

# Office 365 - Intermediate

## Course Overview - 1-day course

### Making effective use of Office 365

This course is designed for users of Office 365 who have attended the Beginner course or possess general skills and knowledge of common O365 products – particularly Teams.

The objectives of the course are to extend your knowledge of product offerings under Office 365, and to understand how those products can be used on their own or combined with others as a holistic solution to increase value.

There is an emphasis on integration and 'joining the dots'. Supported by several exercises spanning multiple applications and an Integration Project exercise.

## Detailed Content

### Introduction

- Course Objectives
- How this manual is organised
- What is Office 365?
- Office 365 Subscriptions
- Office 365 in the workplace

### Managing a Team

- Re-Introduction to Microsoft Teams
- Create a new Team
- Manage a team
- Managing Team Members
- Pending requests to join a team
- Types of Team Members
- Team Owners
- Team Members
- Guests in Teams
- Limitations for Guests
- Restricting Guests via Administration
- Settings for a Team
- Team picture
- Uploading a Team Picture
- Member permissions
- Default permissions
- Guest permissions
- @mention settings
- Turn off @mentions
- Fun stuff
- Emojis
- Stickers
- Animated GIFs
- How a Team code works

- Reset a code
- Remove a code
- Using a Team Code
- Archive your team
- Read only archived team
- Restore an archived team

### Working with Teams

- Get a link to a team
- Launch teams app or browser
- Get a link to a channel
- Links for non-team members
- Email to the channel
- Send a message via Email
- Reply within Teams to a message generated via Email
- Remove a channel's Email address
- Keyboard shortcuts
- Status in Teams
- Modify your Status
- Reset the Status
- Personal settings
- Priority people when Do Not Disturb is set

### Teams Apps

- Apps in Microsoft Teams
- Tab Apps
- Personal, Chat and Channel Tab Apps
- View a personal Tab
- Wiki untangled
- Wiki in a channel
- Personal Wiki

- Wiki elsewhere in O365
- Bot Apps
- Bot App as a Personal App
- Access the Who Bot
- Bot App as a Chat
- Access Who from a Chat
- Bot App in a Team Channel
- Using the MS Forms Channel Bot
- Creating a quick poll with the Forms Bot
- Connector Apps
- Adding a Connector App
- Connecting to a 3<sup>rd</sup> party app
- Actions in Connectors
- Modifying a Connector
- Specifying different conditions for the Connector
- Remove a Connector
- Messaging Apps
- Adding a Messaging App
- Removing an App from a Team
- Collaborating with the Wiki App
- Using @mentions in Wiki
- View Conversation and Activity of the @mention
- Collaborating with Files
- Conversation on a File
- Collaborating with Office documents
- Comments in an Office Doc
- Conversations in an Office Doc

# Office 365 - Intermediate

Chat in an Office Doc

## Forms

Introduction to Forms  
The Forms landing page  
Create a Form  
The Office and Forms portals  
Create a Form in Teams  
Edit a Form in Teams  
Create a title, add an image and change the Theme of the Form in Teams  
Adding Questions to the Form  
Question types  
Toggle mandatory questions  
Edit a Form on the web  
Change the order of questions  
Form settings  
Open the Form to all users  
Set an end date on the Form  
Add a Thank You message to the Form  
Share the Form  
Web Links, QR codes, and other sharing options  
Verify the Form is accessible to all users  
Access the Form in Teams  
Rename the Forms tab  
Form Results tab  
Extended Exercise – Quiz Form  
Create a Quiz in Forms  
Add quiz questions  
Allocate scores to the questions  
Move or Delete a Form  
The Forms Recycle Bin  
Form Branching  
Forms in other Office applications

## Approval Flows

Introduction to Flow Approvals  
Approval Templates  
Create an Approval Flow Manually  
Test and Run the Approval Flow from Flow

Add a conditional action after approval  
Flow integration with Teams

## Sharing Flows

Introduction to sharing of Flows  
Allow other users to run  
The Dynamics 365 interface  
Allow other users to run with your credentials  
Sharing a Flow with other Owners

## Administration of Flows

Copy (save as) a Flow  
Enable and Disable Flows  
Export a Flow to file  
Configuring Connections  
Delete a Flow  
Optional Integration Project Exercise

## Sway

Introduction to Sway  
Accessing Sway  
Sway Examples  
Sway from a topic  
View a Sway  
Sway from an existing document  
Sway from a template  
Create a Sway from Blank  
Adding formatting and images to the title  
Adding heading cards to Sway  
Navigating and Keyboard Shortcuts  
Add other cards to the Sway  
Embed content in sway  
Groups of cards  
Group types  
Design view  
Sharing the sway  
Deleting a Sway

## Extended Topic - Power BI in Power Platform

Introduction to Power Platform

What is Power BI  
Data Visualisation  
Objectives of Power BI  
How to access Power BI  
View My Workspace  
Where is the Sample data  
Get data from samples  
Navigating dashboards and reports  
Experience cross-filtering  
Housekeeping workspaces  
Try Q&A  
Edit a report  
Create new visuals in the report

## Wrap up and Housekeeping

About Office 365 again  
Honourable mentions  
Housekeeping of Team

## Integration Project

The Business Scenario  
Create the Form  
Add the Form to Teams  
Create the Planner  
Design the Flow  
Test the Flow  
Create the Flow  
Housekeeping – delete the Form & Flow  
The Flow design