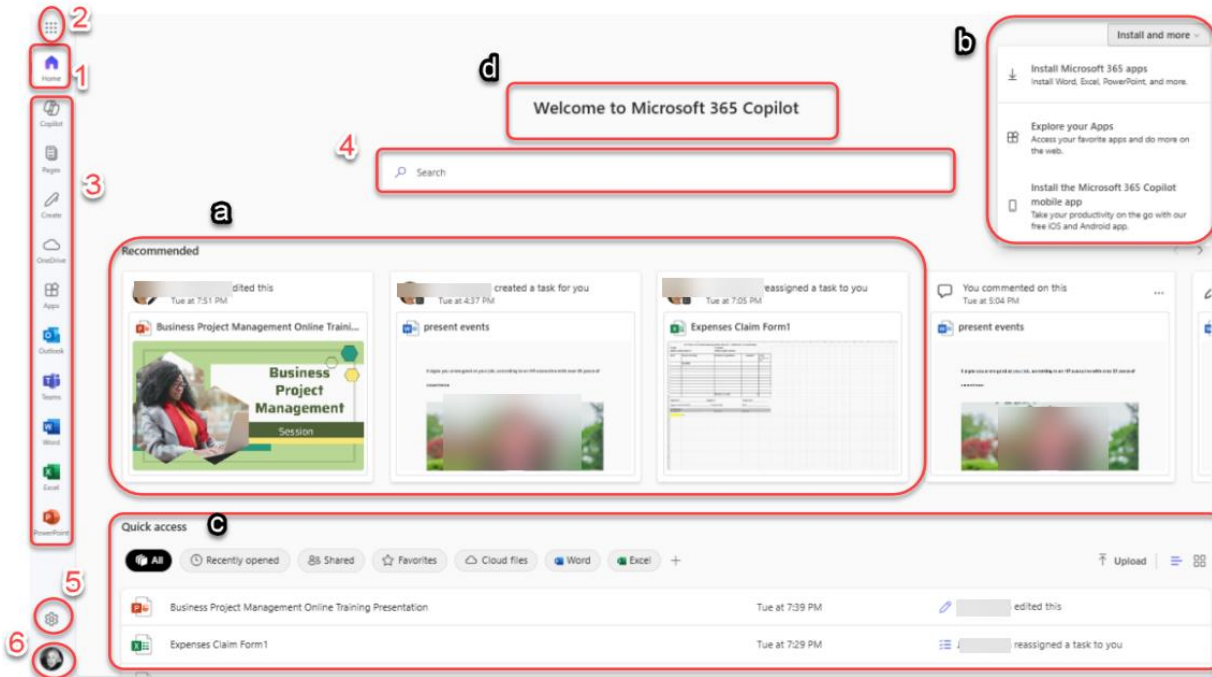


OFFICE 365 OVERVIEW

Structure of Microsoft Office 365 online (office.com)

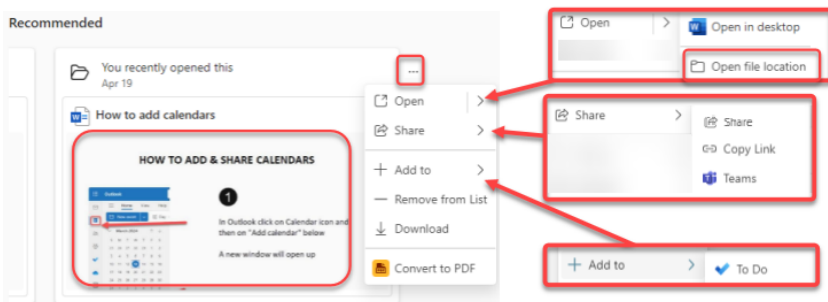


Office 365 Portal:

- 1) Home page (default start page)
 - a) Recommended (recently worked on files)
 - b) "Install and more" drop-down menu
 - c) Quick access
 - d) Welcome to Copilot (only if you installed it)
- 2) App Launcher
 - 3) Side Menu
 - 4) Search bar
 - 5) Settings
 - 6) Account Manager

1. Home Page

a) **Recommended** view shows you the files you recently worked on as large tiles, with the preview below the file name, and by clicking on the 3 dots (...) you can access the following actions:



a

Open - this opens the file itself

Open > Open file location (please only use "Open in desktop" option as last resort, as you should only work with files in the cloud/online)

Share - you can share the file by message/email or copy link to it, or share it in Teams

+Add to - you can add the file to a To Do list

-Remove from List - removes the file from the Recommended view (does not delete it)

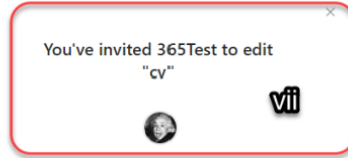
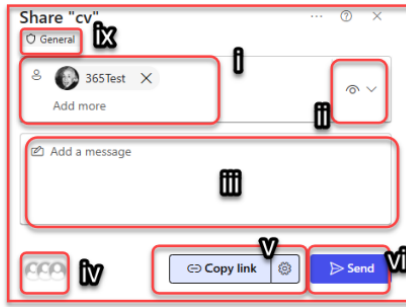
Download - downloads the file to the Downloads folder on your computer

Convert to PDF - converts the file to PDF

Sharing from Recommended view:

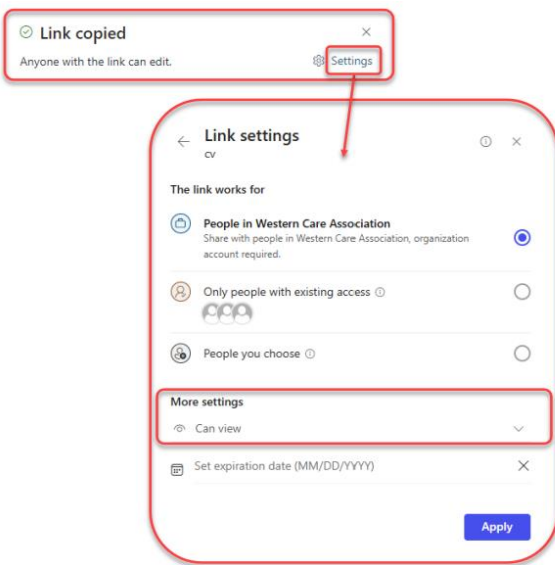
If you choose "Share" and then "Share" option you will see the window like this ->

- i) type the name(s) of the person(s) you want to share the file with (or their email address(es))
- ii) select the access level (Edit / Review / View / Can't download)
- iii) type a message (optional)
- iv) here you can see who else has access
- v) if you don't want to send an email or message, you can just copy a link, by clicking on "Copy link" button and then paste it into a chat etc. Additionally, by clicking on "Settings" (cog icon next to the "Copy link" button) you can see the access levels details for individuals/group(s) and links
- vi) press "Send" if you are sending a message
- vii) you will see a confirmation window like this



viii) the person you shared the file with will receive a message like this, they can open the file by clicking on its name or Open button. If they want to share it with someone else, they can click on Share button and will see the same "Share" window as described here

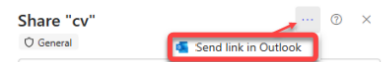
ix) the sensitivity label applied to the file is shown here



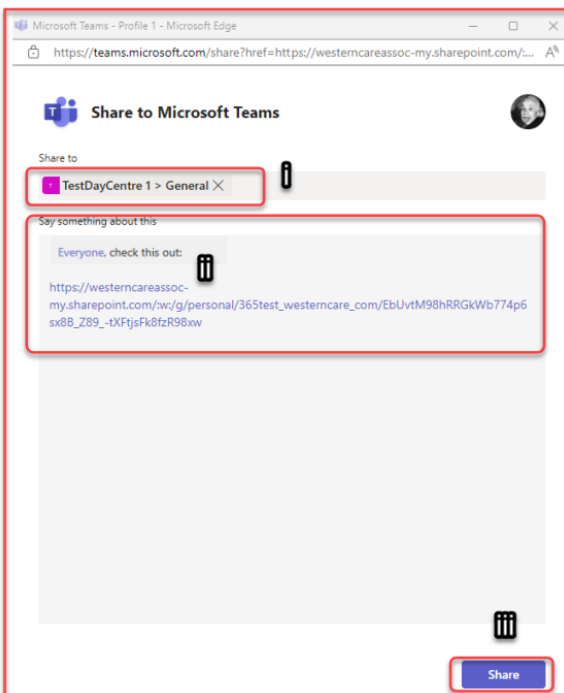
If you choose Share then select Copy Link option, then you will see "Link copied" confirmation window

If you want to change the access level click on the "Settings" link next to the "cog" icon and change access type in "More settings"

You can also set an expiration of access date.

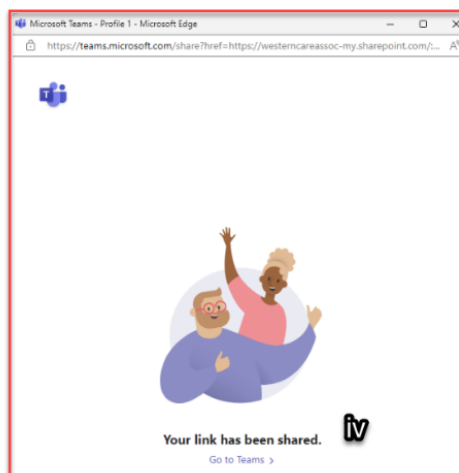


x) you can also choose the option to send a link from Outlook by clicking on the 3 dots (...) and then on "Send link in Outlook". This will create an email in Outlook with a link inside it.



If you choose Share and then the Teams option, you can share directly into a Teams channel

i) if you click inside the field it will show you recent locations in the drop-down but if you don't see the channel you want to share to, then start typing the channel name and select it when you get the right one

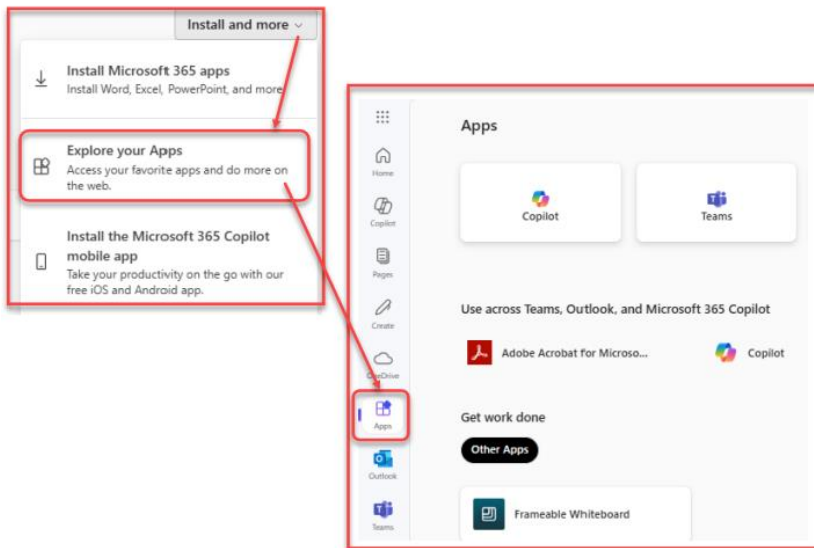


ii) you can type an optional message above the link if you wish to

iii) click on "Share" button

iv) you will see a confirmation window like this one, if you want to check how it looks click on "Go to Teams >" link at the bottom

b) "Install and more" drop-down menu options:



b

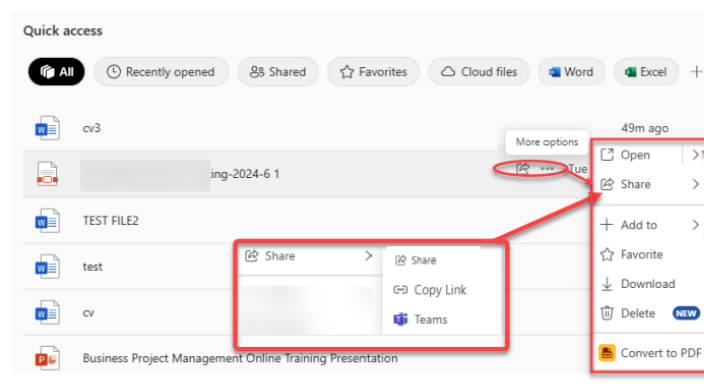
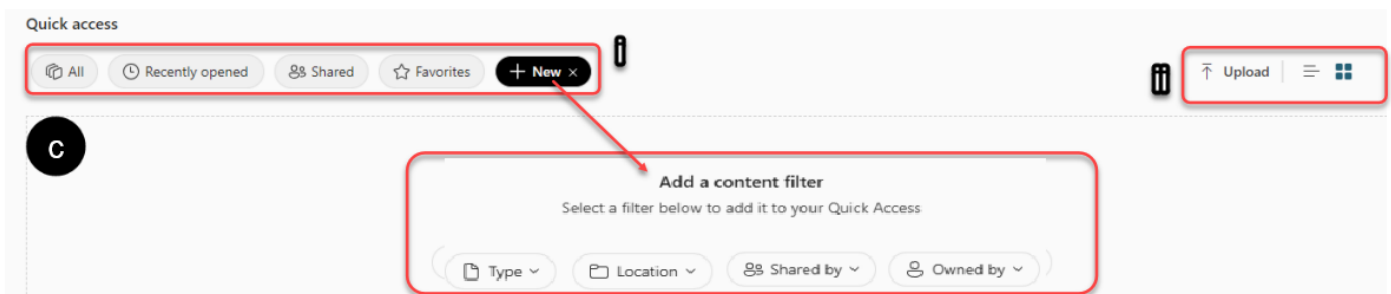
From the drop-down menu under "Install and more" you can choose "Explore your Apps", this will open the Apps window, this is the same as clicking on the Apps tile on the side menu directly.

Note: you do not need to use any other option in this menu ("Install and more")

c) "Quick access" view shows you all your files recently accessed/created/edited/shared with you etc.

i) You can sort this view by pre-set categories such as "Recently opened", "Shared" or "Favourites" or create a new content filter - by Type, Location, Shared by, Owned by and Tags

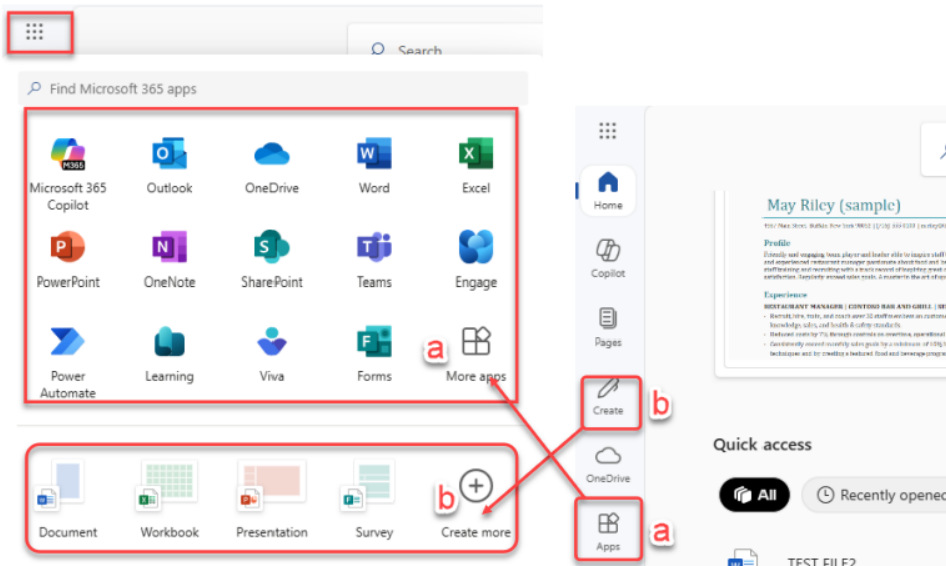
ii) You can upload files here and change display option from List to Grid



To display "More options" click on the ... (3 dots) next to the file name. "Share" icon is also next to it. The following file actions here are the same as in Recommended:

- * Open (Open in Desktop / Open file location)
- * Share
- * +Add to (To Do)
- * Favourite (this adds the file to Favourites category, adds a star, for sorting)
- * Download
- * Convert to PDF

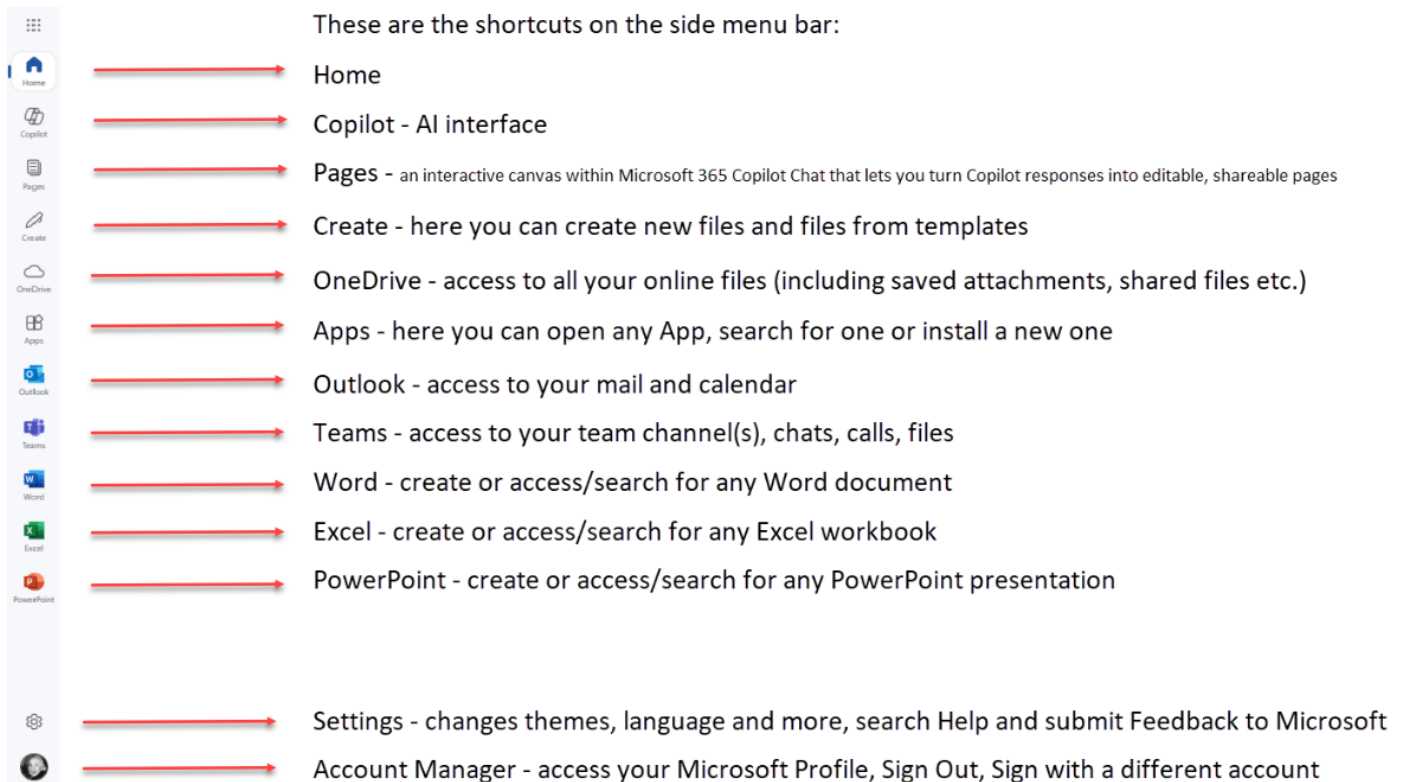
2. App Launcher



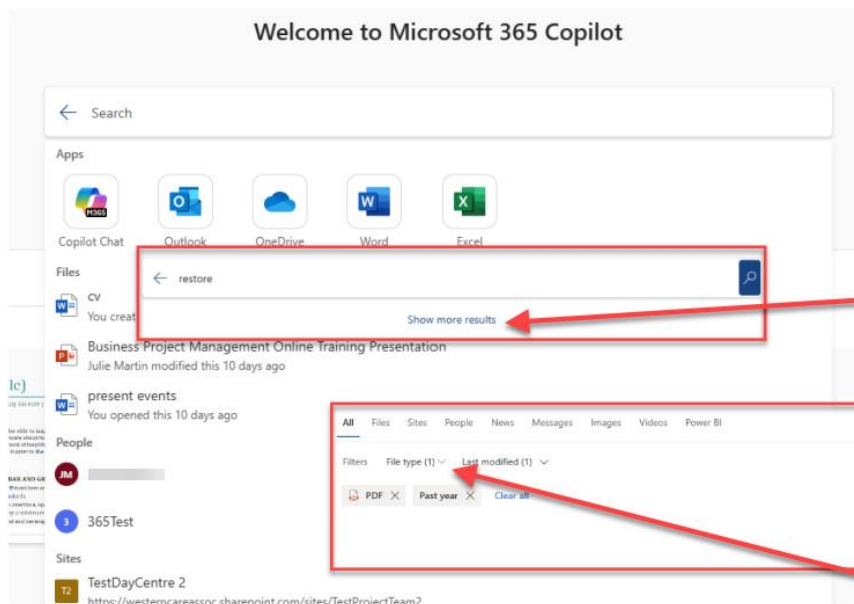
The apps you see in the App Launcher open the same apps that you see if you clicked a) the Apps link on the side menu

and blank file types below the apps are the same that can be found on the "Create" section that you can access either by clicking on b) "+Create more" or "Create" button on the side menu

3. Launch side menu



4. Search Bar



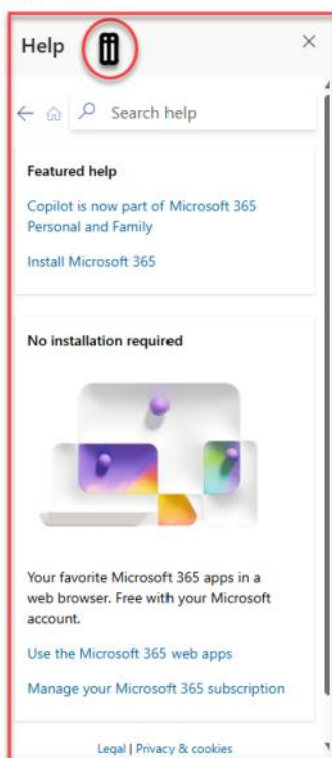
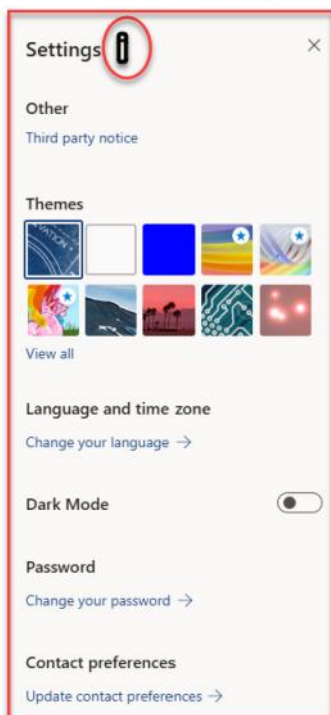
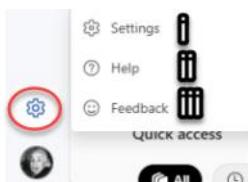
When using the search bar you can search through Apps, Files, Sites, People, News, Messages, Images, Videos and PowerBI. Simply entering a word that is contained in the entity you're looking for will show you multiple results.

If the word you enter in search is not found in any of the above entities, you can click on "Show more results" below the bar

You will be able to narrow down the search by file type, modified date and and sort by relevance and date.

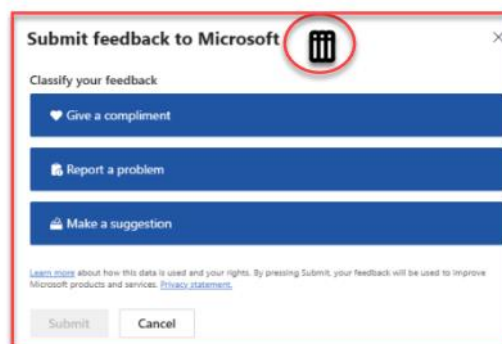
For search hints & tips refer to "[How to use search in 365](https://training.westerncare.ie/)" guide on our training website (<https://training.westerncare.ie/>).

5. Settings



By clicking on the "Settings" button (cog icon) you can access:

- i) **Settings** (you can change portal colour theme and language/time zone options and change password)
- ii) **Help** (search Microsoft help articles)
- iii) **Microsoft feedback**



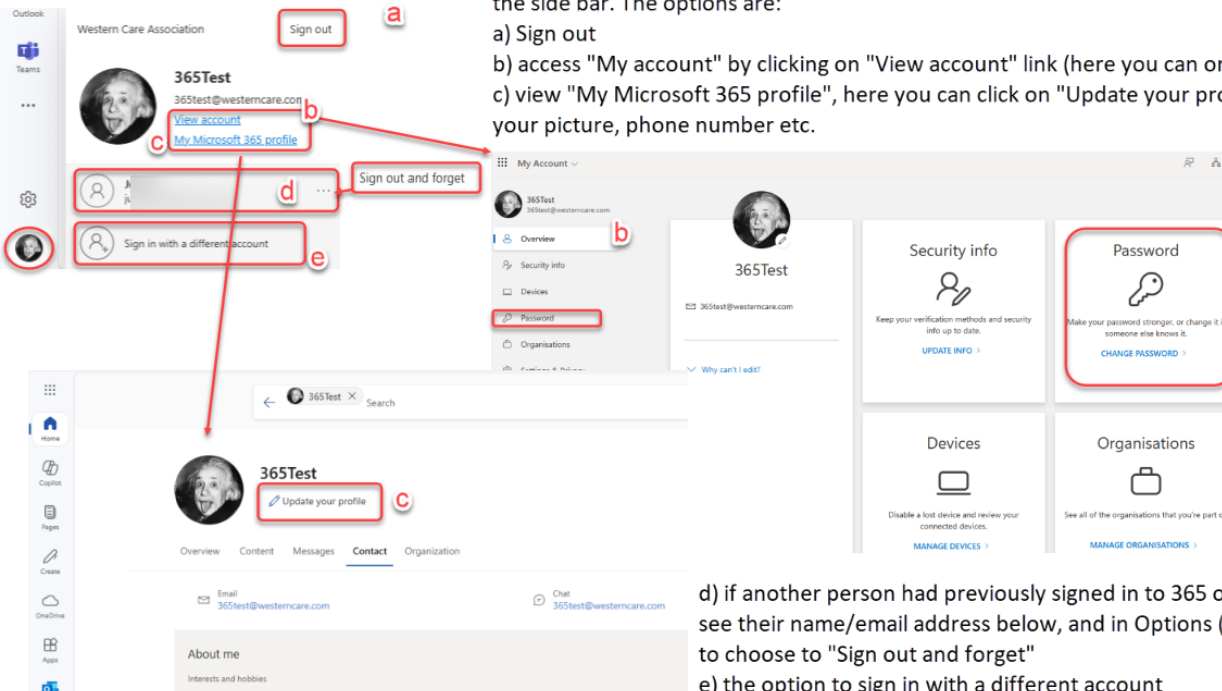
6. Account Manager

You can access your Account Manager by clicking on your profile bubble icon below the Settings on the side bar. The options are:

a) Sign out

b) access "My account" by clicking on "View account" link (here you can only change your password)

c) view "My Microsoft 365 profile", here you can click on "Update your profile" option and change your picture, phone number etc.



d) if another person had previously signed in to 365 on your device, you will see their name/email address below, and in Options (3 dots) you will be able to choose to "Sign out and forget"

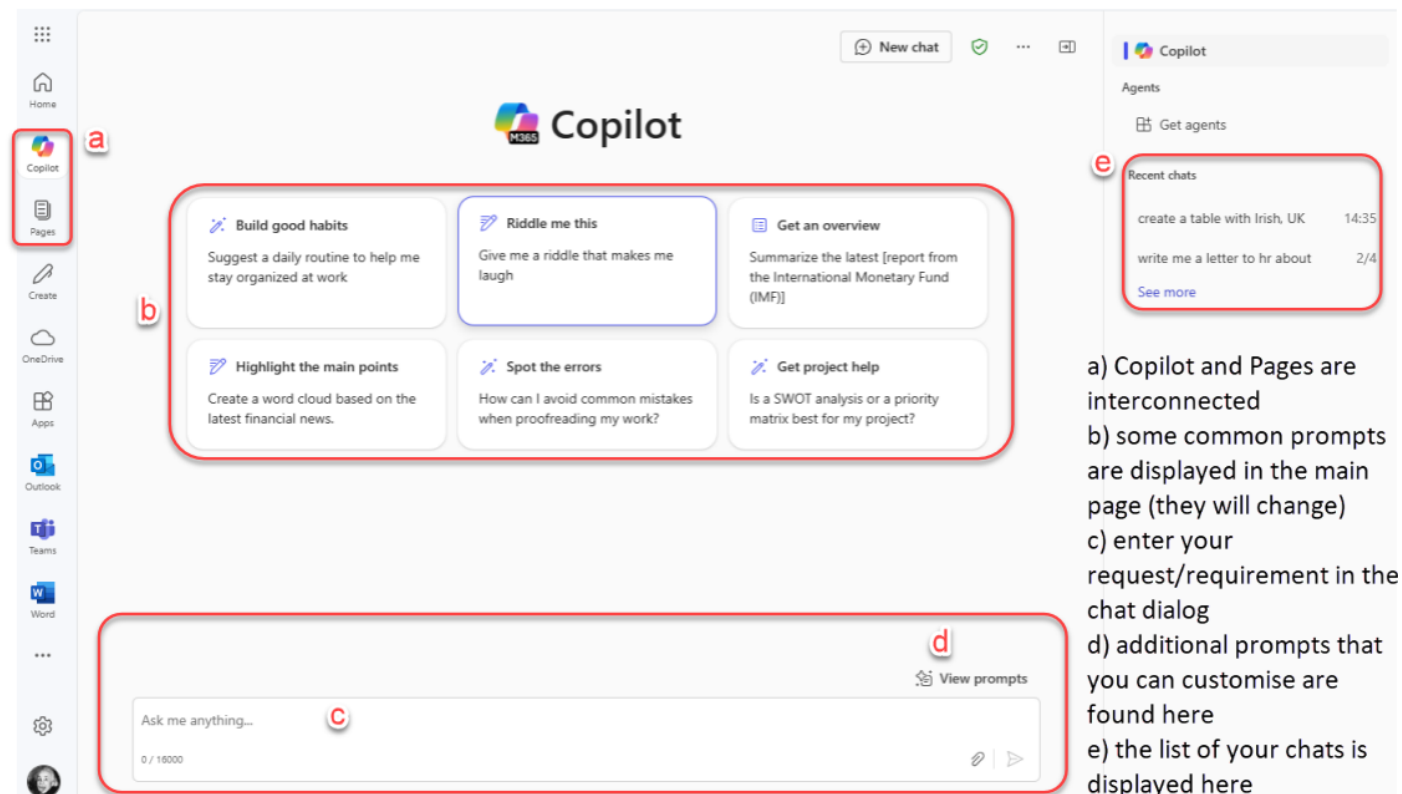
e) the option to sign in with a different account

You can follow "[How to change profile details](https://training.westerncare.ie/)" guide on our training website (<https://training.westerncare.ie/>) to change your account details such as your picture, phone number, biography, skills, interest and hobbies, projects, education and birthday.

Other Launch Side Toolbar sections

Copilot

If you opted to install the Copilot app (Microsoft Office 365 will keep prompting you every time you log in). You will have 2 new icons on your side bar for it (Copilot and Pages):



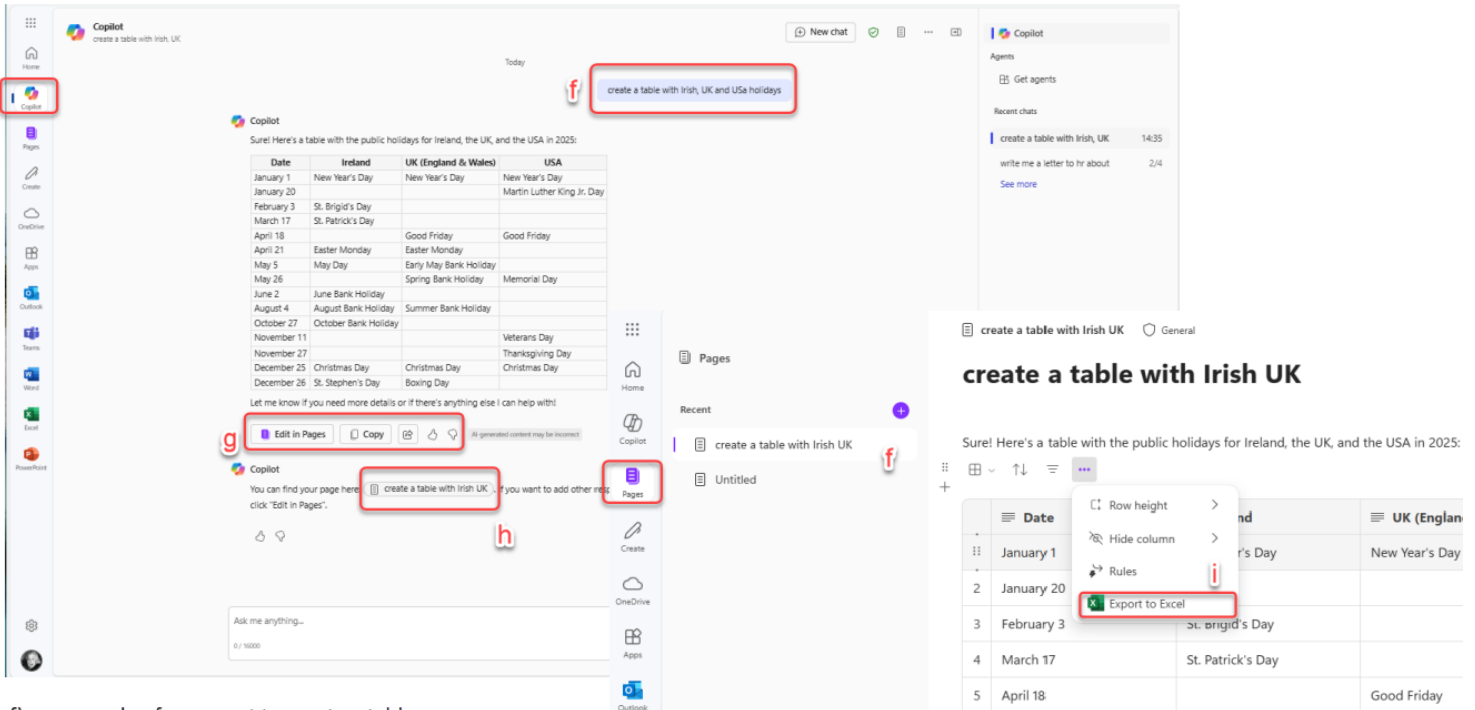
a) Copilot and Pages are interconnected

b) some common prompts are displayed in the main page (they will change)

c) enter your request/requirement in the chat dialog

d) additional prompts that you can customise are found here

e) the list of your chats is displayed here



f) an example of a request to create a table

g) the options Copilot provides to work with is to "Edit in Pages" (same as (h)), "Copy" and Like/Dislike

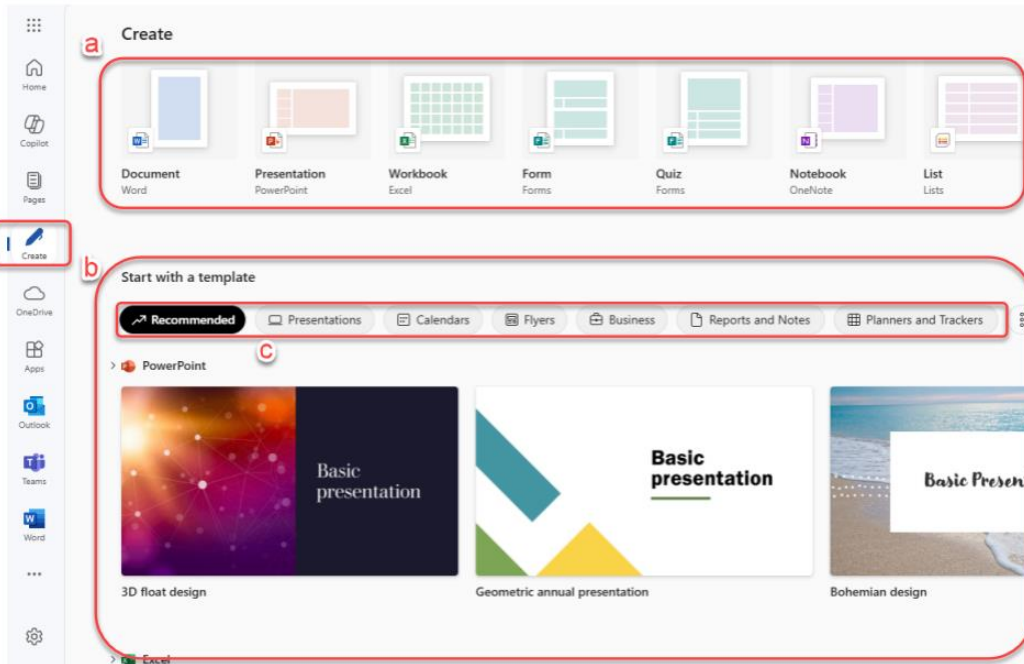
h) link to open the content directly in Pages

i) in Pages you also have an option of exporting to the app (content-relevant)

You can learn more about how to work with Copilot in these online videos

["Using copilot"](#) and ["Copilot video tutorials"](#)

Create



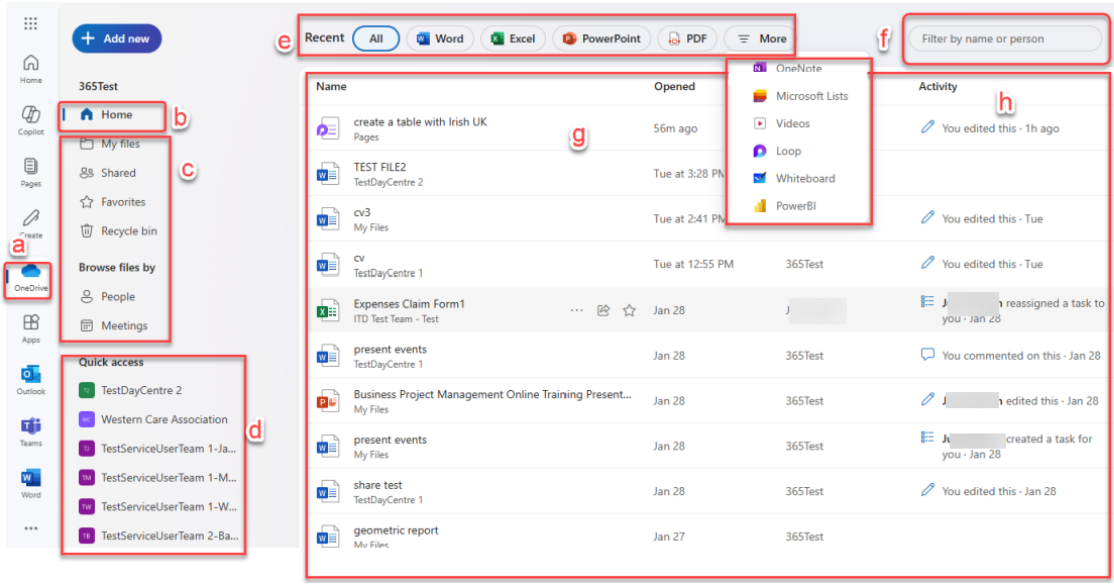
"Create" page:

a) by clicking on one of the tiles here you can create a new blank file of the type you choose

b) for PowerPoint / Excel / Word here you can choose to create a new file from a template

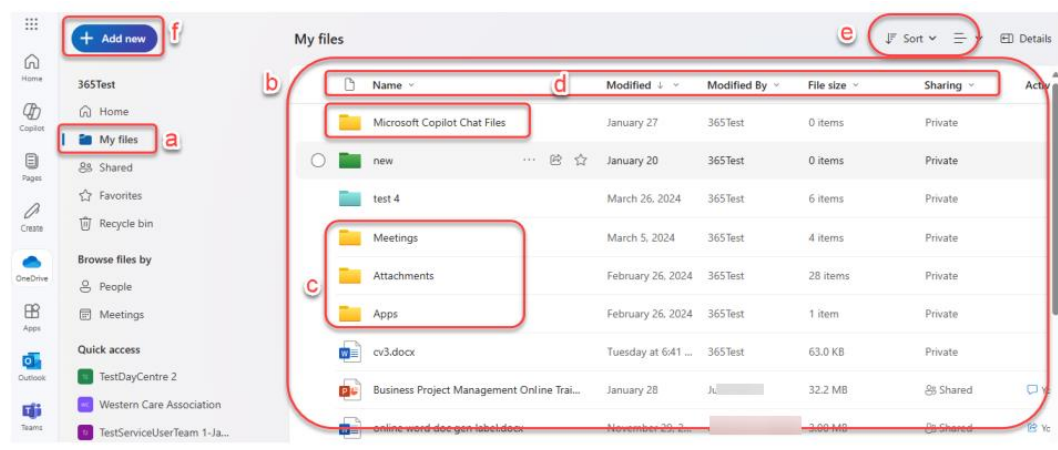
c) you can also sort templates by these categories

OneDrive

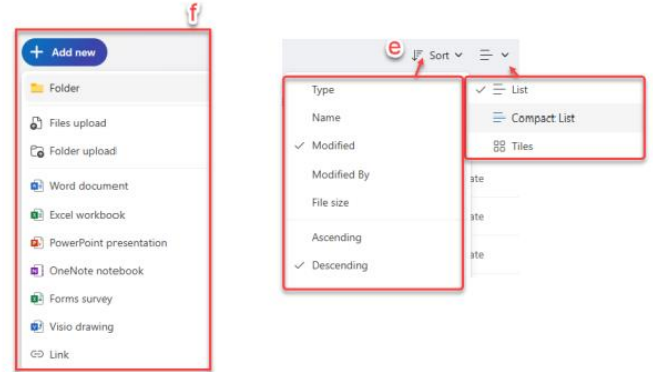


- a) When you click on OneDrive
- b) by default "Home" page of OneDrive will be open
- c) your categories are displayed here (the only difference between Home page view and My files is that you can only see folders in My files)
- d) here you can also have a quick access to the Teams' channels you are a member of
- e) you can sort files by types listed here
- f) you can filter by name or person
- g) the view shows you files you worked on or that were shared with you and see the columns such as Name/Opened/Owner/Activity

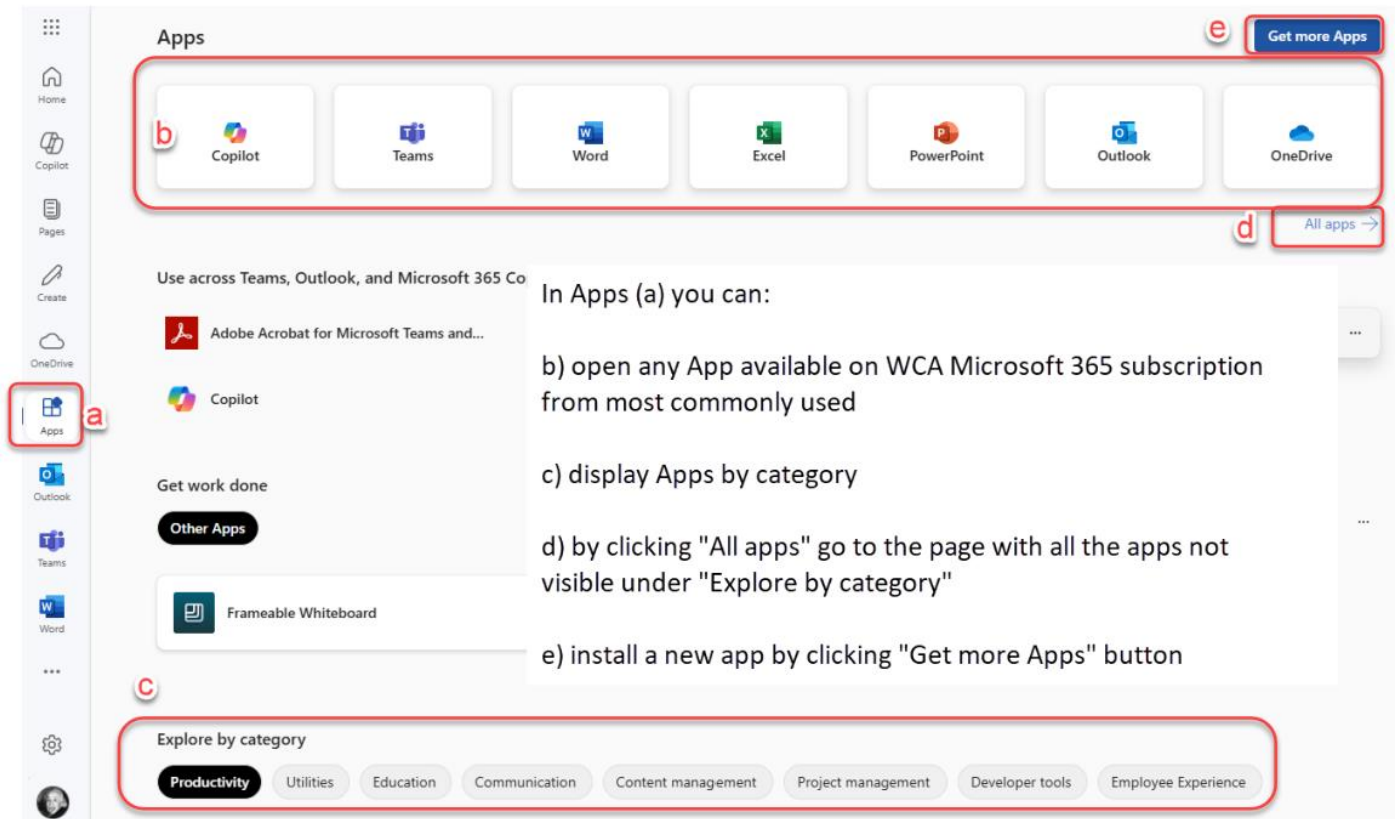
OneDrive > My files



- a) go to My files
- b) you can see both files and folders that you created online
- c) by default 365 also creates these folders: Microsoft Copilot Chat Files (if you installed Copilot) / Meetings / Attachments (for all attc
- d) you can sort files by these columns and sort each column by additional setting clicking on the drop-down arrow next to the column name
- e) there are additional sorting options and view options (List/Compact list/Tiles)
- f) by clicking on "+Add new" you can create and upload files and folders



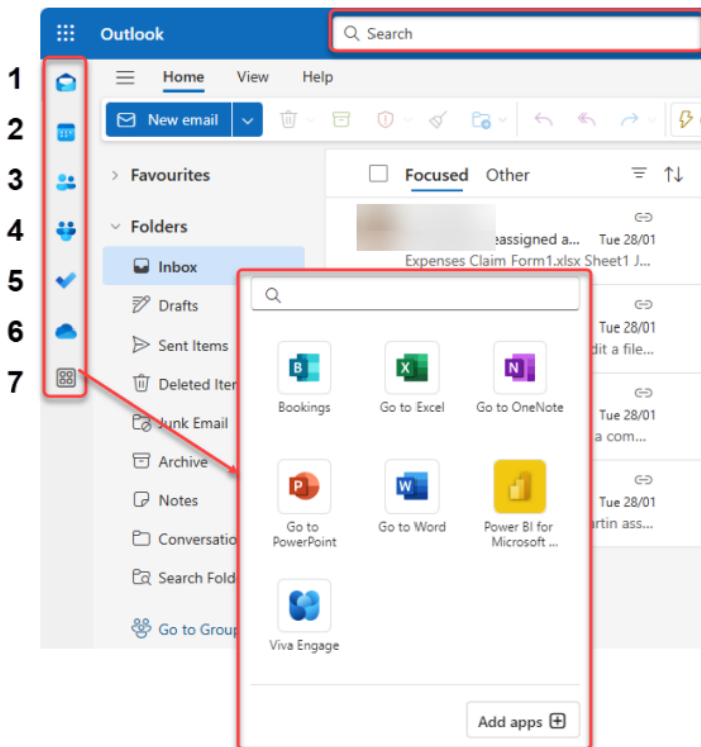
Apps



In Apps (a) you can:

- b) open any App available on WCA Microsoft 365 subscription from most commonly used
- c) display Apps by category
- d) by clicking "All apps" go to the page with all the apps not visible under "Explore by category"
- e) install a new app by clicking "Get more Apps" button

Outlook

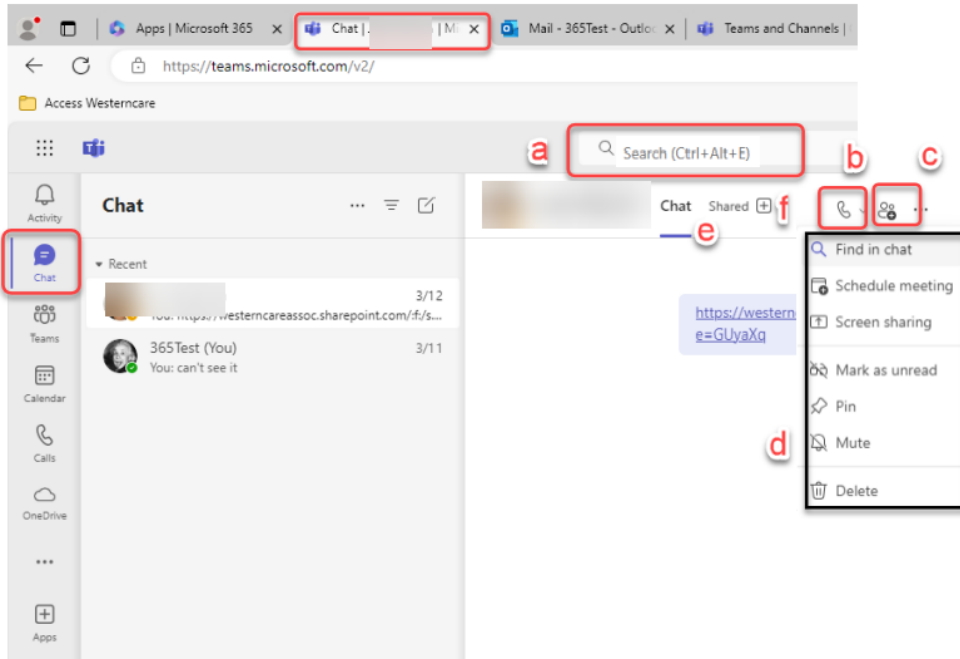


Outlook in 365 has the same look and functionality as the desktop app. It takes on the same colour theme you chose in 365 portal settings and opens in a new tab in the browser.

On the side bar there are shortcuts for other parts that you can open in the same or new tab (to open in a new tab right-click the corresponding icon and click on Open in new tab

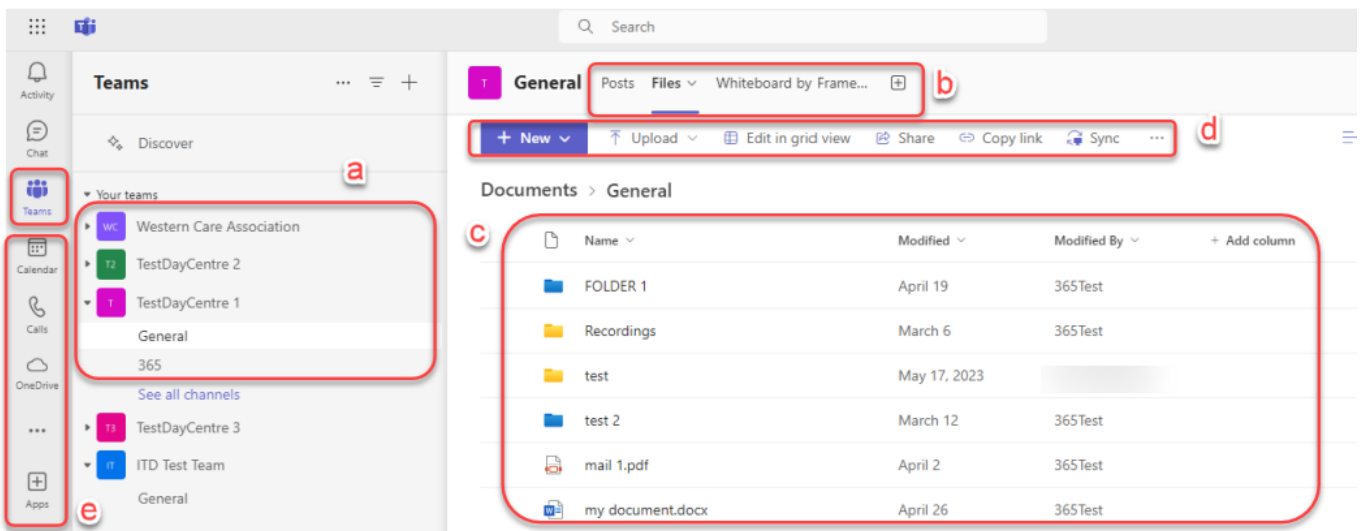
1. Mail
2. Calendar
3. Contacts (address book)
4. Groups (address book)
5. TO DO
6. OneDrive
7. Apps

Teams



By default Teams opens in "Chat" section of it in a new tab. Here you can:

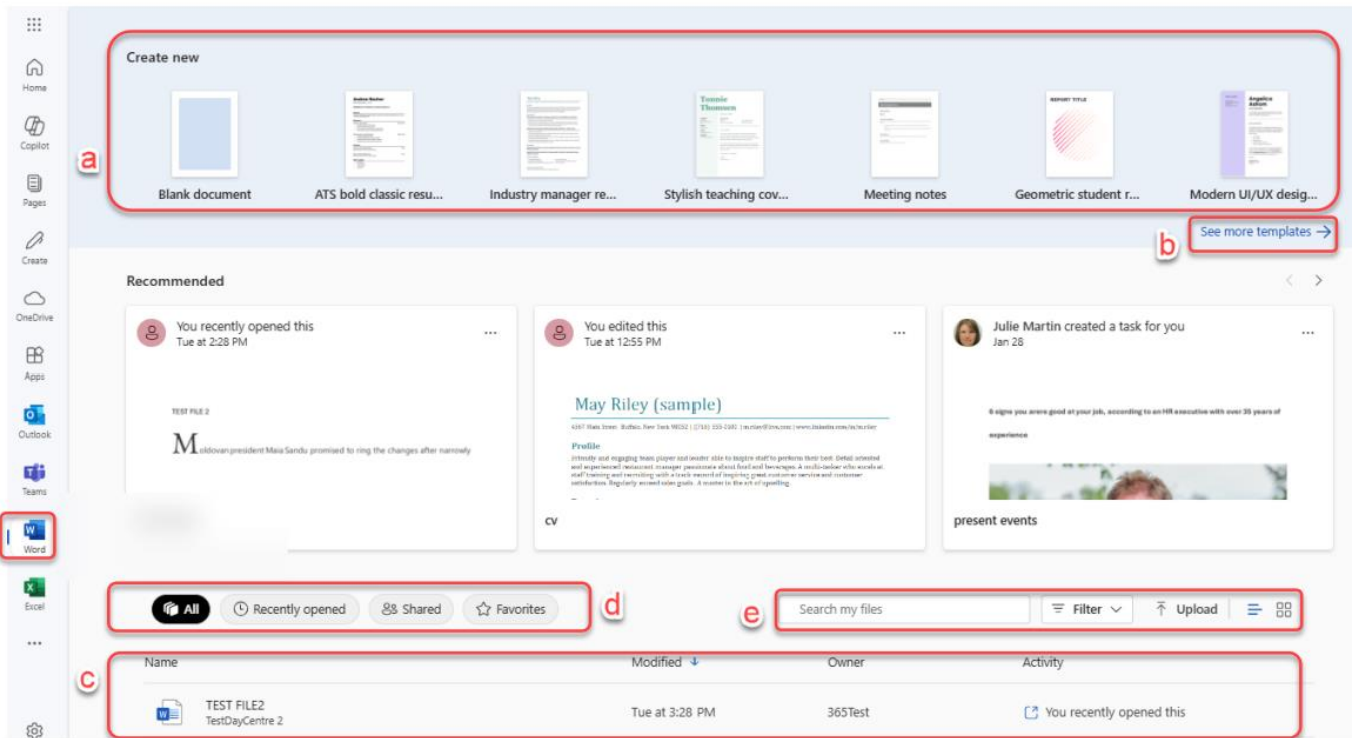
- a) search a person's name or group and start a chat
- b) can make an audio / video call
- c) add people to chat (create a group chat)
- d) take other actions
- e) find shared files
- f) add a tab



In "Teams" section of Teams you can:

- a) see different channels you are the owner or member of
- b) every channel has "Posts" and "Files" sections for chats and documents, you can also add app links
- c) work with files and folders
- d) create new folders/files/links etc. and take other actions
- e) access your team calendar in "Calendar", see a record of calls (and make calls) in "Calls", access your files in "OneDrive", search and access apps in "... " and "Apps"

Word / Excel / PowerPoint



Word, Excel and PowerPoint only show the documents of the same type
(Word only shows documents, Excel – spreadsheets, etc.)

In the app page you can:

- create a new document, blank or from a template
- choose a template that's not displayed on the page by clicking "See more templates"
- view all files created in this App by you or shared with you and sort by columns such as "Modified" etc.
- sort content by filters such as "Recently opened", "Shared" etc.
- search for a file that was created in this app, filter, upload and change view style