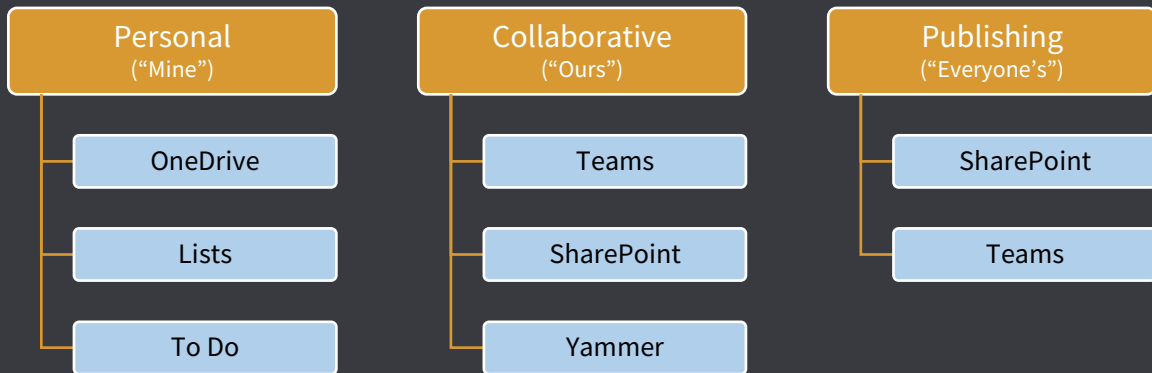


Consider The Context



Microsoft 365 Basics

- Store your personal files in OneDrive, share selectively, and move items to other locations that are ready for a wider audience.
- Generally, author Office documents in the desktop apps, save to OneDrive, then move/manage items in other SharePoint or Teams locations using OneDrive online.
- When using OneDrive sync ('little blue cloud in taskbar') you have access to your OneDrive files, but you can also sync SharePoint/Teams libraries. Only sync a library once from the top-level folder, rather than multiple times from multiple folders. You can select which folders you want to include in the Settings menu of OneDrive Sync.
- If you need to share externally, setup specific locations enabled for this and don't do it from areas deemed 'internal only', and generally avoid doing this from OneDrive.
- Personal tasks in Outlook are synced to the To Do app. Planner tasks are bound to a group/plan. Both can be accessed together from the Teams 'Tasks by Planner' personal app.
- Use strict naming conventions and consistent icons for Microsoft Teams based on types of Team (by purpose) to keep things neat and tidy.
- Create Teams and SharePoint sites according to a plan rather than whims.
- Use tabs in Teams Channels to bring in lists, forms and content from other areas or systems.
- Before creating content or data in M365 tools, ask yourself if there is a business system better suited for it first.
- Get familiar with Microsoft Search, SharePoint document library filters and views, and Teams features.



Improve your business performance with information technology.