

Microsoft 365 – Intermediate

Course Overview – 1-day course

Making effective use of Microsoft 365

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

The objectives of the course are to extend your knowledge of product offerings under Microsoft 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 Microsoft 365?
- Microsoft 365 Subscriptions
- Microsoft 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 3rd 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 Microsoft documents

Microsoft 365 – Intermediate

Comments in an Microsoft Doc
Conversations in an Microsoft Doc
Chat in an Microsoft Doc

Forms

Introduction to Forms
The Forms landing page
Create a Form
The Microsoft 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 Microsoft 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 Microsoft 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