



# Office 365 Utilities

First African Conference on Knowledge Management for Change

Lome, Togo  
(June 13 – 15, 2023)

Dr Justin Ekpa,  
KM Lead, Caritas Nigeria

# Outline

- Introduction and Background
- Microsoft 365 Ecosystem
- Overview of Components
- User Mindset
- Dos, Don'ts and Taboos
- How-Tos
- Conclusion

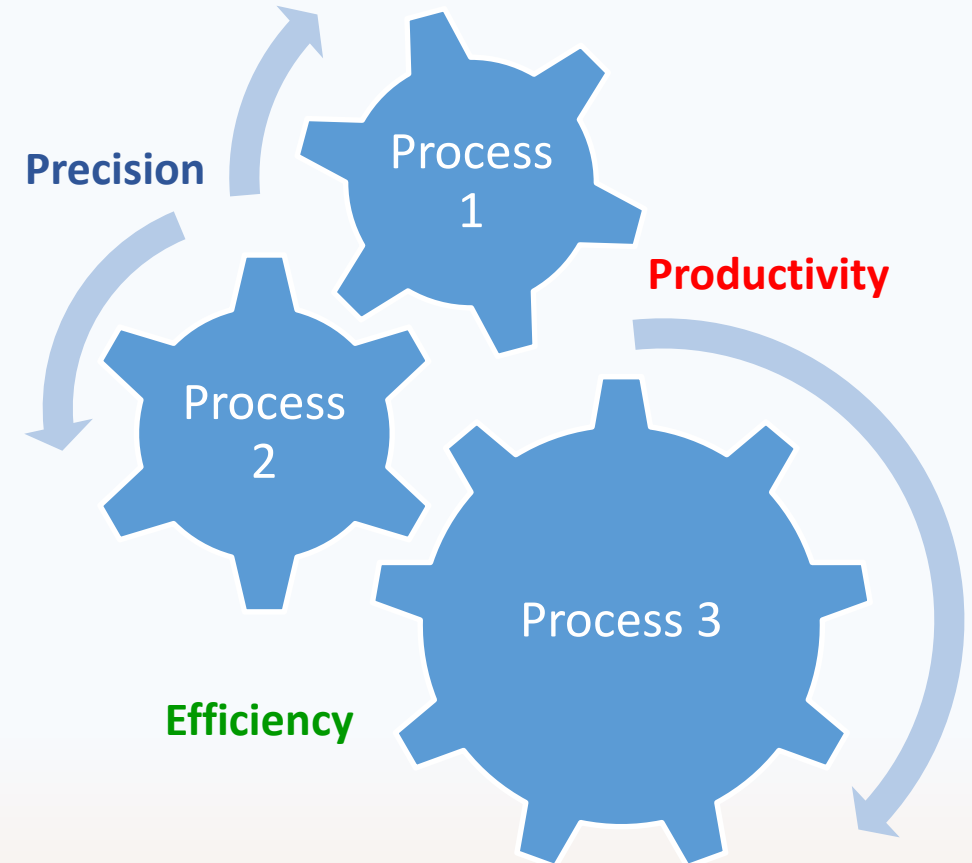
# Introduction

- **Utilities** – Advantage/benefits derived from something
- Caritas Organizations – Our work in development space gives us clear business goals and objectives that have to be met:
  - Project interventions, office work, administration etc
- How can we leverage Office 365 (Microsoft 365) to achieve our goals?



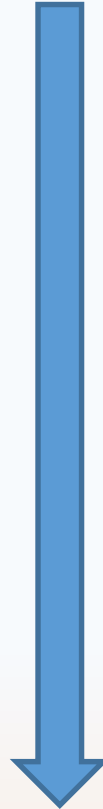
# Background

- Organizations and the business processes – increased efficiency and productivity
- The quest for process automation to improve productivity through technology
- Office 365 - Evolution from PC based software to a robust enterprise business solution that has transformed the way organizations work today:  
**efficiency, precision, productivity**



# Evolution of Microsoft 365

- MS Office 1.0 Word, Excel, PowerPoint – 1990
- **Office 2003 – Most used version**
- **Office 2007 – Ribbon interface**
- **Office 2010 – Office Web Apps**
- **Office 2013 – Cloud Integration**(cloud-based business suite)
- **Office 2016**
- **Office 2019**
- **Office 2021**



**Office 365 (2011)** - web versions of Word, Excel, PowerPoint, OneNote, and a mail program

**Microsoft 365 2021**

# Microsoft 365 Ecosystem

- Cloud-based business applications solution with complete suite of tools to simplify and automate business processes at various levels:
  - Individual, groups, Organization-wide, institutions; and beyond (externally)
- Model: SaaS (Cloud and PC-based)
- Features
  - cloud space for content and applications
  - Diversity
  - Integration/Synchronicity/Dependabilities/Shareability
  - Use across multiple devices

**50+ applications**

Huge potentials to harness



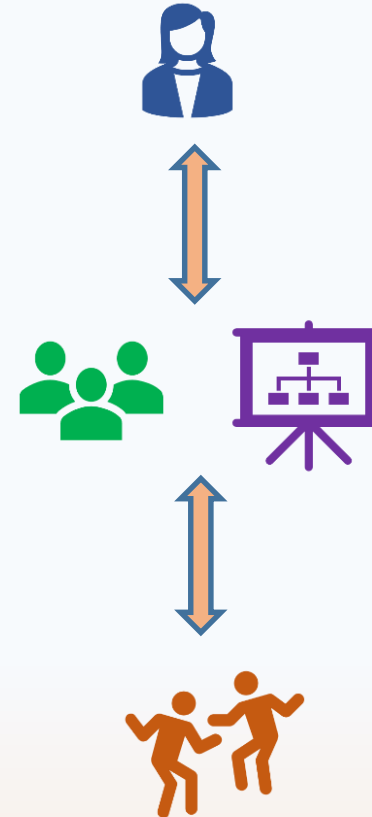
# Analogy

Microsoft 365 Ecosystem: a Republic with all the elements of nationhood: citizenship, specific national products or goals, privileges, a unique environment, work tools etc

Attributes	Republic	Microsoft 365 Ecosystem
Space	Physical	Virtual – Devices (PCs, Mobile etc); Browser
Membership	Citizenship (born/visa)	Users (Login)
Identification	National ID/Passport	Email Account
Rights & Responsibilities	National Assets (Land, house, roads, healthcare etc)	To create and own (Onedrive, Sharepoint, Groups etc)
Goals	National Products/Interest	Business Goals of the Organization
Connectivity	Movement	Internet
Communication	Media, national Orientation agencies	Email System
Work Tools	Facilities, institutions/public utilities	Applications

# Classification

- **Productivity Tools (Personal Office)**
  - Outlook; Word; Excel, PowerPoint; OneNote
  - Sway; Planner; Calendar; PowerApps; Forms; Lists; ToDo; Whiteboard
- **Enterprise Tools (Org-wide):**
  - Outlook; OneDrive; SharePoint; Teams; Yammer; Delve; Project; Viva Insights; Stream; Power Automate; Security; Power BI
- **Add-ins/Third Party Extensions**
  - Applications inside tools in the ecosystem
  - +/- Additional Subscription
  - Connectors





# Productivity Tools

- Core

- OneNote
- Word
- PowerPoint
- Excel
- Outlook

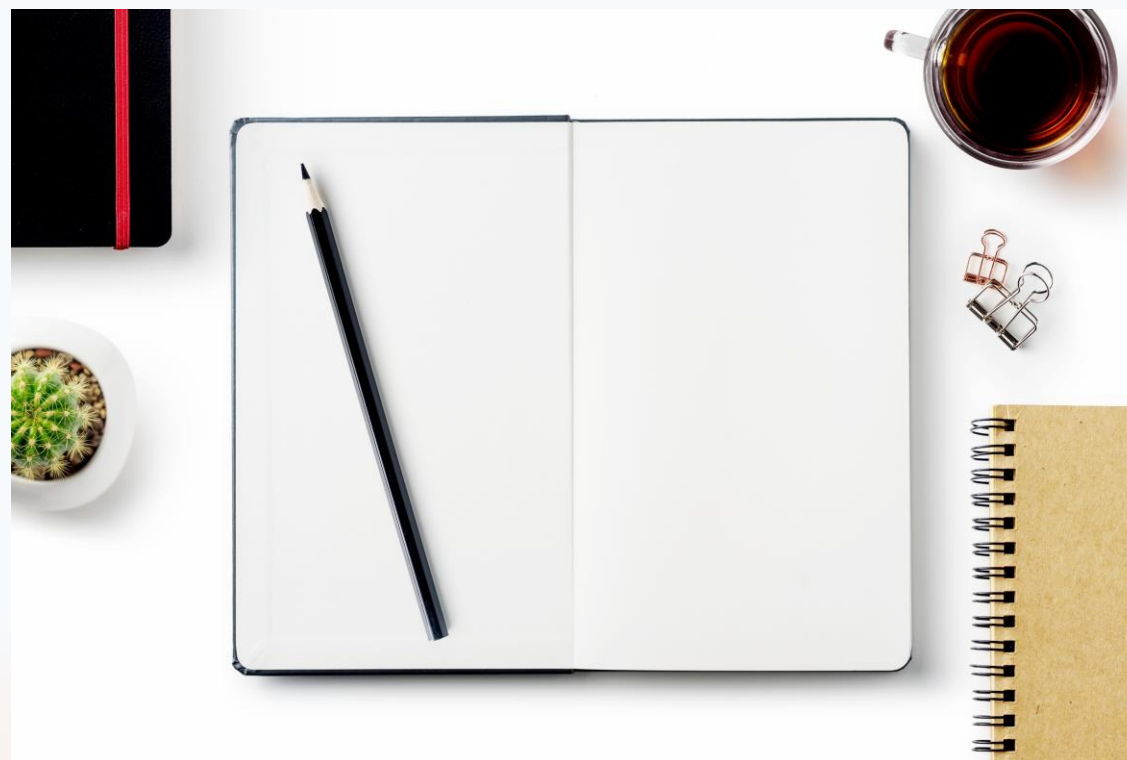
Sway

Power Apps

- Basic business tools on the ecosystem for generating outputs (office files)
- Used at the individual level
- Content-oriented
- PC and Cloud versions (browser, mobile)
- Online space benefits:
  - AI, Realtime Search, online resources
- Direct **Sharing**
- Countless integrated addons

# Use case: Microsoft OneNote

- Powerful content-creation tool
- Rarely used or least understood tool
- Digital notebook – canvas/dashboard
- Organize your work:
  - notebooks, sections, pages, tags
- Gather and optimize your thoughts:
  - ink, stylus, finger, word processing
- Mix media:
  - audio notes/transcription, video recording, images, extract text, web clipper
- Automation:
  - Meeting notes; sync with outlook
- Share and collaborate on a notebook
- Use across multiple devices



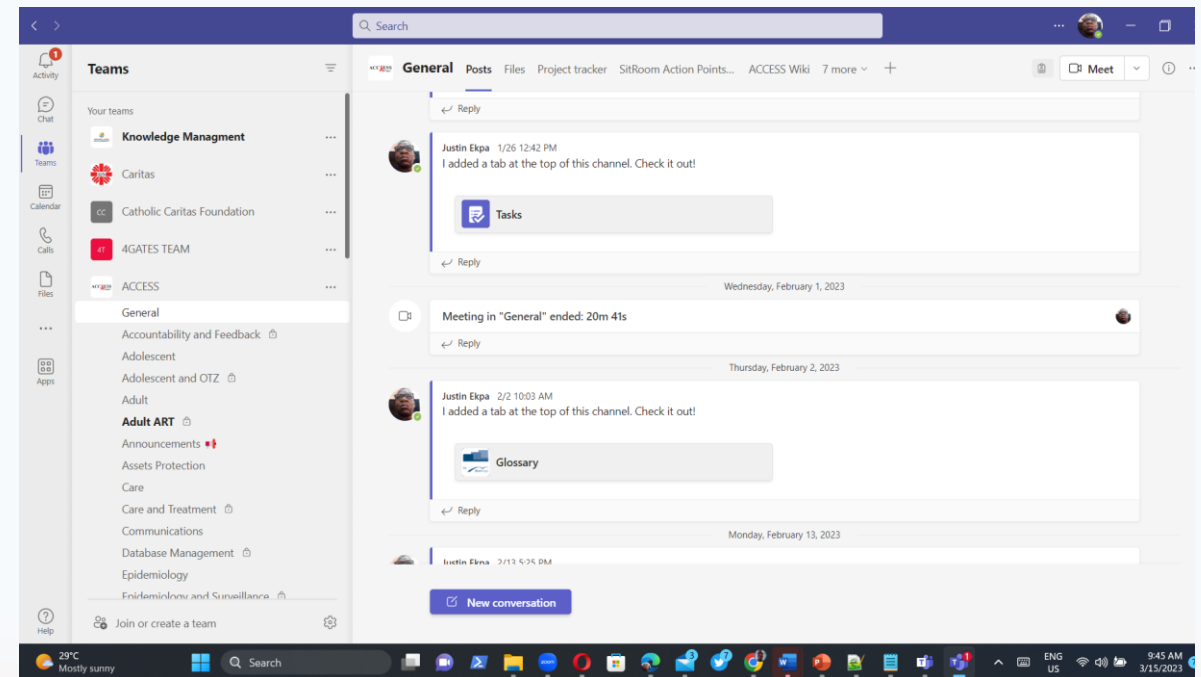
# Enterprise tools

- **Teams** – Group virtual workstation; knowledge creation hub for project teams with application and content on the same location
- **OneDrive** – default file/documents repository
- **SharePoint** – Group or Team information/communication hub or portal for sharing and collaboration
- **Delve** – user-to-user profiles and career development platform: create, edit and share documents, gather right team for a project
- **Yammer** – internal social media, engage and build a network/Communities (CoP)



# Use case: Microsoft Teams

- Group virtual workstation;
- knowledge creation hub – brings people, content and tools together
- Teams creation comes with other associated components y default:
  - Email Group
  - OneDrive
  - SharePoint
- Structured:
  - Main Team – Owners/Members/Guests
  - Channels – Moderators/Members
    - General; Public; Private
- Powerful meeting Platform
- Huge collection of useful apps for so many initiatives across the organization



# Devices Apps

- The **SaaS model** is a cloud-based software (entire ecosystem)
- Applications can be accessed from anywhere with an internet connection and a browser
- There are Equivalent apps for all components on our internet enabled devices
  - PC, Tablets, Mobile
  - Search for and download appropriate app
- NB: There are limitations among types of devices in terms of what can be done
- Any file can be edited in real time using either the browser or relevant app as necessary

# Automation

There are provisions for the automation of processes and tasks within the Microsoft 365 ecosystem

- **Power Automate**
  - Flows
  - Activities data
- **Power BI**
  - Data Analysis
- **Custom apps** – the ones you create yourself
- **Connectors** – links apps to other apps

# Third Party Business tools

- Add-ins or extensions
- **5,362** tools and more
- Subscription-based
  - Overall, more cost-effective
- **Formula:**
  - Imagine whatever functionality you your desire to enable me you manage your project or the team you work with >> search for it >> and you will find an app that will meet your need.
- Examples:
  - LMS365
  - Simple In/Out (device-based sign in register) on Teams

# Caritas Nigeria LMS on LMS365

The screenshot shows a SharePoint LMS interface. At the top, there is a dark blue header with the 'SharePoint' logo, a search bar labeled 'Search this site', and several utility icons. Below the header, the main content area is titled 'Quality Concepts Overview' with a 'QC' icon. To the right of the title, it indicates 'Private group', 'Not following', and '2 members'. Below the title, there are action buttons: '+ New', 'Discard changes', 'Page details', and 'Analytics'. On the right side of this section, it says 'Draft saved 3/17/2023', 'Edit', and a 'Republish' button. The main content area features a large banner image of a woman presenting to a group of people. Overlaid on the left side of the banner is a circular icon with a checkmark. Below the banner, the text 'Concepts and Principles of Quality' is displayed. To the right of the banner, there is a 'Course management' link. On the left side of the interface, there is a navigation pane with a list of items: 'Course Catalog', 'My Training Dashboard', 'Home', 'Conversations', 'Documents', 'Notebook', 'Pages', 'Site contents', and 'Recycle bin'. At the bottom of the navigation pane, there is a section for 'Add real-time chat' with a brief description and a 'Close' button. Below the banner, there are two main content blocks. The first is 'Course description', which includes a dropdown arrow and a paragraph: 'This module gives an overview of key concepts and principles of quality management and how they culminate in meeting the needs of the customer. It also draws out the difference between QA and QI. Lastly, it provides an in-depth...'. The second block is 'Information', which shows a star rating of 0 ratings and an 'e-Learning' icon.



# User Rights and Privileges

- Tiered Relationships: With other members; with groups; with All Staff (Company)
- Powers and privileges
  - Individualization: You get full rights for whatever you create
  - Transferability and controls: you can transfer privileges to others as you deem right
- **Protocol: Creation** of an enterprise block or group (Email, Team, Yammer Community):
  1. Creates Email Group
  2. Creates OneDrive Repository
  3. Creates SharePoint site
- **Activities** (Sharing/Posts/Comments/Replies/Likes etc):
  - Initiates email alerts to all parties involved
  - Generates internal data that can be accessed in future
  - Self-accounting
- **Choices** (Social Media System)
  - Follow/Unfollow
  - Like/Unlike
  - Mentions (using @ character in any part of the ecosystem)

# Compendium/Mindset for operating in the Ecosystem

- Everyone has a unique identity in the space
- All activity is tied to that identify
- Assets (files) are safer in the cloud than the PC
- All creations could get to other people in the space
- Any outputs or creations (files, folders, apps) can be shared with any one or groups

**MINDSET**



# Dos and Don'ts

## Dos

- Create your files, name them appropriately and store them in OneDrive before sharing
- Organize your work with OneDrive
- Share files directly and grant appropriate permissions
- Sync your PC files to OneDrive: maintains a single version of documents
- Own your work: remember your file metadata
- Preferably edit files in/from the cloud
- **Collaborate with others on a file: smarter and more practicable**

## Don'ts

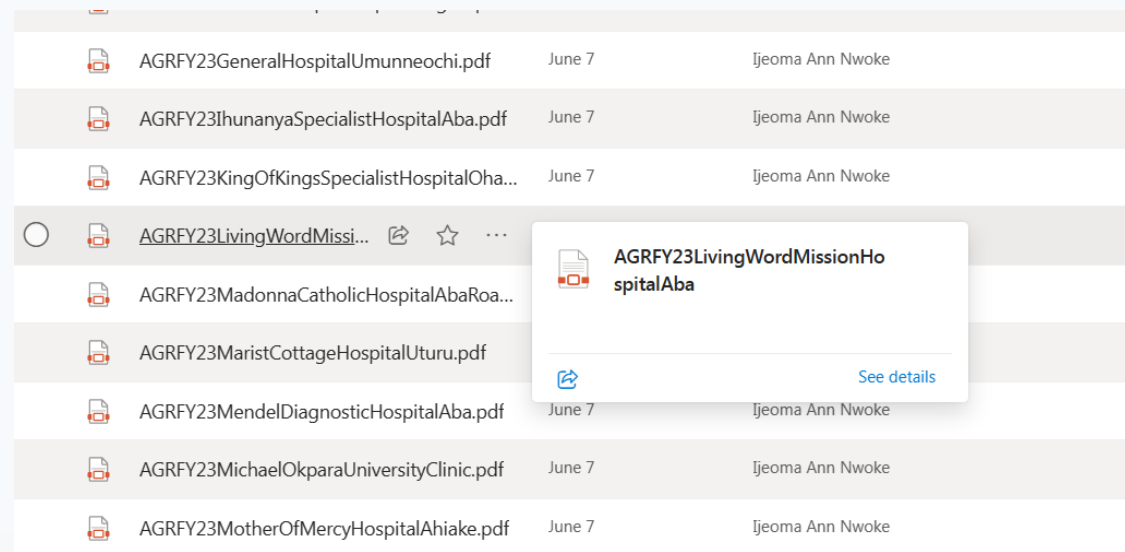
- **Using email attachments to share files.**
- **Special Characters:**
  - Using these characters in your file names:  
**\* : \_ \ / < > | " ' ? [ ] { } | ; = + % ~ ^ # @ & £ \$ , .**
  - Including *spaces* in your file names instead of applying Word delimitation
- **Downloading files to edit and uploading same file after editing**
- **Keeping different versions of documents on both cloud and PC**

# Best Practices

- **File-sharing: Upload on OneDrive; generate and share links with edit permissions**
- **Collaboration: Upload to OneDrive; grant permission to collaborators; co-edit from one location**
- **Email attachments:**
  - **choose to save on OneDrive**
  - **Save space; single document; one version**
  - **Ease of collaboration later**
- **Meetings: Schedule meeting inside Teams or any of the channels**
- **Syncing: Sync your PC to your OneDrive account**
  - **Space-saving options**

# Naming your Files in OneDrive

- Apply a Taxonomy System:
  - Folder Naming System
  - File Name System
  - Metadata System
- Avoid spaces in your names
- Maintain a controlled vocabulary
- Useful Tools
  - Bulk Rename Utility
  - Total Commander
  - MetadataTouch



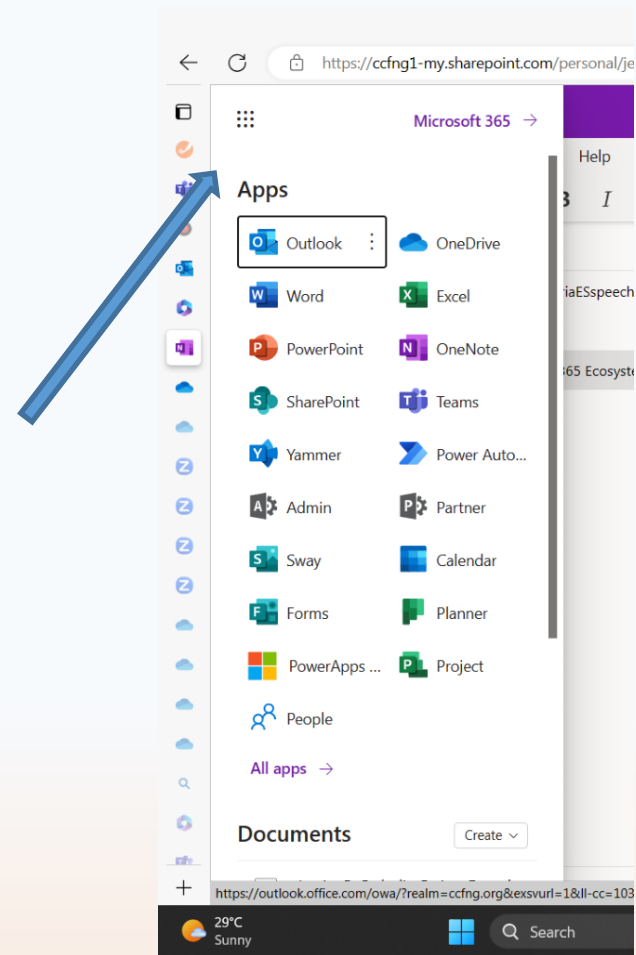
The screenshot shows a list of PDF files in OneDrive. The file 'AGRFY23LivingWordMissionHospitalAba' is selected, and a tooltip is displayed over it. The tooltip contains the file name and a 'See details' link.

File Name	Date	Author
AGRFY23GeneralHospitalUmunneochi.pdf	June 7	Ijeoma Ann Nwoke
AGRFY23IhunanyaSpecialistHospitalAba.pdf	June 7	Ijeoma Ann Nwoke
AGRFY23KingOfKingsSpecialistHospitalOha...	June 7	Ijeoma Ann Nwoke
AGRFY23LivingWordMissionHospitalAba		
AGRFY23MadonnaCatholicHospitalAbaRoa...		
AGRFY23MaristCottageHospitalUturu.pdf		
AGRFY23MendelDiagnosticHospitalAba.pdf	June 7	Ijeoma Ann Nwoke
AGRFY23MichaelOkparaUniversityClinic.pdf	June 7	Ijeoma Ann Nwoke
AGRFY23MotherOfMercyHospitalAhiake.pdf	June 7	Ijeoma Ann Nwoke

# A few How-Tos and tricks

# Launching Microsoft 365 Apps

- Open Browser
- Login to Outlook account:  
[www.login.microsoftonline.com](http://www.login.microsoftonline.com)  
or [www.outlook.office.com](http://www.outlook.office.com)
- Open **App launcher** and choose desired App from the drop down
- Download equivalent App for PC, tablet or mobile (if available) or as prompted



# Editing a cloud-based file on Desktop (Word, PowerPoint, Excel, OneNote)

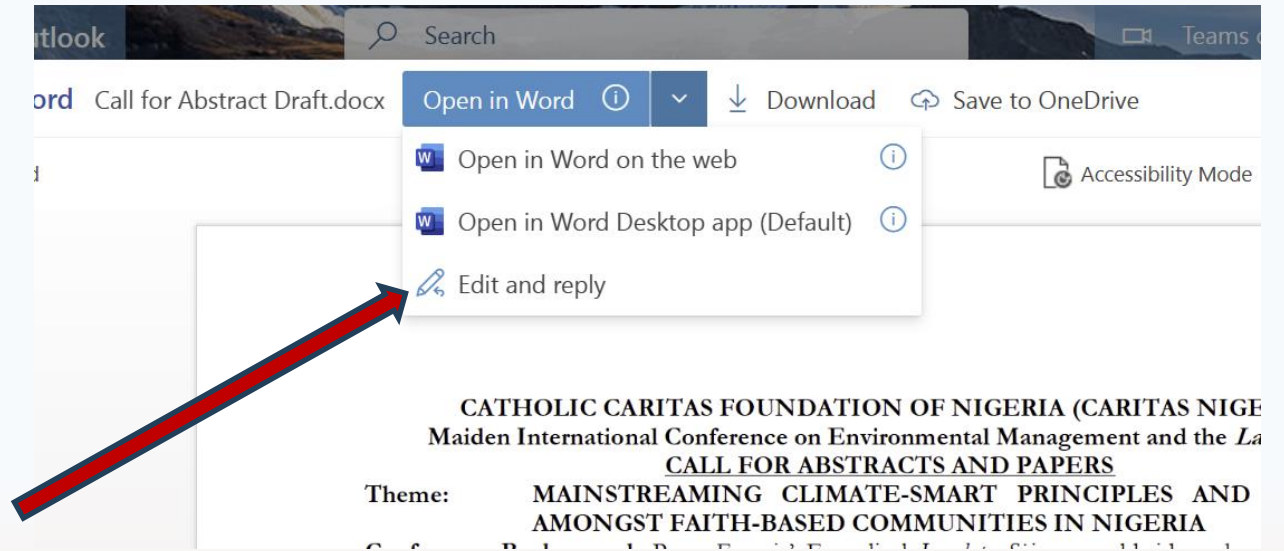
- Open file in a browser by clicking on link
- On the main menu (top right axis) click on the 'Editing' dropdown and select 'Open in Desktop App'
- This launches the file in desktop App
- Continue editing and either save intermittently or finish and save at the end
- Each time you save, the file connects to the OneDrive Exchange server to sync
- Ensure you have internet before you close file or PC app



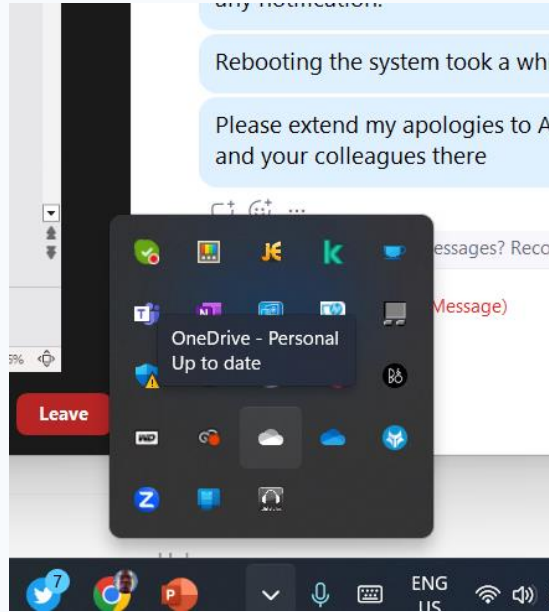
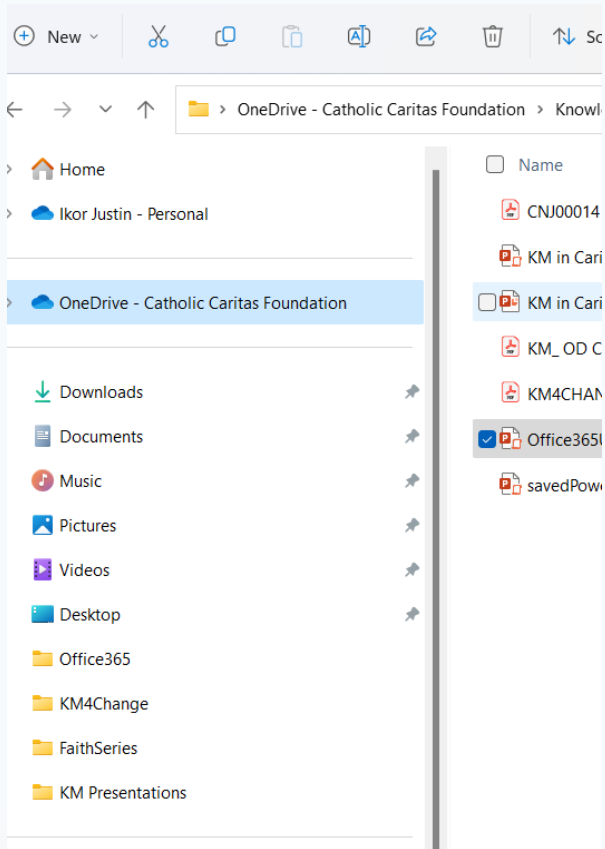


# Editing Attachments sent by email for inputs without downloading

- Open Email
- Click on attachment to get to editing mode
- Commence editing and complete
- Select **edit and reply**

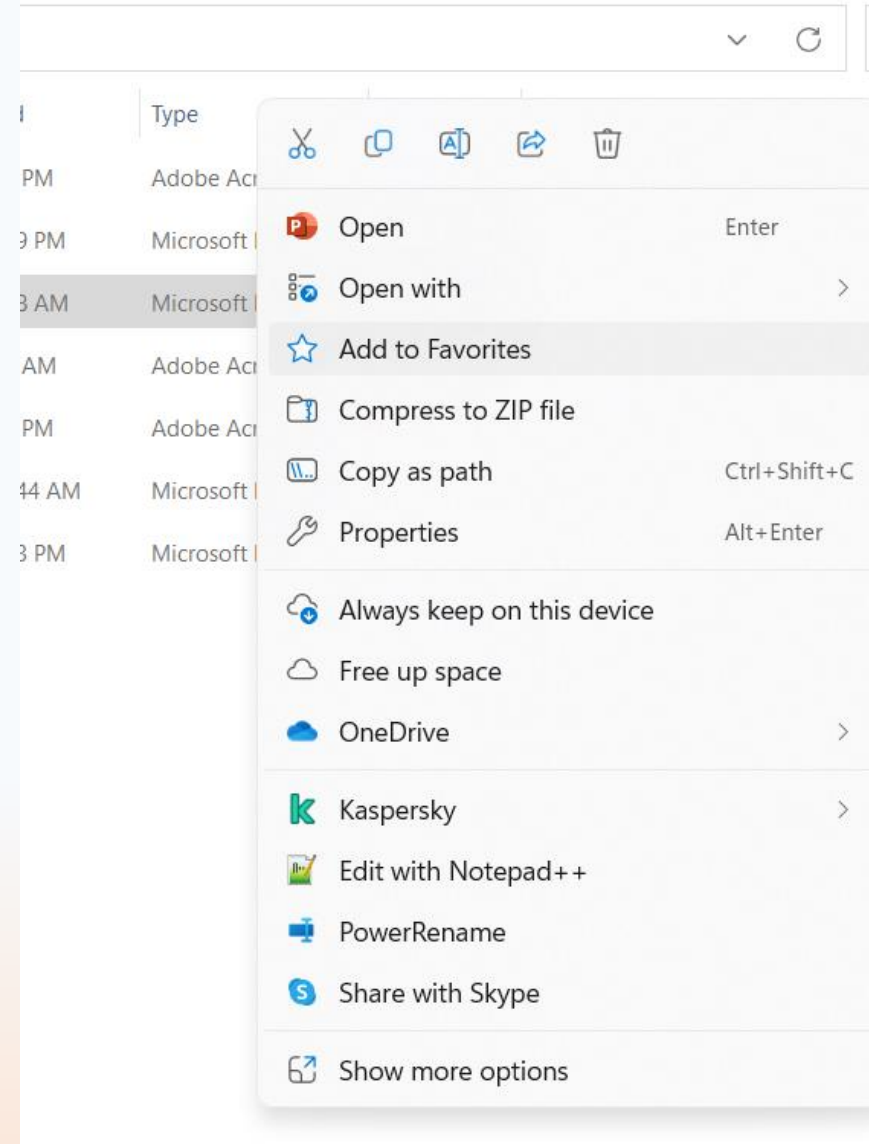


# Syncing OneDrive to PC



indation > KnowledgeManagement > KM4Change

Name	Status	Date modified
CNJ00014	✓	6/5/2023 3:06 PM
KM in Caritas Nigeria	✓	6/10/2023 7:29 PM
KM in Caritas Nigeria-updated	✓	6/14/2023 8:58 AM
KM_OD CoP session 14 December- A...	✓	6/6/2023 9:59 AM
KM4CHANGE Conference 2023 Agend...	✓	6/5/2023 1:39 PM
Office365Utilities_km4change	✓	6/14/2023 12:44 AM
savedPowerpointm	↻	6/14/2023 3:53 PM



# Acquiring Office 365

## Individual

- Microsoft Account
- Free (Minimal functionalities)
- Personal/Family License

## Enterprise (Subscription – number of users) for:

- Workplace (companies)
- NGOs
- Schools

# Conclusion

- Microsoft 365 is the ultimate solution for organizations that seek to function optimally in the knowledge age
- The ecosystem has more than enough third-party applications to meet the needs of an organization across all departments or functions
- If properly harnessed, Microsoft 365 can transit any organization into a highly efficient, knowledge-driven organization well-positioned for optimal performance and excellence.

# Live Demo Session



Thank you for listening