

M365

Beginner Level

Duration: 1 Day (9am – 4pm)

Course Pre-Requisites: None

Course Overview

In this course, learners will gain a foundational knowledge of how Microsoft 365 apps can be utilised cohesively to streamline daily activities. The course provides insights into effective communication, collaboration, task management, and knowledge capture, ensuring participants are well-equipped to maximise their productivity using Microsoft 365 tools.

1. Introduction

A foundational overview of the Microsoft 365 suite, its core applications, and the potential it holds for transforming everyday tasks. Learners will get a glimpse of what's in store throughout the course.

2. Starting Your Day Effectively

Kickstart your day with productivity in mind. This module will guide participants on how to review their calendar, set daily goals, prioritise tasks, and utilise Microsoft 365 tools for an efficient start.

- Creating and Managing Tasks and Meetings
- To Do list management
- Calendar management
- Activity feed in Teams
- Create a task or a calendar event from a Teams post

3. Communicating and Collaborating with Colleagues

In this section, learners will explore the essential tools and features within Microsoft 365 that facilitate seamless communication and collaboration with colleagues. Topics include chat functionalities, shared document editing, and utilising Teams for group projects.

- Working with Teams chat
- Organising Teams chat
- Sharing and working on files in Teams chat
- Working with Teams and Channels
- Private Vs Public Teams
- Using @ mentions in Teams
- Staying organised in Teams and Channels
- Collaborating on files in Teams and Channels
- Managing your Teams settings

4. Communicating and Collaborating with Customers/Externals

This module delves into the nuances of customer interaction using Microsoft 365. Learners will understand how to leverage various apps to maintain effective customer communication, schedule meetings, and share presentations or documents externally.

- Customising actions in Outlook Mail
- Creating rules for Outlook Mail
- Using templates
- Setting up signatures
- Creating task in Outlook
- Create a meeting from Outlook Mail
- Sending emails to Teams
- Searching Vs Filing

5. Working with Tasks

Learners will be introduced to task management within Microsoft 365. From setting up to-do lists in Microsoft To Do, to tracking complex projects in Planner, this section ensures participants are well-equipped to handle their daily tasks efficiently.

- Using the MS To Do application
- Manage your tasks using the My Day feature
- Assigning tasks to others
- Using the MS Planner application
- Create a new Plan
- Working with buckets and cards in Planner
- Viewing tasks and plans in MS Teams
- Track status of plans

6. Working with Files

Learners will be introduced to task management within Microsoft 365. From setting up to-do lists in Microsoft To Do, to tracking complex projects in Planner, this section ensures participants are well-equipped to handle their daily tasks efficiently.

- What is OneDrive?
- Managing files in OneDrive
- Sharing files from OneDrive
- Adding copy links from OneDrive to Emails
- Adding files to Teams chat and channels from OneDrive
- What is SharePoint?
- How does SharePoint differ from OneDrive?

7. Creating New Documents and Templates

Learners will explore the various tools available within Microsoft 365 for creating documents, spreadsheets, presentations, and more. Emphasis will be on using templates, integrating multimedia, and leveraging cloud capabilities.

- Using the M365 Home Page
- Finding and opening common applications in M365
- Creating a new documents directly from M365
- Reusing content from other sources in M365
- Creating and storing templates in M365
- Creating a new document in Teams / SharePoint

8. Capturing Knowledge for Reuse

Knowledge management is crucial in today's work environment. This section focuses on how to capture valuable insights, document best practices, and utilise features like OneNote and SharePoint to store and retrieve knowledge for future use.

- What is OneNote?
- How to create Notebooks, Sections and Pages
- Using OneNote in meetings
- Assign tasks from meetings and OneNote
- How to use the Loop Component in Teams meetings
- Where to access Loops in M365

9. Finishing the Day

As the day concludes, it's essential to wrap up effectively. This module guides learners on how to review their tasks, prepare for the next day, and utilise Microsoft 365 tools to ensure they're set for a productive tomorrow.

- Bringing it all together
- Review all tasks, meetings, documents and notes in preparation for the next day.