
















# Microsoft 365 | Quick Reference

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	App	Usage Guidelines New and Interesting Features
Word		<p>Create Documents. Never do manual formatting.            Always use Styles: Instant navigation, TOC, drag to rearrange topics            Use Editor to refine your writing and improve vocabulary            Use Dictation – to type text by talking. Choose from 20+ languages</p>
Excel		<p>Always use Tables for raw data. Clean-up data using Get and Transform.            Use Flash Fill for quick data clean-up. Convert location data to 3D maps.            Use Excel Ideas (Analyze Data) to learn all possible useful things.            Use Excel mobile to capture photos and convert to data. Use XLOOKUP instead of VLOOKUP. Import millions of rows into Data model.</p>
Lists		<p>Use Lists instead of Excel for tabular data entry. Create columns – date, choice, number, lookup and more. Add mandatory columns and validations. Share with multiple people – they can see and edit only their own data. Connect to Excel to create a live Pivot Table or create Power BI dashboard. Add to Teams or use independently.</p>
Power BI		<p>Enhance data analysis. Import data from 140+ data sources. Clean-up data without macros or manual work. Create interactive dashboards. Share reports with colleagues. Schedule automatic refresh. Use Q&amp;A to ask questions to Power BI. Find out why a value increased or decreased using the power of AI. Plot location data on Maps – and much more.</p>
PowerPoint		<p>Create impact without wasting time. Use Design ideas to create beautiful title slides, arrange pictures automatically, convert bullets into illustrations. Use Presentation Coach to improve your presentation skills. Use Subtitles or Present Live to translate your voice to one or more languages. Record narration, add webcam video and export as video.</p>
Office		<p>Install this combo Office app on mobile phones. Word, Excel, and PowerPoint are available in a single, convenient app. Convert images / data to PDF, take photos and add data to Excel or Word, Scan business cards or documents, convert photos to a presentation and more...</p>
OneNote		<p>Capture notes. Install on desktop, laptop and mobile. Create new notebooks on OneDrive. Automatic sync across devices. Right click on a meeting in calendar and choose Meeting notes – link notes to meetings. Use mobile app to record audio, photos or scribble to take notes. Use the built-in calculator. Add action items and convert to Outlook tasks.</p>

Sway		Create and share web pages instantly. No programming knowledge needed! Just add content – text, images, videos, audio, links, embeds, YouTube, Stream and more. Design is automatic. Get link and share internally or externally. Works on mobile as well as desktop browser.
Forms		Capture data, conduct surveys or create quizzes. Add questions – simple text, choice, ranking, Likert, NPS and more. Share link internally or externally. Live data analysis. Export to Excel. Automate responses to form submission using Power Automate. Integrates with Stream videos.
OneDrive		Store all your files here. Safety + Efficiency. Share links with others instead of sending files as attachments. Multiple people can edit the same file at the same time. No copies. No need for repeated copy-paste. Auto-Save prevents file corruption. Sync across devices. Allow editing or share read-only. Use Comments with @mention for contextual sharing.
SharePoint		Use for creating Intranets or departmental co-ordination sites. DO NOT put departmental shares here. Use Teams instead.
Stream		Put all your videos here. Set the language after uploading the video. For few languages it creates an automatic, searchable transcript. Accepts all types of videos. Install mobile app as well. Conserve bandwidth and adjusts video quality automatically. Add Forms Quiz within video.
Outlook		Use only for Ad-Hoc work which is not urgent. Avoid attaching files unless it is a statutory or legal requirement. Send links to OneDrive or Teams files instead. Enable Focused inbox and let it automatically dump less important mails to the Other folder. Make a unified list of all your pending work in the Tasks folder. Use Tasks for delegation of work.
To Do		Must install this mobile app. This shows Tasks and flagged emails from Outlook, shared task lists from Planner and work assigned to you. Add relevant to tasks to My Day. Create your own checklists. Delegate work to others. Monitor and execute work efficiently.
Shifts		Manage multiple staff shifts. Configure timings, roles, leaves, coordination, swaps and more. Get instant reports. Keep everyone informed with live updates.

Bookings		<p>Let customers book time slots for your services using a powerful online calendar. Decide available time slots, add staff members, decide service offerings, configure pricing, accept payments. Eliminate the need to have a person to manage time bookings.</p>
Teams		<p>Manage all types of teamwork without the need to move to another application. Teams is a container. Ad-hoc work is best done using Teams chat. Share files, conduct audio / video calls, coordinate and execute. For structured work (projects), create separate teams in Teams. Keep each project separate. Add channels, shared task lists and files.</p>
Planner		<p>Add shared tasks list to any channel in Teams. Add tasks, specify deadline, add sub-tasks, update status. Delegate to team members. View the status as a Kanban view or as a graphical report. Integrates with the To Do app. Connect to Outlook calendar.</p>
Whiteboard		<p>Use online, shared whiteboard during meetings. Everyone can draw. No need to have a stylus or touch screen. Can draw using mouse as well. Use templates or start with blank. Save whiteboard with the meeting for future reference. Amazingly simple, but powerful tools.</p>
Yammer		<p>Use Yammer to interact across the entire organization. Use it for Leadership Engagement, for crowdsourcing feedback or ideas, for announcements, for praising achievers, for debating and consensus building. Use Yammer to achieve anything which involves all staff members in an open and transparent manner.</p>
Power Automate		<p>Use Power Automate to coordinate across all these apps. When something happens in one app (trigger), relevant action(s) can happen in other apps. Learn from and use hundreds of templates and without knowing any programming. Use this for automation, notifications, error handling, approvals, mail monitoring and more.</p>
Power Apps		<p>Create mobile apps quickly and that too without knowing programming. Connect the apps to data in Excel, SharePoint, or Teams. Create world class user interface, use GPS, camera, audio and video inputs. Integrate with business systems. Use Power Automate to streamline workflows.</p>