



MICROSOFT 365

Collaboration Tools for Newbies

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The new way to get things done!

Your Complete Office in the Cloud

Microsoft 365 offers access to a suite of popular productivity tools such as Word, Excel, PowerPoint, Outlook, SharePoint, Teams, OneDrive, Planner, Lists and many more. With Office 365, users can access and use these tools from anywhere with an internet connection, collaborate with others in real-time, and store their files securely in the cloud.



Office 365 is a popular choice for individuals and organizations of all sizes who need reliable and efficient productivity tools for work or personal use.

How can this book help a newbie to learn quickly about Office 365?

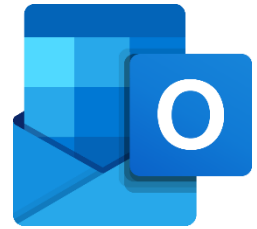
If you're new to Office 365 then it's for you, this book can help you to quickly learn about collaboration tools.

Be more productive.

Office 365 offers a wide range of productivity tools that can help you work more efficiently and effectively.



Getting started with Outlook.



Microsoft Outlook is the preferred email client used to access your email account.

Organizations can also integrate Outlook with Microsoft's SharePoint platform to share documents, project notes, collaborate with colleagues, send reminders, schedule meetings, assign tasks to employees.

Here are some of the key collaboration features available in Outlook:

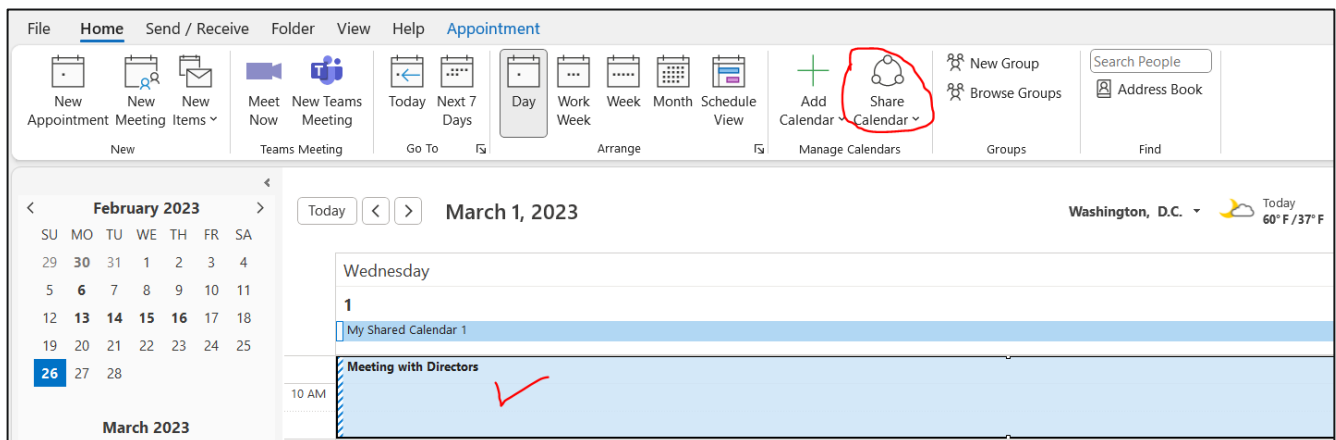
Shared calendars: With Office 365, you can share your calendar with others, allowing them to view your schedule and book meetings with you.

You can also view the calendars of others, helping you to schedule meetings and coordinate your work.

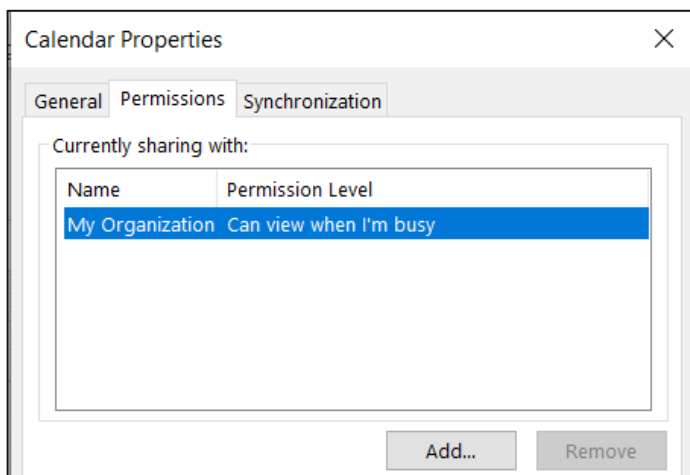
Demo

Share your calendar:

1. Select Calendar > Share Calendar.
2. Choose a calendar to share.
3. Select Add, decide who to share your calendar with, and select Add.
4. Select OK and you'll see the added people with a default permission level.
5. Choose a name, select the access level to give, and select OK.



Click +Add button and select user.



Tip! You can also share calendar with external users like Gmail etc.

Next select permissions.

Permissions

- ☐ Can view when I'm busy
- ☐ Can view titles and locations
- ☒ Can view all details

Gmail user can copy “this URL”.

Accept and view calendar

Having trouble viewing the calendar? Try adding an Internet calendar and providing [this URL](#).

Finally! The calendar will appear in Google.

Calendar Today < > March 1, 2023

Create

March 2023 < > GMT+05

S	M	T	W	T	F	S
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

WED
1

My Shared Calendar 1

8 AM

9 AM

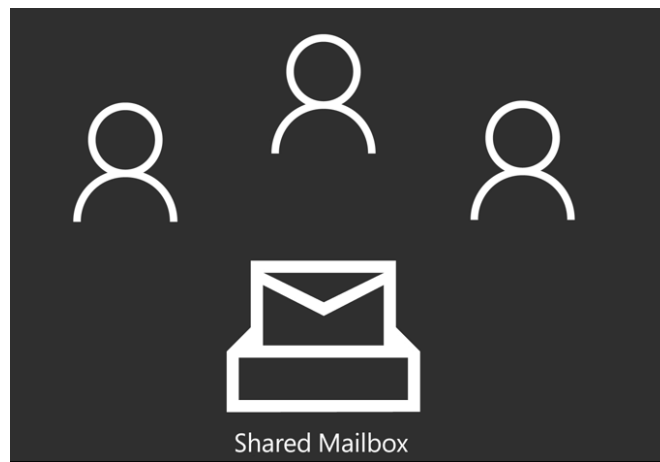
10 AM

Meeting with Directors
9:30 – 11am

Shared mailboxes:

A shared mailbox is a mailbox that multiple users can access and use to send and receive email messages.

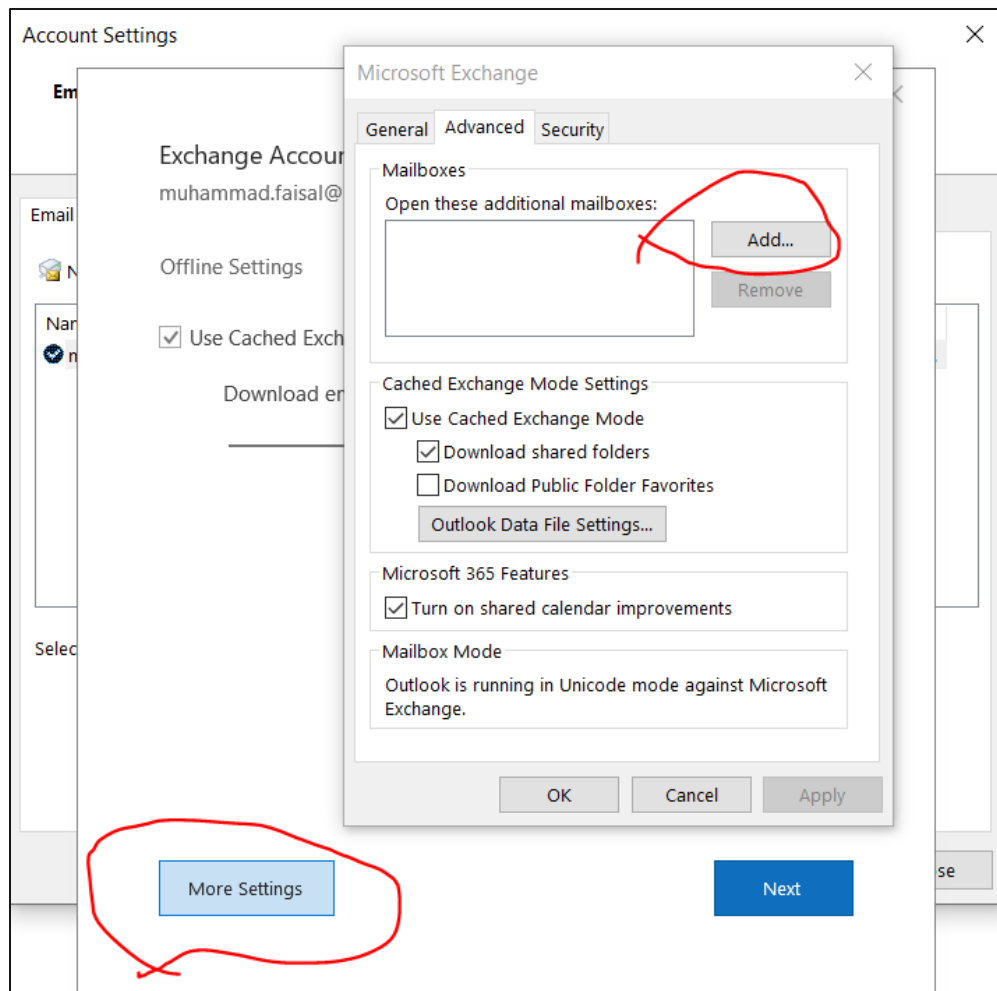
This can be useful for teams that need to manage a shared inbox, such as a customer service team.



Demo:

Open and use a shared mailbox in Outlook.

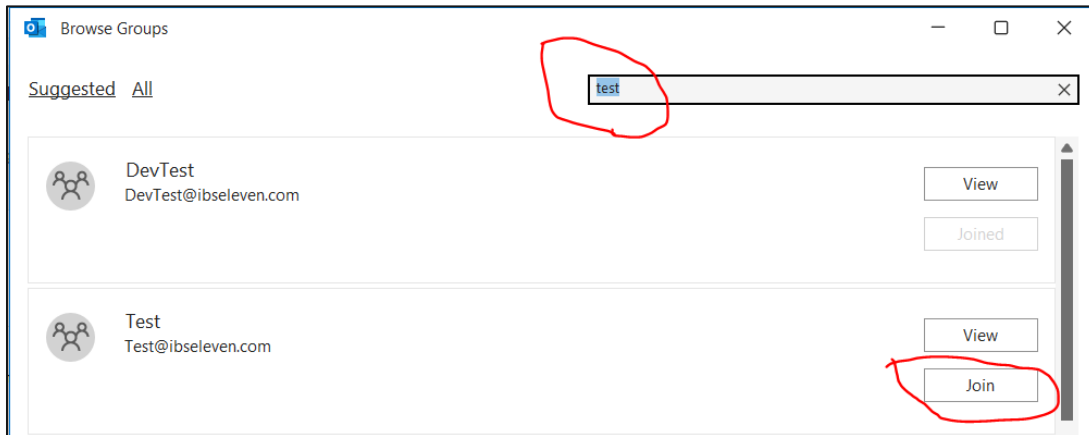
1. Open Outlook.
2. Choose the File tab in the ribbon.
3. Choose Account Settings, then select Account Settings from the menu.
4. Select the Email tab.
5. Make sure the correct account is highlighted, then choose Change.
6. Choose More Settings > Advanced > Add.
7. Type the shared email address, such as info@contoso.com.
8. Choose OK > OK.
9. Choose Next > Finish > Close.



Groups:

Outlook in Office 365 includes a feature called Groups, which allows you to collaborate with a group of people on shared email messages, calendars, files, and notes.

Groups can be useful for project teams or departments that need to work closely together.



Tip! Outlook Groups are backed by Microsoft 365 Groups.

Type of group	Security group	Microsoft 365 group	Mail-enabled security group	Distribution group	Shared mailbox
	Used for granting access to resources and for managing devices.	Used for collaboration. Includes a group email and shared workspaces.	Includes the ability to send mail to a group. Cannot be dynamically managed. Cannot contain devices.	Used for sending notifications to a group of people.	Used when multiple people need to access the same mailbox, such as a support email address.
Where groups can be created	Azure AD				
	Microsoft 365 admin center				
	Exchange admin center				
	Outlook				
	Teams				
	SharePoint				
	Planner				
	Yammer				
	Stream				
	Power BI (classic)				
	Roadmap				
	Project for the web				

Online meetings:

Outlook in Office 365 includes a feature called Microsoft Teams, which allows you to host online meetings with colleagues or partners.

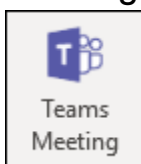
Teams include video conferencing, chat, screen sharing, and other collaboration features.

Setting up an online meeting in Outlook

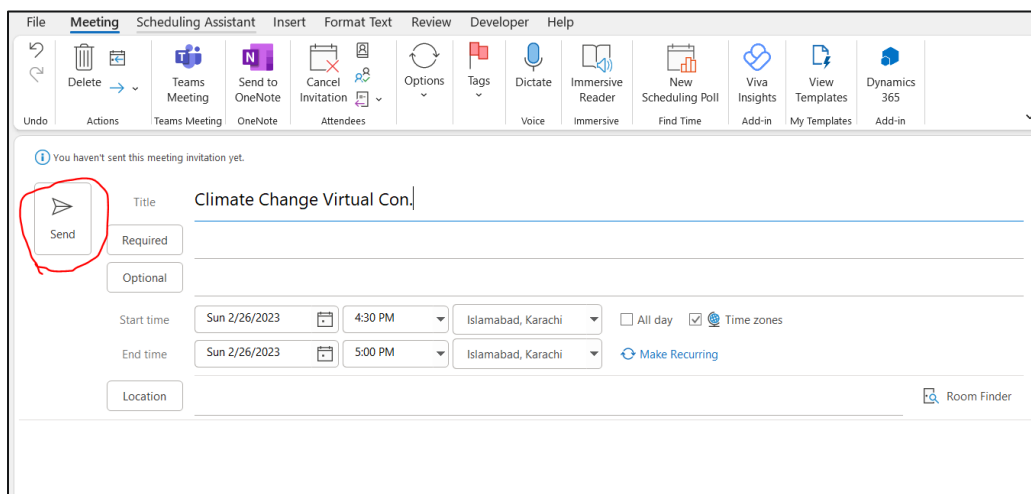
1. Open Outlook and go to your calendar.
2. On the Home tab, select New Meeting.



3. Add online meeting information by selecting Teams Meeting or Skype Meeting.

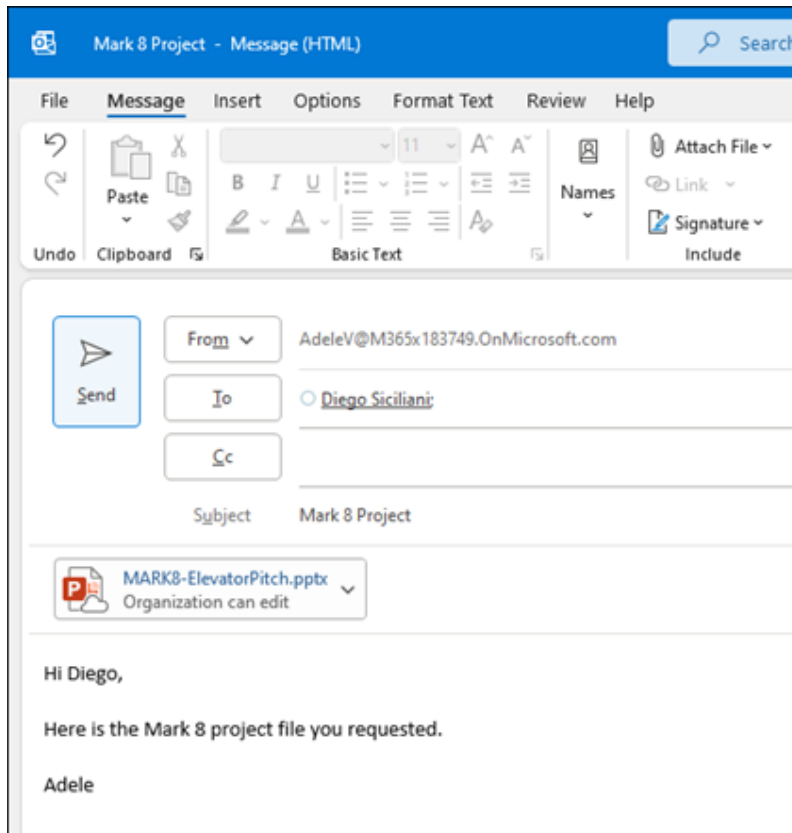


4. Fill in the meeting information as needed, including meeting attendees.
5. Select Send.



Tip! To find a time that works for everyone, select Scheduling Assistant on the Meeting tab.

Another useful thing is that you can directly attach your documents from [OneDrive for Business](#) which saves time.



Overall, Outlook in Office 365 offers a range of collaboration features that can help you work more efficiently with others.

By taking advantage of these features, you can streamline your communication and collaboration, and get more done as a team.

OneDrive for Business



OneDrive for Business is a cloud-based file storage and sharing service included in Office 365 that offers several collaboration features.

- Access and edit your files from all your devices (1 TB Storage Space).
- Share inside or outside your organization.
- Work together in real-time on Office documents.
- Quickly find the files that matter to you.
- Keep your files protected and backed up.

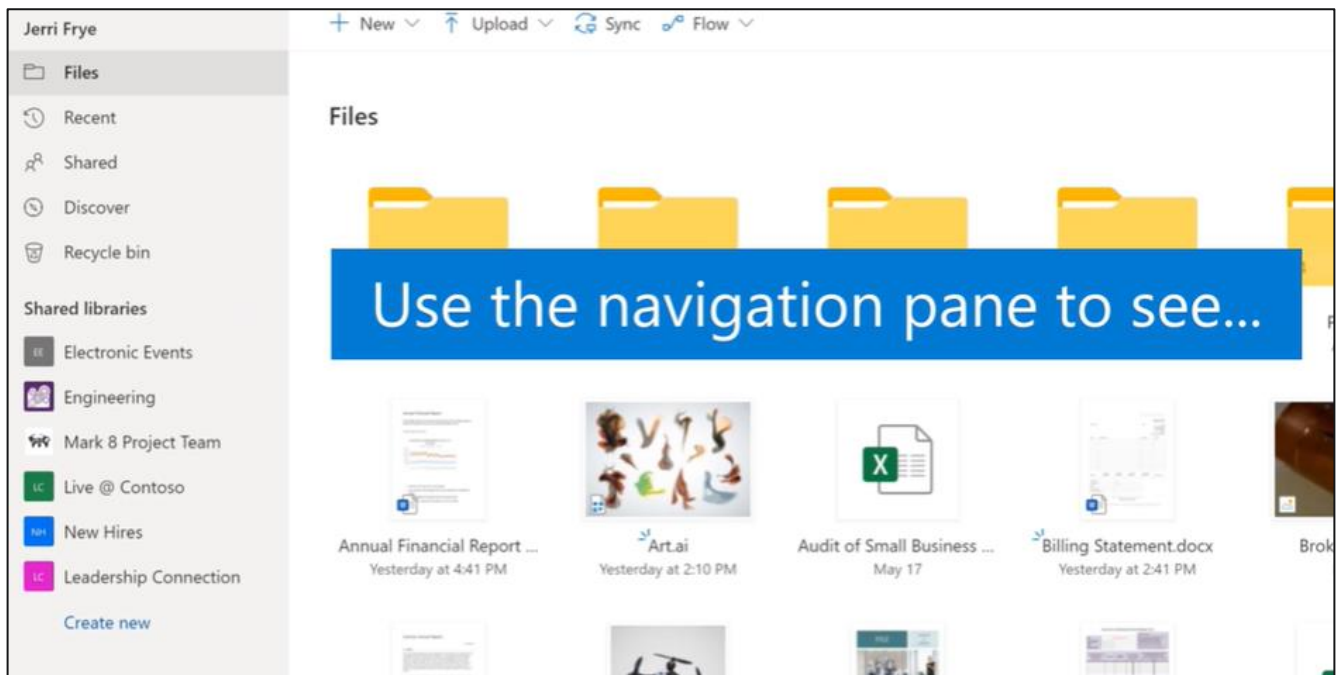
OneDrive for Business gives you one place to store, share, and sync your work files.

- File sharing
- Co-authoring
- Version control
- Mobile access
- Integration with other Office 365 apps

In OneDrive, there are a few basics to learn that will help you find files and folders and get information about them.

Navigation pane

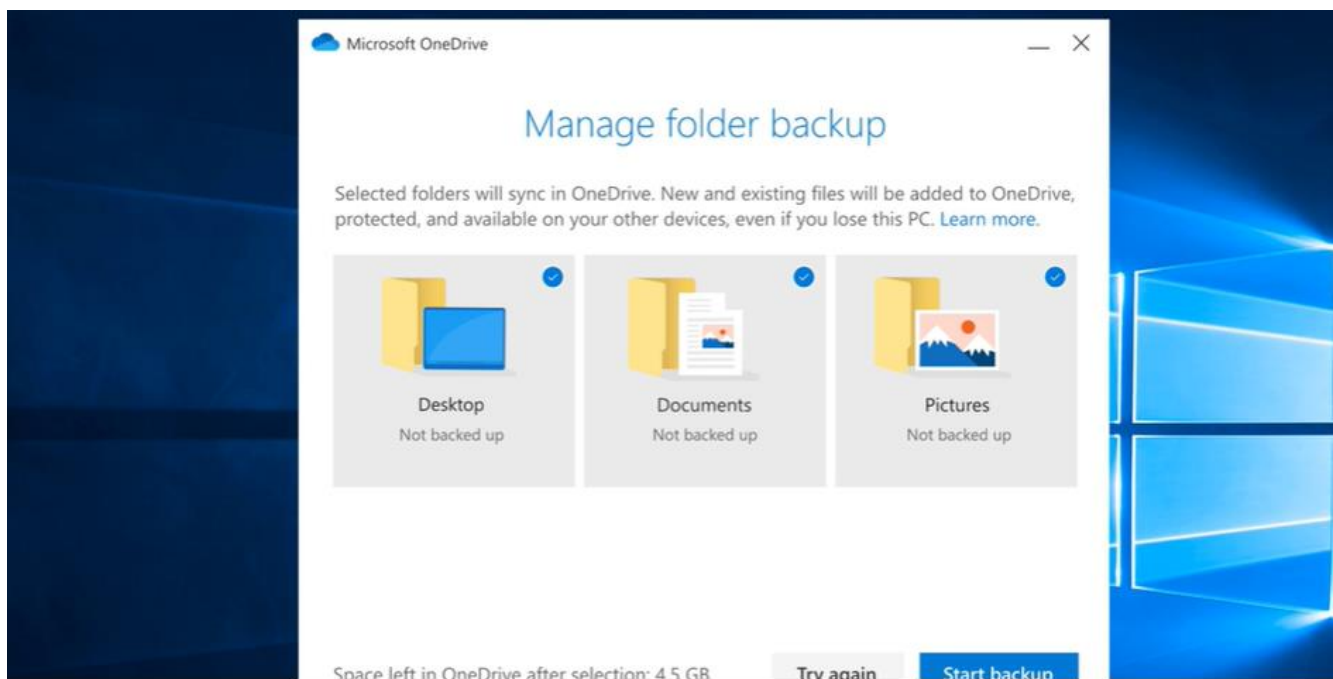
- **Files** is your home base where you can find all your files and folders.
- **Recent** shows the files you worked on last.
- **Shared** are the files others have shared with you and the files you've shared with others.
- **Recycle bin** shows your deleted files and folders (Retention for Deleted Items = 30 Days).
- **Shared libraries** show files in recently visited Teams and SharePoint sites.



OneDrive for Business (Sync & Backup)

You can back up your important folders on your PC (your Desktop, Documents, and Pictures folders) with OneDrive, so they're protected and available on other devices.

1. Select the blue cloud icon in the Windows notification area, select Help & Settings > Settings, then Backup > Manage backup.
2. Select the folders that you want to back up.
3. Select Start backup.



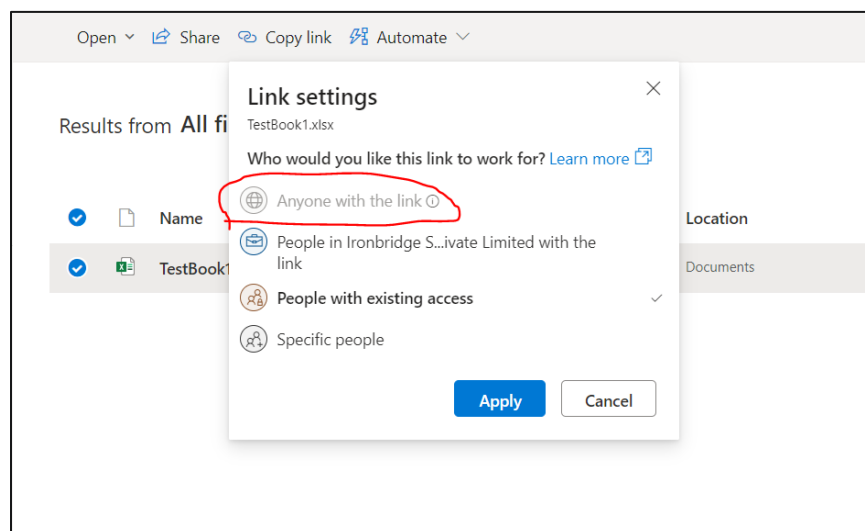
OneDrive for Business (Share Files & Folders)

When you use Microsoft 365 Business and save your files to OneDrive or SharePoint, sharing your files is the same wherever or however you work.

Share a file or folder:

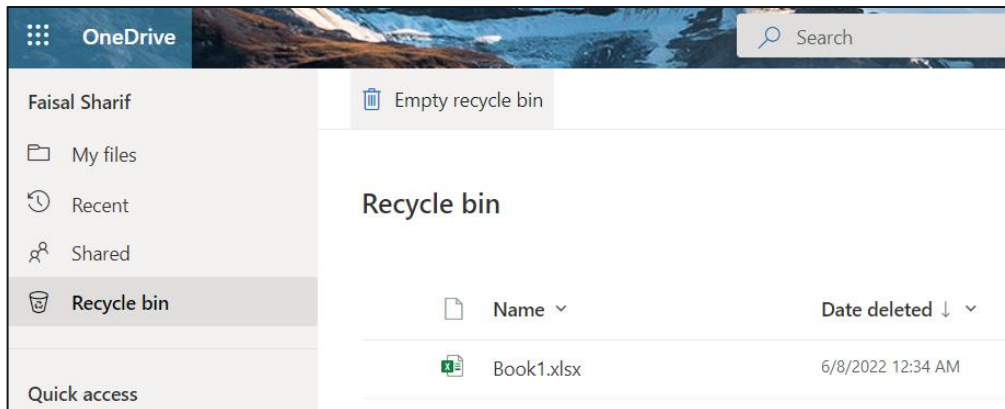
1. With a file open or a file or folder selected, select **Share**.
2. If you are working on your desktop and the file hasn't been saved to OneDrive or SharePoint, select a location you want to upload your file.
3. Select the down arrow to choose permissions for the link you will be sharing. Options include:
 1. **Anyone** (if your organization allows it)
 2. **People in your organization**
 3. **Specific people**
4. Select **Apply** to save the permissions.
4. Enter the name or email address of people you want to share with.
5. Type a message.
6. Select **Send**.
7. Or you can select **Copy Link** and send the link in an email or add it to a file.

Tip! If external sharing is disabled by your admin then you won't be able to share with external users.

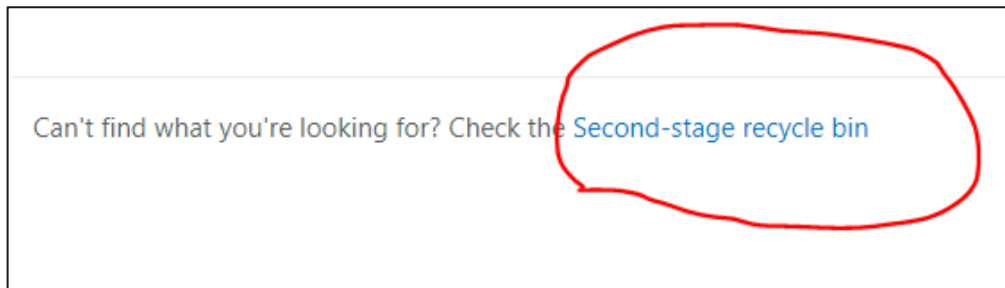


OneDrive for Business (Restore Delete Items)

Restore Items from Recycle bin (Kept for 30 Days)

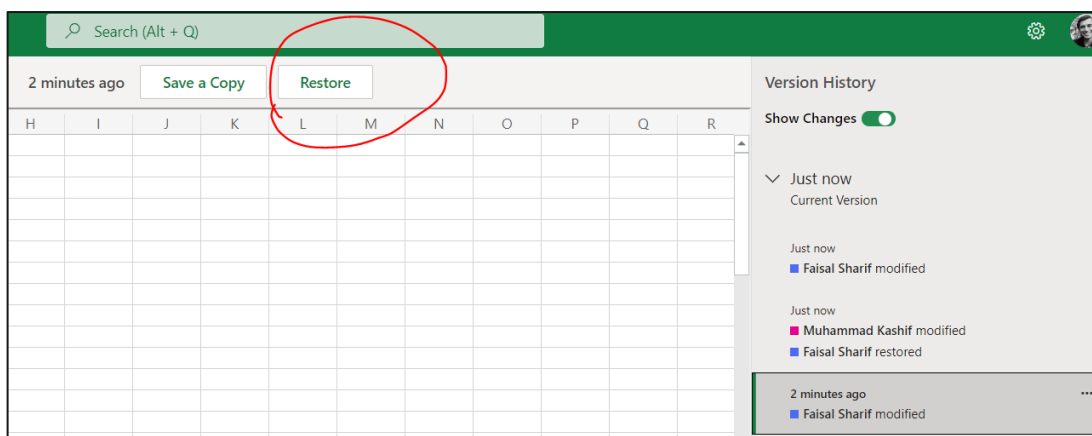


Restore Items from Second Stage Recycle bin.



Tip! To restore items from permanently deleted items contact your admin.

You can view changes, restore document versions.



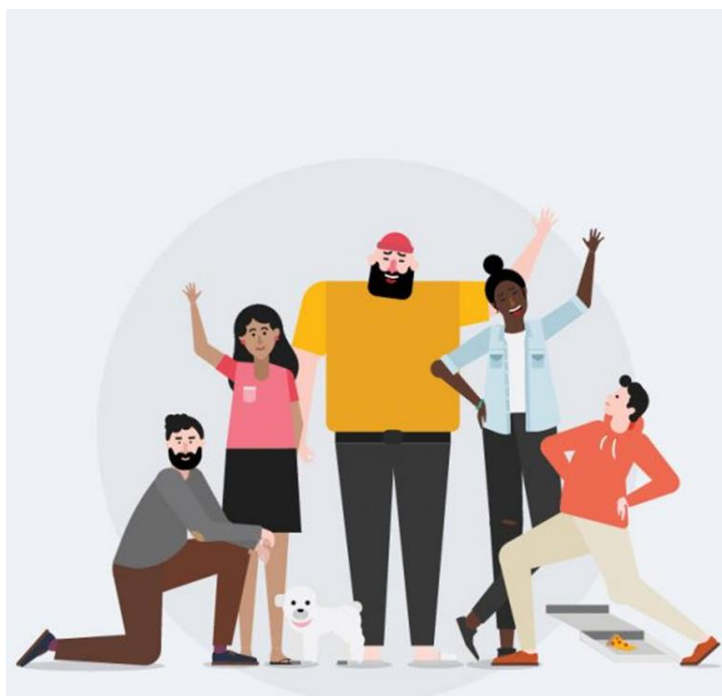
Microsoft Teams



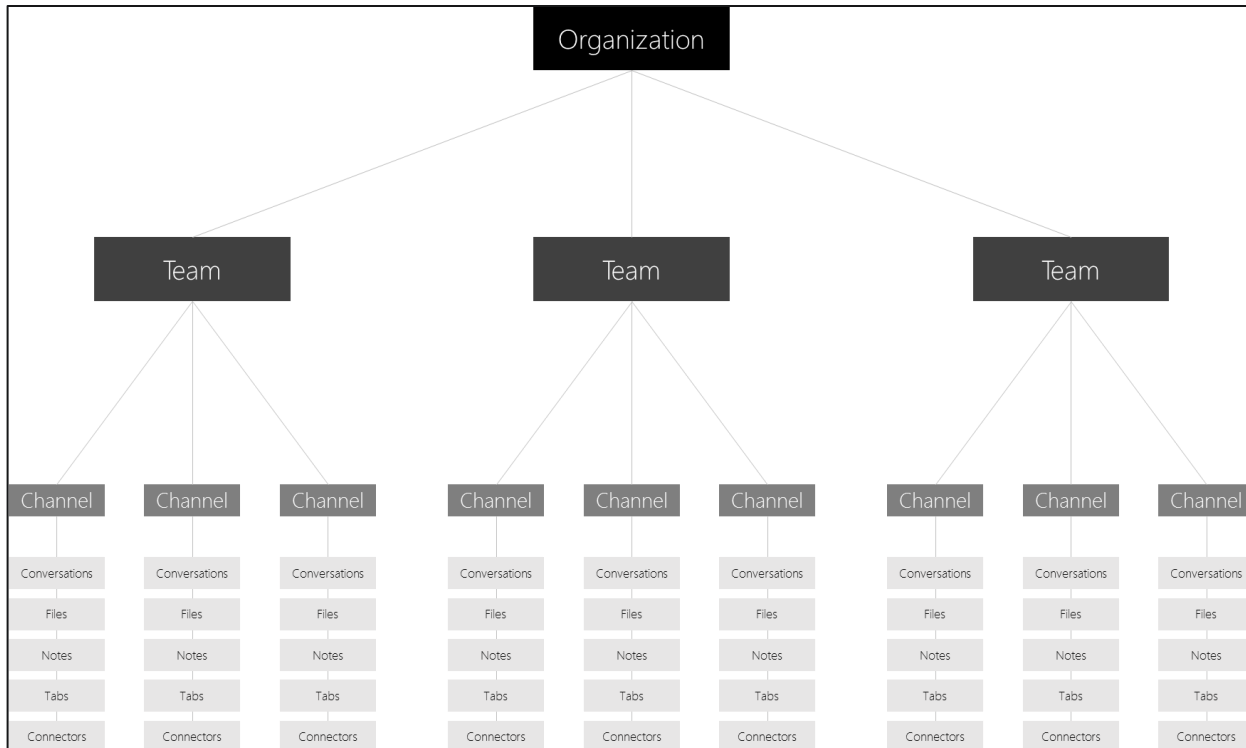
Microsoft Teams is a collaboration app built for hybrid work, so you and your team stay informed, organized, and connected – all in one place.

Explore how Teams can help you and your colleagues come together no matter where you are:

- **Chat** - Message someone or a group to talk about work, projects, or just for fun.
- **Teams** - Create a team and channels to gather people together and work in focused spaces with conversations and files.
- **Calendar** - Connect with people before, during, and after a meeting so prep and follow-up are easy to find. This Teams calendar syncs with your Outlook one.
- **Apps** - Find familiar apps and explore new ones to simplify, customize, and manage how you work.



Microsoft Teams Structure



Organization

All teams created by employees in your organization are associated with your Office 365 tenant. You can designate all employees or a subset of employees with the ability to create teams, using Office 365 Groups.

Team

A team is designed to bring together a group of people that work closely to get things done. Teams can be dynamic for project-based work (E.g. launching a product, creating a digital war room), as well as ongoing, to reflect the internal structure of your organization (E.g. departments and office locations).

Channel

A channel helps organize the team's conversations, content and tools around a specific topic. Channels can be organized by topic (events), discipline (design), project (launch) or just for fun (fun stuff). Team owners can create channels, and enable team members with the ability to create channels, as needed.

Memberships and Roles

Three roles in Teams:

Owner: person who creates the team or assigned the role.

Responsible for managing team-wide settings and membership, including invitations.

Team member: the people that have been invited to join the team.

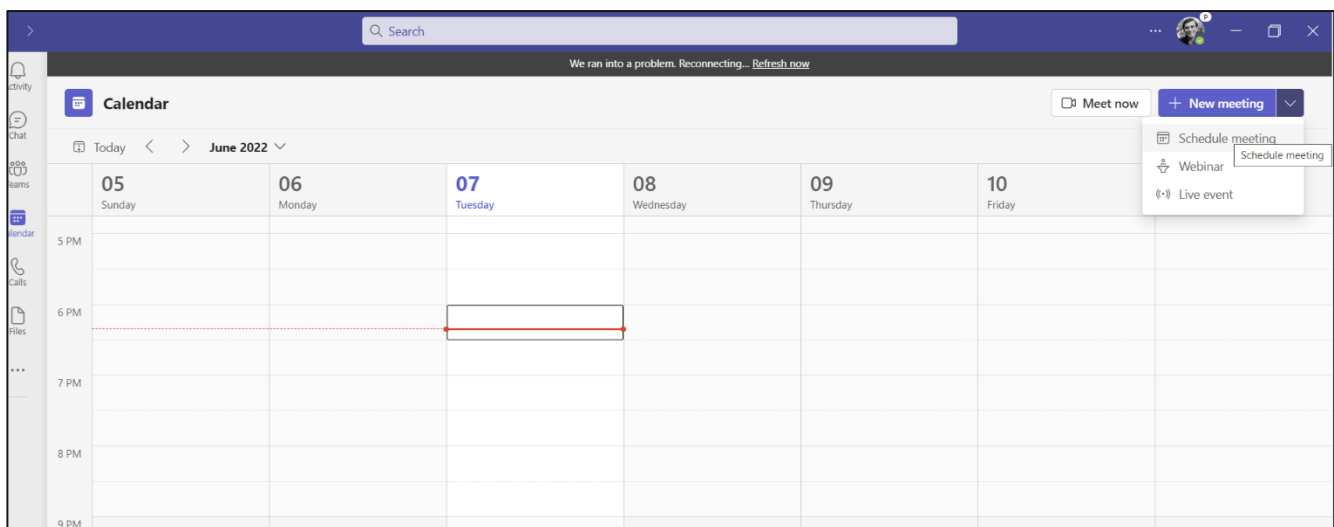
Guests: Office 365 users who are outside of your tenant can be added to the team by team owners.

Team Meetings

Meetings are an essential place where work happens in Microsoft Teams – whether you're engaging an important client or catching up on a group discussion.

Create a meeting and discover how to adjust your settings before you join one:

1. Go to your **Calendar** and select **New meeting**.
2. Add people to the invite such as colleagues in your organization or external guests.
3. Add a location or make it an online meeting.
4. Type an agenda.
5. Check **Scheduling Assistant** to make sure your proposed time works for everyone.
6. Choose to automatically record a meeting in case someone can't make it and select **Send**.
7. Join a meeting from an email, a channel, a mobile device, or your calendar.
8. Choose your meetings settings from the pre-join screen, and select **Join now**.



Join a Teams meeting from the app

1. From your **Calendar**, select **Join** on a meeting before it's started, or one that's in-progress.
2. Turn on your camera, select **Background filters**, and choose how you'd like to appear:
 1. Select a custom background.
 2. Select **Blur**.
3. Choose your audio settings.
4. Select **Join now**.

Join a Teams meeting on the web

Don't have the Teams app? You can still join a Teams meeting.

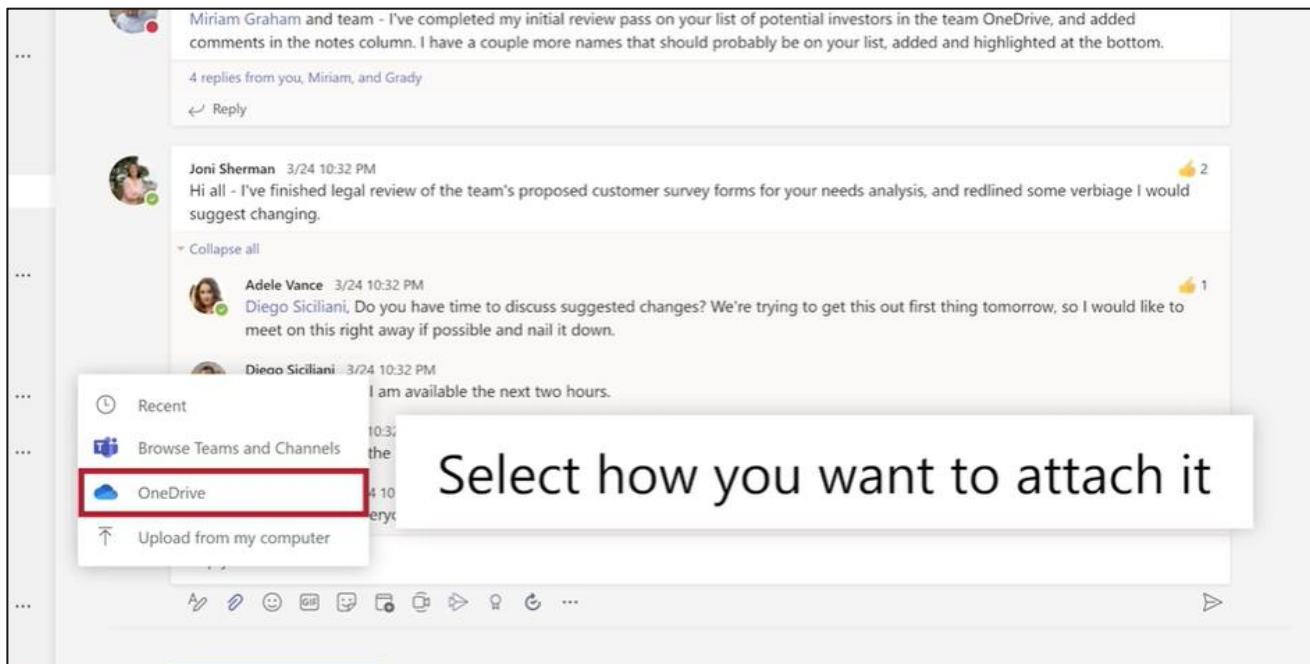
1. In your email invite, select **Click here to join the meeting**.
2. You can also use a dial-in number and conference ID from the email to call in.
3. You have three choices:
 1. **Download the Windows app**: Download the Teams desktop app.
 2. **Continue on this browser**: Join a Teams meeting on the web.
 3. **Open your Teams app**: If you already have the Teams app, go right to your meeting.
4. Type your name.
5. Choose your audio and video settings.
6. Select **Join now**.
7. Depending on meeting settings, you'll get in right away, or go to a lobby where someone in the meeting will admit you.

Upload and Share Files

Upload and share files to work with others in Microsoft Teams.

Attach a file from a channel

1. In a channel, under a message box, select **Attach files**. Select how you want to attach it:
 1. **Recent**: Attach recent files.
 2. **Browse Teams and Channels**: Attach files from a team or channel.
 3. **OneDrive**: Select single or multiple files from a OneDrive for Business account.
 4. **Upload from my computer**: Upload files from your device.
2. Select a file > **Open**.
3. If you'd like, add a message and @mention someone in your post.
4. Select **Send**.



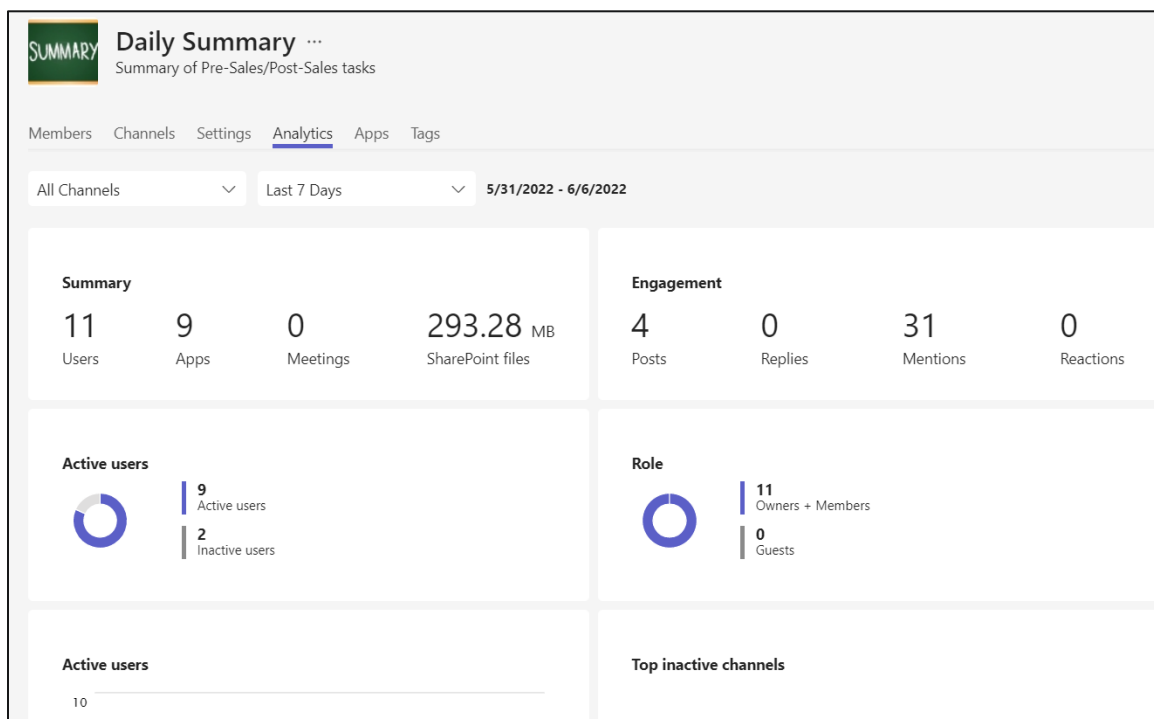
Usage reports for Microsoft Teams

Microsoft Teams user activity:

Last activity date, channel messages, chat messages, calls, meetings

Microsoft Teams app usage

Windows, Mac, Web, iOS, Android phone, Windows Phone



SharePoint



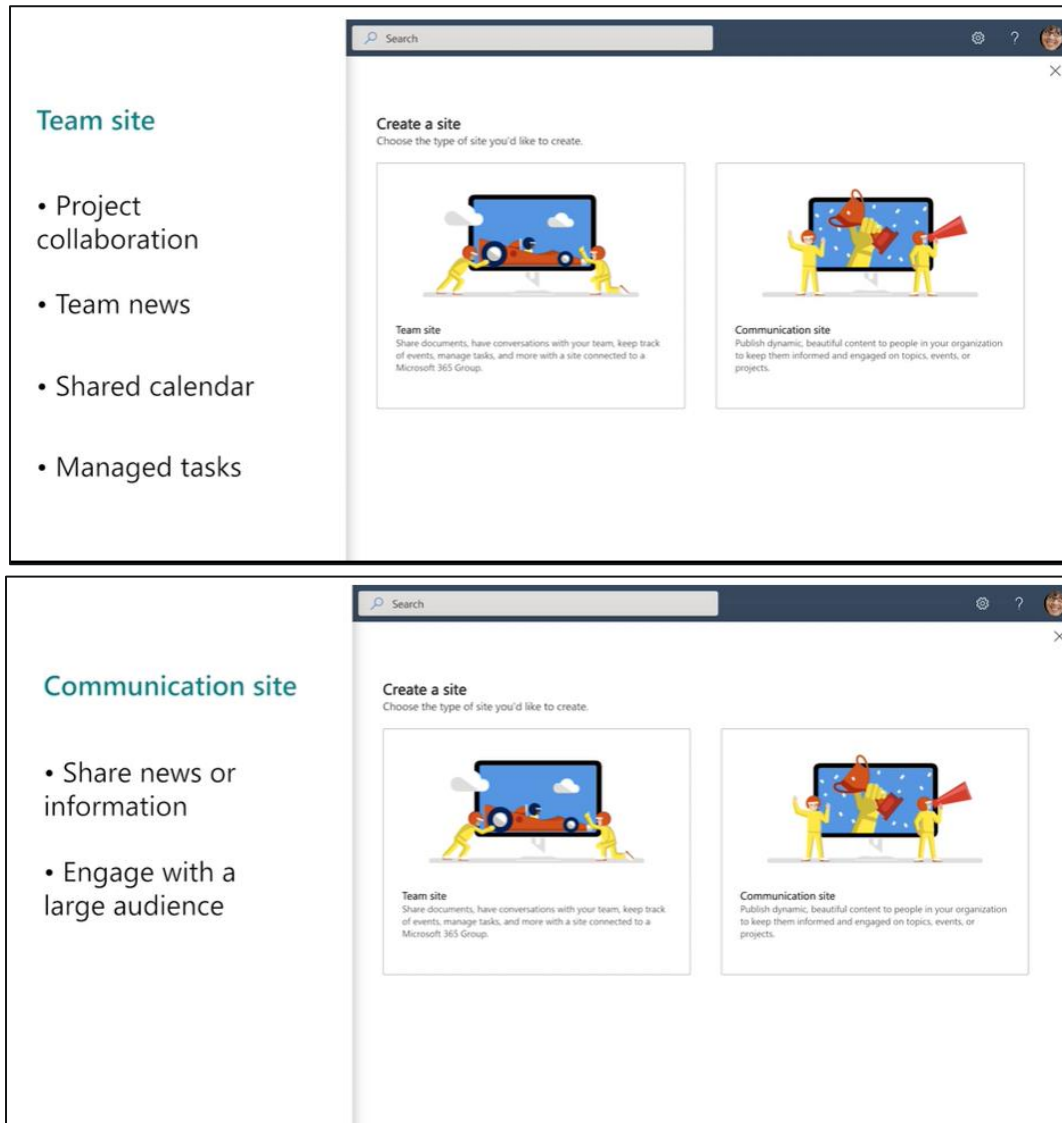
Overview

With Microsoft SharePoint on your PC, Mac, or mobile device, you can:

- Build intranet sites and create pages, document libraries, and lists.
- Add web parts to customize your content.
- Show important visuals, news, and updates with a team or communication site.
- Discover, follow, and search for sites, files, and people across your company.
- Manage your daily routine with workflows, forms, and lists.
- Sync and store your files in the cloud so anyone can securely work with you.
- Catch up on news on-the-go with the mobile app.

Create a Team or Communication Site

Create a team site to connect people on a team, or create a communication site to reach a broader audience across your company.



Site Permission Levels:

1. Site Owners
2. Site Members
3. Site Visitors

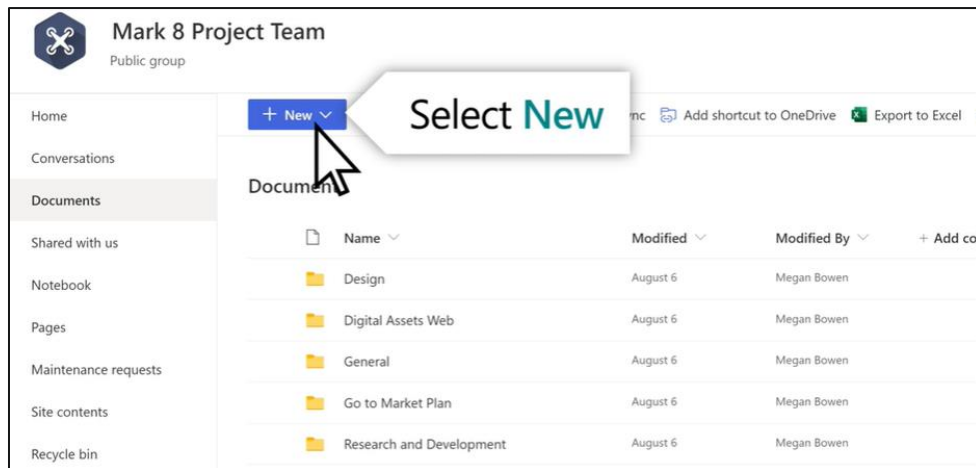
Custom Groups with Desired Security Roles (Edit, Contribute, Full Control, Restricted View)

Create and Share Files in Library

In a Microsoft SharePoint document library, create a new file, upload your own, and then share it with others.

Create a file:

1. To create a new file, select **New** and the file type you want.
2. When the new file opens in your browser, add text, images, and more to your file and it'll automatically be saved to the document library.
3. Select down arrow next to the file name to rename the file or select the site name to see the new file in your document library.



Upload a file:

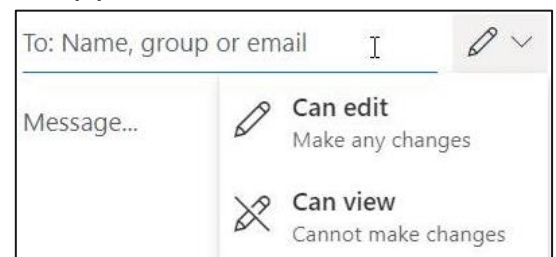
From your computer, select the file you want and drag it into the document library.

Share a file:

Select the file you want to share so a green checkmark appears.

Select Share.

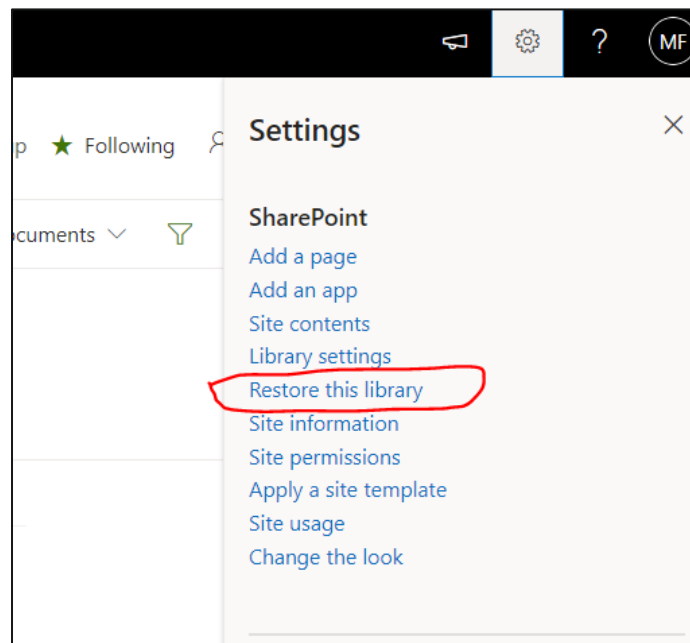
Select an option to share your file:



Restore Document Library

Deleted Items can be restored from:

1. Site Recycle bin.
2. Second Stage Recycle bin.
3. Third Stage Recovery.



Tip! Deleted site collections are retained for 93 days. After 93 days, sites and all their content and settings are permanently deleted, including lists, libraries, pages, and any subsites.

Planner

Office 365 Planner is a tool that allows teams to organize and collaborate on projects.



It is a visual, web-based planner that allows users to create and manage tasks, assign them to team members, and track progress in real-time.

Welcome Faisal Sharif

Planner in your pocket

Capture tasks, update progress, continue conversations and more

Get the app

Pinned

Follow up

Follow up

22
Tasks left

Not started	22
In progress	0
Late	0
Completed	11

Boards: Planner uses boards to represent projects, with each board containing a list of tasks. Users can create multiple boards for different projects, and switch between them easily.

Tasks: Each task in Planner can include a description, due date, and assigned team member. Users can also add comments, attachments, and labels to tasks.

Checklists: Planner allows users to create checklists within each task, helping to break down larger tasks into smaller, more manageable sub-tasks.

Progress tracking: Planner includes a dashboard that allows users to see the progress of each task, and the overall progress of the project. Users can also receive email notifications when tasks are completed, or deadlines are approaching.

Links & Resources

Explore more here:

[Microsoft Collaboration Tools](#)

Outlook training

Outlook for Microsoft 365, Outlook 2021, Outlook 2019, Outlook 2016, Outlook 2013, [More...](#)

Windows



Quick Start



Set up and customize



Create and send email



Manage email



Organize your inbox



Contacts and tasks



Calendar