



Red River

**WHEN TO USE
WHICH FEATURES IN
OFFICE 365**



The Office 365 suite is a powerful, versatile suite of varied work, collaboration, and productivity apps, all of which are incredibly useful for any business or organization, from small startups and nonprofits to multinational enterprises. With tons of great applications like the ever-useful Word, Excel, and PowerPoint to SharePoint, Microsoft Teams, and OneDrive, Office 365 offers tons of fantastic options.

Office 365's versatile suite of apps can, at times, almost be as much of a drawback as it is a boon. With so many useful tools, it can be difficult to know which to use for a given use case or scenario. You or your organization may have suboptimal use of your Office 365 apps, using one tool when another might make more sense, or not using others at all.

In this eBook, we'll look at some of the most commonly misused or underutilized features of Office 365, and when you should be using them.

A Three-Tiered Strategy

When evaluating any app in the Office 365 suite, it's important to ask yourself two questions. First, what purpose does this app serve? Second, who is this app for?

When it comes to making strategic decisions over apps to use in your organization, you can broadly categorize apps into three tiers: for the individual, for the team, and for the organization.

Note that this does not necessarily mean who is using the applications. After all, an organization is made up of individuals. For example, Microsoft Word is the archetypal "individual" app, in that it is an app that largely empowers an individual employee to do work. Even if the app is used by a whole team or a whole organization, its purpose is still to facilitate individual work.



Individual Apps

This category includes apps designed to facilitate work done by a single individual employee. Most of the common day-to-day workplace tools fall into this category, like the Office suite, including Word, Excel, PowerPoint, Outlook, and OneNote.

While collaboration can be facilitated by the apps in this category, the apps themselves are less inherently collaborative than others.

Team Apps

In this category, we see apps that are designed not just for individual workers, but to connect teams and help them collaborate with one another. With its calendar and scheduling functionality, an app like Planner is a perfect example of this. Unsurprisingly, Microsoft Teams is designed to be the crowning team app in the Office suite – it's designed from the ground up to have everything a team needs in order to collaborate and succeed.

Organization Apps

This category of apps includes those that are designed to help an organization function on a structural level. SharePoint is the archetypal organization-level app, being a foundation for much of the work any company will do. This can also include things like Microsoft Azure for businesses that have moved entirely to the cloud, and the associated apps like Azure Active Directory for governing who has access to which files and documents. Strictly speaking, however, the Azure framework is a separate framework from the Office 365 environment, so we won't be discussing it in further detail in this ebook.

Not all apps fall neatly into one of the three categories, of course. We've identified Outlook as an individual-level app, but one could make persuasive arguments for either of the other two categories, as well. Similarly, something like PowerBI would likely be a team-level app, but the insights it offers can help guide entire organizations at the highest level. However, broadly speaking, these three categories of apps suffice for a generalist way of looking at an organization's needs and strategic focus.

Now that we've identified the three categories of apps in the Office 365 suite, let's look at each individual category for improvements you can make.



OFFICE 365 INDIVIDUAL APPS

At the basic level, your workers are probably very familiar with the standard Office suite. They use Word to write documents, Excel to create spreadsheets, PowerPoint to make presentations, and so on. In some ways, there is less room for optimization here than at other parts of the organization, because how each individual uses something like Word or Excel will be different based on how that person prefers to work. On the other hand, even with the limited areas for improvement, these apps are so commonly used that even small improvements will add up over time.

Word

- Use version control. Office 2016's co-authoring feature made it practical for team using Office to collaborate and jointly work on individual documents, similar to Google Documents. When connected to OneDrive or SharePoint, you can use the version control feature to see who made which changes and when. This also gives you the ability to revert to previous versions of a file if need be.
- Set headings and styles. This tip is as useful for a novelist as it is an office worker. While writing a document, use styles like "Heading 1," "Normal," and so on rather than manually changing text bit by bit. This will let you change the styles, which will then automatically propagate through the document en masse.
- Track changes and leave comments. If you're not using the cloud co-authoring feature, making sure you turn on "Track Changes" to improve transparency in what edits have been made. Comments can further help drive conversations and explain why certain changes were made.



Excel

- Lock tabs and individual cells. Many people don't know that you can prevent changes to entire tabs or even individual cells. Locking things that you don't want changed accidentally is a great way to collaborate without risking any mistakes that you might not notice until much later.
- Don't neglect metadata. Include key information like author or keywords in the File Properties tab. Metadata is key to many aspects of the Office framework – more on that later.
PowerPoint
- Your mouse (or finger) can be a laser pointer. Many people know about the PowerPoint keyboard shortcut Ctrl+P, which turns your mouse into a red “laser pointer” dot. Fewer people know that it can be done on mobile touchscreen devices – simply hold your finger down on the screen, and it will activate the red dot.

Outlook

- Schedule Teams meetings through Outlook. Most organizations already use Outlook's calendar functionality to keep track of schedules, potential conflicts, and to schedule meetings. Fewer know that you can schedule and launch a Teams meeting directly from the Outlook calendar.



OFFICE 365 TEAM APPS

From a practical standpoint, an organization may find the greatest benefit to be gained when optimizing their use cases for team-level apps. Most of the work employees do on a day-to-day basis is work done in collaboration with their coworkers. This is true for small companies and it is true for large ones. There are fantastic apps in the Office 365 suite for teams to use as a group, but those apps must be correctly used for optimal results.

Teams

- Have a plan for who can create teams and channels. Microsoft Teams is a fantastic app for collaboration in an office, and it can be tempting to create new teams or channels within a team on an ad-hoc basis. Every new project with a new permutation of workers becomes a reason to create a new team or a new channel. Over time, this can become unworkable and unwieldy as people start using different channels for different things, or forget which channel is the appropriate place to start talking about a given topic. Sometimes, you absolutely do need to create a new team, group, or channel, but there should be a fixed protocol governing when and who can execute on that.
- Connect face-to-face with remote workers over video. Cloud-based work has made it more possible than ever to work remotely, whether every now and then or on a full-time basis. However, remote workers may have trouble feeling connected to their in-office counterparts. Regular video chats with Teams or Skype for Business are a great way to counter this – video conferencing captures much of the nuance in verbal, face-to-face communication that is lost over text.
- Control use of GIFs, emoji, and memes. This is entirely dependent on your company culture. Microsoft recommends the use of things like GIFs and emoji to boost morale and “inject some personality” into work conversations. Through Teams, you can enable or disable these features as you see fit – but remember, while it’s important to be professional, having fun at work is rarely a bad thing.



Planner

- Manage projects and tasks with Office 365 Planner. One of the newer apps in the Office 365 suite, Planner helps teams organize projects, tasks, and workflows. Microsoft's answer to apps like Trello or Asada, Planner is fully integrated with the rest of the apps in the suite. As mentioned in the "Individual Apps" section, Office 2016 onward offers excellent co-authoring in apps like Word and Excel. Simply using this feature can seriously enhance your team's collaborative efforts, bringing Office 365 up to parity with much of the Google suite.



OFFICE 365 ORGANIZATION APPS

The backbone of many organizations using the Office 365 ecosystem is Microsoft SharePoint. SharePoint has evolved from a simple file-storage solution into a framework that can govern nearly every asset that holds value for a company or other organization, from videos and documents to websites. For many companies, SharePoint is the intranet.

However, there are other organization-level apps that companies can use, like the Azure suite.

SharePoint

- Enforce library and file naming conventions. If there is a single “most important rule” for using SharePoint, this is likely it. If SharePoint is not organized properly, its many benefits cease to be benefits. What good is an intranet when you can’t find the files or projects you need? Make sure that all files are saved with a consistent convention so you can order them correctly and there will be no confusion. Have a consistent structure to your file library so that employees don’t waste time trying to find a document someone else saved.
- Sort information with metadata, not just folders. Metadata is a seriously underutilized tool for telling SharePoint what’s in a file. When you fill in a file’s metadata, SharePoint’s search and filter features can help find a file more easily. This means that even if a file gets dropped into the wrong folder by accident, it can be found without much trouble. Having deep folder hierarchies can hide information and be confusing to root through.
- Use “check out” to avoid conflicts. Collaboration is well and good, but not if it leads to conflicts like two people editing the same file at once without specifically using an Office 365 co-authoring feature. SharePoint lets you “check out” files so that only one person can edit them at a time.



Yammer

- Use Yammer to facilitate communication within your organization. An internal social network, Yammer lets teams and workers discuss events and projects together. Yammer shares some overlap with apps like Slack in that it easily facilitates communication, with employees creating public and private groups. Beyond these standard “chat app” features, Yammer lets administrators post announcements that an entire organization can see, supports native Q&As in a system similar to Quora, and offers a host of other features.

The Office 365 ecosystem is full of powerful tools to help workers excel at their jobs and collaborate with one another. This guide is only scratching the surface. If you'd like an expert to help you truly get the most out of your Office 365 adoption, [contact CWPS today](http://www.redriver.com).



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