Navigating Microsoft 365

Unlocking the full potential of the Microsoft Suite

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Overview

In today's fast-paced digital landscape, businesses need robust and versatile tools to stay competitive and productive. Microsoft 365 offers an extensive suite of applications and services designed to meet the needs of modern businesses, regardless of their size or industry.

From enhancing productivity and collaboration to ensuring security, Microsoft 365 is a powerful platform. However, navigating the world of features and subscription options can be overwhelming, especially for those new to Microsoft 365. There is a tangible cost to not understanding all that Microsoft 365 has to offer. Too often, businesses are turning to costly third-party tools to perform functions that are already included in 365. For instance, many are not aware of Microsoft Bookings and instead pump money into a SaaS calendar app.

Harnessing the full potential of Microsoft 365 not only boosts your IT ROI but also simplifies your operations. This ensures data is handled safely, giving IT teams visibility over all processes and reduces the incidence of shadow IT. This comprehensive guide will help you understand the various Microsoft 365 subscriptions, explore the essential tools included, and delve into advanced security features like Entra ID, Intune, and Defender for Business. We'll uncover some lesser-known gems within Microsoft 365 that can significantly enhance your workflow and productivity.

Whether you're a small business looking to streamline operations or a large enterprise seeking to expand your use of 365, this guide will provide you with the knowledge and insights needed to unlock the full potential of Microsoft 365.

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Understanding Microsoft 365 Subscriptions

Microsoft 365 offers tools and features fit for any business, no matter the size or industry. The platform can tailor its offering to different customers by offering distinct subscription plans.

If you're new to Microsoft 365, these plans can be tricky to navigate. This section will give you a rundown of the plans on offer to help you decide which is right for you.

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What is included in Microsoft 365 Business?

Business Basic
Microsoft 365 Business Basic is designed for small to medium-sized businesses that require essential productivity and collaboration tools without the need for desktop applications. This plan includes user management, 1TB of cloud storage and custom emails for up to 300 employees, the web and mobile versions of Microsoft Office, and collaboration through Microsoft Teams. The big omission here is the desktop versions of Office applications.

Business Standard
This subscription includes all the features of Business Basic, plus the full desktop versions of Office applications. It also includes a few additional productivity apps, such as Bookings, Planner and Microsoft Forms. This plan is ideal for businesses that heavily use Microsoft Office desktop applications, and will suit those who operate in a hybrid or in-person working model. Smaller remote-first companies may be fine with Business Basic.

Business Premium
This subscription includes all the features of Business Standard, plus advanced cybersecurity, device management, and identity protection services. This tier is useful for growing companies, particularly those handling sensitive data. Microsoft's cloud identity platform, Entra ID (previously Azure AD) helps you manage control and access to your apps and data, while Intune allows you to manage end-point devices. Business Premium is ideal for businesses that handle sensitive data, require robust security measures, and need to ensure compliance with industry regulations.

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Enterprise, Frontline and Education Subscriptions

Microsoft's subscription offerings extend beyond small to medium-sized businesses. It offers plans tailored to larger enterprises, frontline workers, and education institutions. These provide tailored solutions that address the unique challenges and requirements of each sector. Let's explore the key plans on offer.

E3 is designed for large organisations requiring advanced productivity, security, and compliance tools. It includes full Office applications, enterprise-level email, and collaboration services, along with a basic set of security features.

E5 builds on E3 to offer more advanced security tools, such as Microsoft Defender, and analytics tools from Power BI Pro. It also unlocks audio conferencing for up to 1,000 attendees.

A3 is tailored for educational institutions, providing all the essential tools needed for teaching and learning. It includes full Office applications, classroom collaboration tools, and enhanced security features to support a safe educational environment.

A5 builds on the features of A3, adding advanced security, analytics, and management capabilities. Like E5, audio conferencing and Power BI Pro are the main upgrades here.

Frontline plans offer essential tools for frontline workers at a more affordable price point.

F1 is aimed at frontline workers who need basic tools to stay connected and productive. It includes essential Office applications and email.

F3 enhances the F1 offering with additional collaboration and productivity tools, including full Office applications on mobile devices. It's designed for frontline workers who need more advanced features to manage tasks and communicate effectively.

F5 operates as a security and compliance add-on to F3 and F1 subscriptions. It offers the security features included in E5 at a lower price.
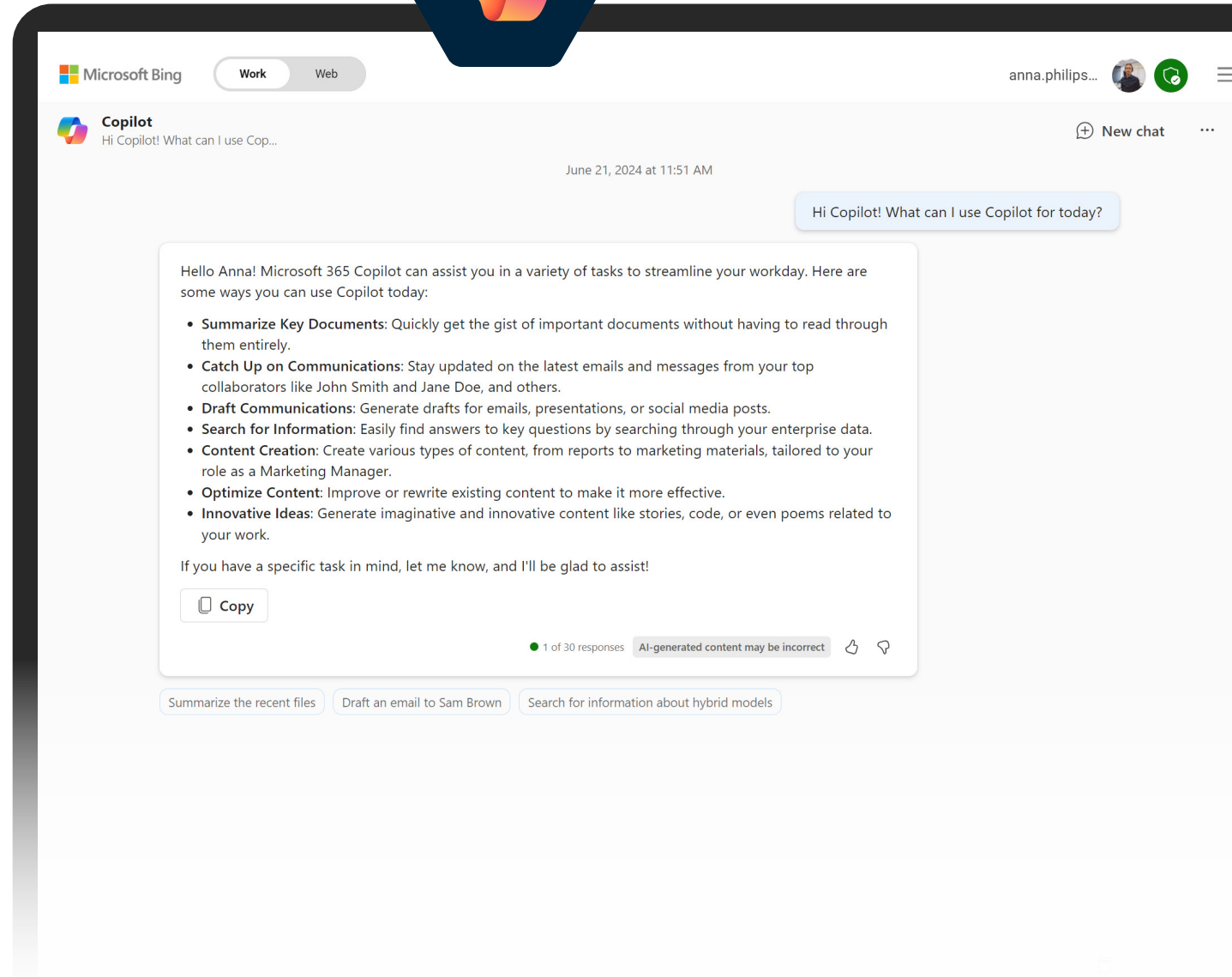
Microsoft's subscription plans cater to needs across different sectors, ensuring that large enterprises, frontline workers, and educational institutions have access to the tools and features they need.

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Copilot as an Add-on

Copilot is Microsoft's AI companion built directly into the Microsoft 365 tools you use in daily work. Copilot isn't included in Microsoft 365 plans automatically and instead is sold as an affordable add-on to plans.

If you're looking to implement Copilot in Word, PowerPoint, Outlook or Excel, you'll need an existing Microsoft 365 plan. Copilot for Web is available as a standalone tool, but you won't get the 365 integrations, which is where Copilot adds the most value.

You can add Copilot to any Microsoft 365 plan, including all Business plans, Microsoft 365 E3, E5, F1, F3 and F5. It is available for Education organisations on A3 and A5.

Microsoft Bing   Work | Web   anna.philips...

Copilot
Hi Copilot! What can I use Cop...   New chat ...

June 21, 2024 at 11:51 AM

Hi Copilot! What can I use Copilot for today?

Hello Anna! Microsoft 365 Copilot can assist you in a variety of tasks to streamline your workday. Here are some ways you can use Copilot today:

- **Summarize Key Documents**: Quickly get the gist of important documents without having to read through them entirely.
- **Catch Up on Communications**: Stay updated on the latest emails and messages from your top collaborators like John Smith and Jane Doe, and others.
- **Draft Communications**: Generate drafts for emails, presentations, or social media posts.
- **Search for Information**: Easily find answers to key questions by searching through your enterprise data.
- **Content Creation**: Create various types of content, from reports to marketing materials, tailored to your role as a Marketing Manager.
- **Optimize Content**: Improve or rewrite existing content to make it more effective.
- **Innovative Ideas**: Generate imaginative and innovative content like stories, code, or even poems related to your work.

If you have a specific task in mind, let me know, and I'll be glad to assist!

Copy

● 1 of 30 responses   AI-generated content may be incorrect

Summarize the recent files   Draft an email to Sam Brown   Search for information about hybrid models

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Cybersecurity: The Business Premium Advantage

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Cybersecurity is one of the most important priorities for any modern business. As the digital landscape evolves, the ability for criminals to steal data, disrupt operations and cause costly damage grows.

Put simply, it pays to invest in cybersecurity. Protection from threats is potentially £1,000s saved. That's precisely why Microsoft 365 emphasises security tools so heavily. In this section, we'll discuss three important defences included in a Microsoft 365 Business Premium subscription: Entra ID, Intune and Defender for Business, and cover why each tool is crucial for your business.

A recent study by PSA Certified found that 75% of businesses consider security a growing priority in the last 12 months. Cybercrime costs UK businesses nearly £21bn per year, with the average annual cost of cyber attacks to a business totalling over £15,000.

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Microsoft Entra ID

Microsoft Entra ID (formerly known as Azure Active Directory) is a cloud-based identity and access management (IAM) service. It helps organisations manage user identities and provide their employees with secure access to applications and data.

Let's discuss some key aspects and features of Entra ID.

Conditional Access

A robust IAM service allows for a key principle of cybersecurity to be implemented, that of conditional access. The easiest way to understand a conditional access policy is as a simple if-then statement.

That is, if a user wants to access a resource, they must complete an action to do so. A user should never be able to access something automatically. This action is most commonly multi-factor authentication.

Entra ID uses signals from various sources to decide whether a user needs to re-authenticate. For instance, if a user's IP comes from a different location than expected, or the device used does not match the user's regular device, the user should be forced to re-authenticate. Entra ID can use these signals to enforce and guide security policies.

IF
An employee logs in with a device that is assigned to them

AND
The device is connected to an unfamiliar network

THEN
Enforce MFA before any data is accessed

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Passwordless Authentication

Passwordless Authentication in Microsoft Entra ID enables users to authenticate without using a password. Instead, users can use a different factor of authentication to sign in. This has two advantages. Firstly, employees often forget passwords and passwordless authentication removes the need to remember and change passwords.

Secondly, it mitigates the risk of passwords being leaked or stolen and essentially forces users to use a more secure method of authentication.

How does Entra ID authenticate users? There are three main methods:

Microsoft Authenticator App

Use the app to sign in by approving a notification or using a verification code.

Windows Hello for Business

Biometric authentication or PIN to access devices and applications.

FIDO2 Security Keys

Physical security keys that provide strong authentication.

Self-Service Password Reset

Password resets are a frustrating and tedious part of an IT helpdesk's workload. Gartner estimates that between 20% to 50% of all help desk calls are for password resets, costing businesses an average of $70 (£55) per reset.

Self-service Password Reset (SSPR) allows users to reset their passwords without administrator intervention. Traditional methods of SSPR trade security for convenience, however, Entra ID can use other factors of authentication to securely let users reset their own passwords.

Users verify their identity through predefined methods such as email, SMS, security questions, or the Microsoft Authenticator app. They won't need to contact IT support or raise a ticket. This saves operational downtime too as employees won't need to wait until someone else can reset their password to continue working.

Single Sign-On

If your business uses multiple tools, platforms and resources, it can be difficult to keep track of login credentials. Third-party applications also act as another point of failure, as a data breach could lead to passwords being leaked.

It's therefore clear having a single sign-on (SSO) is both a convenience and security benefit. SSO in Microsoft Entra ID provides users with seamless access to multiple applications using one set of login credentials.

Users authenticate once and gain access to all assigned applications without additional logins. Entra ID supports thousands of SaaS applications with pre-configured SSO settings.

Finally, Entra Connect integrates on-premises directories with Entra ID to provide SSO for both cloud and on-premises applications.

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Microsoft Intune

As hybrid and remote work is now the norm, the management and security of devices (known as endpoints) is crucial to a business's security posture. A recent study revealed that 68% of organisations have seen an increase in endpoint and IoT security attacks over the past year.

Microsoft Intune is a cloud-based mobile device management (MDM) and mobile application management (MAM) service. It helps businesses manage the devices and apps their workforce uses to access company data, ensuring security and compliance with organisational policies.

We will now discuss some key features of Intune.

Application Management

Managing the apps that your employees use on mobile devices can be tricky. These apps are often a point of failure during cyber attacks, with unauthorised or poorly configured mobile apps offering criminals an entry point into your digital infrastructure.

Intune allows you to manage the lifecycle of apps used in your business. You can deploy apps to user devices remotely, ensuring that the right apps are available to users. You can configure app settings and policies to control how apps are used on devices, avoiding any misconfiguration vulnerabilities.

Intune can also streamline patch management, as having out-of-date apps can leave your organisation vulnerable to attacks. You can force apps to update and retire apps when they are no longer needed or are not updated by their developer.

Device Management

Device Management in Intune provides comprehensive tools for managing the lifecycle and security of devices accessing corporate resources.

You can enrol devices into Intune for management either by users or IT administrators and create and deploy device configuration policies to manage settings, such as Wi-Fi, VPN, and email profiles.

With Intune, you can define and enforce compliance policies to ensure devices meet security and compliance standards. Non-compliant devices can be restricted from accessing corporate resources.

Windows Autopilot

Windows Autopilot is a set of tools that simplifies the process of setting up and pre-configuring new devices. Devices can be configured automatically on the first boot, reducing the need for IT intervention, and can be personalised with specific apps and settings based on the user's role.

For instance, an Autopilot policy for the sales team to have CRM applications installed and pre-configured can be pushed to devices.

Autopilot allows for a zero-touch deployment model, making it easier to deploy devices at scale.

Microsoft Defender for Business

Traditional antiviruses can't keep up with modern threats. Defender for Business is an endpoint security platform designed specifically for small and medium-sized businesses.

Powered by AI, it helps you identify, protect against, detect, and respond to complex cyberattacks. It aims to be a holistic solution for protecting your business from ransomware, malware, phishing, and other endpoint threats.

Here are some useful tools included in Defender:

Endpoint Detection and Response

EDR focuses on securing endpoint devices - such as desktops, laptops, and mobile devices - from attacks. Defender can scan and record the activities of endpoint devices to provide you with visibility into potential threats and incidents.

EDR provides a powerful defence against attacks before they happen. Defender uses machine learning and behavioural analytics to detect suspicious activities and potential threats.

EDR can use risk patterns to help uncover malware attacks. Microsoft Defender also makes it easier to investigate and resolve threats. It provides tools for tracking and managing security incidents from detection to resolution.

Mobile Threat Defence

Mobile Threat Defense in Microsoft Defender for Endpoint extends protection to mobile devices, helping organisations secure smartphones and tablets.

It identifies and mitigates threats on mobile devices, including malware, network attacks, and phishing attempts, and provides real-time alerts and actionable insights for mobile threats.

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Next-Generation Protection

Modern malware is often polymorphic. That is, it changes and mutates over its lifecycle to dynamically evade protection measures. Microsoft Defender's next-generation protection helps fight against rapidly evolving threats.

It achieves this through machine learning models, behaviour analysis, and heuristic-based protection. Defender uses predictive algorithms to search for signals of an attack and identify any suspicious user behaviour.

The key here is real-time monitoring and response. Risk patterns are continuously hunted for, and when a threat is detected, it will be removed, quarantined or flagged instantly.

Web Content Filtering

In Microsoft Defender, Web Content Filtering helps organisations control access to web content and protect against web-based threats.

It does this primarily through category-based filtering. This allows administrators to block or allow access to websites based on predefined categories that are associated with malware and malicious content. Microsoft regularly searches and flags suspicious sites, and Defender updates this list of untrusted sites regularly.

Need more control? You can create and enforce web filtering policies suited to your needs and even apply different filtering policies to specific users or groups within the organisation

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Beyond Productivity: The Untapped Features

The key to harnessing the power of Microsoft 365 is making use of its lesser-known tools. While most are familiar with staples like Word, Excel, and Outlook, Microsoft 365 offers many additional features that can significantly enhance workflow, collaboration, and security.

Let's explore some of these hidden gems and see how your business can make the most of them!

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Microsoft Bookings

Bookings is a scheduling and appointment tool that allows you to easily schedule and manage appointments with your customers or colleagues.

With Bookings, you can create a customisable booking page, allowing customers to easily schedule appointments online. The tool integrates seamlessly with your Outlook calendar, ensuring that you never double-book or miss an appointment. It provides automated reminders and confirmations, reducing no-shows and keeping your customers in the loop.

Finally, you can use Power Automate connectors to automate booking workflows. For example, you can configure Bookings to input data in a CRM when appointments are made. Bookings is a powerful alternative to calendar tools such as Calendly.

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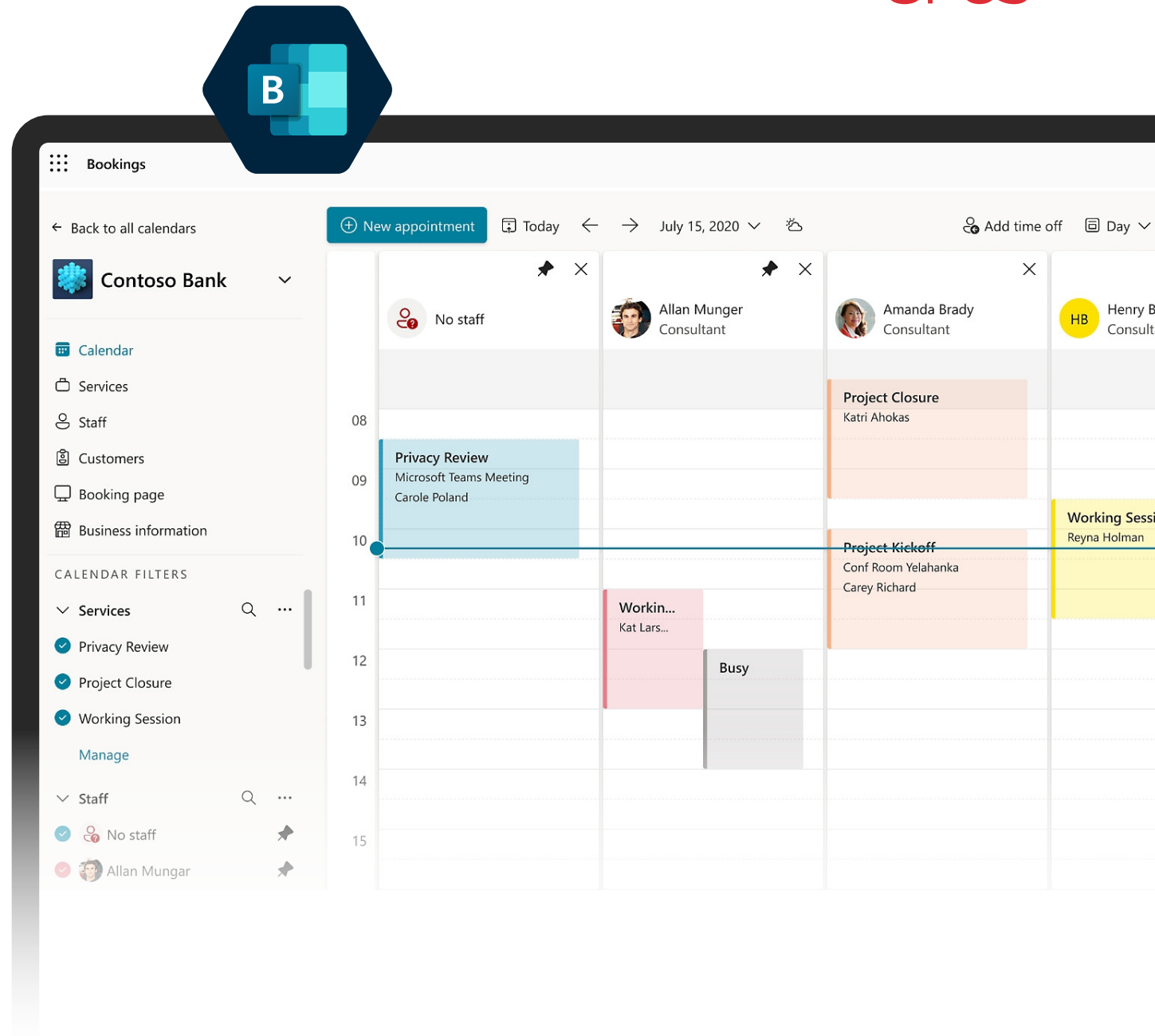
Microsoft Forms

Microsoft Forms allows users to create surveys, quizzes, and polls to be shared both internally and externally. It's ideal for collecting feedback, gathering data, and analysing results easily.

It integrates seamlessly with other Microsoft 365 applications, enabling easy sharing and collaboration. Additionally, the tool offers various customisation options and built-in analytics to help you interpret the data collected. Using Microsoft Forms can significantly enhance your ability to gather insights and make informed decisions based on real-time feedback.

Microsoft Lists

With Microsoft Lists, you can create, share, and track lists with colleagues. With Microsoft Lists, you can create custom lists tailored to your specific needs, complete with pre-built templates, customisable views, and smart rules to automate processes.

These lists are cloud-based and can be accessed anywhere. Using Microsoft Teams integration, you can work on lists together, keeping track of items and information all from your Teams app.

Microsoft Planner & To-Do

Microsoft Planner is a planning application that allows users to collaboratively create plans, organise tasks, assign responsibilities, and track progress. It is a useful alternative to Kanban-based productivity tools such as Trello.

Planner integrates seamlessly with Microsoft Teams, enhancing team communication and collaboration. It is ideal for project management, enabling teams to stay organised and focused on their goals. Microsoft To-Do, on the other hand, is a personal task management tool that helps you organise your daily tasks. You can create to-do lists, set reminders, and prioritise tasks. As a cloud platform, To-Do syncs across all devices and even integrates with Outlook.

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Microsoft Whiteboard

Microsoft Whiteboard is a digital whiteboard, that allows users to collaborate in a virtual workspace.

This tool provides a freeform, infinite canvas where teams can brainstorm ideas, sketch plans, and share concepts in real time. It is a great alternative to similar tools such as Miro.

These features are especially useful for remote or hybrid work, as it replaces a traditional whiteboard. Remote employees can add ideas wherever they are, and all changes are viewable instantly. Integration with Microsoft Teams and OneNote allows for easy sharing and embedding of whiteboards into meetings and notes.

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Microsoft Power Platform

The Microsoft Power Platform is a powerful suite of applications that allows you to build, analyse, and automate processes, without the need to learn any code. This suite includes Power BI, Power Apps, Power Automate, and Power Virtual Agents, each serving a unique purpose in transforming data and workflows:

Power BI

Power BI allows users to visualise data and share insights using interactive dashboards and reports.

Power Apps

Power Apps is used to create custom no-code applications. These apps can solve specific business needs, automate tasks, and streamline processes, all while integrating seamlessly with other Microsoft services and third-party applications.

Power Automate

Formerly known as Microsoft Flow, Power Automate is used to automate repetitive tasks and workflows.

By leveraging the Power Platform, organisations can harness the full potential of their data, streamline operations, and drive innovation with custom solutions tailored to their needs.

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Microsoft Loop

Microsoft Loop is a collaboration and productivity tool used to enhance team collaboration. It is a place where colleagues can work on documents, share ideas and keep track of progress together. It is a useful alternative to the productivity platform Notion.

Microsoft Loop is organised into workspaces. These are shared spaces where teams can organise and collaborate on projects and are made up of Loop Pages. These flexible canvases are where users add Loop Components - portable pieces of content such as text, tables, task lists, and more. Any component can be moved or updated in real time by multiple users.

What are some use cases for Loop? The platform lends itself well to project management, as teams can manage projects, track tasks, and collaborate on documents to make progress on a project. Loop is also useful for content creation, as writers, editors, and designers can co-author content and gather feedback within Loop Pages.

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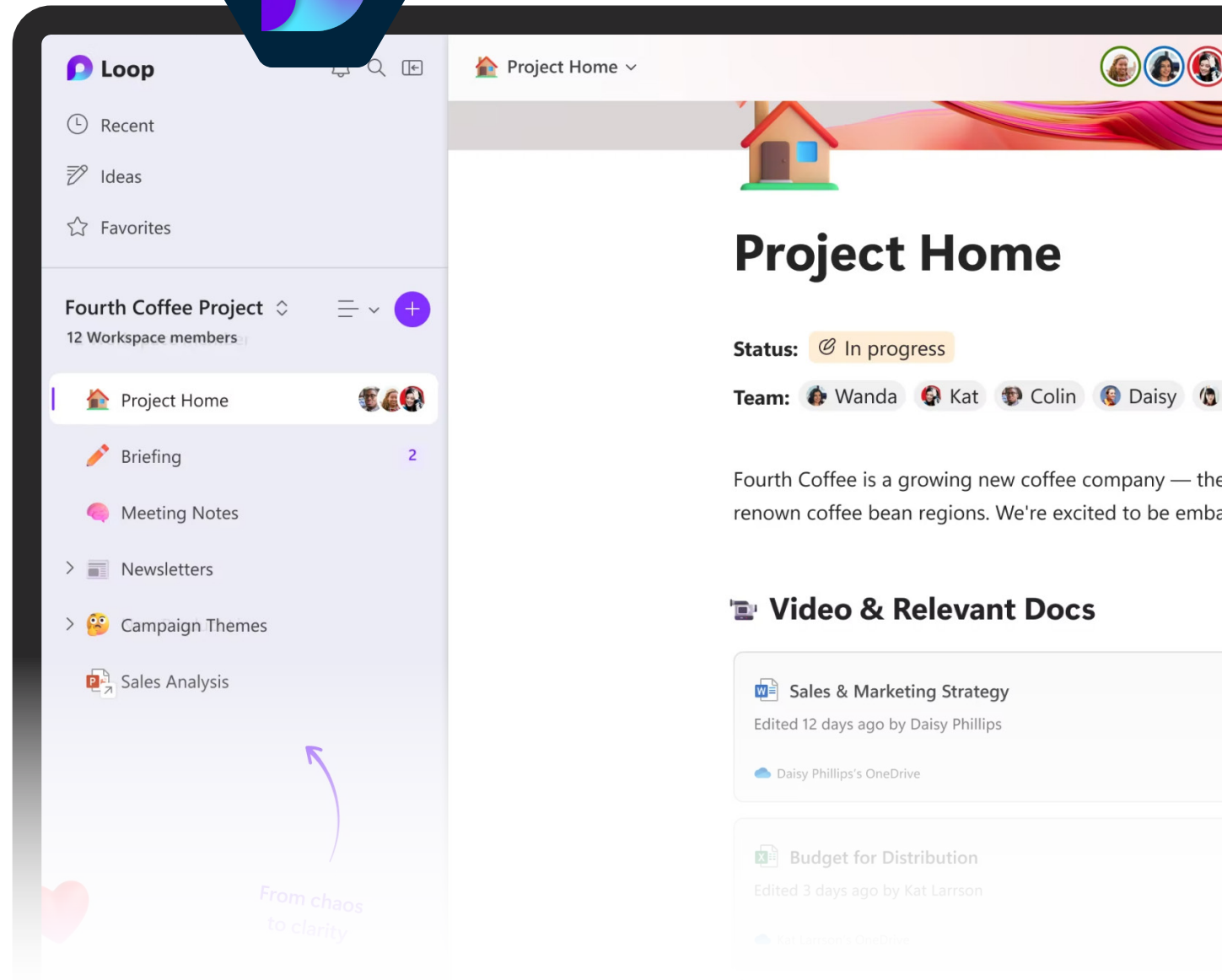
Microsoft Viva

Microsoft Viva is an employee experience platform built within Microsoft 365 and Microsoft Teams that allows you to train and support your employees in harnessing your digital infrastructure. It can be best understood as an end-to-end employee learning and training platform.

Viva is made up of a suite of tools. These are:

Viva Connections: This acts as a gateway to the digital workplace, integrating various resources, company news, and conversations into one place. It's accessible through Microsoft Teams and helps employees stay connected with company updates.

Viva Insights: This provides employees and managers with data-driven insights and recommendations to improve productivity and well-being. It allows you to track useful metrics such as focus time, and identify possible risk factors for poor well-being.

Viva Learning: This is an e-learning platform that centralises learning content from various sources such as LinkedIn Learning, Microsoft Learn, and third-party providers, making it easily accessible within Teams. It offers personalised learning recommendations based on role, interests, and career development goals.

Viva Topics: Topics uses AI to organise content and expertise across your organisation into relevant topics, making it easy to discover information and experts. It is an easy and intuitive way to build a knowledge base for your business.

Viva Goals: This helps organisations align on objectives and key results (OKRs) and drive business outcomes. It integrates with Microsoft Teams to keep everyone informed and engaged with their goals and progress.

Viva Engage: This is an internal social network tool designed to foster community building, conversations, and engagement within the organisation. It provides a platform for employees, wherever they may be, to keep others in the loop daily!

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Copilot for Microsoft 365: The Future of Productivity

We are now in the age of AI. The advancements in machine learning, and in particular, large language model (LLMs) have transformed the way we work. From automating mundane tasks to suggesting research ideas and generating content, generative AI is a game-changer.

Copilot is Microsoft's AI companion. It is available throughout nearly all apps in Microsoft 365, offering you time-savings and unlocking productivity.

In this section, we'll define Copilot and explore some crucial use cases for the technology in Microsoft 365.

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What is Copilot in Microsoft 365?

Copilot in Microsoft 365 is an AI-powered tool designed to assist users by enhancing productivity and streamlining workflows within the Microsoft 365 suite. It combines the power of GPT-4 with Microsoft Graph, a data API, to provide actionable and dynamic suggestions, responses and support.

It can provide a range of assistance to users, including:

Contextual suggestions: Providing real-time suggestions and recommendations as you work.

Content generation: Got writer's block? Copilot can generate content, such as drafting emails and creating documents and presentations using contextual information.

Process automation: Automating repetitive tasks and processes, such as scheduling meetings, setting reminders, and managing to-do lists.

That's just to name a few! It learns from user interactions, becoming more efficient and personalised over time. Unlike other LLMs, Copilot operates within the secure environment of Microsoft 365, ensuring that user data is protected and compliant with organisational policies and regulations. To best understand how Copilot can boost your productivity, let's discuss some useful examples of the tool in action in Microsoft 365 apps.

The Ultimate Guide
Maximising Efficiency With Microsoft Copilot
Discover detailed insights in to Copilot features and functionality including use cases and ROI.

Download Your Free Guide Now
www.opustech.co.uk/microsoft-copilot-guide/

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Copilot in Outlook

Copilot is your assistant in Outlook, improving productivity by managing emails and drafting responses. It can automatically prioritise emails based on importance and urgency, highlighting critical messages using contextual information. It can provide some clean-up suggestions too, such as recommending old or irrelevant emails to be archived or deleted.

When you open a message, Copilot can provide some suggested quick actions, such as replies, follow-ups, calendar items and delegations.

Need help writing emails? Copilot drafts responses to common queries and routine emails, which you can review and send with minimal edits. It uses contextual information to craft personalised replies.

Copilot in Word

Understanding and generating text is the bread and butter of large language models (LLMs). Using Copilot in Word can transform how you write and read content. Let's see how!

Reading a long document and short on time? You can simply ask Copilot to summarise a document for you and it will. It will provide a short and actionable summary of the document's main points. You can even ask Copilot to generate insights on the document, such as providing recommendations and follow-up actions.

Copilot can, of course, generate documents, but did you know it can also edit them? Simply ask Copilot to "improve this report" and it will analyse the text for you, providing recommendations and edits to improve the piece.

Copilot in Excel

Copilot can be used to streamline data analysis in Excel. In particular, Copilot can help with data importing and cleaning. Copilot can import financial data from various sources, such as bank statements and sales records, into Excel. It can automatically clean and format the data, removing duplicates and correcting errors.

In the same vein, Copilot is very useful for debugging errors with formulas and calculations. It can identify anomalies and outliers in the data, flagging potential issues for review.

Finally, Copilot can generate financial reports, including income statements, balance sheets, and cash flow statements, within just a few clicks.

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Copilot
in Teams

Copilot is a useful tool for automating tedious tasks in Microsoft Teams.
For instance, you can ask Copilot to schedule meetings, generate draft agendas and send out invitations.

Did someone miss the meeting? Have you forgotten to take minutes? Copilot can transcribe meetings and use this to generate succinct re-caps of what has been discussed.

It can also send out automated to-do actions to the correct people, and ensure these are added to the next meeting's draft agenda.
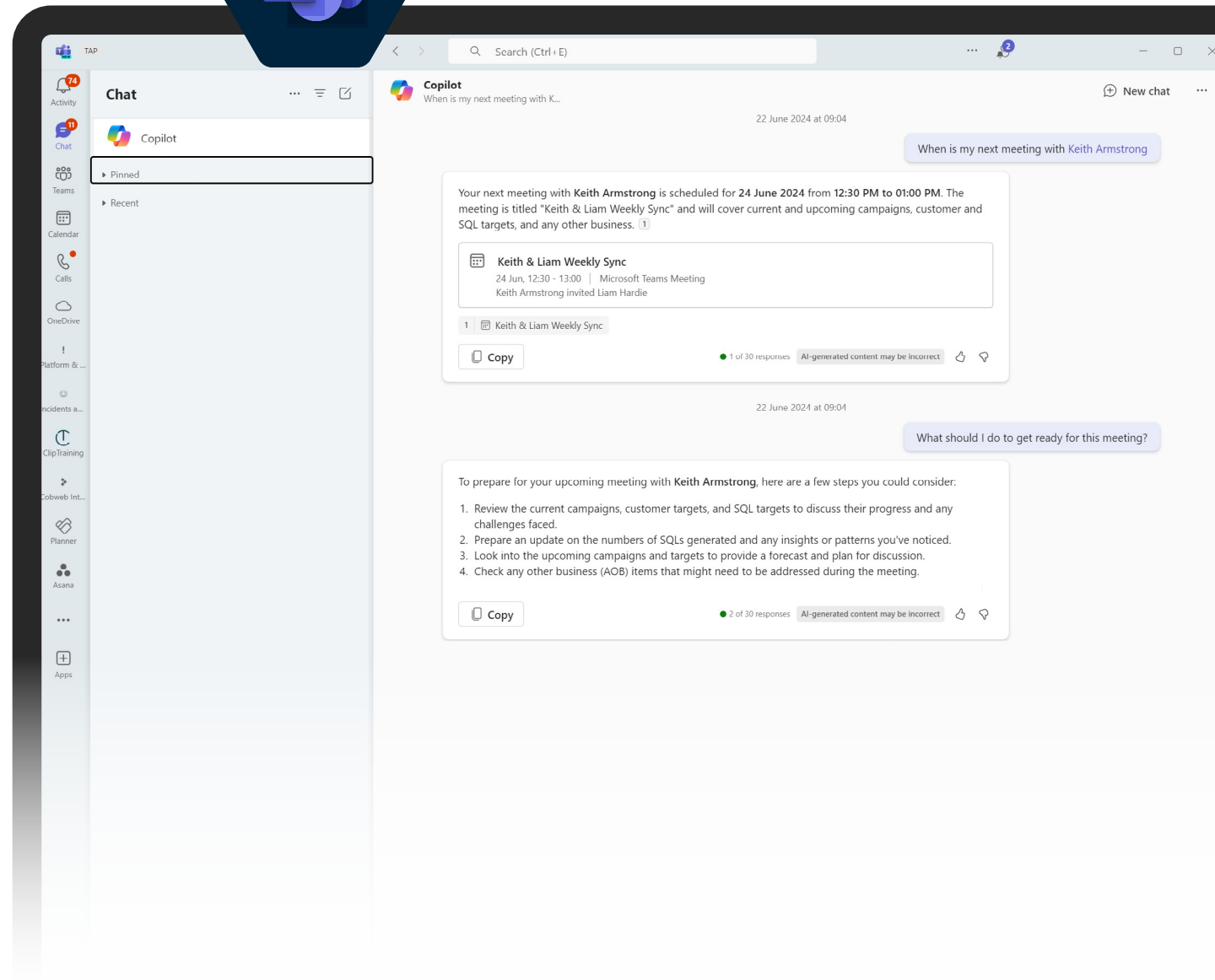
How We Can Help

Microsoft 365 is crucial for harnessing the power of a digital transformation. However, navigating the vast world of features within the platform can be daunting, especially when it comes to ensuring optimal security and productivity. That's where Opus come in.

Our team of experienced professionals can guide you through selecting the right Microsoft 365 subscription plan tailored to your specific business needs. We'll help you understand the differences between plans and ensure you get the best value and features for your operations. Then, we can focus on securely setting up and managing your Microsoft 365 deployment. It's vital that your data is protected and accessible only to authorised users, and working with an MSP provides peace of mind as you integrate advanced tools like Copilot into your workflow.

Beyond well-known applications like Word, Excel, and Outlook, we can help you unlock the full potential of lesser-known tools such as Microsoft Bookings, Forms, Lists, Planner, and the Power Platform. Our expertise ensures these tools are integrated seamlessly into your operations. Finally, we can provide ongoing support and training to ensure your team is comfortable and confident in making the most out of Microsoft 365.

Interested? Partner with us to unlock the full potential of Microsoft 365. With our expert setup, management, and support, you can focus on what you do best—growing your business—while we ensure your digital infrastructure is secure, efficient, and optimised. Get in touch today to get started!

The Ultimate Guide
Maximising Efficiency With Microsoft Copilot
Discover detailed insights in to Copilot features and functionality including use cases and ROI.

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