



MODERN WORKPLACE

WORK SMARTER WITH
MICROSOFT OFFICE
365

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Work Smarter not harder, what does that mean?

We've heard the phrase, but in the context of using IT Applications, how does it apply to us?

Here's an excerpt from an online article published in March 2019 by Dan Shelton, Director of Product Management at US Company Zscaler:

How Office 365 migration changes the way businesses operate. One of the most tragic things in the world of IT is when people adopt a new technology but don't adopt a new way of working. The reason this is a problem is that almost every piece of enterprise software is much more than the application itself. It's also a mindset, a way of working that uses the software to create business value.

You can see a classic example of the importance of mindset as organizations migrate to Office 365. When people use the traditional Office suite, they do so in the way that it was intended to be used—on individual PCs or laptops where the programs run locally and where the user can have high-quality interactions with the various Office applications. This has all been well and good, and for decades we've enjoyed the benefits of that experience.

But now, with Office 365, Microsoft has been able to recreate the experience of using Office software with a combination of web-based and PC- and laptop-based software along with new assets resident in the cloud. Because the assets are in the cloud and surrounded by new forms of communication technology, it's possible to work in completely different ways.

However, these new ways of working have to be recognized and embraced to make the most of Office 365's powerful productivity and collaboration tools.



To help understand the change in mindset from the traditional way of working with Office software, consider these two different scenarios.

Cast: Jake, a Sales Executive. Simon, a Consultant. And Hannah, a Field Service Engineer.

Scenario 1; Hannah is working onsite at a client, installing a new piece of equipment. Hannah has a query about the installation specs, and needs to review the documentation.

Using Teams, Hannah can have a text chat or video call with her colleagues back at the office on her Android phone. They set up an Installations Team within Microsoft Teams. Hannah's colleagues share the install documentation in the Files section of the Team, which Hannah can see on her laptop.

A crucial piece of information appears to be out of date. Hannah video calls Simon, the consultant, who has the latest information. He has the updated file in SharePoint, so he sends the link to this file to Hannah through the text chat service. Using this link, Hannah is able to open the file securely on her tablet, and is able to seamlessly finish the installation.

Scenario 2; Jake, Hannah and Simon need to work on a proposal for a client. The deadline is in three days.

Jake is in Canada, and Simon is in the UK, and Hannah is in Germany.

In Teams, Simon has already set up a Project Team for the client, and using Microsoft Planner, has created and assigned tasks for the various stages of constructing the proposal, including getting costs from Jake, and engineering input from Hannah.

Jake goes in to Microsoft Planner, picks up his assigned task to create a quotation. This document is saved in SharePoint, and attached to the Plan. At the same time, Hannah has made notes on her laptop in OneNote, and the notes are shared to the Plan.

Simon can see the progress of each task as he drafts the body of the proposal, but would like concurrent input from Jake and Hannah.

With the Proposal document in SharePoint, Simon schedules a Teams meeting for the team in Outlook. Simon joins the meeting on his iPhone, while Hannah uses her Android Phone. Jake also has Teams open on his laptop, and Hannah has her trusty tablet again.

They all concurrently open the Proposal document. While Simon is writing the body, Hannah completes the section regarding technical issues, transferring details from her OneNote notes, while Jake fills in the costs, all at the same time. Each of them can see where the other is typing within the same document.

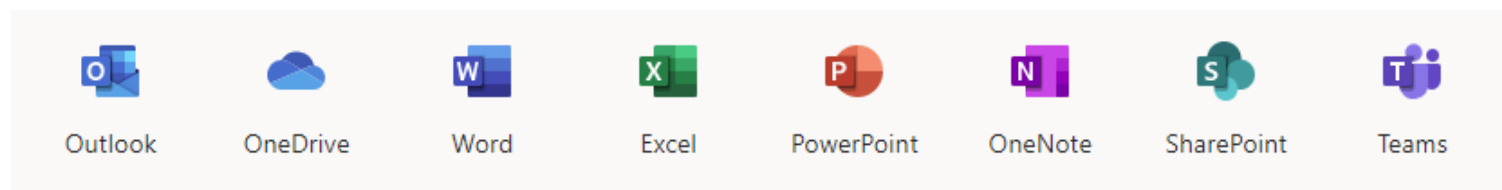
Once the Proposal is complete, the document is saved, and the link is shared to the Quality Control Department, who can open the file directly in SharePoint. When the document passes QC, Simon then sends the proposal to print, ready to present to the client.

At no point did any of the documents containing confidential client information and costings need to be e-mailed back and forwards with different amendments made.

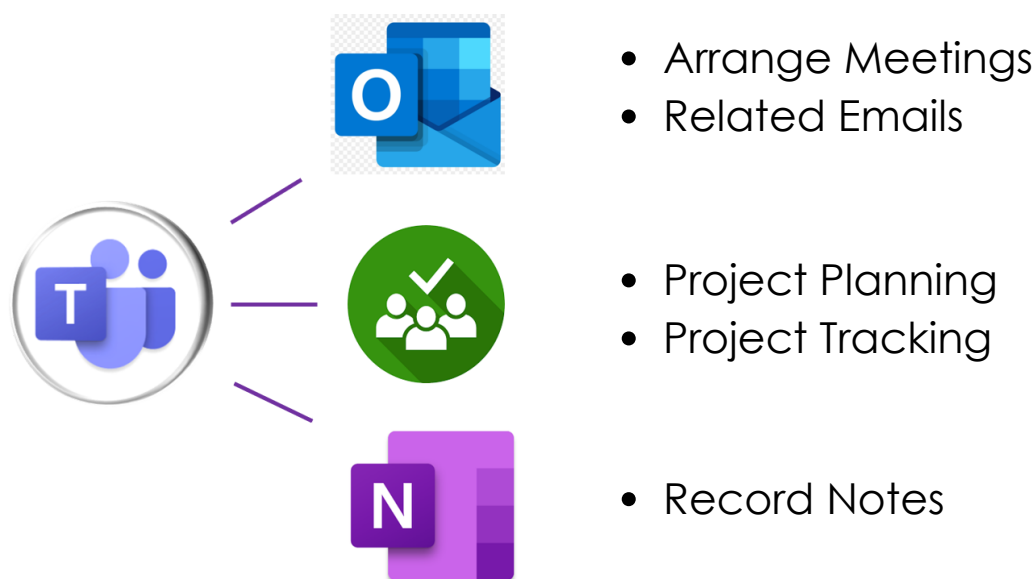
These are just two examples of the way that work patterns can change to be more efficient, thanks to the integration between different tools in Office 365.

Using Office 365 Tools to change the way you work

In the scenarios discussed previously, The team had the full range of Office 365 Tools available to them – these are some of the tools you may find you have available to you.



The Integration between these tools is key to using them in different ways to how you will have done in the past.



In this case, Teams was acting as the hub, through which various other tools were called upon;

- Calendars & meetings (Outlook)
- Create, share, and edit documents (SharePoint, OneDrive, OneNote)
- Video and Voice Calls between mobile devices (Teams Calling)
- Chat and Instant Messaging (Teams Chat)
- Project Management (Planner, Teams) Collaboration is key.

Microsoft Teams

Overview

Before getting started it's important to understand how Teams fits into the larger Office 365 picture, as creating Teams has some wider implications.

Every Team created will automatically create a matching Plan, SharePoint Team Site, Office 365 Group and shared OneNote.

While this brings a number of great benefits, such as shared documents and centralised team information, it can cause some governance and admin headaches. Luckily, the admin side of Office 365 and Teams allows this to be managed.

Once your organisation has access to Teams, you can: download the desktop application, access Teams through your browser or download the mobile app.

Teams & Channels

To start your teamwork collaboration, you need a team. Setting up Teams is easy and done in a few clicks, requiring a Team name and a description; this then allows team members to be added. As mentioned above, a new Team will create a matching Office 365 Group, OneNote, SharePoint site and Plan—so this does need to be done with some caution.

Each Team has subsections, which are called Channels, and a General Channel will automatically be created. You can have multiple Channels within a Team; for example, you could have a 'Marketing' Team and then Channels such as 'Social Media', 'Product Launch', 'Blogs' etc. Or a Company could be a Team and Channels can relate to departments - you can choose whatever suits your organisation's way of working. Whenever there is a new notification or activity, the Channel will become bold.

Channel Tabs

Each Channel all have their own tabs along the top. Conversation (group chat), Files (shared documents) and Notes (shared OneNote) are automatically created when you create the Team. You can also add your own tabs.



Conversations

Conversations are one of the key features of Teams, allowing each Team to have a centralised discussion that is saved and easily searchable. Conversations are the central component where all teamwork is recorded—from file sharing to video calls.

The use of @mentions allows you to tag participants or even whole teams to notify others. Users that look at Conversations will easily see where they have been mentioned through the red @ symbol to highlight areas of importance to them. On top of this, your desktop app will notify you through an alert. As well as tagging, users can 'like' content and share emoticons or GIFs.

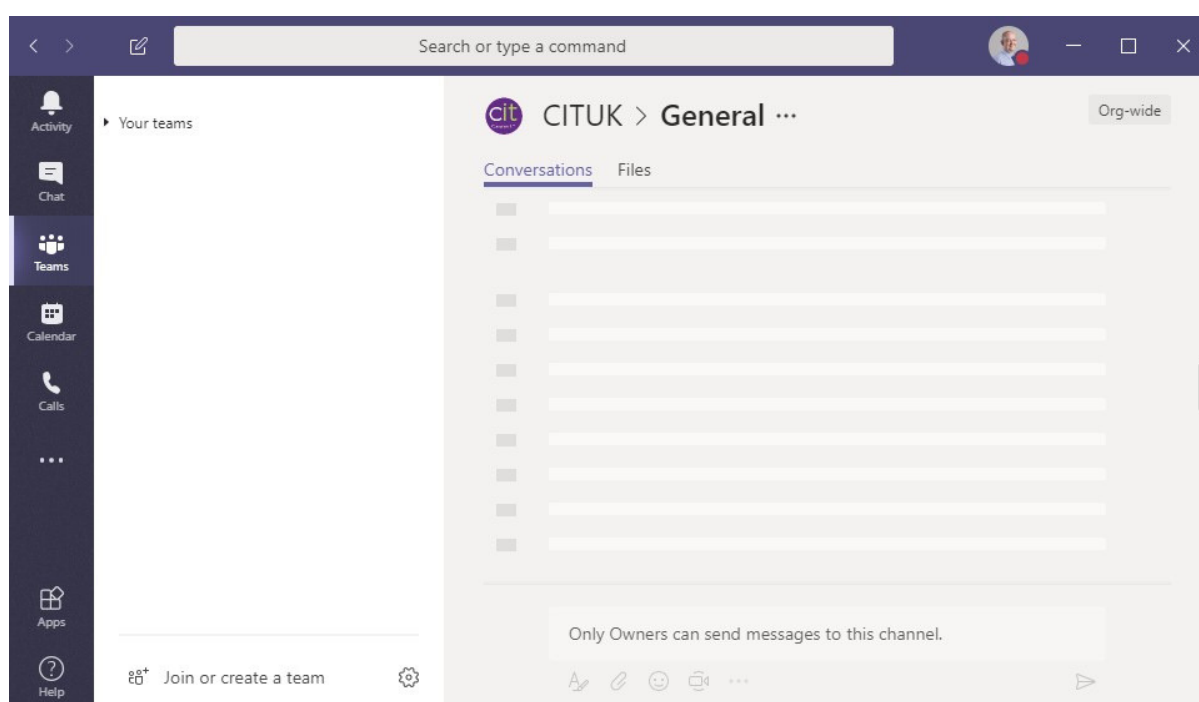
Files

In your Teams window, you can perform a variety of tasks directly within that window or browser, so that you avoid flicking between different applications. These tasks include the ability to delete, download, move files, open, copy, edit or get a link to share with others – giving you all the key features you would get in the native apps.

You can also start a Group chat alongside the file, to allow team discussions while all working on the files - and this conversation will appear in your Conversation thread.

Notes

Notes takes you to the Team shared OneNote. Within Teams you can view and edit your OneNotes (directly within the Teams window) or you can click to edit in the OneNote app.



OneNote

Overview

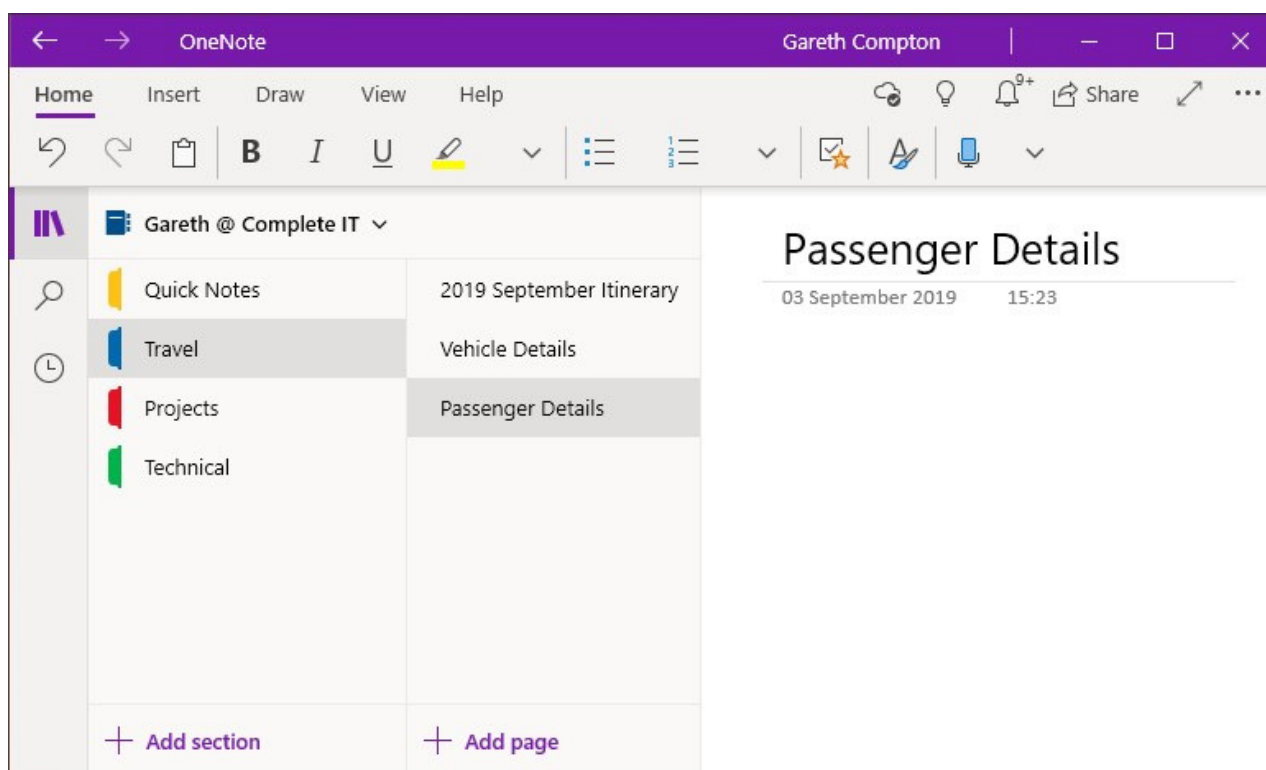
Think of OneNote as a digital version of a paper notebook – it's that simple, but also so much more.

It can be a powerful way to organise projects and ideas as well as taking notes, and jotting down details.

You can capture digital images and insert them and annotate them, given the correct tools (for example, if you're using a Microsoft Surface tablet with a Stylus, or an iPad with an Apple Pencil).

Notebooks, Sections, Pages

OneNote is a hierarchical information store; It comprises of Notebooks (of which you can have more than one), and each notebook has sections, and within each section you can have multiple pages. Graphically, each section can have a coloured tab to easily identify within the notebook:



Planner

Overview

Microsoft Planner is one of those apps which is not publicised, but is included free in your Office 365 Subscription, and may very well be worth looking into for minor project planning tasks. Within the Planner Hub you can see your plans. Each plan has a number of “buckets” – think boards if you’ve used Trello – and within those buckets (which you create and name, they’re not pre-defined) you can create and assign tasks. The Planner Hub provides you with oversight tools for reporting on progress, etc.

Planner can be viewed online through the Office portal.

Plans

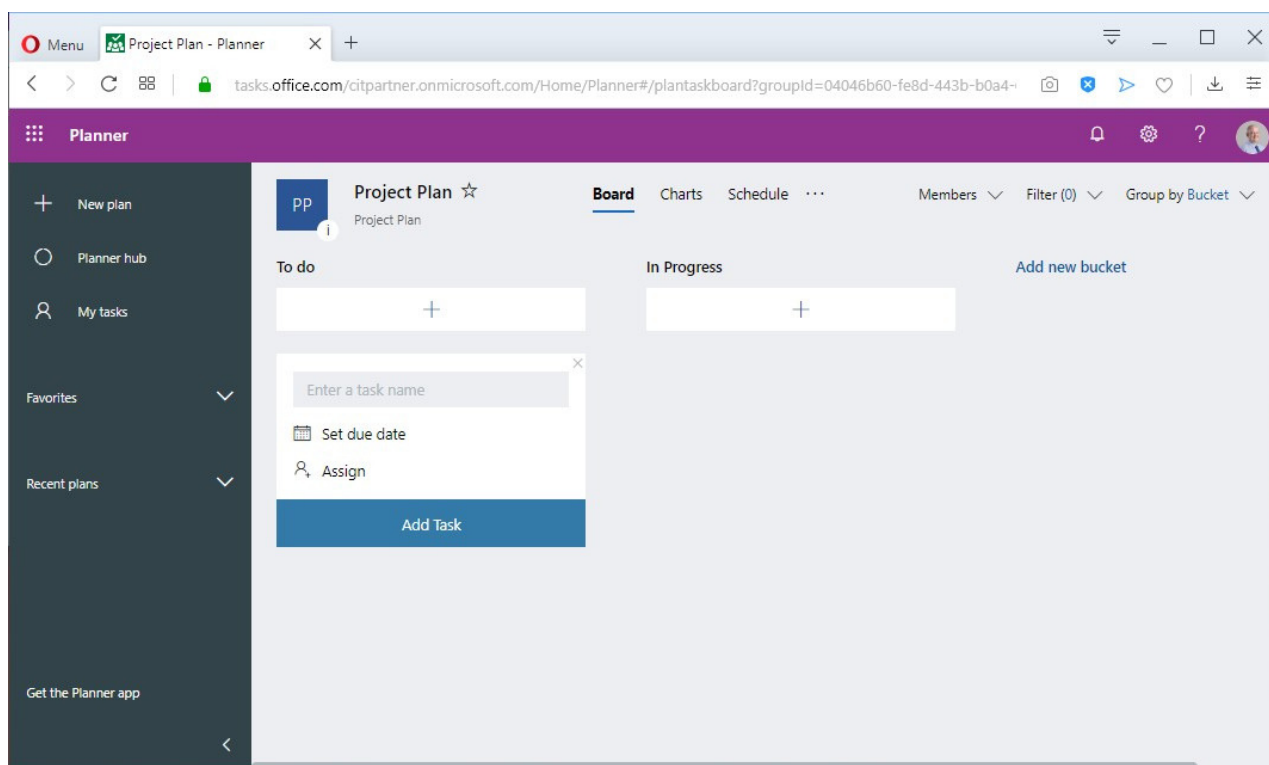
Each Plan organisationally is a blank page to start with. You create and name the buckets, which could be the stages of a project, and then in each bucket, you can create and assign tasks.

Tasks

Tasks in Planner are simple to create, and if you’re in a team or group, you can assign them to yourself or colleagues.

Attaching Documents

Documents relating to the task can be stored in SharePoint and attached to the task, so template documents, process documents etc.



Collaboration Concepts - the basics

Collaboate

With Office 365 tools, including Word or Excel or PowerPoint, and storing the files in SharePoint either through a file store or via Teams, you and your team can actively collaborate on documents or files without having to pass them around via e-mail, with multiple versions sat in inboxes etc. Like Google Docs, each file can be edited at the same time by multiple users.

Secure Online File Storage with the ability to share

With SharePoint Online as the back end, and using OneDrive for Business to synchronise between your device and the SharePoint server, you can store your files virtually, and be safe in the knowledge that they are secure, yet shareable by you to colleagues and business partners on demand.

Multi-device Continuity

Microsoft Office 365 gives you the potential options to collaborate over a wide variety of devices, mobile and office-based, with Apps such as Word, Excel, Teams available for the desktop, iOS and Android platforms, or through a web browser with online versions of those apps, such as Word Online, Teams, Planner etc.

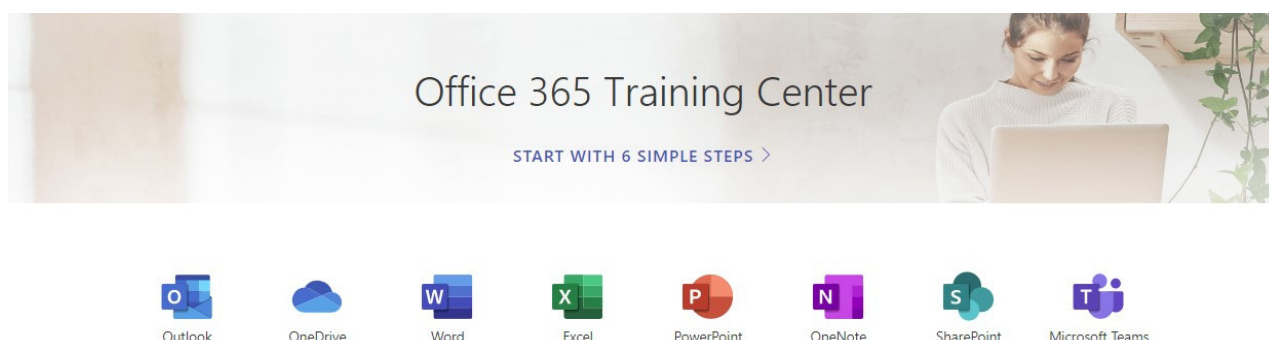


Further Information

Microsoft have more resources online for you to take a look through to get a better understanding of what you can do and how to change the way you work with the tools available to you in Office 365.

Their Office 365 Training Center is available here:

<https://support.office.com/office-training-center>



Or, you can speak to your Complete I.T. Team of Technical Consultants, Account Managers and Helpdesk Analysts who will be able to help you become more efficient in the way you work with Office 365.





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