

Collaboration Workbook

Descriptions & Uses of Microsoft 365 Collaboration Tools



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Microsoft Outlook



Microsoft Teams



OneDrive for Business



SharePoint



Yammer

Microsoft Outlook is a personal information manager, and the default Microsoft 365 email client. Outlook also keeps track of your calendar and contacts, all in one location. If it does not come pre-installed on your work computer, in most cases you can also download it directly from your organization's Microsoft 365 dashboard.



Outlook Tips

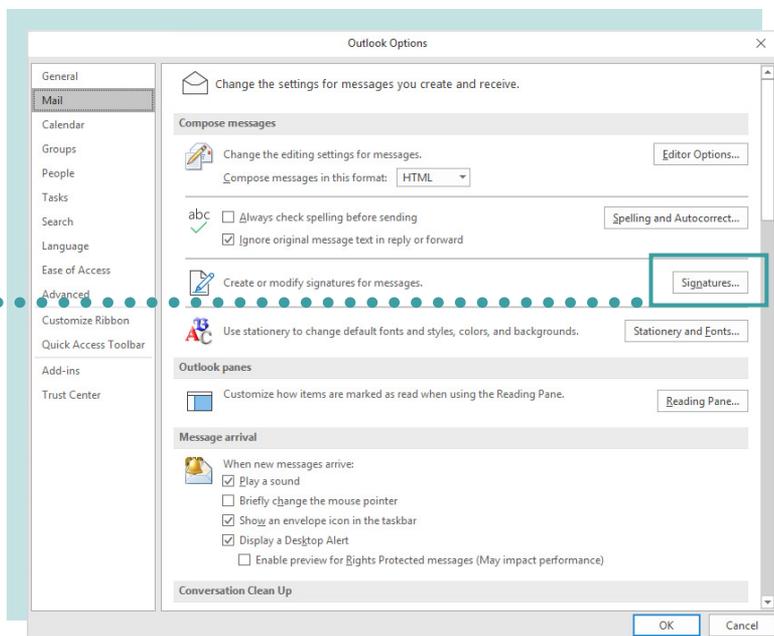
SETUP BUSINESS EMAIL on your mobile phone for **iOS** or **Android** with these step by step instructions.

TO ACCESS BUSINESS EMAIL through a browser, log into your organization's intranet at <http://www.office.com>. Under **Apps**, click the **Outlook** logo

• SETUP YOUR EMAIL SIGNATURE.

To setup your Outlook signature, navigate to the Options Menu. Under the Mail tab you will find the Signature and Stationery menu.

ADD A TEAMS MEETING LINK to an Outlook Calendar invite by clicking **Teams Meeting** on the ribbon at the top of the invite.



Microsoft Teams is the Microsoft 365 default chat and video conferencing, and content sharing and collaboration application.

This tool is used to communicate with your departmental colleagues, project team, or anyone you are closely collaborating with on a daily basis. Think of it like a “WhatsApp” group on steroids. For setup, download the desktop app by searching for Microsoft Teams in your desktop search bar and pinning the application to your taskbar.



Teams Tips

[Download the mobile app](#)

TO CREATE A TEAM, in the Teams app, on the left, click **Teams**. At the bottom of the **Favorites** pane, click **Join or Create a Team**. In the **Join or Create a Team** pane, hover over the **Create a Team** tile and click **Create a Team**. To avoid duplication and content sprawl, check with your colleagues that a new Team would be helpful and that a similar Team hasn't already been created.

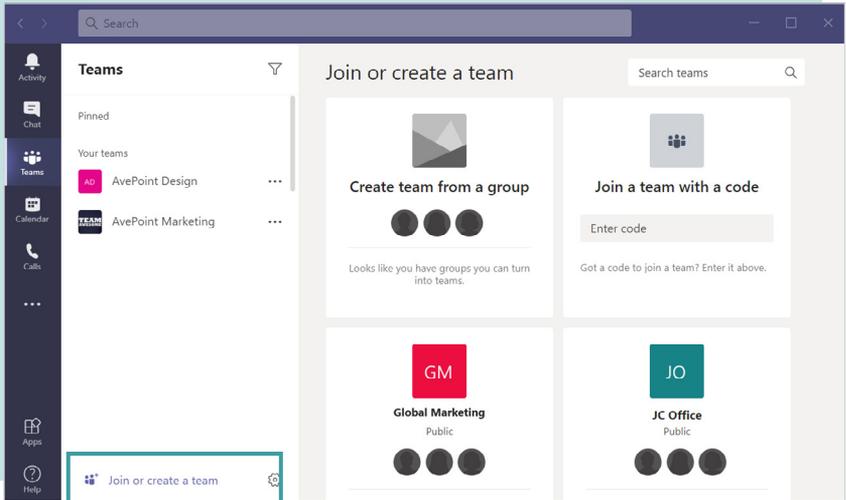
TO JOIN A TEAM, in the Teams app, on the left, click **Teams**. At the bottom of the **Favorites** pane, click **Join or create a team**. In the **Join or create a team** pane, use the Search box (top right) to find the team you're looking for. Hover over the Team's tile and click **Join team**. Alternatively, a Team owner can add you to their Team. If this happens, you'll receive an email notification. Many Teams won't show up in search as they are default private. When you hear of a Team that is relevant to you, ask the owner if they can add you to the Team.

TO INITIATE A CHAT, in the Team app, on the left, click **Chat**. Above the **Recent** pane, click the **New Chat** button.

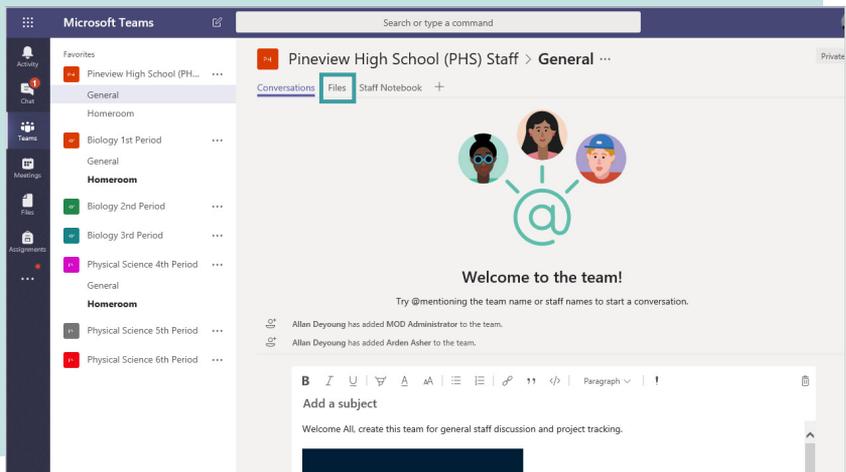
TO START A CONVERSATION, in the Teams app, on the left, click **Teams**. In the **Favorites** pane, click the name of the Team in which you want to start a conversation. Below the Team name (top), if necessary, click the **Conversations** tab. At the bottom of the **Conversations** tab, type your opening message in the **Start a new conversation** box, and click the **Send** button. To notify a specific individual use @ followed by their name. To notify everyone in the Team use the @ followed by the Team name.

TO ACCESS A TEAM'S FILES, in the Teams app, on the left, click **Teams**. In the **Favorites** pane, click the name of the Team whose files you wish to access. Below the Team name (top), if necessary, click the **Files** tab.

Create a Team...



Access Files...



OneDrive for Business is your personal space for saving and sharing documents, and is hosted in Office 365 (the cloud). It's accessed by logging into <http://www.office.com> and clicking **OneDrive** in the top right corner of any page.



OneDrive for Business Tips

SAVE YOUR DOCUMENTS to your OneDrive to ensure they're backed-up and restorable (saving to your local drive could result in lost content if your laptop suffers a catastrophic crash).

EASILY SHARE DOCUMENTS. Saving to OneDrive also allows you to easily share your documents with others. To do that, navigate to OneDrive, find

the document, click the vertical "..." to the right of the document's name, and select **Share**. The same can be done for your OneDrive folders.

TO ORGANIZE DOCUMENTS, find the document, click the vertical "..." to the right of the document's name, and select **Move To**. Select a OneDrive folder and click **Move Here**.

SharePoint is Microsoft 365's document repository and knowledge management platform. It's accessed by logging into <https://www.office.com> and clicking **SharePoint** under **Apps**.



SharePoint Tips

ACCESS SHARED RESOURCES. You can access a number of shared resources in each site including **Documents**. In this section you can upload, download and get a link to share documents.

MANAGE ACCESS. Once a document is selected, you can manage its access on the left sidebar.

COMMON SITES. You will see common sites related to each department where internal facing collateral is stored.

Yammer is often described as “Facebook for Enterprise,” and is Microsoft 365’s internal social sharing platform. This tool is used to get to know everyone else in the company, see what’s going on in other offices, and ask question to a larger audience. Use it to share industry news, notify everyone of business/work/team achievements, and/or praise coworkers.



Yammer Tips

POST WITHIN YAMMER GROUPS. You can post to the *All Company* group by typing in the *What are you working on?* box at the top of the home page, or in a specific group by navigating to that group and typing in the *Share something with this group...* box at the top of the page.

SEARCH YAMMER GROUPS. You can search for Yammer groups, posts, people, and topics by typing what you need in the *Search* box at the top left.

TO ADD A YAMMER GROUP to the ‘Groups’ bar on the left for quick access,

you must join that group. To join a group, find that group and click ‘Join Group’ at the top right of that group’s header image

TO TAG SOMEONE IN A POST, type @ followed by that person’s first name, and click their name in the pop-up box. Hashtags can be used by typing # followed by the tag

GIFS, ONLINE FILES, AND LOCAL FILES can be added to posts/replies by using the buttons at the bottom right of a new post or reply

The screenshot displays the Yammer 'All Company' group interface. On the left, a sidebar lists various groups, with 'All Company' highlighted. The main content area features a header for the 'All Company' group, a search bar, and a post by Dane Simberkoff. The post includes a link to a CSMwire article about Google's privacy regulations. The interface also shows a members list and navigation options like 'Update', 'Poll', 'Praise', and 'Announcement'.



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