

Maximizing Your Nonprofit's Productivity with Microsoft Office 365

Tyler Hoffman // Digital Solutions Consultant

About Me



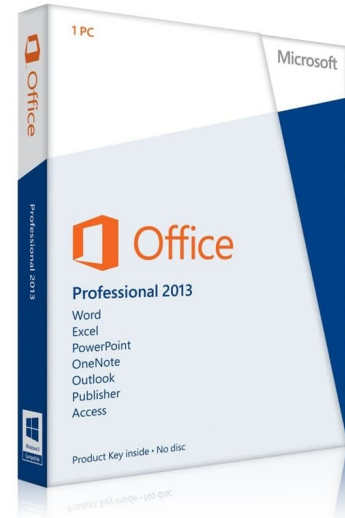
Objective

Explore easy-to-implement strategies for getting good work done with Office 365:

- **Understand** its value
- **Simplify** your work
- **Maximize** your effort
- **Automate** your tasks

What is Office 365?

The Old Way...



What is Office 365?

The New Way...

Office 365 is an integrated experience of productivity apps and cloud services consisting of:



Traditional Office and...

What is Office 365?

...Modern Web Tools



Dynamics 365

Break down the silos between your business p...



Excel

Discover and connect to data, model and anal...



Forms

Create surveys, quizzes, and polls and easily s...



Kaizala

A simple and secure mobile chat app for work



MyAnalytics

Create better work habits with insights into yo...



OneDrive

Store, access, and share your files in one place.



OneNote

Capture and organize your notes across all yo...



Outlook

Business-class email through a rich and famili...



People

Organize your contact info for all your friends,...



Planner

Create plans, organize and assign tasks, share ...



Power Automate

Create workflows between your apps, files, an...



PowerApps

Build mobile and web apps with the data your...



PowerPoint

Design professional presentations.



Security



SharePoint

Share and manage content, knowledge, and a...



Stream

Share videos of classes, meetings, presentatio...



Sway

Create and share interactive reports, presentat...



Tasks

Create and manage tasks in Outlook.



Teams

The customizable, chat-based team workspac...



To Do

Manage, prioritize, and complete the most im...



Video

Share videos of classes, meetings, presentatio...



Whiteboard

Ideate and collaborate on a freeform canvas d...



Word

Bring out your best writing.



Yammer

Connect with coworkers and classmates, share...

Advantages to Nonprofits

- **Free and discounted plans** for verified 501(c)3 nonprofits
- **Hosted email** with varying degrees of storage:
- **Increased security** features to better protect data and files
- The **collaborative, anywhere, anytime** availability of the cloud
- The opportunity to **cancel/replace redundant services**, saving money
- **Support 24/7.** Don't have on-call IT staff? Office 365 provides 24/7 professional-level support.

Peace of Mind with Built-In Security

- **Forces users to create strong passwords** and change them on a schedule
- **Includes two-factor authentication.** Office 365 can require two “factors” to sign you in: a password as well as a unique code or prompt sent to your smartphone.
- **Enroll devices** and remotely erase them in the event they are lost or stolen.

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What is Office 365?

- **Outlook:** email, calendaring and contact management
- **OneDrive:** share files, collaborate on documents, and sync files
- **SharePoint:** store, share and access information online
- **OneNote:** free-form note-taking program for any device
- **ToDo:** quickly capture and retrieve tasks
- **Forms:** create surveys, quizzes, and polls, and easily see results
- **Power Automate:** easily create automated workflows
- **Teams:** single workspace for conversations and content

OneDrive

- **Sync and backup** your files across devices
- Software and browser-based
- Replaces “My Documents,” “My Pictures” folders
- One to many collaboration
- Share links to files rather than attachments
- Allows for external access
- Best for **in-progress** or **private** content

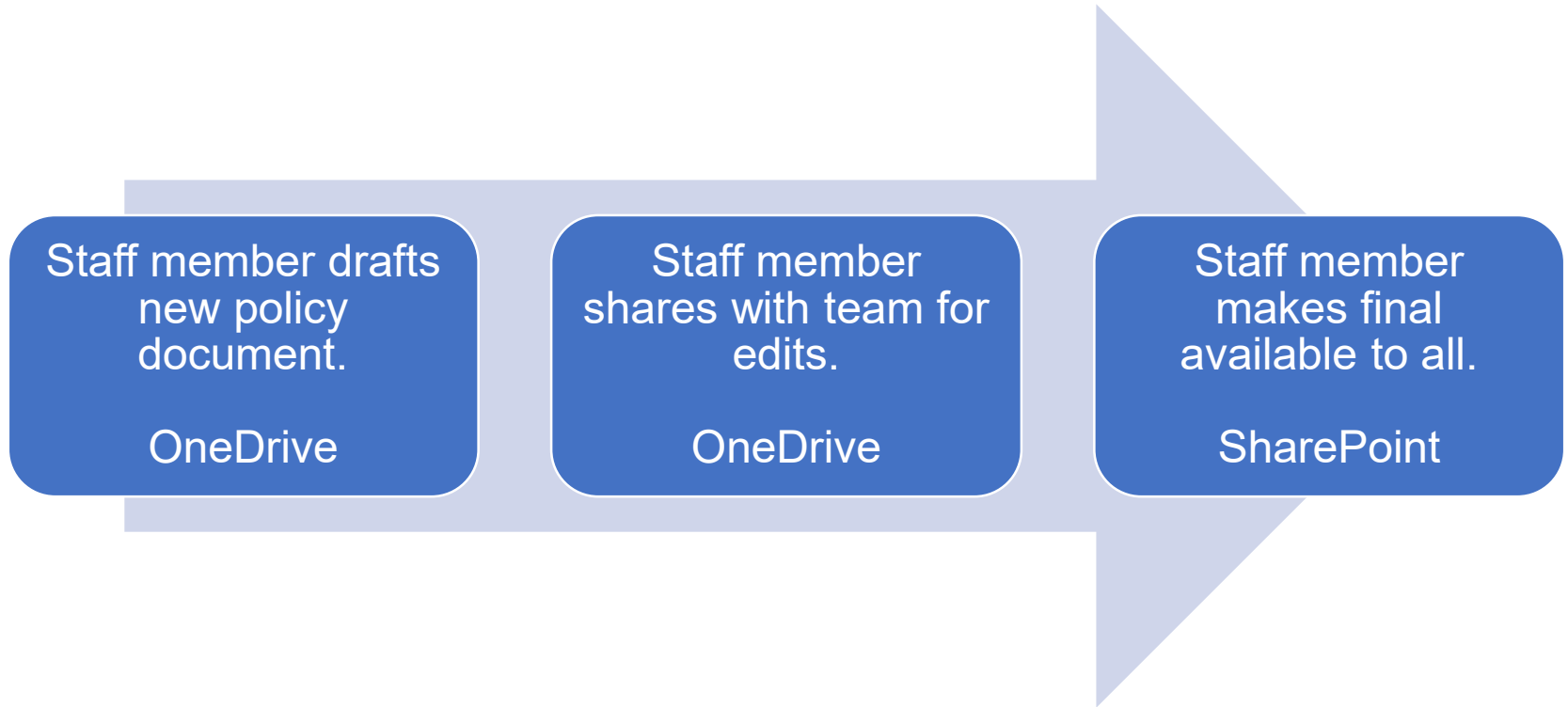


SharePoint

- Internal sites for teams
- Browser-based only
- Information sharing
 - Calendar
 - Video
 - Documents
 - Lists
- Allows for external access
- Best for **published** content



OneDrive + SharePoint Scenario



OneDrive + SharePoint

Demonstration

OneNote Overview

- Capture notes and information
- Access it everywhere
- Organize notes into binders, sections and pages
- Clip content from your web browser
- Add content from other Microsoft apps (Outlook)
- Easily search all your notes



OneNote Ways to Use

OneNote gathers notes, tasks, drawings, screen clippings and other data allowing for:

- Simplified research collection
- Better meeting notes and follow-up
- Going paperless



OneNote Web Clipper

Add the OneNote Web Clipper to your web browser so you can save, annotate, and organize anything from the web.

- Quickly capture any webpage to OneNote, where you can easily edit, annotate, or share it.
- Reduce the clutter and clip only the article, recipe, or product information you really need.
- Access your clipped webpages on any computer, tablet, or phone - even when you're offline.

→ Download at onenote.com/clipper



Office Lens Capture Your Information

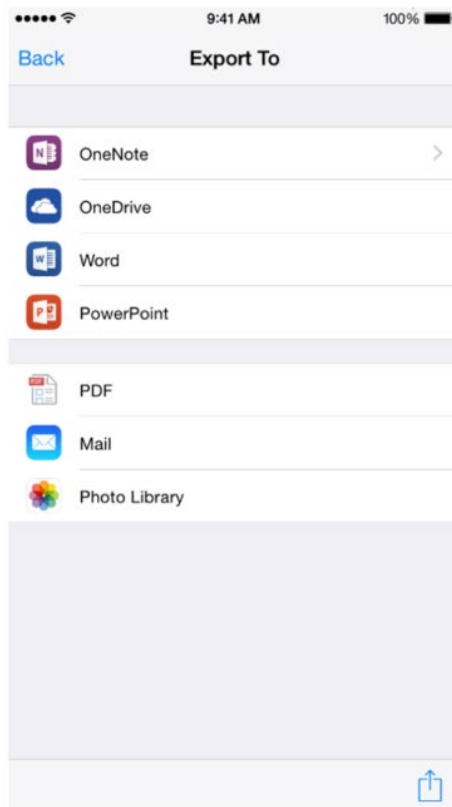
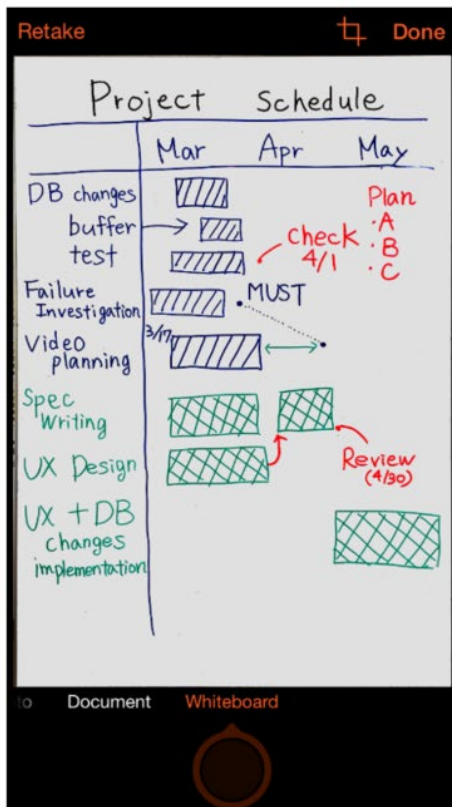
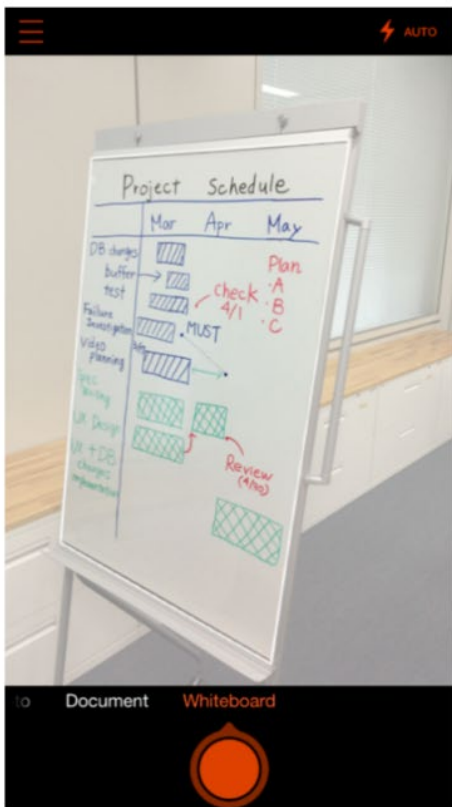
Office Lens

- Companion app for OneNote
- Access it everywhere
- Capture business cards, documents, whiteboards
- Import contact information directly into Outlook
- Save to OneNote, OneDrive and more

→ Download from the Apple App or
Google Play Store

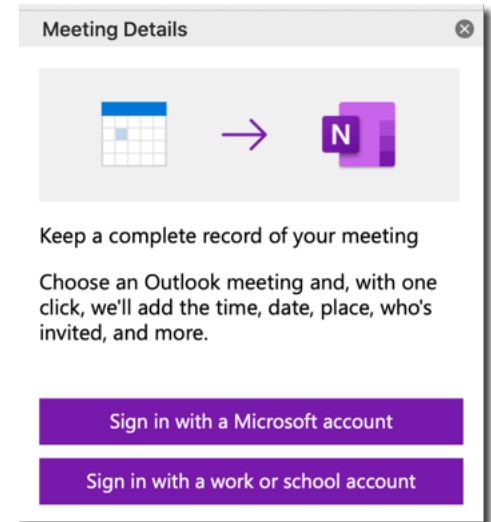
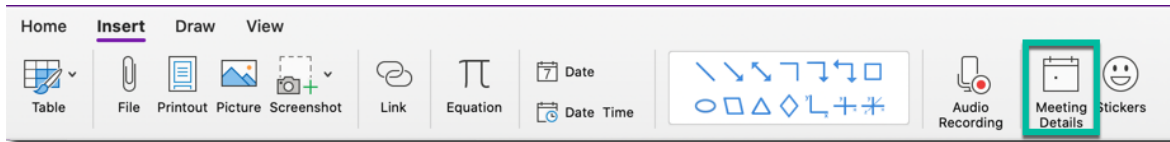


Office Lens Capture Your Information



OneNote Meeting Notes

- OneNote syncs automatically with your Outlook calendar
- By inserting Meeting Details in OneNote, you receive:
 - Meeting date and time
 - Meeting location
 - Roster of invitees
 - Roster of attendance (coming soon for Teams)



OneNote Meeting Notes

tyler.hoffman@philips.com

Database Portal

Flash Conversion Project

2018

Expectations for development templates and flash conversion

Tuesday, September 25, 2018 8:50 AM




Meeting Date: 9/25/2018 9:00 AM

Location: Skype Meeting

Link to Outlook Item: [click here](#)

Invitation Message (Expand)

Participants (Collapse)

-  [Hoffman, Tyler](#) (Meeting Organizer)
-  [Preston, Diana](#) (Accepted in Outlook)
-  [Gary Argento \(Gary.Argento@philips.com\)](#) (Accepted in Outlook)

Notes

OneNote

Demonstration

Microsoft ToDo

- Break tasks down into simple steps, add due dates, and set reminders to keep you on track.
 - To Do is integrated with Outlook Tasks, making it easier to manage all your tasks in one place.
 - Microsoft To Do is available for free, and syncs across iPhone, Android, Windows 10, and the web.
- Download from the Apple App or Google Play Store, or from office.com > ToDo



**Microsoft
ToDo**

Demonstration

Microsoft Forms

- Build a form in minutes
- Create surveys, quizzes, and polls, and easily see results as they come in.
- Invite others to respond to your form using any web browser, and even on mobile devices.
- Use built-in analytics to evaluate responses as they're submitted.
- Export form data, such as quiz results, to Excel for additional analysis or grading.

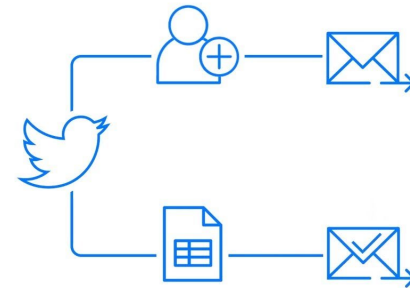


Microsoft Forms










Demonstration

Power Automate

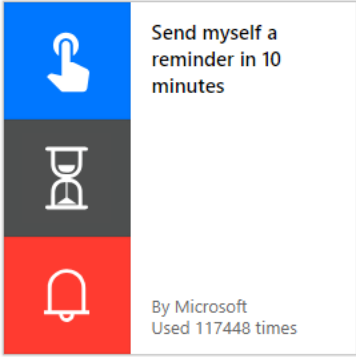
- Create and automate workflows across apps without code
- Automated workflows are called flows.
- To create a flow, specify what action should take place when a specific event occurs
- Flows can be simple or complex
- Flows can be shared and collaborated among people
- Flows run approximately every 5 minutes
- Similar to popular consumer services:
 - IFTT (If This Then That)
 - Zapier



My flows Team flows Business process flows + Create from blank **Create from template** Import

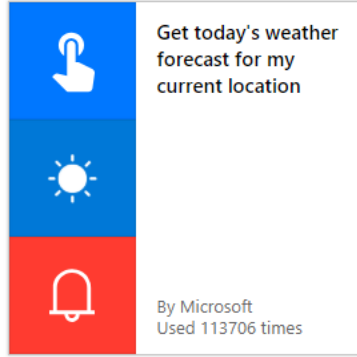
Name	Last modified			
 Sync events from Office 365 Calendar to Google Calendar	16 hours ago	<input checked="" type="checkbox"/> On		 ...
 When an item is created -> Create file	5 months ago	<input type="checkbox"/> Off		 ...
 CDP 2.0	6 months ago	<input checked="" type="checkbox"/> On		 ...

You may also like



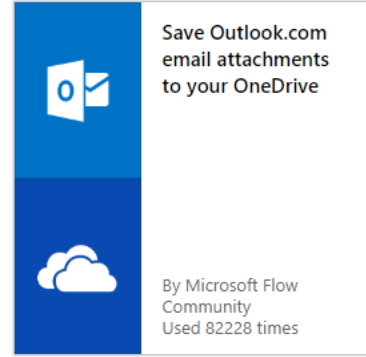
Send myself a reminder in 10 minutes

By Microsoft
Used 117448 times



Get today's weather forecast for my current location

By Microsoft
Used 113706 times

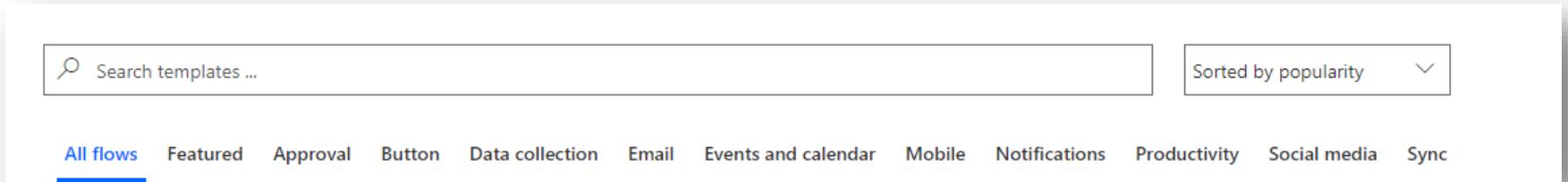


Save Outlook.com email attachments to your OneDrive


By Microsoft Flow Community
Used 82228 times

Power Automate Templates

- Search for template by service (ex: Outlook), or
- Browse categories




Power Automate Notifications




Send an email when a new item is created in SharePoint.

By Microsoft Flow Community
Used 3470 times




Send a customized email when a new file is added

By Microsoft
Used 12230 times



Send a notification when Microsoft Forms responses are received

By Microsoft
Used 1681 times



Get a push notification when a new file is added in OneDrive for...

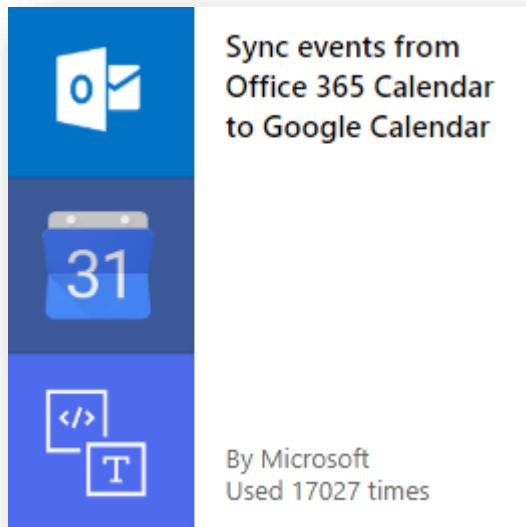
By Microsoft
Used 1682 times

Power Automate for Data Transfer

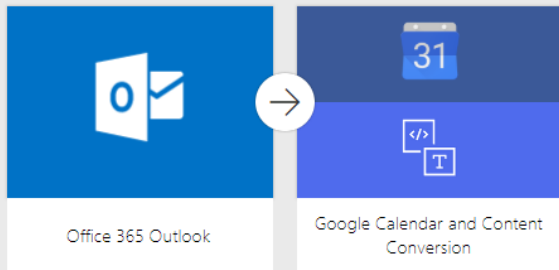
- Use Flow to copy data between services:
 - Send email attachments to OneDrive
 - Sync events between calendars
 - Log certain email in a SharePoint list (or spreadsheet)

Power Automate Example

- Use Power Automate to sync data between two calendars.
- Ex: Copy events from your work calendar to your personal calendar to stay on top of appointments



Sync events from Office 365 Calendar to Google Calendar



Sync changes including adding, updating and deleting from Office 365 Calendar to Google Calendar.

To use this template:

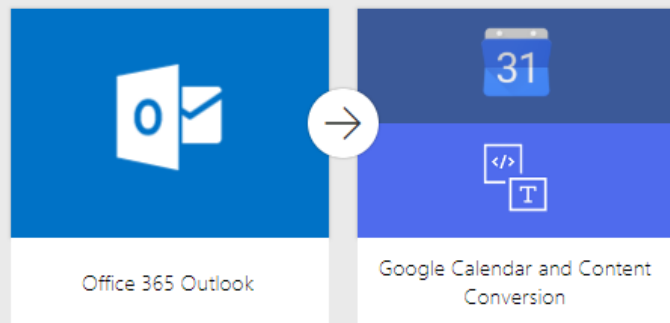
Google Calendar
Switch account

Content Conversion
tyler.hoffman@philips.com

Office 365 Outlook
tyler.hoffman@philips.com
Switch account View permissions

Continue

Sync events from Office 365 Calendar to Google Calendar



Sync changes including adding, updating and deleting from Office 365 Calendar to Google Calendar.

*Office 365 Outlook Calendar id
Calendar

*Google Calendar Calendar ID

Edit in advanced mode

Create Flow

Power Automate Example

- Use Power Automate to log specified email in a SharePoint list (or spreadsheet)
- Ex: log mail in a specific folder
- Ex: log mail that is flagged for follow-up

When an email is flagged (Preview) ...

Folder

Show advanced options ▾

+

Create item ...

* Site Address

* List Name

* Subject ←

IDNumber

Course Code

Status Value

Email Date ←

Body ←

Developer Assigned Value

General Comments

Solution

Resolved Date

Show advanced options ▾

Search	+ New	Export to Excel	Flow	PowerApps	All Items
Process Library	RE: AW9073	RE: Project ready to be p...	Resolved	3/12/2018	<p>Hey Tyler Here you go! Greetings Sander Please use the following link to access the directory: file:\\nljehvtrdnabv1.storage.philips.com\\file\\droplet20180319-</p>
PLC Migration Dashbo...	RE: XD9933	Final Version	Resolved	3/12/2018	Hello Tyler
CDS List as of May 17, ...	Project ready to be published CMS90...		Resolved	3/8/2018	<p>You are correct the existing XD9933T exam will</p>
Instructions: Using Sha...	RE: Updated Report: CMS9135 Projec...		Resolved	3/9/2018	Hi Tyler,
CDDT Task Tracker	Project ready to be published US9098		Resolved	3/8/2018	<p>I have the suspicion the arrow slons have</p>
Flash Conversion Proje...	Project ready to be published US9098		Resolved	3/8/2018	<p>Hi GES Publisher. A Project from the Netherlands has been completed and can now be published. See attachment Please use the following link to access the directory: file:\\nljehvtrdnabv1.storage.philips.com\\file</p>
Shared Documents	Project ready to be published XD0732		Resolved	3/14/2018	<p>Hi Diana, XD0732 is ready to be published. It was peer reviewed by Tim. I have placed a</p>
GES Weekly Support R...					
Meeting Recordings					
Master Storage Clean-...					
GES Tool Feedback					
Edit					

Feedback

Return to classic SharePoint

Microsoft Teams

- Get your team on the same page with group chat, online meetings, calling, and web conferencing.
- Collaborate on files with built-in Office 365 apps like Word, Excel, PowerPoint, and SharePoint.
- Add in your favorite Microsoft apps and third-party services to keep the business moving forward.



Microsoft Teams

Microsoft Teams

Video

Staying in Touch

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Digital Solutions Consultant

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[LinkedIn.com/in/tylerehoffman](https://www.linkedin.com/in/tylerehoffman)