# Beginning Microsoft 365 Collaboration Apps

Working in the Microsoft Cloud

—

*Second Edition*

—

Ralph Mercurio
Brian Merrill

Apress®

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**Brian Merrill**

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*Beginning Microsoft 365 Collaboration Apps: Working in the Microsoft Cloud*

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ISBN-13 (pbk): 978-1-4842-6935-0
ISBN-13 (electronic): 978-1-4842-6936-7
https://doi.org/10.1007/978-1-4842-6936-7

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Cover image designed by Freepik (www.freepik.com)

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*To my wife, Sarah: Thank you for always being in my corner.*
*I love you more and more every day.*
*To our children, Bobby and Julia: You have made me so proud,*
*and I am excited for the future for both of you. I love you.*
*—Ralph*

*To Meredith: Thank you for your love and support.*
*I love you more today than yesterday!*
*To our beautiful children, Charlotte, Bridget, Brian, and Erin:*
*Keep shining brightly!*
*—Brian*

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# About the Authors

**Ralph Mercurio** is a Microsoft Certified Professional with 18 years of experience. He works for the City of Durham in North Carolina and focuses his efforts on providing collaborative solutions to its many departments. He has held various roles in the technology field, including as a SharePoint infrastructure architect consulting for various companies in the New York City metro area.

Ralph also has experience architecting and deploying solutions that leverage the best features of Microsoft 365 and provide real business value while solving user experience issues. He has seen many technology changes throughout the years, and he discovered a passion for helping users find ways to leverage what they need to know to learn a new technology. With Microsoft 365, he has made it his goal to help users realize the potential of this powerful platform in order to get the most out of these ever-changing applications.

**Brian Merrill** is a Microsoft Certified Educator (MCE) and a Microsoft Certified Trainer (MCT). He is currently the educational technology analyst for one of the largest school districts in Pennsylvania. In that role, he serves as the global administrator of the district's Microsoft 365 environment, managing Microsoft Teams and SharePoint and training faculty and staff on new technologies and systems. Brian is also adjunct faculty at the Harrisburg University of Science and Technology, where he teaches courses in the Learning Technology and Media Studies program. He also teaches courses on learning technologies and solutions as well as Microsoft tools. Brian is a Microsoft Innovative Educator Expert and a member of the Minecraft for Education Advisory Board.

# About the Technical Reviewer

**Jesse Roos** has worked in numerous information technology roles since the year 2001. Jesse has a lifelong passion for technology that started with building computers at the age of 8 and building websites by age 10.

He has served in many roles from data processing, technical support, and telecommunications to network and server administration. For the last 15 years, Jesse has worked for the Central Bucks School District in Pennsylvania, where he currently serves as Senior Network Administrator.

He has been administering Microsoft 365 since the beginning when it was called Live@edu. Jesse now specializes in administering all aspects of Microsoft's cloud platforms including Microsoft 365, Azure, and Intune.

# Acknowledgments

I would like to extend a thank you to Jill Balzano, Joan Murray, and the rest of the team at Apress for your patience and guidance in writing the second edition of this book. I thought the first time writing this book was daunting, but the second time seemed just as hard.

I would also like to acknowledge Brian Merrill, my co-author on this book. I appreciate his persistence and help in writing the content for this book. I truly believe he added value and hope you will find it valuable as well.

Finally, I would also like to thank the technical reviewer, Jesse Roos, for his work reviewing the chapters quickly to ensure their technical accuracy.

—Ralph Mercurio

# Introduction

Microsoft 365 is Microsoft's SaaS (Software as a Service) platform. It offers Outlook, SharePoint, OneDrive, Office, and other collaboration applications to help businesses and other entities use the cloud to provide these applications to their users.

By utilizing Microsoft 365, entities can offer low-cost access and reduce the administrative and IT overhead associated with providing these services. By doing so, end users gain access to updated applications without having to wait and can utilize these new features or applications once Microsoft releases them. However, many users are not adequately trained in using these applications, and without a foundational understanding of them, these applications can be overwhelming. Because of this ever-increasing issue, this book attempts to bridge the gap for end users new to the Microsoft 365 platform as well as for more advanced users by providing a functional understanding of each application in the Microsoft 365 suite.

As Microsoft 365 evolves and Microsoft releases new features or applications, feel free to reach out to me via LinkedIn or by contacting me at ralph@capelesssolutions.com or visit my website, capelesssolutions.com.

## Who This Book Is For

The goal and purpose of this book is to provide the knowledge to use Microsoft 365, particularly around the collaboration apps described in the following. These applications form the foundation of Microsoft 365, and each chapter guides you through the basics of them via text and images.

This book also serves as a resource to users who have been introduced to Microsoft 365 but are still unfamiliar with many of the applications. This book does not require a subscription to Microsoft 365, but having one will allow you to follow along as we dive into each collaboration application.

If you are a reader of the previous edition of this book, then perhaps seeing Microsoft 365 in the title might seem a little strange. In the not too distant past, "Microsoft 365" was referred to as "Office 365," a name a lot of us got pretty used to and the name many users

still reference. However, to keep current and stay in tune with Microsoft's latest naming conventions, we will use "Microsoft 365" throughout the book.

# How This Book Is Structured

This book is organized by chapters, with each chapter introducing a particular collaboration app in Microsoft 365. This was done on purpose because it will allow you to read the chapters that interest you most or that cover the application you are currently using – without the need to read the entire book cover to cover. This book includes step-by-step instructions, images, tables, and examples detailing the features of each application.

## Chapter 1: Welcome to Microsoft 365

This chapter introduces you to the concept of Microsoft 365 and SaaS. It also guides you through creating a Microsoft 365 trial account, if needed.

## Chapter 2: SharePoint Online

This chapter provides an overview of creating lists, libraries, and sites. It also introduces some of the basic principles such as list/library columns, metadata, views, and the available templates to use.

## Chapter 3: OneDrive

This chapter covers OneDrive and how to navigate around OneDrive and use it effectively to manage your files. This chapter also shows how to create Office files within OneDrive and how to share files with users.

## Chapter 4: Microsoft 365 Groups

This chapter discusses the components of a Microsoft 365 group as well as how to create and maintain a group. It also shows you how to manage users and invite external users.

## Chapter 5: Teams

This chapter introduces Teams and provides a functional understanding of the application. You learn how to navigate within Teams and understand the interface. This chapter also discusses creating teams and channels and using some of the basic functions included in Teams.

## Chapter 6: Yammer

This chapter details using Yammer within an enterprise environment. It discusses the Yammer interface and creating posts that can be shared with users.

## Chapter 7: Office

This chapter introduces Office and Office Online. It discusses some of the similarities and differences between the versions. It also demonstrates some of the advanced capabilities of the platform including real-time co-authoring.

## Chapter 8: Planner

This chapter introduces Microsoft Planner and is concerned with task management. It covers the basics of Planner, including creating tasks, editing tasks, deleting tasks, and reporting on task statuses.

## Chapter 9: Stream

This chapter introduces Microsoft Stream, an enterprise-capable video platform, and some of the basic functions within Stream. This chapter also discusses some of the advanced features of Stream and how to access them.

## Chapter 10: Forms

This chapter introduces Microsoft Forms, an application to create a variety of browser- and mobile-ready forms. You can create forms, surveys, and quizzes. You also learn about some of the features within the application, such as data types, reporting, and grading.

## Chapter 11: Power Automate

This chapter demonstrates how to utilize Microsoft Power Automate, from a simple flow to a complex flow. It will guide you through creating a flow. You will create an approval flow and a flow that incorporates a third-party service for electronic signatures.

## Chapter 12: Power BI

This chapter serves as an introduction to Microsoft Power BI, the data analytics platform of Microsoft 365. Power BI is a very powerful application that can use multiple data sources and pull the data into convenient dashboards to be consumed.

## Chapter 13: Power Apps

In this chapter, we will introduce Microsoft Power Apps and walk through two examples: creating a PowerApp and editing a SharePoint list form.

## Chapter 14: Making Sense of It All

This chapter serves as a summary chapter, highlighting each application and its intended purpose within Microsoft 365.

# PART I

# Getting Started

## CHAPTER 1

# Welcome to Microsoft 365

Welcome to *Beginning Microsoft 365 Collaboration Apps*. My intention with this book is to introduce the concepts behind Microsoft 365, how it works, and what it can offer you regarding functionality, collaboration, and ease of use. There are many applications within Microsoft 365, and I will focus on the specific applications that foster collaboration, dedicating a chapter to each.

In this book, I will discuss SharePoint, OneDrive, Teams, Office, and a few other applications that make up Microsoft 365. I will also introduce two relatively new applications from Microsoft: Stream and Power Automate. Microsoft Stream is a video sharing and collaboration application; Power Automate connects workflow actions across most of Microsoft 365 and external applications.

In this chapter, I will approach Microsoft 365 from a very high level, including a perspective on collaboration and how it has evolved throughout the years. It is important to understand and acknowledge the past and present as Microsoft 365 lays the foundation for workplace collaboration in the future. I will also discuss how to set up a Microsoft 365 account so that you can experiment and follow along. I am a firm believer in doing as opposed to reading because it reinforces the content and allows you to become familiar with and confident in the interface and nuances of Microsoft 365.

As we navigate through the various chapters of this book, please be aware that Microsoft has changed the name of the product from Office 365 to Microsoft 365. This change aligns the platform with its use and eases some of the confusion of the old name. Due to this change, some parts of the platform have not been fully updated by Microsoft with regard to the name change, but for our purposes we will refer to the platform as Microsoft 365.



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R. Mercurio and B. Merrill, *Beginning Microsoft 365 Collaboration Apps*,
https://doi.org/10.1007/978-1-4842-6936-7_1

# Collaboration in the Workplace

Collaboration has changed over the years from a rigid structure to a more flexible model that embraces technology and allows information workers to have more freedom and control over getting their work completed. Microsoft classifies information workers as employees who consume and create content. This includes nearly every department of an organization; some examples of content are budgets, employee records, project documents, technical guides, and forms. With that, not all companies embrace the model, and they prefer (sometimes strongly) that employees report to a company office location to perform their duties.

As we all are aware, the global pandemic of 2020 has brought on a new way of working. The Covid-19 pandemic quickly changed the way corporate leaders thought of remote work, the safety and well-being of their employees, and the acceptance of technology, which has fundamentally shifted the way we work today.

Overnight, information workers found themselves in a new way of working, and IT departments scrambled to find ways to connect people back to work. For many companies, Microsoft 365 was the chosen platform to enable information workers to be productive and have access to the information they needed.

As technology has evolved outside the workplace and made our lives arguably easier, technology has also evolved inside the workplace as we are aware of it. In today's workplace, you can have a video conference with someone halfway around the world and see and hear them in high definition. You can also search and retrieve email messages from years ago or get your mail on your mobile device with all the bells and whistles you expect.

Part of the allure of Microsoft 365 is that the content you are interested in is searchable and relevant. Think back 20 years ago and how you found information before the introduction of search engines, notably Google. To think I once used Microsoft Encarta or asked for a ride to the library to access their collection of *Encyclopedia Britannica* volumes, it boggles my mind to this day. Now Microsoft 365 is capable of searching across email, SharePoint, OneDrive, and the other applications to ensure you find the relevant item; it is even capable of searching within the document to improve its relevancy.

In some cases, a VPN connection is still required to access large systems such as an ERP system, a billing system, and custom-built applications that aren't available outside of the company through a proxy or some other means. I won't touch base on Azure,

which is another Microsoft offering for companies looking to use IaaS (Infrastructure as a Service).

Today's collaboration tools allow for the sharing of information, which ultimately improves processes, boosts the bottom line, and delivers well-executed projects. Individuals working in a silo can't bounce ideas off each other or seek out other experienced individuals and so must bear the cost of a poorly executed project.

An excellent example of how collaboration works is to think of a group of university professors aligning their resources and experiences to deliver a well-received article or a world-changing vaccine. If they worked in their isolated environments, their outcomes and innovations might be much less impactful.

In the business world, teams collaborate around the launch of a new product, which involves teams from marketing, technology, sales, and leadership. This type of activity may include geographically dispersed teams or team members in other offices around the world. Technology must bring them all together so the objectives can be met and the product gets to market.

Part of the design and success of Microsoft 365 is that it allows companies to have a digital workplace. It allows companies and employees to have the tools to not only collaborate but get work done on their time on a cloud-based platform supported by Microsoft. It provides applications around the way people need to work, whether that is document-based, email, chat, or video collaboration; Microsoft 365 moves the common applications we use daily to the cloud and allows us to use the tools and applications we need to get our job done.

Let's dig into Microsoft 365 and discuss its elements and why it makes business sense to move to it.

## What Is Microsoft 365?

Microsoft 365 is Microsoft's SaaS offering for email, collaboration applications, and Office ProPlus. SaaS stands for Software as a Service. The easiest way to understand the concept is that you simply sign into a website and access the software instead of installing it locally on your PC or Apple device. Popular examples of SaaS are not only Microsoft 365 but QuickBooks and Salesforce.

With SaaS, there generally is no software to install; the vendor maintains and supplies the software, updates, and hardware needed to run the software. In turn, you simply pay a monthly fee, and you have access to the software or platform.

Microsoft 365 is Microsoft's biggest software endeavor yet and has been years in the making. For over 25 years, Microsoft has been developing software to be installed on a company's servers within a company's data center. This includes not only Microsoft Exchange (email) but also products like Microsoft SharePoint, which was first released in the early 2000s. This approach required companies to buy and maintain expensive server equipment and needed the appropriate technical staff to support the systems.

Microsoft 365 changes the game by removing the need to buy expensive servers or ensure that the IT staff are trained to administer and support the software. By transitioning to Microsoft 365, IT departments and personnel can now focus on providing solutions that can help a business grow instead of managing software and infrastructure.

## How Does It Work?

Microsoft maintains data centers around the world in many different regions to be able to offer this service. Each data center contains thousands of servers in perfectly stacked arrays with multiple electrical connections, cooling equipment, on-site support, and all in a highly secure facility with various levels of protection. Because Microsoft provides all the hardware, it also maintains an extensive disaster recovery plan. If one of the data centers were to experience an outage or catastrophic event, Microsoft 365 and its users would see minimum disruption and minimal downtime, if any. This model is also supported by a financially backed service-level agreement (SLA), ensuring that if Microsoft doesn't maintain its agreed SLA, there is a financial penalty for the company.

But all of this doesn't matter because of the beauty of all it is that you simply go to Office.com from any major supported web browser and log in with your credentials. Once authenticated, you will be presented with a variety of applications to choose from. From an end user perspective, that is 100% correct, but let's take a brief look at what must happen first to make it a seamless experience for the end user.

In most cases, your company's IT department has already done the heavy lifting. This includes signing up for Microsoft 365, configuring the service, and licensing the end users so they can access the appropriate applications. I do want to touch upon a few key points that can affect the Microsoft 365 experience:

- Microsoft 365 comes in a variety of license levels, each with a different per-user cost. This book will focus on Microsoft 365 for Business and Microsoft 365 for Enterprise; some applications will not

be available for education, government, and nonprofit license levels. This is relevant because if an application we are discussing is not available to you, it could be because of the plan your company has subscribed to or a licensing issue.

- Some applications or features discussed in this book may not be visible to you because you may not have an appropriate license assigned to you to use them. If an application is not visible, your IT department may need to assign a license to you to use it.
- Companies have the option to determine when updates and new functionality get released to their respective tenants. This is known as the release preferences. By default, Microsoft sets all tenants to "standard release." This means that updates and applications are deployed when they are publicly available and not in beta. Companies have the option to set the Microsoft 365 tenant to "targeted release for everyone" and "targeted release for selected users." "Targeted release for everyone" means that everyone who is using Microsoft 365 in your organization will get Microsoft 365 updates during the first phase of deployment. This will introduce functionality and features before the majority of Microsoft 365 tenants get the updates. "Targeted release for selected users" allows updates and features to be deployed to a specific set of selected users. This is useful to test and review updates before they are deployed to everyone. Keep in mind that some updates only get deployed to the entire organization. The interesting part of this feature is that it allows Microsoft to be agile by monitoring support tickets and fixing issues before the update is deployed to everyone using Microsoft 365.
- If you do not have access to Microsoft 365 or if your company will not license the appropriate applications to you, Microsoft will allow a 30-day trial to be created, and you will have access to the applications discussed in this book. After 30 days, your account will be deactivated by Microsoft. You also will be able to purchase a single license monthly if you want to experiment for a longer period.

## Why Should You Choose Microsoft 365?

Microsoft 365 combines the best of the Microsoft products with an amazing, proven infrastructure platform all for a price that makes it attractive to businesses. And because it is SaaS, the service is continually updated and made better each day. These new additions can be taken advantage of on day one without the typical installation and planning that traditional software requires.

---

**Note** If you already have access to Microsoft 365 and the related applications, feel free to skip to the next section. This next section is intended for users who do not have access to a Microsoft 365 tenant or wish to create one simply as an exercise in conjunction with this book.

---

## Creating the Microsoft 365 Trial Tenant

Open your favorite web browser and navigate to `www.office.com`. For this book, you will create a trial Microsoft 365 Business Standard account. On the `Office.com` website, select Products ➤ For business ➤ Plans & pricing. See Figure 1-1.

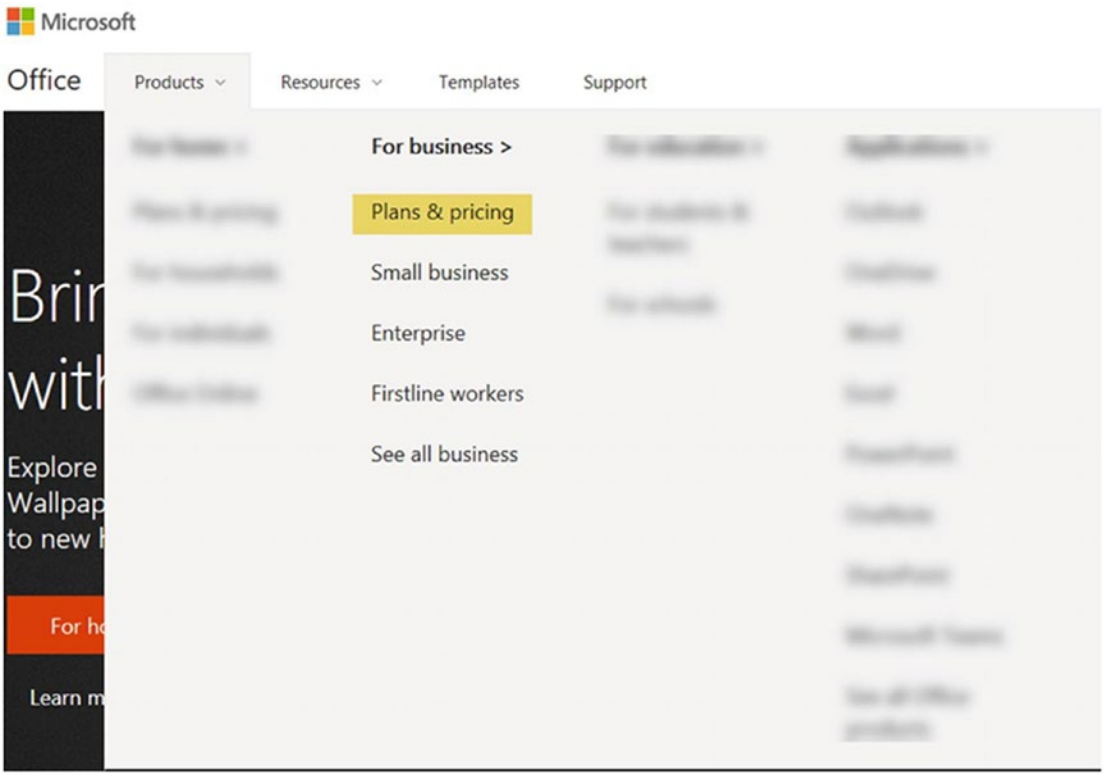


***Figure 1-1.*** *Creating the trial account for Microsoft 365*

You will be presented with various business plans. Scroll to the bottom of the page and select "Try free for 1 month" within the Microsoft 365 Business Standard box. At the bottom of the column, click the "Try for free" button. Fill out the form, substituting your information instead of my information. For the purposes of this book, I used an Outlook.com email address for the trial but will revert to using my corporate tenant for the remainder of the chapters. Enter an email address you will like to use for the creation of the tenant. Do not use your corporate email address. See Figure 1-2.

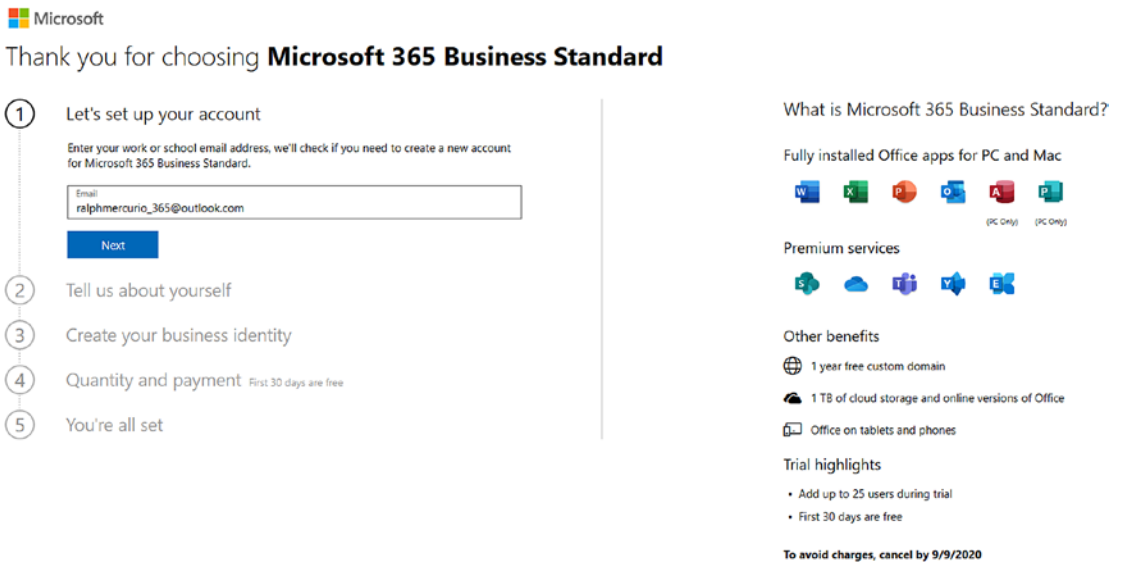


***Figure 1-2.*** *Entering account details to create the Microsoft 365 account*

Click "Next" when you're ready to move to the next screen. On the "Tell us about yourself" screen, enter your details and unique company name. Your company name cannot be your current employer because that name may be reserved or already used. Make up your company name. Click the "Next" button. See Figure 1-3.

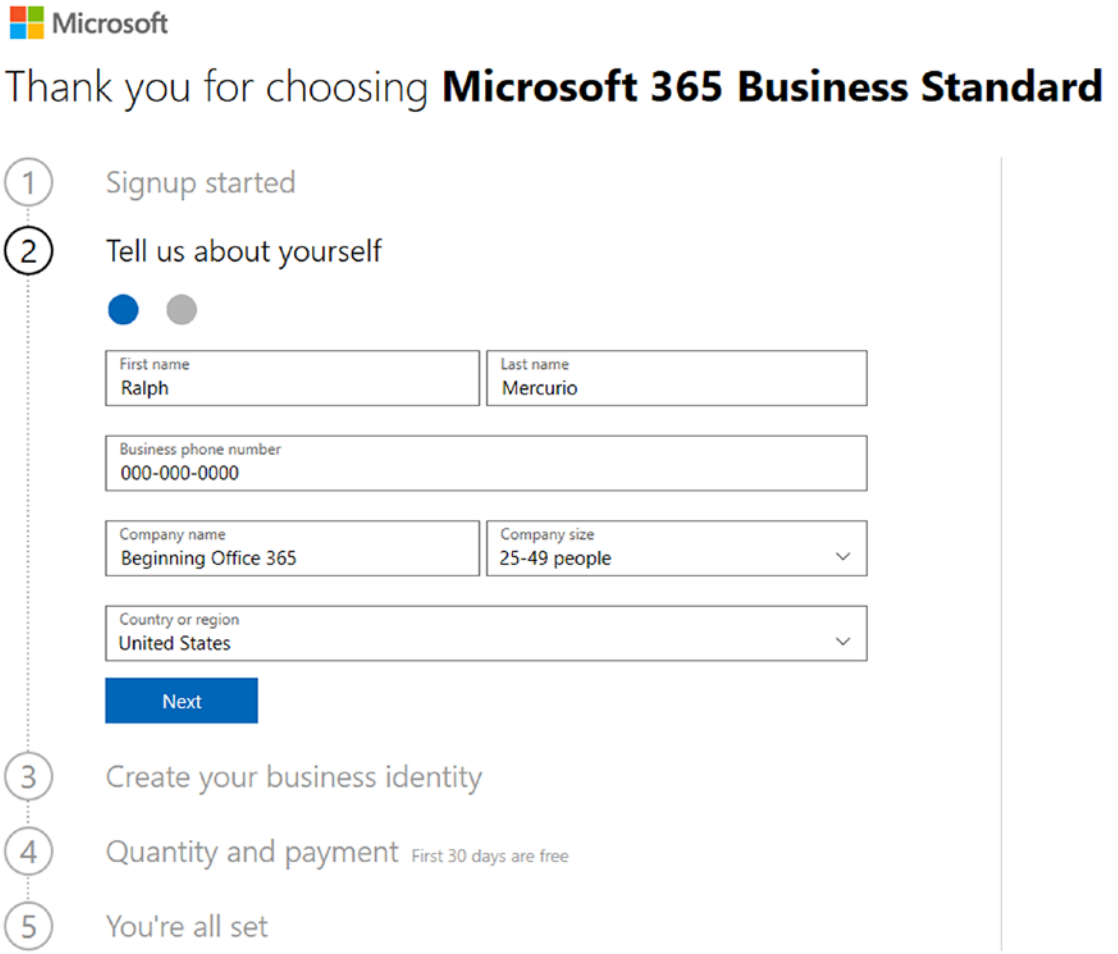


***Figure 1-3.*** *Create your Microsoft 365 account*

Enter your valid mobile number. The Microsoft service will call or text to verify the tenant requested is being created by a person and not a robot. See Figure 1-4.

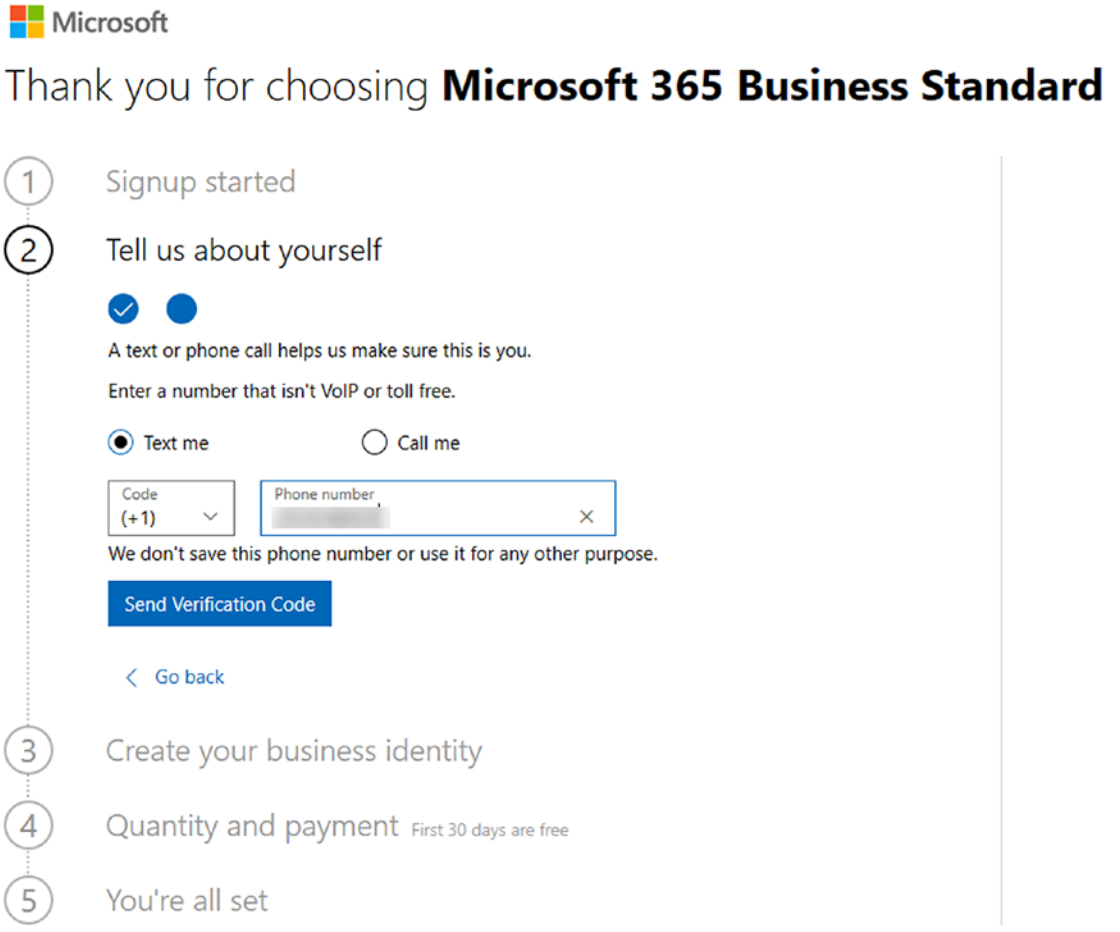


***Figure 1-4.*** *Proving you are a real person*

It could take a few seconds for Microsoft to send the validation code. Just be sure you entered the correct phone number to authenticate. Once you receive your code, enter it on the following screen. See Figure 1-5.