make it easy using technologies that are proven to work.

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

Collaboration is a key component of Word 2016, 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 2016 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 invitation to edit or view the document.

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

Enable real-time co-authoring.

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

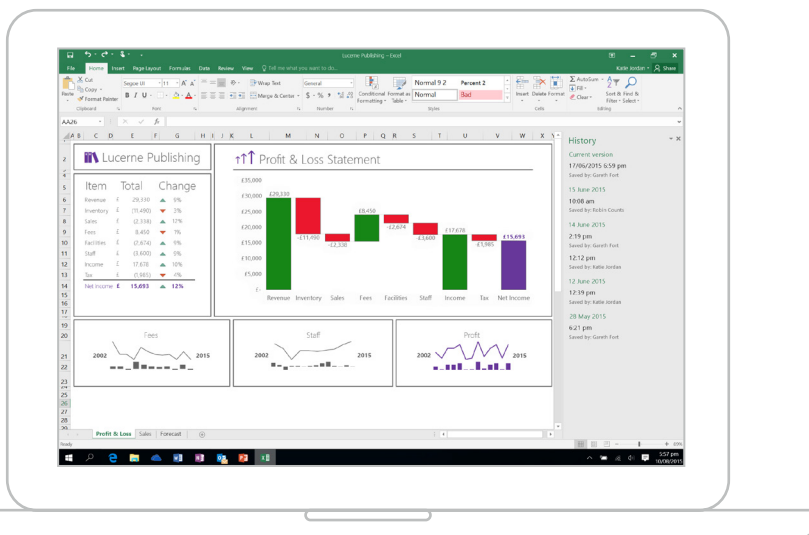
Work together seamlessly.

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.



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 2016's improved version history lets you see and revert changes to ensure that nothing is lost.



See document history at a high level.

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

See who contributed to a file.

All revisions are listed by date and show the names of people who made the 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, simply select "Restore" and the document will be reverted back to the file as it was at that point in time.



Putting teamwork front and centre



Collaborate with PowerPoint in Office 2016.

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

Get team visibility.

The top-right corner of the screen shows you who's working on the file and where they're 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 to or resolve comments.



New attachment feature tips

The days of digging around for files you want to attach to emails are now gone. With Outlook 2016, 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 have recently accessed on 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 when you're attaching a file

Easily search for files from multiple locations.

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



Two ways to communicate smarter in Skype for Business

Now, with Skype for Business, you can simplify the communication experience by providing a tool that's both familiar and functional for calling, group conference calls, video and sharing.

1. Chat to all project collaborators at once.

Need to ask a quick question or clarify a point on a project? While working in Office Online, simply click on the Skype icon in the top-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 to a customer.

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



Two things that you probably didn't know about SharePoint

1. Never overwrite an edit.

When a document has been "checked out", no other person can make edits to the document until it has been checked back in. To enable the "check out" feature for 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 by 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 in 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.



Three 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 that your team is up to date all the time?

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



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

The Discovery feed and a smarter search feature help 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-to-one dialogue or 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 that 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-to-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 recognises 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 four views:

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

Give and take back control.

Open up or close 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 Telephone 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.



Six 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 organised 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 "favourites".



Sway

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

Four 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.



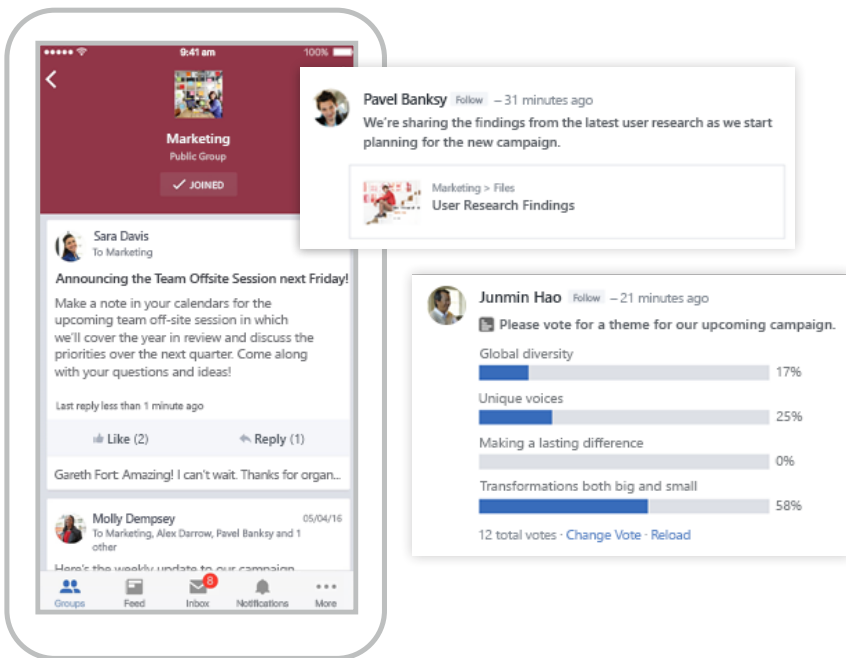
4. **PowerPoint presentations:** Integrate a finished presentation by selecting the PowerPoint file in OneDrive and clicking "Embed". Then, copy the HTML code and paste it into your Sway. Select "Preview" to watch and interact with the presentation.



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

1. Make announcements to the group.


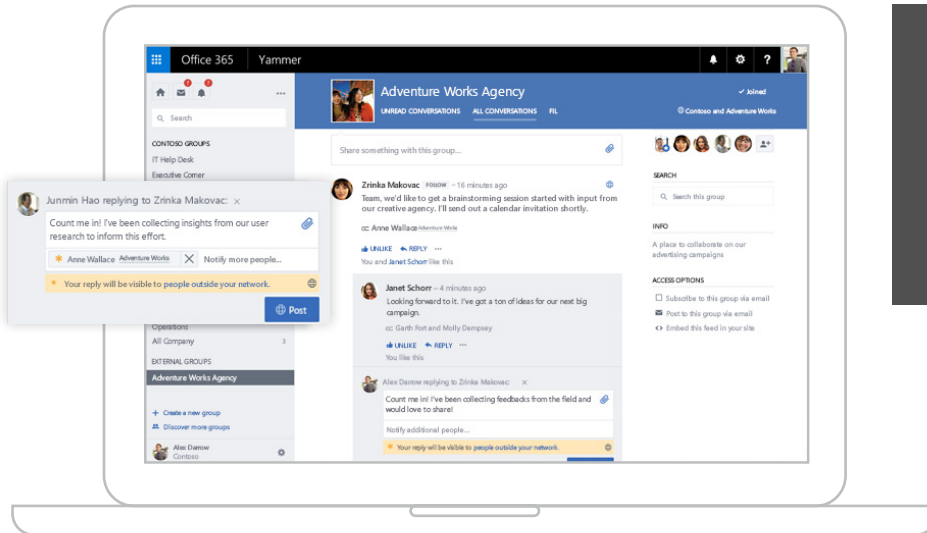
The "Announcement" feature is a perfect way to share information with a wide range of people at once. By posting an announcement, group members will see it in two places: Their Home Feeds and Inboxes.



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 that is already located within the app.

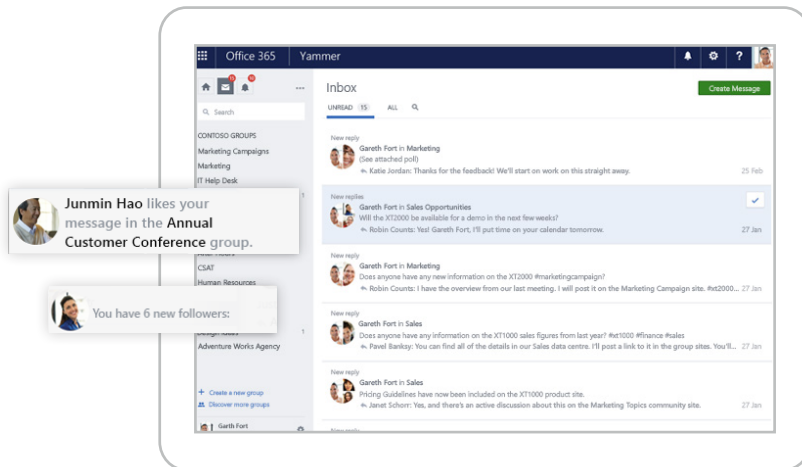


PRO TIP

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, prioritise 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 five or a Fortune 500, enterprise-level security and compliance standards are non-negotiable when 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 three 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 the US for the medical industry (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 to 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 licence 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 that your emails will never be scanned for advert-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 customisable 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 centres, 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 organisation. Prioritise security across the board with protection against external threats, and defend with internal access controls.

- To deal with external threats and unknown risks, Exchange Online **Advanced Threat Protection** comes included with 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 preventing 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 the email flow.





Share files safely and 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 (with SharePoint Online). Purchase SharePoint Online as a standalone offering or as part of an Office 365 suite and enable 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 that you rely on.

Three 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 synchronisation 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 custom 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 unauthorised user access by setting up policies that ensure that company emails and documents can only be accessed on phones and tablets within your Office 365 service. If a device with Office 365 installed is lost or stolen, administrators can wipe the device clean, regardless of whether it was owned by an employee or the company. Furthermore, employee-owned devices can only have company information wiped, 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 forwards 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 organised way for you and your employees to edit and share files with each other, in order to promote greater productivity and efficiency.

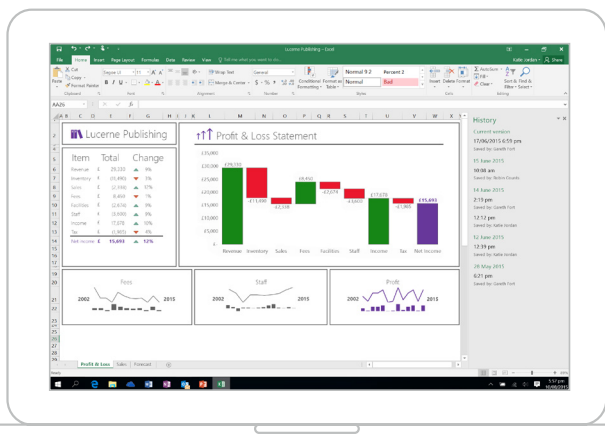
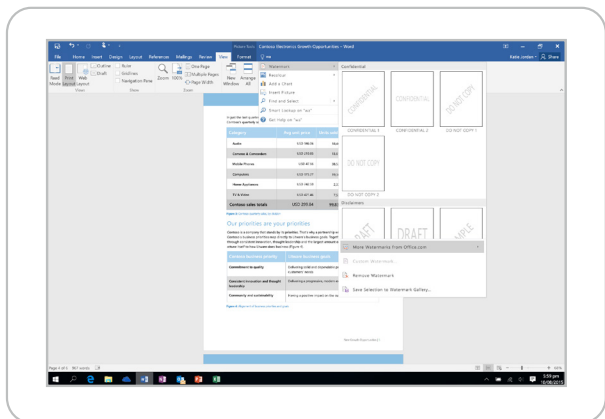
From editing in Word to sharing with your employees, you'll be able to manage and collaborate on shared documents without interruption. When all of your tools are talking to each other, it makes it easy for you to work on projects in real time with your team, from virtually anywhere.

The top time-saving features in Word and Excel



"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 that you want to use or actions that you want to perform.



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

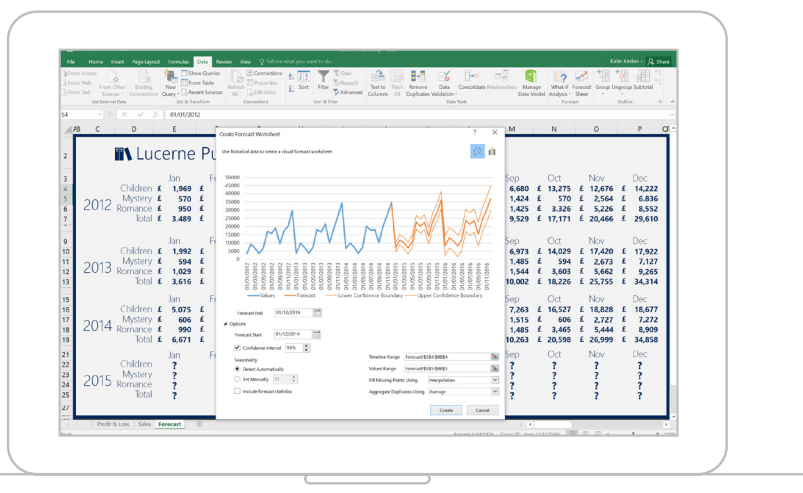


One-click forecasting

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 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 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 organisational procedures. Running a SharePoint workflow is easy. Those using it can choose the workflow type that they want, specify the options that will work best in the situation and let the workflow take over.

There are five pre-programmed workflow types:

1. Approval workflow.

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

2. Feedback collection 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. Signature collection workflow.

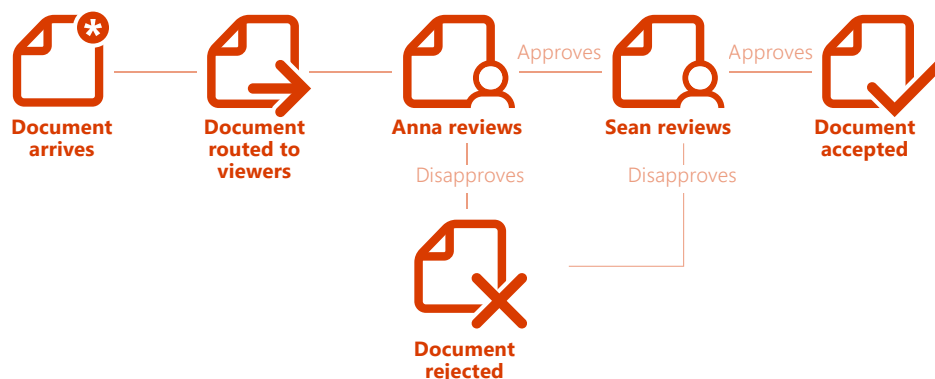
Route the Microsoft Office document to designated people for their digital signatures.

4. Three-state workflow.

Track the status of a list item through three 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.

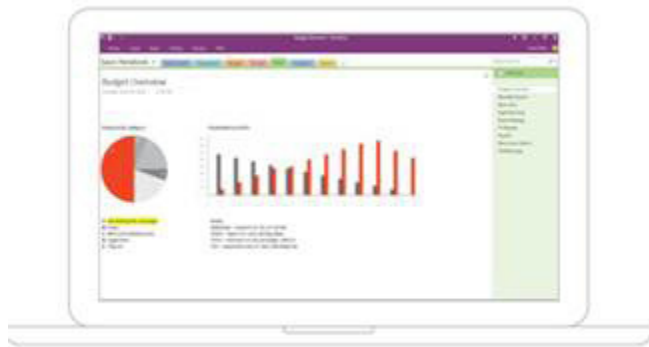
Specifically designed for publishing sites, this workflow automates content routing to subject matter experts and stakeholders for approval and review.





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 that they've captured 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 selecting 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 have opened the notebook, anyone with permissions can add meeting notes, all at the same time. OneNote syncs automatically, and everyone's notes appear.

Chapter 6

Insights unleash the power of data



From customer-generated data to the data on 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 analyse, then visualise data in beautiful presentations and compelling visuals that can then be shared amongst 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 "Data Sets" section in the left pane, select the ellipses that 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 can 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 visualisations from specific questions that you ask.

- **Start in the dashboard** for the data set that you want to analyse.
- **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 data set, 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 be in your dashboard.
- **Change the title or subtitle** by hovering over a tile, clicking on the pencil icon and opening the tile's details.



MICROSOFT MYANALYTICS

Personal insights help employees to work smarter

Using Microsoft MyAnalytics, employees can see how they're spending time across four 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 reading 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?

Scaling for success starts with the right business apps to get the work done. Better work is truly 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 organisation, it's time to: Take a **Guided Tour**