

Matching Microsoft 365 Tools to Workplace Tasks

Group PowerPoint Presentation | Case Study: Riverdale Nursing Home

Group members

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Date

June 2026

The challenge at Riverdale

Riverdale is a nursing home for older adults needing daily personal care, medication support and monitoring. Carers, senior carers, nurses and administrative staff work across **two buildings on a shift basis**. The home already uses Microsoft, but staff are unsure which tool to use for which task.

This has led to:

- Confusion over working methods
- Duplicated work
- Missed messages
- Inefficient ways of working



Our brief

As a group we review four everyday workplace tasks and recommend the most suitable Microsoft tool for each. We will explain what each task involves, why the tool fits, how it improves efficiency and communication, and its advantages and limitations.

Our recommendations at a glance



01

Staff communication

Microsoft Teams



02

Secure file storage &
sharing

OneDrive



03

Care documentation

Word



04

Staff scheduling

Excel



TASK 01

Staff communication

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Microsoft Teams

WHAT THE TASK INVOLVES

Staff across Riverdale's need to share shift handovers, urgent updates and day-to-day messages quickly and reliably, on different shifts.

WHY MICROSOFT TEAMS — AND HOW IT HELPS

Teams brings instant messaging, dedicated channels, and audio/video calls into one secure hub. Teams is easily accessible on desktop, tablet and mobile. So replacing scattered texts and paper notes with one searchable thread keeps conversations organised. This means fewer messages are missed and work is not duplicated.



Advantages

- Real-time chat, calls and video
- Channels keep topics organised
- Works across both buildings and on mobile
- Integrates with the rest of Microsoft 365



Limitations

- Notification overload can distract staff
- Needs staff training and suitable devices
- Depends on internet.
- Not a substitute for the formal care record



Fewer missed messages and less duplicated work through one shared channel.

References: Microsoft (2024); The Inform Team (2023).



TASK 02

Secure file storage & sharing

OneDrive

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WHAT THE TASK INVOLVES

Care plans, policies and shared documents must be stored and shared securely between staff and across Riverdale Nursing home. This should be possible while protecting residents' sensitive and personal information.

WHY ONEDRIVE — AND HOW IT HELPS

OneDrive offers cloud storage with controlled access, encryption and version history, so the right staff can reach the right file from any device. Residents' records are 'special category' data under the Data Protection Act 2018 and UK GDPR. These records need strong safeguards and access controls. This replace insecure email attachments with controlled link-sharing.



Advantages

- Encrypted, access-controlled storage
- Reachable from any device or building
- Automatic backup and version history
- Controlled link-sharing, not email attachments



Limitations

- Depends on internet access
- Permissions must be set and reviewed carefully
- Over-sharing risk if access is not governed
- Requires staff training and licensing



One secure, up-to-date copy avoids lost or duplicated files.

References: Microsoft (2024); Skills for Care (2018); Care Learning (2025).



TASK 03

Care documentation

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Word

WHAT THE TASK INVOLVES

Staff write care plans, assessments, incident reports and letters. These records must be accurate, legible, factual and completed promptly. This is to support safe, person-centred care.

WHY WORD — AND HOW IT HELPS

The NMC Code requires records to be clear, accurate and completed as soon as possible. Word provides reusable templates, clear formatting, spell-check and 'track changes' to produce consistent, professional, legible documents. Shared templates cut duplicated effort and standardise records. In health care, 'if it is not recorded, then it has not been done'.



Advantages

- Familiar and easy to use
- Templates ensure consistency
- Professional, legible formatting
- Saves directly to OneDrive for sharing



Limitations

- Not a clinical record system on its own
- No built-in audit trail unless paired with secure storage
- Uncontrolled copies can cause version conflicts



Standard templates support accurate, NMC-compliant record keeping.

References: NMC (2018); NHS England ; RCNi (2024).



TASK 04

Staff scheduling / rotation

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Excel

WHAT THE TASK INVOLVES

Managers build and manage shift rotation for carers, senior carers and nurses across the nursing home. And also tracking working hours, staff availability and adequate cover for residents.

WHY EXCEL — AND HOW IT HELPS

Excel's grids, formulas and conditional formatting let managers automate hours, flag staffing gaps and adjust cover at no extra cost, and rotation are easy to share or print. A clear visual rotas shows coverage at a glance. It helps avoid both understaffing and duplicated shifts. This is important when balancing residents' needs with staff availability.



Advantages

- Flexible and customisable layouts
- Low cost and widely understood
- Formulas automate hours and cost totals
- Easy to share or print



Limitations

- Manual data entry is error-prone
- No real-time updates for last-minute swaps
- Struggles with very complex shift patterns
- Version-control issues if copies circulate



At-a-glance coverage reduces understaffing and duplicated shifts.

References: Peopleware (2025); Everhour (2025); LeaveWizard (2026).

Summary of recommendations

Workplace task	Microsoft 365 tool	Key benefit for Riverdale
Staff communication	Microsoft Teams	One organised hub for messages, calls and handovers
Secure file storage & sharing	OneDrive	Encrypted, access-controlled storage of records
Care documentation	Word	Consistent, legible, NMC-aligned record keeping
Staff scheduling / rotas	Excel	Clear, low-cost rotas with automatic hour totals

Conclusion

- ✓ Riverdale's problems — confusion, duplicated work and missed messages — stem from unclear tool choices, not a lack of technology.
- ✓ Matching each workplace task to one suitable Microsoft 365 tool gives staff a clear, shared way of working.
- ✓ Teams, OneDrive, Word, and Excel each address a specific task while meeting the home's duties of care and data protection.
- ✓ Used together, they improve efficiency and communication and support safe, person-centred care.



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