

Getting Started in Microsoft 365

OVERVIEW

The **Getting Started in Microsoft 365** course provides a practical and confidence-building introduction to working in a modern digital workplace.

Designed for users who are new to Microsoft 365 - or who are transitioning from other platforms - this course introduces the core applications used in everyday work, including Outlook, OneDrive, Word, Excel, OneNote and Microsoft Teams.

Participants will learn how to navigate the Microsoft 365 environment, communicate effectively, create and manage documents, store and access files securely, and work confidently across applications. Throughout the course, emphasis is placed on developing strong foundational skills and understanding how tools connect to support daily work.

LEARNING OUTCOMES

By the end of the course, participants will be able to:

- Navigate confidently within the Microsoft 365 environment and applications
- Understand the purpose of key Microsoft 365 apps and how they work together
- Send, receive, and organise emails and calendar items using Outlook
- Create and edit basic documents in Word and Excel
- Store, access, and manage files using OneDrive
- Share files appropriately using cloud-based tools
- Capture and organise notes using OneNote
- Understand basic communication options using Teams
- Move efficiently between applications and manage daily work digitally

These outcomes provide a strong foundation for everyday work and prepare participants to build more efficient workflows using Microsoft 365.

DURATION & DELIVERY

The duration of this course is typically **3–4 hours or 1 day**, depending on the level of depth and practical exercises included.

This course can be delivered in a range of formats to suit your team:

- **Onsite training** - delivered at your workplace
- **Live online training** - delivered virtually in real time
- **Hybrid delivery** - a combination of onsite and online participants for teams working across multiple locations

All training is delivered by experienced Microsoft 365 specialists with a focus on practical, real-world application.

PREREQUISITES

No prior Microsoft 365 experience is required.

A basic understanding of personal computers, files, and folders is recommended.

COURSEWARE

Learning materials are available for purchase at the time of booking. These may include training materials, reference guides or supporting resources, depending on the course.

While core concepts remain consistent across versions of Microsoft 365, trainers will highlight any relevant updates, interface changes, or new features during delivery to ensure participants receive the most current and practical guidance.

MICROSOFT 365: MODERN WORKPLACE TRAINING PATHWAY

Our Microsoft 365 Modern Workplace training is designed to help individuals and teams work more efficiently, collaborate effectively, and get better value from the tools they use every day.

All courses can be delivered as outlined below, or we can customise a training program to ensure your team completes the exact topics they need in the timeframe that best suits your organisation.

MODERN WORKPLACE COURSES

- **Getting Started in Microsoft 365** – Build confidence using the core Microsoft 365 applications, including Outlook, OneDrive, Word, Excel, OneNote, and Teams. Ideal for new users or those requiring a strong foundation.
- **Working Smarter with Microsoft 365** – Improve personal productivity by managing email, organising work, structuring files, and building efficient daily workflows across Microsoft 365 applications.
- **Collaborating Effectively in Microsoft 365** – Transform how teams work together using Microsoft Teams, shared files, and real-time collaboration tools, with a focus on reducing reliance on email.
- **Managing Files & Information in Microsoft 365** – Learn how to organise, store, and manage documents across OneDrive and SharePoint to reduce duplication and improve accessibility.
- **Modern Work Habits with Microsoft 365** – Develop better ways of working by improving communication practices, managing meetings effectively, and using the right tools for the right tasks.
- **Managing Tasks & Work in Microsoft 365** – Use Microsoft Planner as a central tool to assign, track, and manage work across teams, improving accountability and visibility.
- **Using Copilot in Microsoft 365** – Leverage AI capabilities to enhance productivity across Microsoft 365 applications, including drafting content, summarising information, and analysing data.

COURSE DETAIL

Introduction to Microsoft 365

- What is Microsoft 365?
- Understanding cloud-based work
- Overview of core applications
- Navigating the Microsoft 365 interface

Working with Outlook

- Sending and replying to emails
- Managing the inbox
- Using folders and search
- Creating calendar appointments and meetings

Creating Documents (Word & Excel Basics)

- Creating and saving documents
- Editing and formatting text in Word
- Entering and editing data in Excel
- Understanding basic spreadsheets

Managing Files with OneDrive

- Saving files to OneDrive
- Accessing files across devices
- Understanding file locations
- Introduction to file sharing

Using OneNote for Notes

- Creating notebooks and sections
- Entering and organising notes
- Using OneNote for everyday work

Introduction to Microsoft Teams

- Understanding Teams
- Chat vs email
- Overview of channels and conversations

Working Across Applications

- Switching between apps
- Searching for content
- Managing your digital workspace