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HOW-TO GUIDE

Getting Started with Microsoft 365

A Quick-Start Guide

What each app is actually for, where your files should live, and the handful of settings worth getting right in week one.

Which app, when

Where files go

First-week setup

BEFORE YOU START

Most businesses use a fraction of what they own.

Microsoft 365 is usually bought for email, and then email is mostly what it gets used for. Everything else sits there, paid for monthly, unopened.

That is rarely anyone's fault. Nobody is given an afternoon to work out what SharePoint is for, or why there appear to be four different places to put a file. So people use what they recognise – Outlook and Teams – and carry on emailing attachments to each other as they always have.

This guide is the afternoon nobody gets. It covers what each app is genuinely for, the one rule that settles where files should live, and the small number of settings worth getting right at the start.

Who it is for. A business that has just moved to Microsoft 365, or has had it for years without ever setting it up properly. It is written for the person making the decisions rather than an IT specialist, so there is no jargon and nothing here requires a technical background.

How to use it. Read pages three to five first – they are the ones that change how people work. The checklists after that can be worked through over a few weeks. You do not need to do everything at once, and doing three things properly beats doing ten badly.

ONE THING TO NOTE

Microsoft 365 comes in several plans, and not every feature described here is in every one. Where something depends on your plan we have said so. If in doubt, check what you are licensed for before assuming a feature is missing – it is often present and simply switched off.

WHAT THIS GUIDE COVERS

01 Which app, and when

02 Where your files should live

03 Your first week

04 Working together well

05 Secure without friction

06 Mistakes, and habits worth keeping

THE PRINCIPLE

One copy of everything, in one place

Almost every problem people have with Microsoft 365 comes from the same habit: emailing copies of files instead of sharing the original.

When you attach a file to an email, you create a second copy. The recipient edits it, sends it back, and now there are three. Someone else was copied in and starts from the first version. Within a week nobody can say which is current, and the answer to “have you got the latest?” is genuinely unknown.

Microsoft 365 is designed to remove that entirely. The file lives in one place, everyone opens the same one, and several people can work in it at once. It sounds like a small change and it is the single biggest one available to you.

01 Share a link, not an attachment

In Outlook, attach from OneDrive or SharePoint and it sends a link automatically. One file, one version, and no mailbox filling up with copies.

02 If it belongs to the business, it does not live with a person

Shared work belongs in SharePoint or Teams, not in someone's OneDrive. Otherwise it leaves when they do.

03 Stop naming files “final”

Version history is built in, so you can see who changed what and roll back. Once people trust that, the v3-final-FINAL habit disappears on its own.

04 Search rather than filing perfectly

A sensible structure helps, but search across 365 is good. Do not spend weeks designing folder trees nobody will follow.

WHERE TO START

If you change one behaviour this month, make it the first one. Ask everyone to send links instead of attachments internally. It takes a five-minute explanation and it quietly fixes the version problem for good.

SECTION ONE

Which App, And When

There is a lot in Microsoft 365, and much of it overlaps. Here is the short version of what each thing is actually for.

AppUse it forDon't use it for OutlookEmail and calendar. Talking to people outside the business.Sending files internally, or as a filing system for documents. TeamsInternal conversation, calls, meetings, and quick access to shared files.Long-term document storage on its own – that is SharePoint underneath. SharePointWhere the business's shared files and sites live. The proper home for company documents.Personal drafts and anything only you need. OneDriveYour own working files and drafts. Personal to you, backed up automatically.Anything the business relies on or others need to find. Word, Excel, PowerPointThe documents themselves. Save them into SharePoint or OneDrive, not the desktop.Excel as a database several people edit at once – use Lists. ListsStructured information: assets, requests, trackers, registers. If several people keep editing the same spreadsheet, Lists is usually the better answer.Free-form documents or long text. Planner & To DoTasks. Planner for shared work, To Do for your own.Full project management on complex jobs. FormsCollecting information – requests, feedback, bookings, checks.Anything needing approval steps; pair it with Power Automate. Power AutomateAutomating the steps between apps: approvals, notifications, filing.Fixing a process that is broken to begin with. OneNoteNotes, meeting records, reference material and how-to instructions.Data you need to report on.

IF YOU REMEMBER NOTHING ELSE

Outlook for outside, **Teams** for inside, **SharePoint** for the business's files, **OneDrive** for yours. That covers the great majority of daily decisions. It also matters later: Copilot is most useful when documents already live in SharePoint and Teams, so good information management comes first.

SECTION TWO

Where Your Files Should Live

This is the question that confuses people most, and it has a simple answer. Ask one thing: **does this belong to me, or to the business?**

MINE

OneDrive

Drafts, notes to yourself, work in progress nobody else needs yet. Backed up, available on any device, and private unless you share it.

THE BUSINESS'S

SharePoint / Teams

Anything shared, relied upon, or that must outlast the person who made it. Teams files sit in SharePoint, so these are the same place seen two ways.

OUTSIDE

A shared link

Sending to a client or supplier? Share a link from where the file already lives, with an expiry date if it is sensitive. Do not attach a copy.

The most common and most damaging mistake is business files living in an individual's OneDrive. It works perfectly well until that person leaves, is off sick, or changes role — at which point nobody can find the tender, the contract or the pricing sheet.

A STRUCTURE THAT WORKS FOR MOST BUSINESSES

- ☐ **One Team or site per real thing, not per person**
By department, function or major client — Finance, Operations, Sales, or a site for a large project. Match how the business is actually organised.
- ☐ **Keep it shallow**
Two or three folder levels is plenty. Deep nesting is where files go to be lost, and search finds things faster anyway.
- ☐ **Give each area an owner**
Someone responsible for who has access and what belongs there. Unowned areas sprawl within months.
- ☐ **Sync only what you need offline**
OneDrive can sync SharePoint folders to File Explorer, which helps people used to network drives. Avoid syncing every library to every device — sync only what people genuinely need offline, or you invite slow machines and sync conflicts.

MOVING FROM AN OLD FILE SERVER

Do not lift everything across unchanged. Move what is active, archive what is not, and take the opportunity to fix a structure that has probably grown for years. This is the one moment it is easy to do.

SECTION THREE

Your First Week

The settings worth getting right at the start, because retrofitting them later is considerably more work.

- ☐ **Turn on multi-factor authentication for everyone**
Before anything else. It is the single most effective protection available and it is included in every plan. Do it on day one, while there are few enough people that it is easy.
- ☐ **Check your domain and email are set up correctly**
Your own domain on email, and the DNS records that stop others sending mail as you. If you are unsure whether this is right, it is worth having checked.
- ☐ **Create accounts properly, one per person**
No shared logins, no generic accounts people pass around. Shared mailboxes are for business addresses such as info@ or sales@ – they are not shared user accounts, and they do not need a licence of their own.
- ☐ **Decide who is an administrator – and keep it to few**
Two people, ideally, with their own separate day-to-day accounts. Everyone being an admin is convenient and a genuine risk.
- ☐ **Set up your first Teams and SharePoint areas**
Following the structure from Section Two. Start with three or four, not twenty – you can add more as needed.
- ☐ **Point OneDrive at Desktop and Documents**
So people's local files are backed up automatically without them having to think about it. This quietly prevents most data-loss incidents.
- ☐ **Agree your external sharing rules**
Whether people can share with anyone, or only named guests. There is a sensible middle ground; the default may not be it.
- ☐ **Check your retention and deletion settings**
How long deleted items and files are recoverable. Know the numbers rather than assuming, and note that this is not the same as a backup.
- ☐ **Write down who to contact when something goes wrong**
One line, somewhere everyone can find it. Obvious, and routinely missing.

A REALISTIC PACE

The first four are worth doing immediately. The rest can follow over a few weeks. What matters is that someone is named as responsible for each, rather than all of it being “on the list”.

SECTION FOUR

Working Together Well

Teams becomes either the best thing about Microsoft 365 or the most irritating, and the difference is a handful of conventions agreed early.

CONVENTIONS WORTH AGREEING

- ☐ **Channels for topics, chat for quick things**
Anything others may need to find later belongs in a channel, where it is searchable. Private chat is where knowledge goes to disappear.
- ☐ **Fewer Teams than you think**
Use channels inside a Team rather than creating a new Team for everything. Sprawl is the most common Teams problem, and it is hard to undo.
- ☐ **Agree what “urgent” means, and what does not need a reply**
Otherwise everything feels urgent and nobody can concentrate. Say plainly that a message outside hours does not expect an answer.
- ☐ **Use the file tab, not attachments, in Teams**
Files posted in a channel live in that Team’s SharePoint. That is the shared original, so edit there rather than downloading a copy.
- ☐ **Turn meetings into notes, not just recordings**
A short written summary of decisions and actions is worth more than an hour of video nobody rewatches. Where you have Copilot, it can draft this for you.
- ☐ **Let people set their hours and status honestly**
Working patterns vary. Visible availability prevents both interruption and the assumption that silence means idleness.

TWO THINGS WORTH SHOWING EVERYONE

Editing at the same time

Two or more people in one document, seeing each other’s changes live. Most people have never tried it, and it removes an entire category of email.

Version history

Every saved version kept, restorable in two clicks. Once people know this exists they stop hoarding copies “just in case”.

ON TRAINING

A single thirty-minute session covering these two features and the link-not-attachment habit will do more than any written manual. Adoption fails far more often than technology does.

SECTION FIVE

Secure Without Friction

Security that gets in the way gets bypassed. These measures are effective and barely noticeable once in place.

- ☐ **Multi-factor authentication, with an app rather than texts**
An authenticator app is both more secure and quicker than waiting for a code. Most people are prompted only occasionally on their own devices.
- ☐ **Share links with the narrowest sensible scope**
“Specific people” rather than “anyone with the link” for anything that matters. Add an expiry date when sharing outside the business.
- ☐ **Review guest access occasionally**
External people you invited for one project tend to keep access indefinitely. Twice a year is enough to keep this tidy.
- ☐ **Keep devices updated and encrypted**
Automatic updates on, and disk encryption enabled. A lost laptop is then an inconvenience rather than a data breach.
- ☐ **Remove access the day someone leaves**
Disable the account, keep the data. Their files and mailbox can be retained and handed over without leaving the account live.
- ☐ **Use a password manager for everything else**
365 handles sign-in to Microsoft services; the other twenty accounts your business uses still need somewhere safe. Not a notebook or a browser.

WHERE PLANS DIFFER

Basic MFA and sharing controls are available across plans. More advanced device management and access rules — Intune and Conditional Access — sit in higher tiers such as Business Premium.

Availability depends on your Microsoft 365 licence.

One thing worth stating plainly: **Microsoft 365 is not a backup.** Deleted items are recoverable for a limited period, which covers accidents but not much else. If your business would struggle to lose its data, a dedicated backup of 365 is a sensible and inexpensive addition.

SECTION SIX

Mistakes We See Repeatedly

Eight things that come up again and again. None is difficult to avoid once you know to look for it.

☐ **Treating Teams and SharePoint as separate places**

They are the same storage seen two ways. Files posted in a Team live in its SharePoint site, so there is no need to decide between them.

☐ **Creating a Team for every conversation**

The most common mistake, and the hardest to reverse. Use channels within a small number of Teams instead.

☐ **Leaving business files in personal OneDrive**

It works until that person leaves. Anything the business depends on belongs in SharePoint or Teams.

☐ **Recreating the old file server, folder for folder**

A migration is the one easy opportunity to fix a structure that grew for a decade. Copying it across preserves the problem.

☐ **Making everyone an administrator**

Convenient, and a genuine risk. Two admins with separate day-to-day accounts is the sensible arrangement.

☐ **Assuming deleted files are gone, or kept forever**

Neither is true. Retention windows are finite and specific — know your numbers rather than guessing.

☐ **Buying add-ons before checking the plan**

Businesses routinely pay twice for capability already included in their licence. Check first.

☐ **Letting Excel become the company database**

A spreadsheet several people edit and email around is the most common cause of lost and contradictory data. Lists does the same job properly, and is included.

☐ **Nobody owning the tenancy**

Settings drift, guests accumulate and licences go unreviewed when no single person is responsible for the environment as a whole.

☐ **Rolling out with no explanation**

Thirty minutes showing people co-authoring and version history changes adoption more than any amount of configuration.

TO FINISH

Five Habits Worth Keeping

If these five become normal, most of the problems in this guide never arise. They are worth stating once to everyone and then simply expecting.

None of them requires training, a policy document or anyone's permission. They are small changes to how people already work, and they compound quietly: fewer duplicate files, smaller mailboxes, less time spent asking which version is current, and considerably less risk when somebody leaves.

- ☐ **Send links, never attachments internally**
The habit that fixes versions, mailbox size and "which one is current?" all at once.
- ☐ **Save into OneDrive or SharePoint, never the desktop**
If it is not in 365, it is not backed up and nobody else can find it.
- ☐ **Ask "mine or the business's?" before saving**
One question that settles where nearly every file should go.
- ☐ **Put anything others may need in a channel**
Not a private chat, where it becomes unfindable within a week.
- ☐ **Review access twice a year**
Guests, leavers and permissions. Twenty minutes, twice a year, prevents years of sprawl.

MAKING THEM STICK

Habits spread by example rather than instruction. If the people others copy — owners, managers, the loudest voices — send links and save into SharePoint, everyone else follows within weeks. If they keep emailing attachments, no amount of guidance will help.

NEXT STEPS

Three things, then stop.

If you do nothing else from this guide: turn on multi-factor authentication, move shared files out of personal OneDrive, and get everyone sending links instead of attachments. Those three account for most of the benefit.

If you would like a second opinion on how your tenancy is set up, or help with the parts that need an administrator, we are happy to talk it through. No commitment, and no obligation to change who supports you.

And if it is already configured well, we will tell you that and leave you to it.

INNOVASYSTEMS

Managed IT support
Microsoft 365
administration
innovasystems.tech

THE GROUP

Innova Technologies Group
Ltd
Hull, United Kingdom
innovagroup.tech
hello@innovagroup.tech

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