Improving your collaboration and insights – a deeper dive into the Office 365 suite

18th March 2020

Thank you for joining – we'll be starting soon

the I.T. team™
Maintaining the health of your I.T. system

WHO IS THIS WEBINAR IS FOR?

- Previously we did a webinar on “Moving to the Cloud”
- This one is all about what you can do with Office 365 when you’ve migrated to it.
- What isn’t it? Not a super deep dive into Power BI and Sharepoint – they need their own webinar series – its an overview of the suite.
- Pragmatic view, with some quick wins

AGENDA

Collaboration – why is it increasingly important?

- Sharepoint
- OneDrive
- Microsoft Teams
- Planner & To Do
- Delve

Automation – how can new tools simplify your operation?

- Power Automate
- Microsoft Forms

AGENDA

Insights – how can you use your organisational data to improve your services?

- Power BI/Power Apps
- My Analytics/Insights

Better tools – interesting new services/tools to consider

- Stream
- Dynamics
- Sway

A little about The I.T. Team

- Formed in 2011, born out of a natural disaster.
- Worked with Office 365 since inception
- A wide range of IT services including Office 365 deployments and IT Support
- Large Not for Profit base
- Work with Customers in NZ & Australia
- Offices in multiple locations
- Perform most migrations remotely

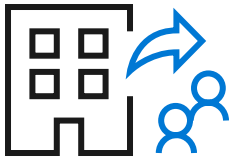
the I.T. team™

Maintaining the health of your I.T. system

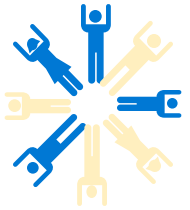
Shifting landscape

There's a growing need to make work better

2x Small organisations are twice as likely to hire remote employees[1]



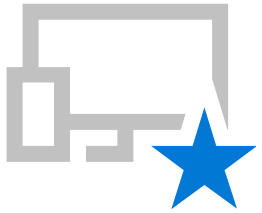
52% of the global workforce works from home at least once per week



6x as many small organisations agree that dynamic team structures will become the norm[2]

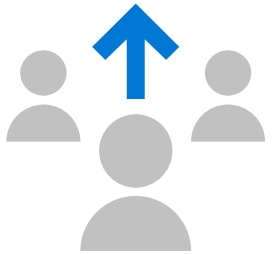
What does teamwork look like for you today?

Better teamwork, better productivity with Office 365



Mobile worker support

Easily support team members who want to work anywhere from any device.

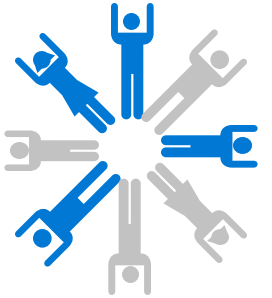


External collaboration

Look more professional when you engage in email and online with customers, coworkers, suppliers.

Enterprise-grade security

Enable access to those who need it and keep out those who don’t.



Real-time teamwork

Work together in one solution with shared docs and online meetings.

Collaboration – why?

SHAREPOINT

ONEDRIVE

MICROSOFT TEAMS

PLANNER & TO DO

DELVE

Sharepoint

SharePoint is a document management and collaboration tool developed by Microsoft. It's basically an intranet and content management system that is **used for** internal purposes

Great for storage of content through department “sites” or intranets.

Excellent document management capability

Version control

More of a “static depository” than a “social collaboration” zone. That’s where Microsoft Teams comes in..

Quick ‘Sharepoint’ Demo

OneDrive (for Business)

SIMPLE DOCUMENT STORAGE SERVICE

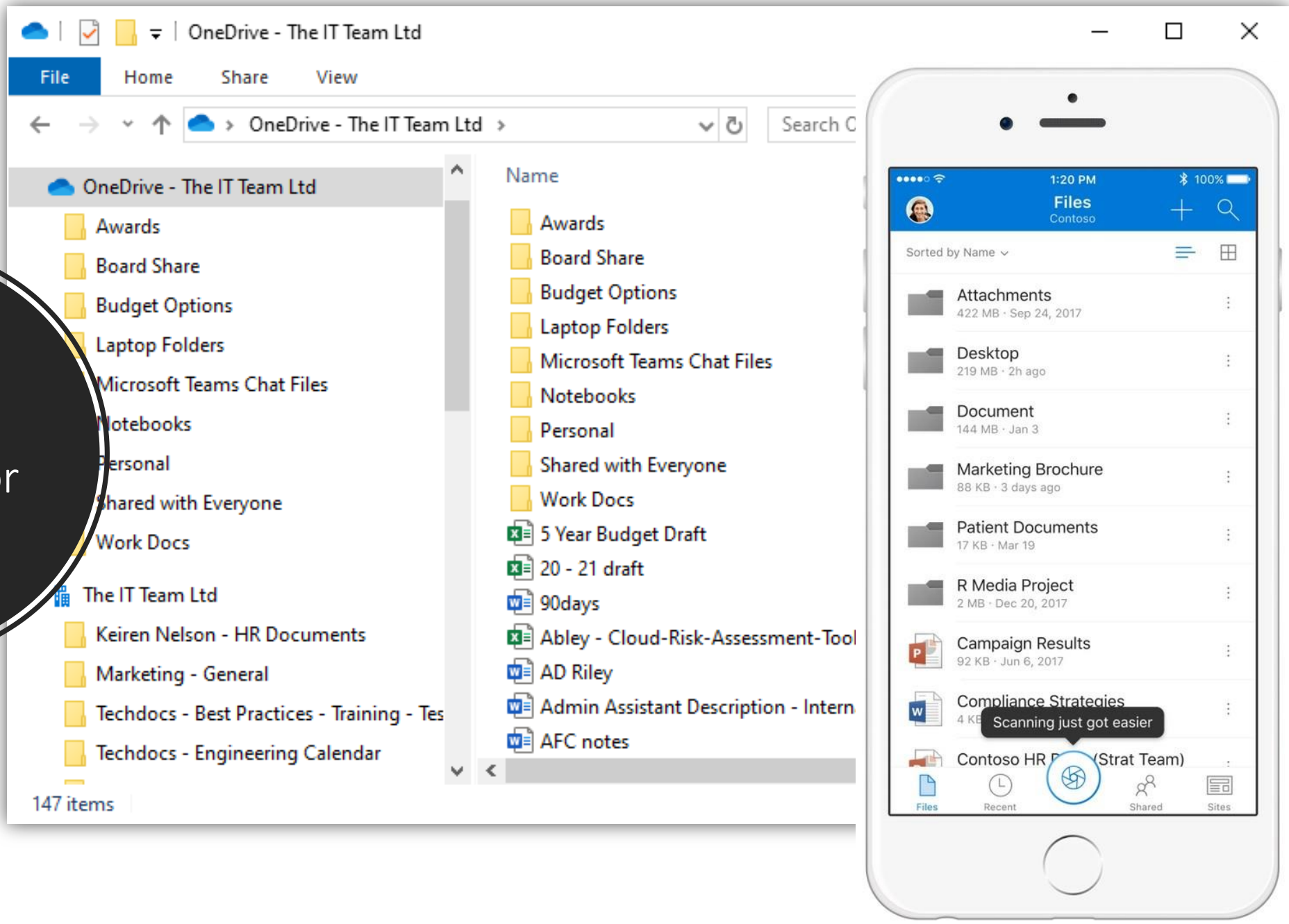
SECURELY HOSTED IN THE CLOUD

SHARING WITH COLLEAGUES AND EXTERNAL PARTIES

SYNC'S WITH MOBILE AND WEB

ALT. TO DROPBOX, GOOGLE DRIVE, ETC

Document Storage – OneDrive for Business



Sharepoint vs OneDrive

SHAREPOINT – GROUP FILES

SHAREPOINT – INTRANET

SHAREPOINT – LINKS, FORMS, WIKI

ONEDRIVE – PERSONAL FILES

ONEDRIVE – SHARING WITH THIRD PARTIES

ONEDRIVE – BACKUP WORKSTATION DOCS

Sharepoint & Teams

Teams & SharePoint - united by a 365 Group

Every time you create a new team in Teams, you're also creating a new Office 365 Group, Calendar, Planner, and SharePoint team site.

For every channel you create in Teams, a folder within a SharePoint document library is automatically created for you

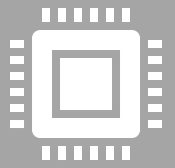
When you click on the **Files** tab within a channel in Teams, the files you see are stored in a document library on a SharePoint team site

Permissions on a team in Teams are the same permissions as the SharePoint site (membership is based around the users of the office 365 Group).

If you already use SharePoint with an Office 365 group, you can add Teams to it.

Microsoft Teams

MS Teams is a chat based workspace and a hub for collaboration.



It’s a “Game Changer” and the fastest growing application in Microsoft history.

COVID-19– rapid adoption of this tool as it’s key to enable your team to work from home effectively

Microsoft Teams – Key features

CHAT

TEAMS AND CHANNELS

VIDEO CALLING

CONFERENCING

CAN ACCESS VIA A BROWSER, OR ALTERNATIVELY IOS/ANDROID APPS

ALL IN THE SAFETY OF THE MICROSOFT PLATFORM

Existing alternatives to Teams

EMAIL

SLACK

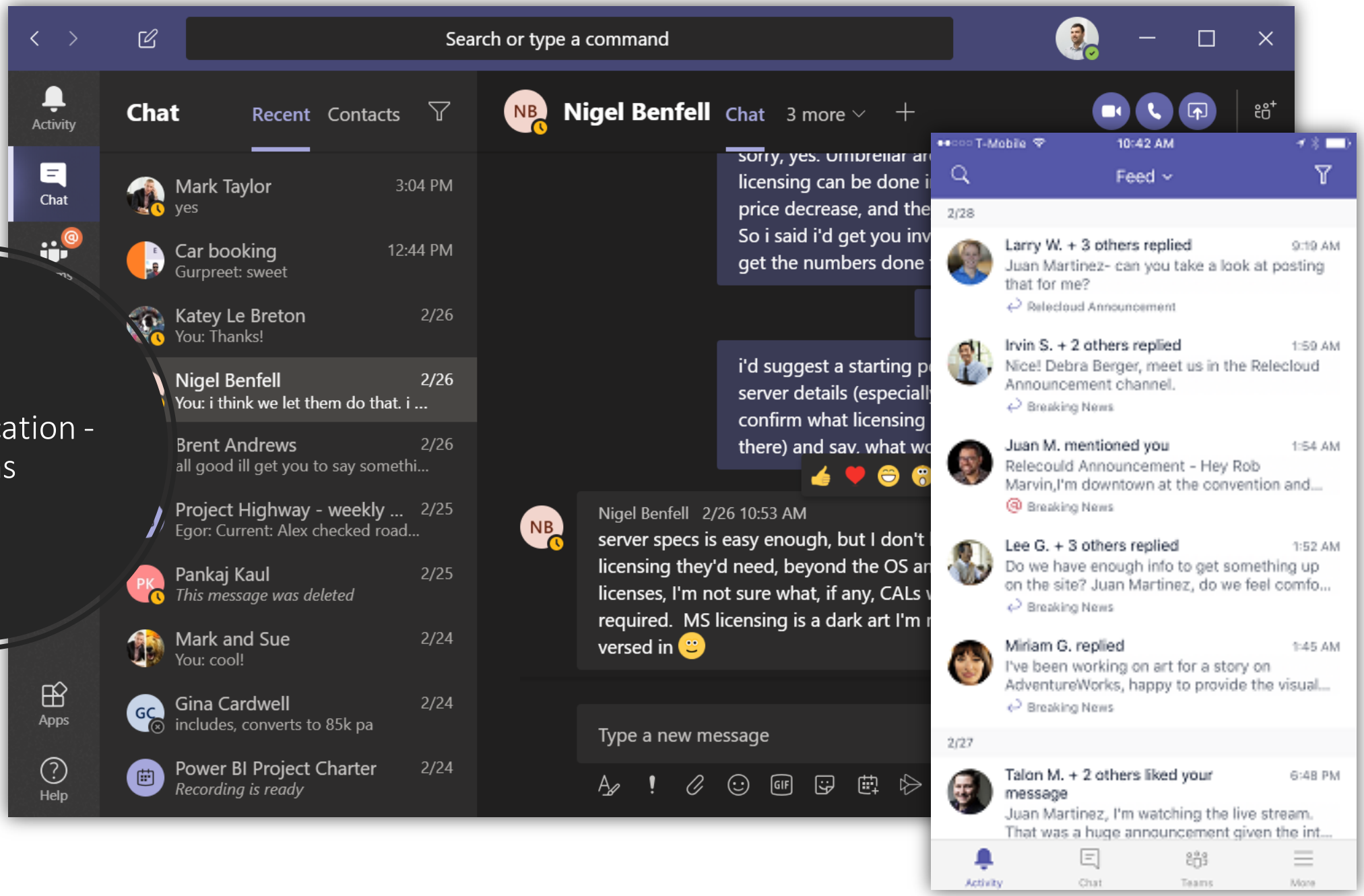
COMPANY MOBILE SMS

SKYPE FOR BUSINESS

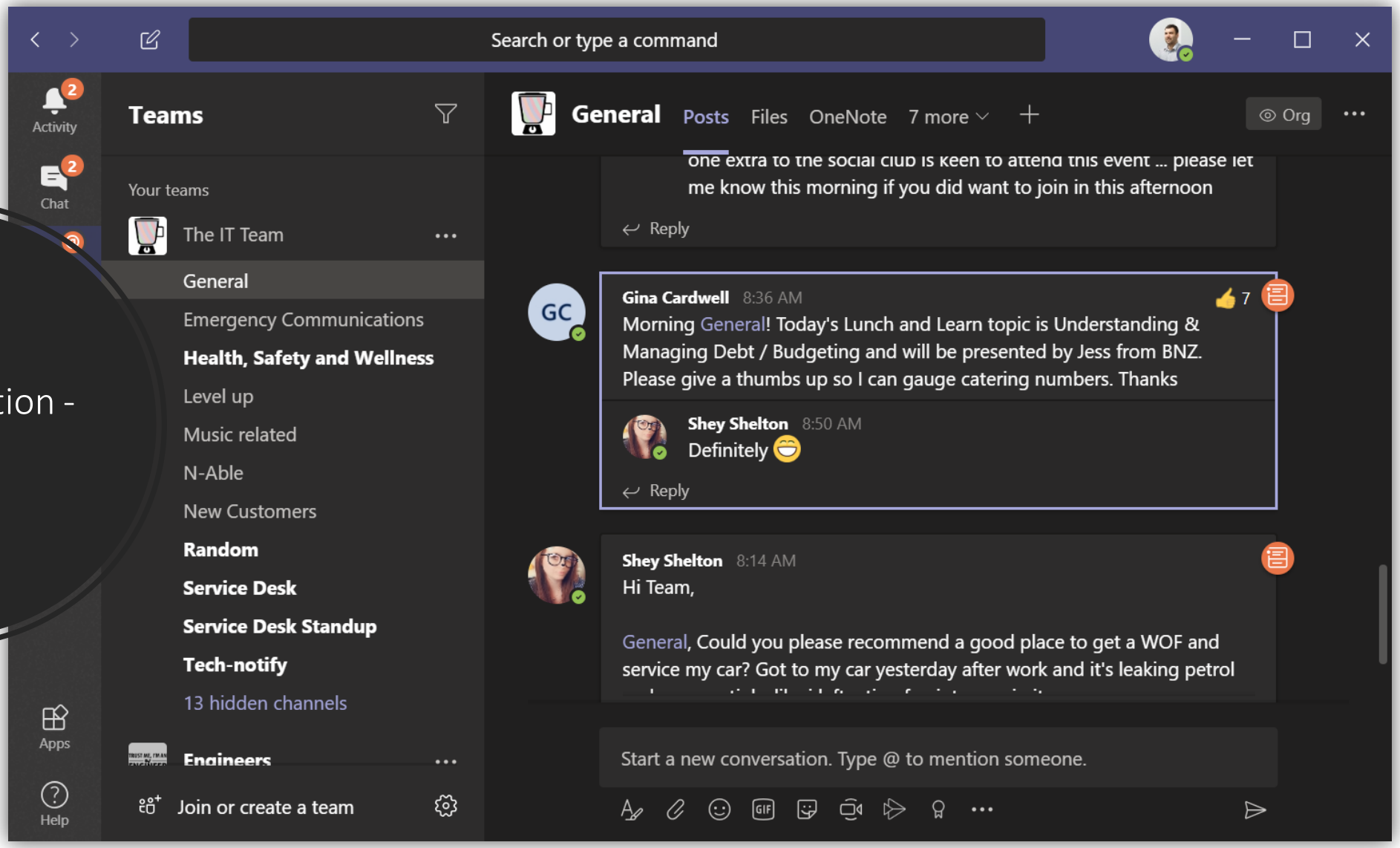
ZOOM

VOIP PHONE SYSTEMS

Communication - Teams



Communication - Teams



Video Calling - Teams

Quick ‘Teams’ Demo

Microsoft Teams – How to start

Teams can have a large positive impact – but you can start small

Chat or Video Calling is a good place to start.

You can start with a small team or the whole organisation.

Attempt to implement yourself or get our assistance to do the implementation with you.

Check out our Ebook on Teams
www.theitteam.co.nz/msteamsebook

Microsoft Stream

Video Streaming Service

Secure to your organisation

Location for viewing Recorded Teams Calls

Ability to auto transcribe

Currently not available for third parties

Quick ‘Stream’ Demo

Microsoft Planner

Microsoft Planner is a simple project management tool to organise and schedule your project activities.

It’s an alternative to common project management tools like Trello, Asana or Click Up.

Works inside Teams very well.

Ties into the To-Do app

Microsoft To-Do

Microsoft To-Do is a cloud based task management system

Breaks tasks down into simple steps, add due dates, and set reminders

Shared lists help you stay connected with colleagues on common tasks

Quickly capture and retrieve your lists and tasks across devices

My Day – intelligent and personalized suggestions to update your daily to-do list (cool automation)

Quick ‘Planner/To-do’ Demo

Delve

It’s an employee directory with “Linkedin-like bells and whistles” really designed for larger organisations.

Makes an employee directory more social by enabling users to search for people in your team who have various interests and/or skills.

Can also see the documents that you colleagues have been working on (if you have shared permissions to view that document)

Automation – why?

Dealing with demand - less paper, more delivering services

Tightening labour market

Access to funding always difficult

More remote working happening – paper forms and approvals not viable

Improve your organisational productivity

Automation gives you a sustained competitive advantage

Power Automate

Microsoft’s cloud-based workflow engine (formerly known as FLOW)

You can quickly automate time-consuming manual tasks

Requires little technical know-how

Workflows can be simple or complex

Build your own or download?

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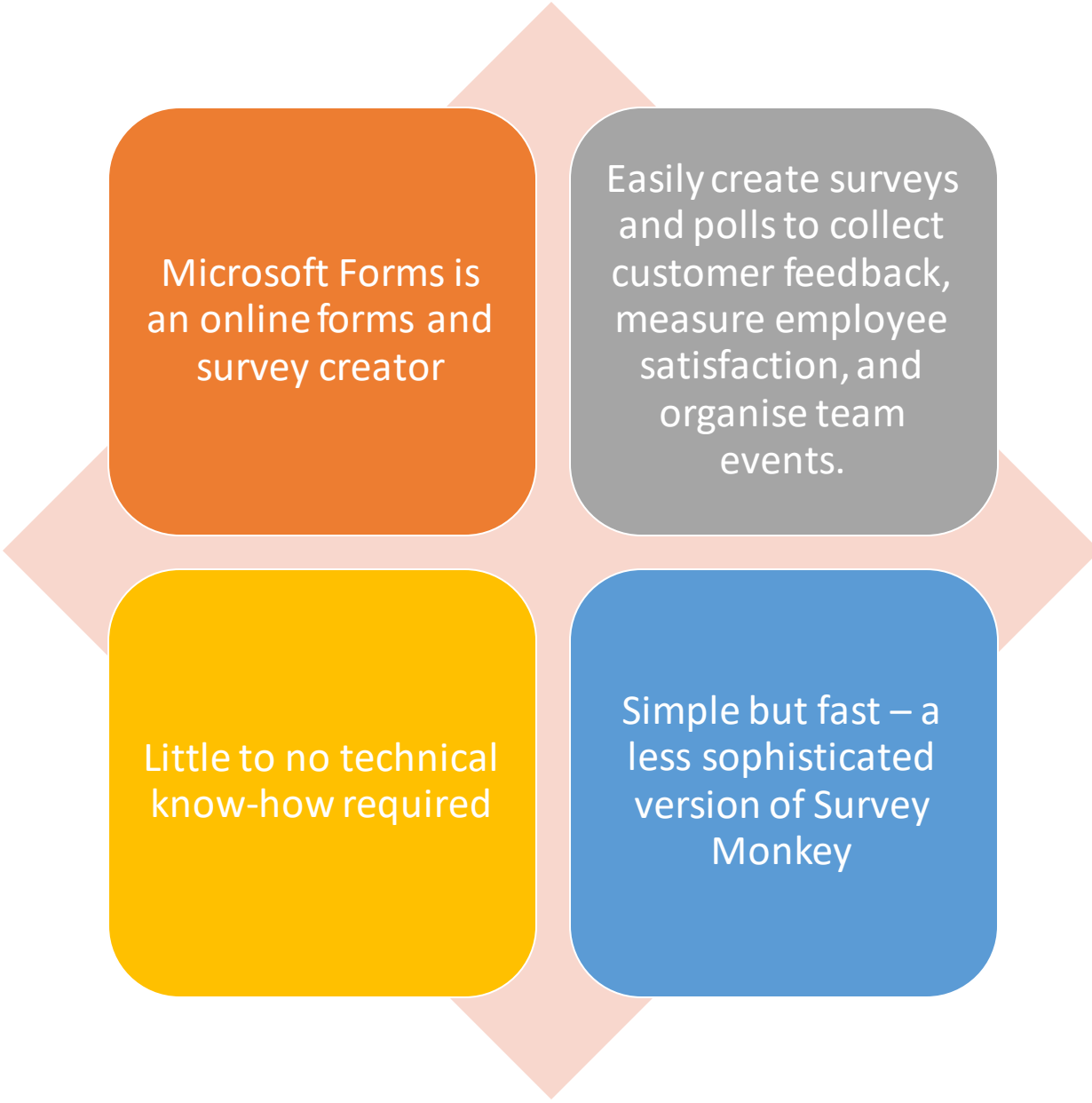
Microsoft Forms



Power Automate – some examples

Alerts of important notifications or emails (or events)

Get notifications on your mobile device.

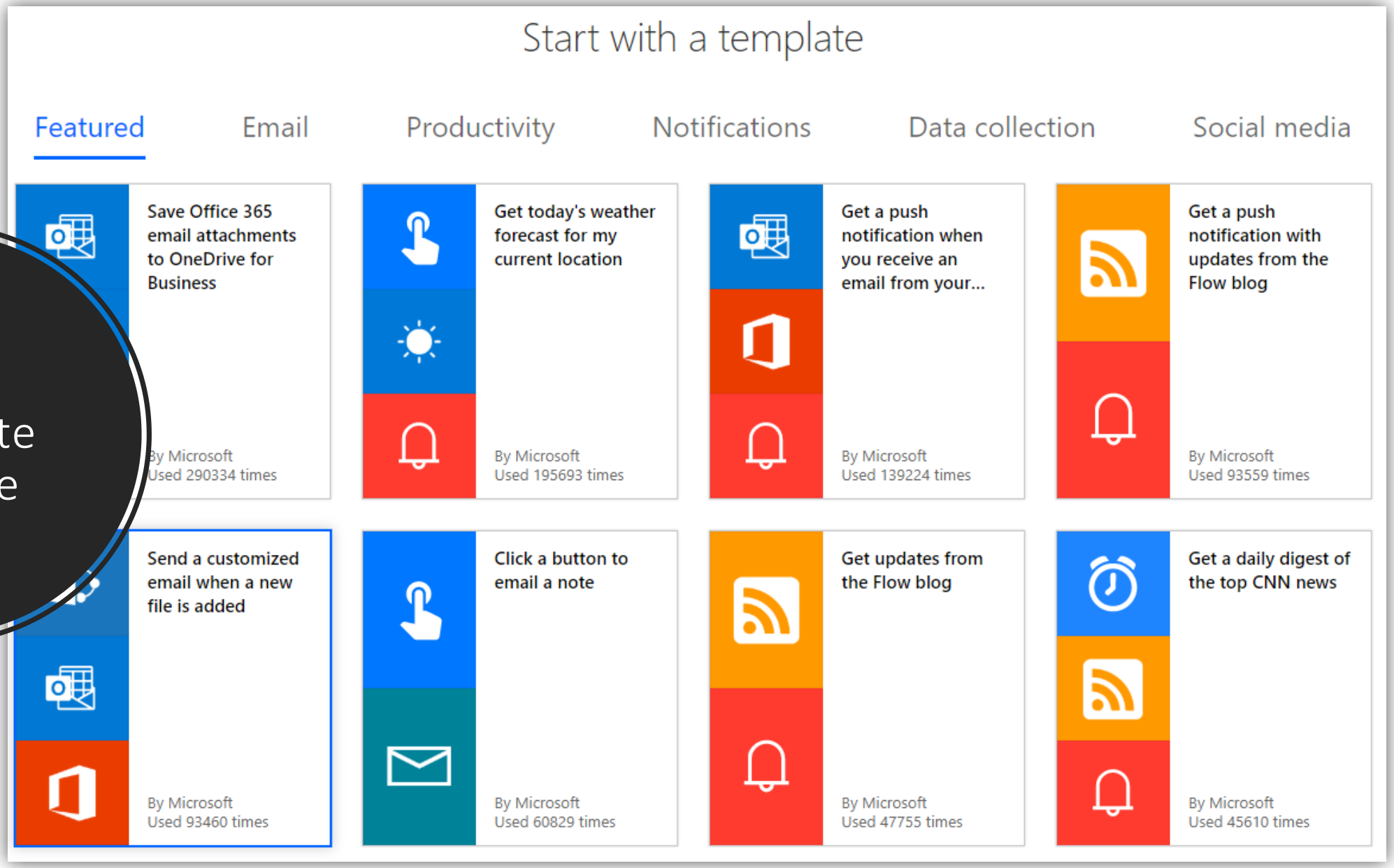
Streamline Leave Approval Process, Purchase Approval

Save attachments in emails to OneDrive or SharePoint.

Engage with social media (auto-connect, add to newsletters)

Automate other approval processes.

Power Automate Example

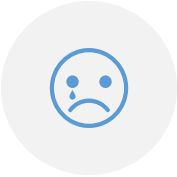


The I.T. Team Expense Claims – Old Way

Paper form

Single approver

Often bypassed for expediency



Forms lost or buried on busy desks

Create challenge for our finance team.

The I.T. Team Exp. Claims - Power Automate

Online form accessible via Teams or Sharepoint

Form emails details to an approver who can access via desktop or most likely mobile

Single click approval

FAST

Full traceability – know who requested and who approved.

Equals Time Savings – 180 hours last year for us!

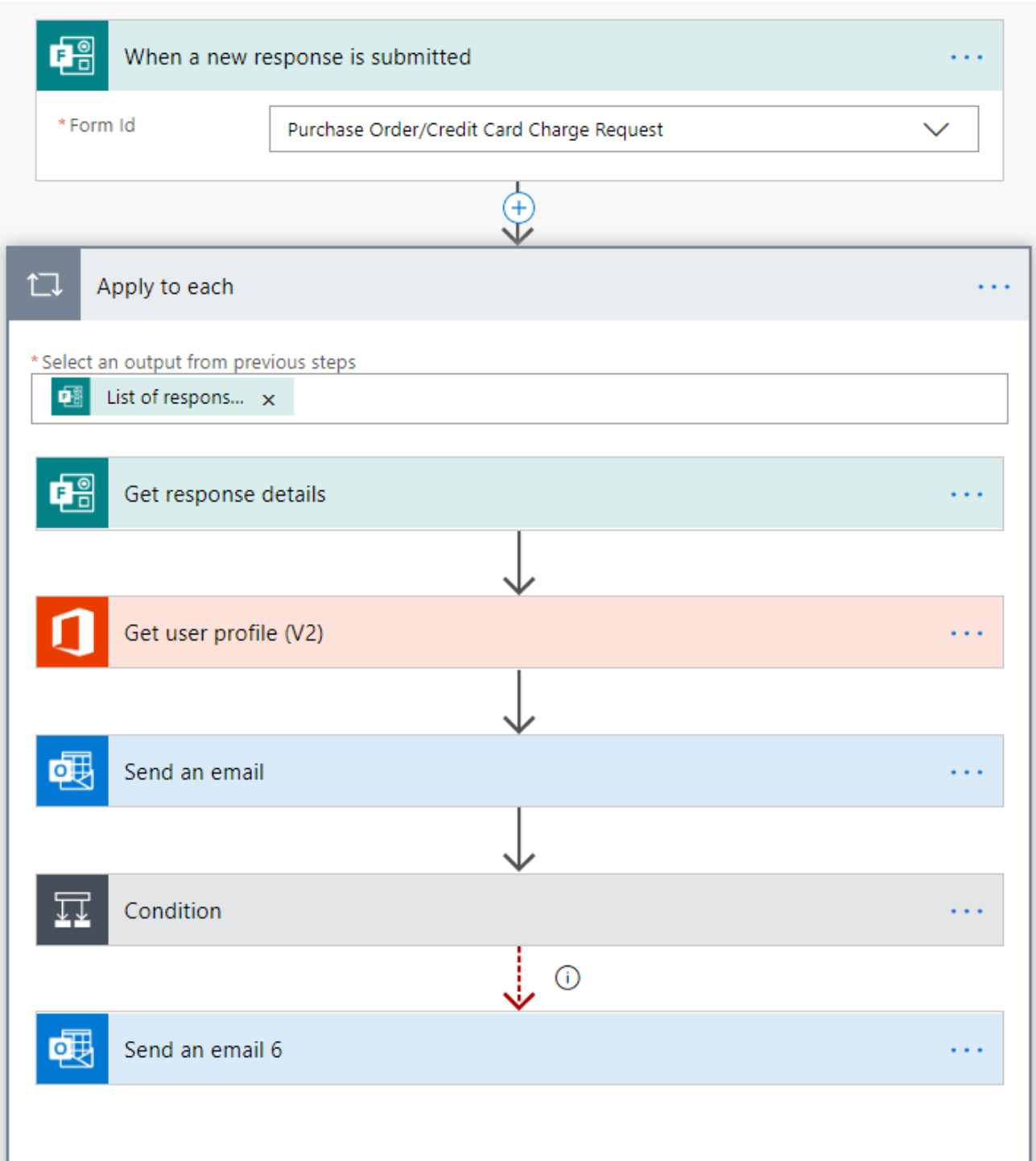
Power Automate – Credit Card Approval

Takes the information from our Request form (Microsoft Form).

Gets the details submitted, and the person who submitted it

Sends an email to the person submitting to confirm what they have done.

Then starts a condition > if it’s an internal purchase, vs if it’s a client purchase.


When a new response is submitted
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Purchase Order/Credit Card Charge Request
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* Select an output from previous steps
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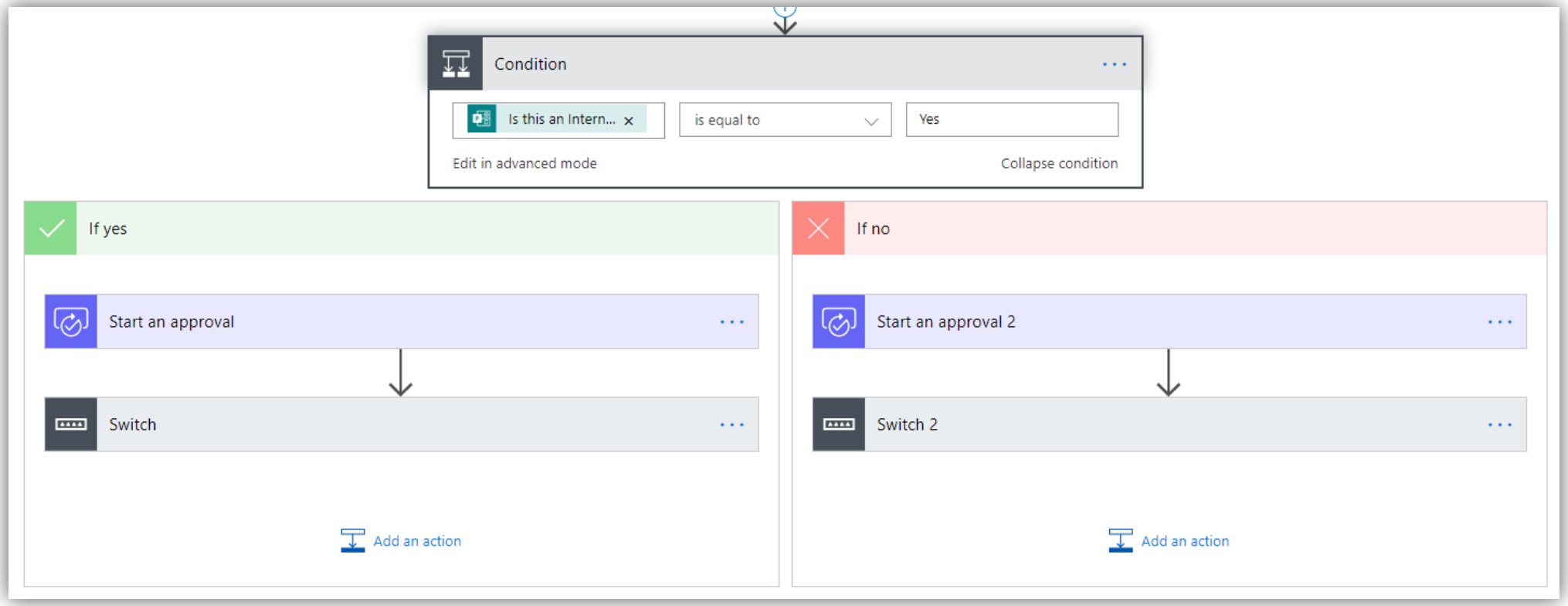
Get response details
Get user profile (V2)
Send an email
Condition
Send an email 6


Condition
Is this an Intern...
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Yes
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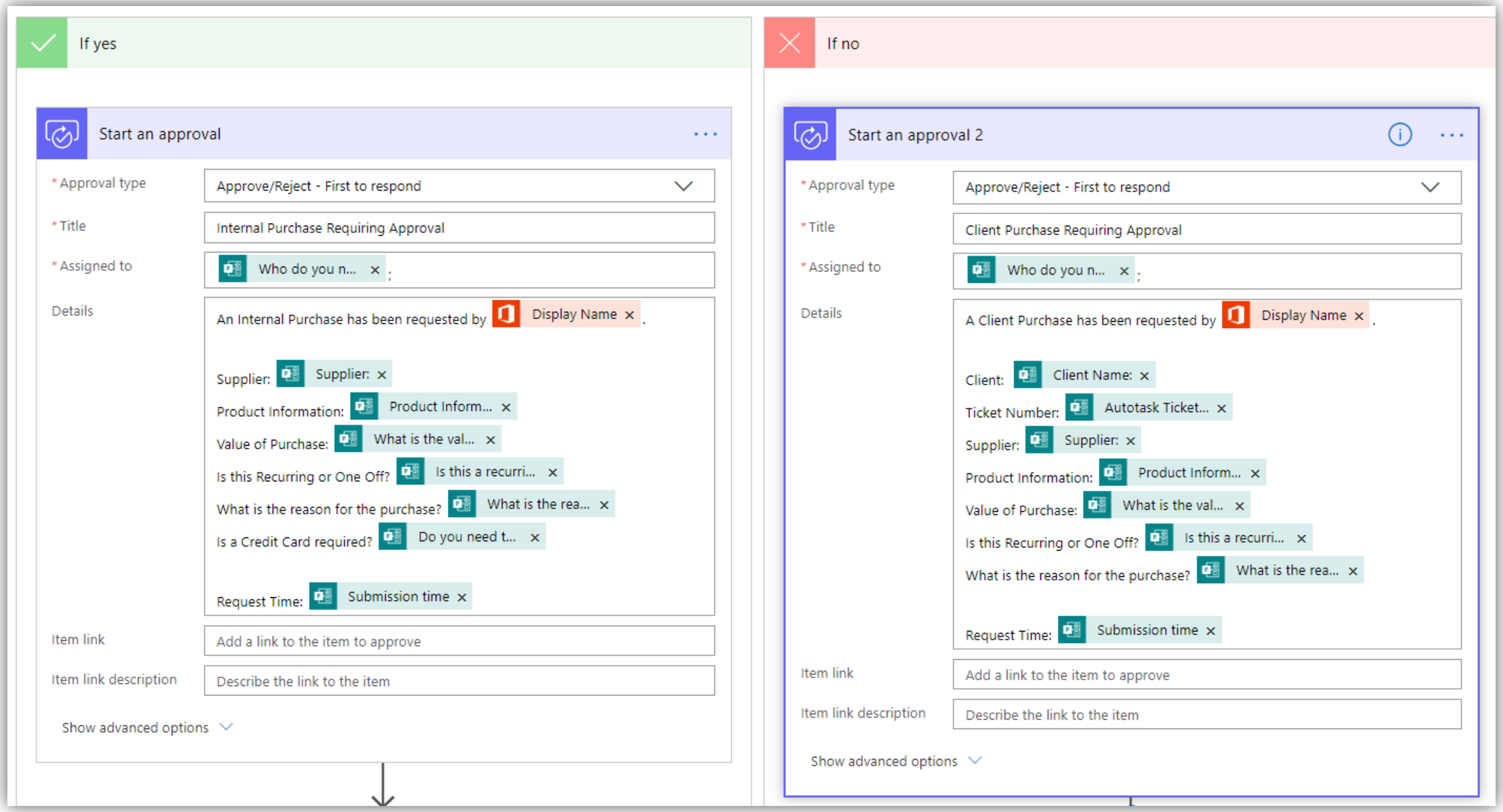
If yes
Start an approval
Switch
Add an action
If no
Start an approval 2
Switch 2
Add an action


If yes
Start an approval
*Approval type
Approve/Reject - First to respond
*Title
Internal Purchase Requiring Approval
*Assigned to
Who do you n...
Details
An Internal Purchase has been requested by
Display Name
Supplier:
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Value of Purchase:
What is the val...
Is this Recurring or One Off?
Is this a recurri...
What is the reason for the purchase?
What is the rea...
Is a Credit Card required?
Do you need t...
Request Time:
Submission time
Item link
Add a link to the item to approve
Item link description
Describe the link to the item
Show advanced options
If no
Start an approval 2
*Approval type
Approve/Reject - First to respond
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Client Purchase Requiring Approval
*Assigned to
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Supplier:
Product Information:
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What is the reason for the purchase?
What is the rea...
Request Time:
Submission time
Item link
Add a link to the item to approve
Item link description
Describe the link to the item
Show advanced options

Approvals | Powered by Microsoft Flow

Pending approval

Requested for **Lucy Rees** <lucy@theitteam.co.nz>
Created by IT Team - Company Forms <forms@theitteam.co.nz>

Date Created: Tuesday, March 17, 2020 7:32 PM GMT
Details: An Internal Purchase has been requested by Lucy Rees.

Supplier: IT Equipment Shop Product Information: Tools for IT work Value of Purchase: 30 Is this Recurring or One Off? One Off What is the reason for the purchase? We need some tools for performing I.T. work. Is a Credit Card required? Yes

Request Time: 3/17/2020 7:32:32 PM

Approve **Reject**

Get the Flow app to receive push notifications and grant approvals from anywhere. Learn more

This message was created by an automated workflow in Microsoft Flow. Do not reply. Microsoft Corporation 2020.

Respond: Reject

Overview

Approval
Internal Purchase Requiring Approval

Requester
LR Lucy Rees

Received
Mar 18, 08:32 AM (1 min ago)

Details

An Internal Purchase has been requested by Lucy Rees.
Supplier: IT Equipment Shop
Product Information: Tools for IT work
Value of Purchase: 30
Is this Recurring or One Off? One Off
What is the reason for the purchase? We need some tools for performing I.T. work.
Is a Credit Card required? Yes
Request Time: 3/17/2020 7:32:32 PM

Reject

Add a comment (optional)

We don't need these!

Confirm Cancel

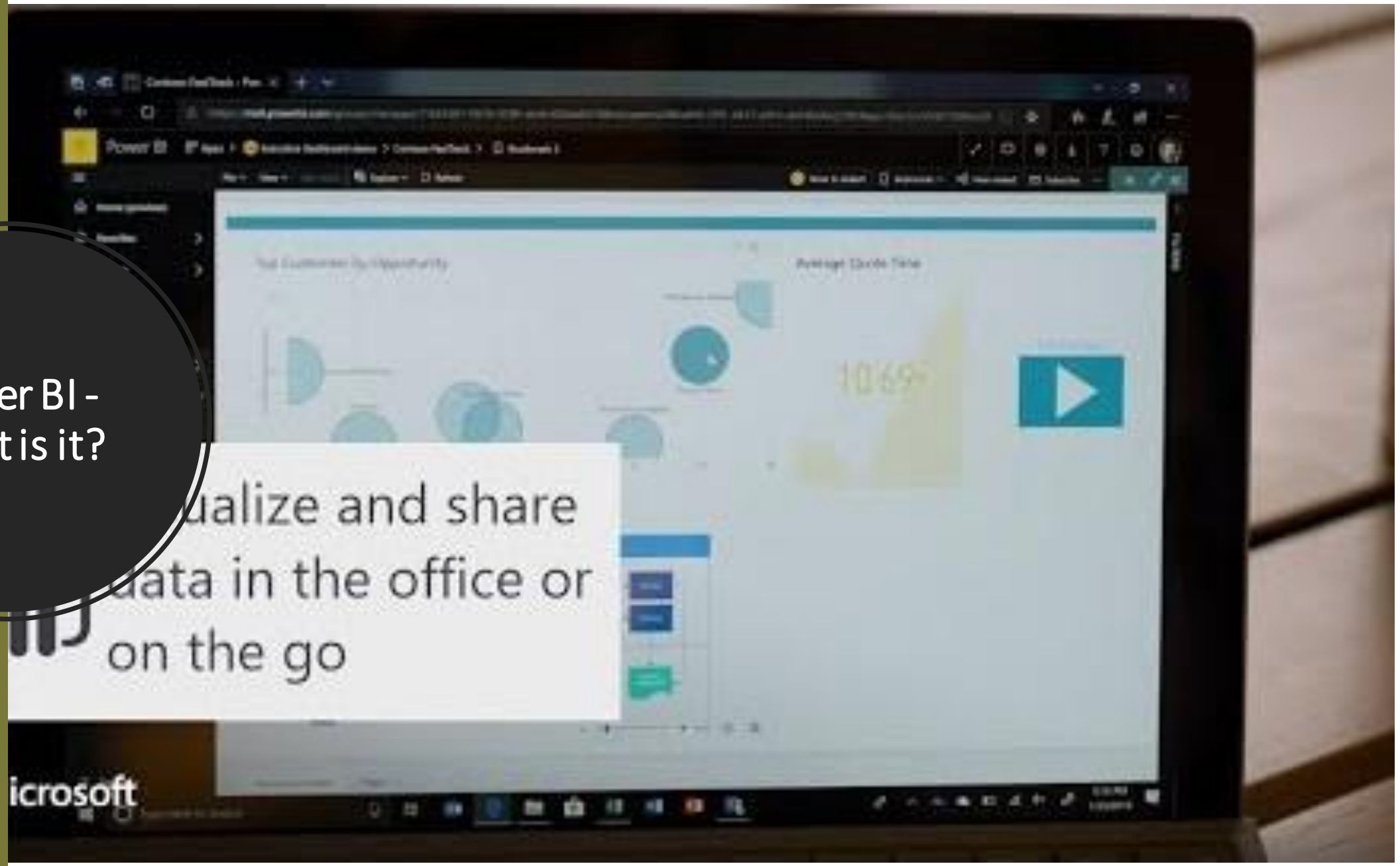
DATA - Most NFPs don’t have great data at their fingertips

A 2018 survey* indicated that:

50% of organisations reported that their systems aren’t capable of capturing information about client outcomes.

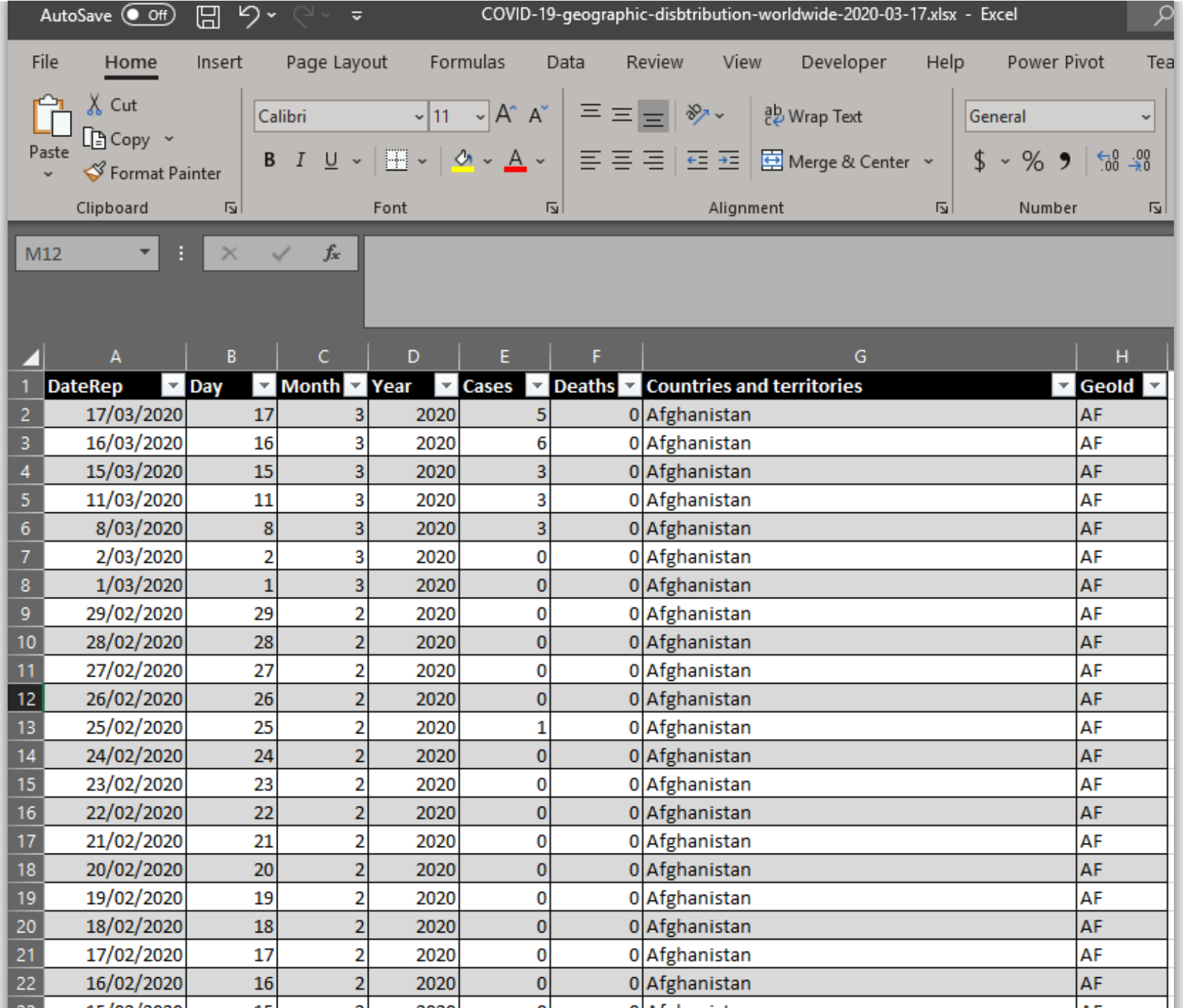
49% of organisations reported that they can’t easily get the information and reports from their systems they require to inform planning, improvement and reporting

Power BI - What is it?



PowerBI - Key Benefits

- It helps to process huge data that other platforms struggle
- In-built with AI prediction capabilities
- Powerful visualisations help to understand data better
- Data trend changes can automatically alert users
- Easy and intuitive interface makes easier to work with
- It can be safely integrated with almost every other platforms.



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5	11/03/2020	11	3	2020	3	0	Afghanistan	AF
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12	26/02/2020	26	2	2020	0	0	Afghanistan	AF
13	25/02/2020	25	2	2020	1	0	Afghanistan	AF
14	24/02/2020	24	2	2020	0	0	Afghanistan	AF
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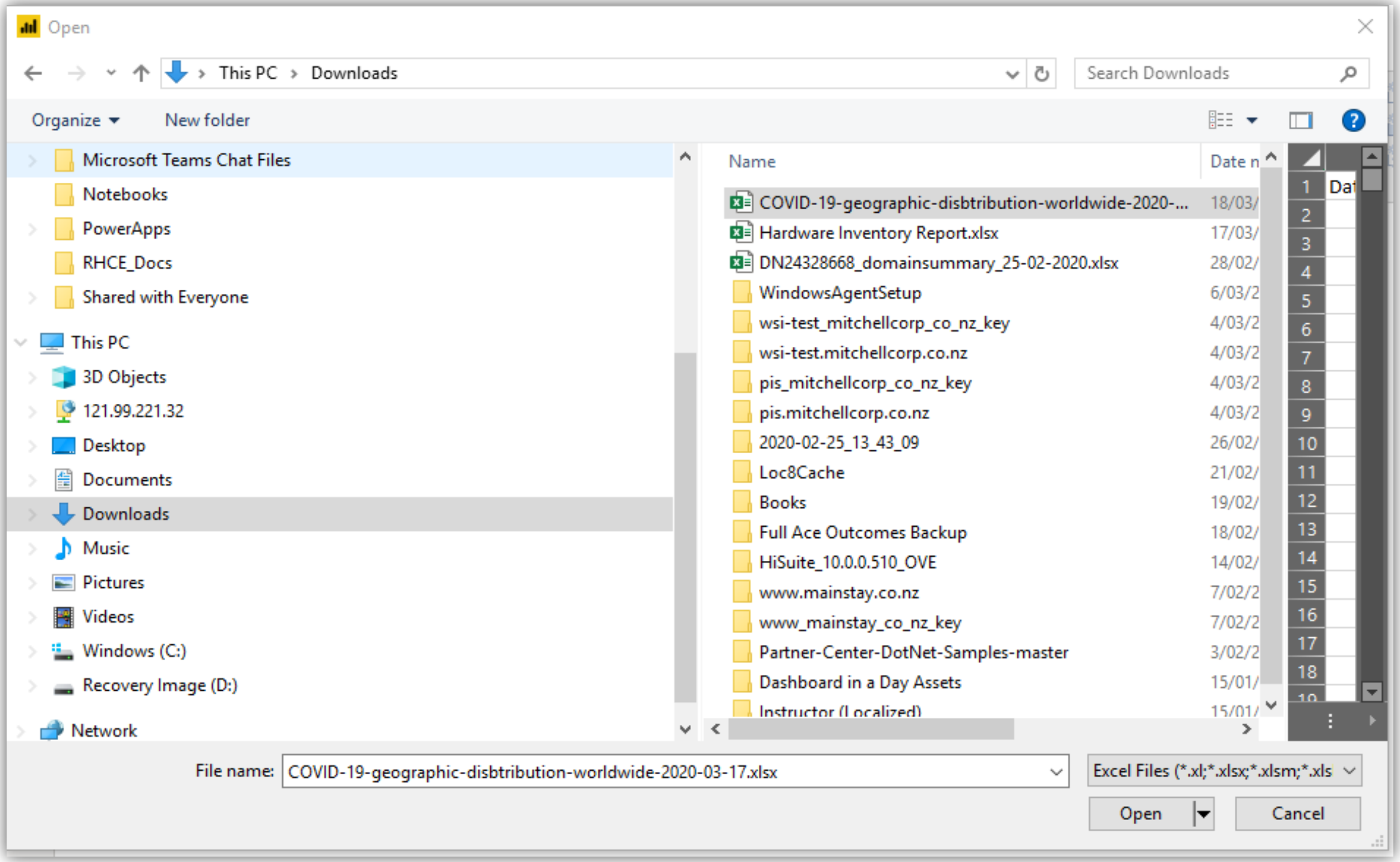
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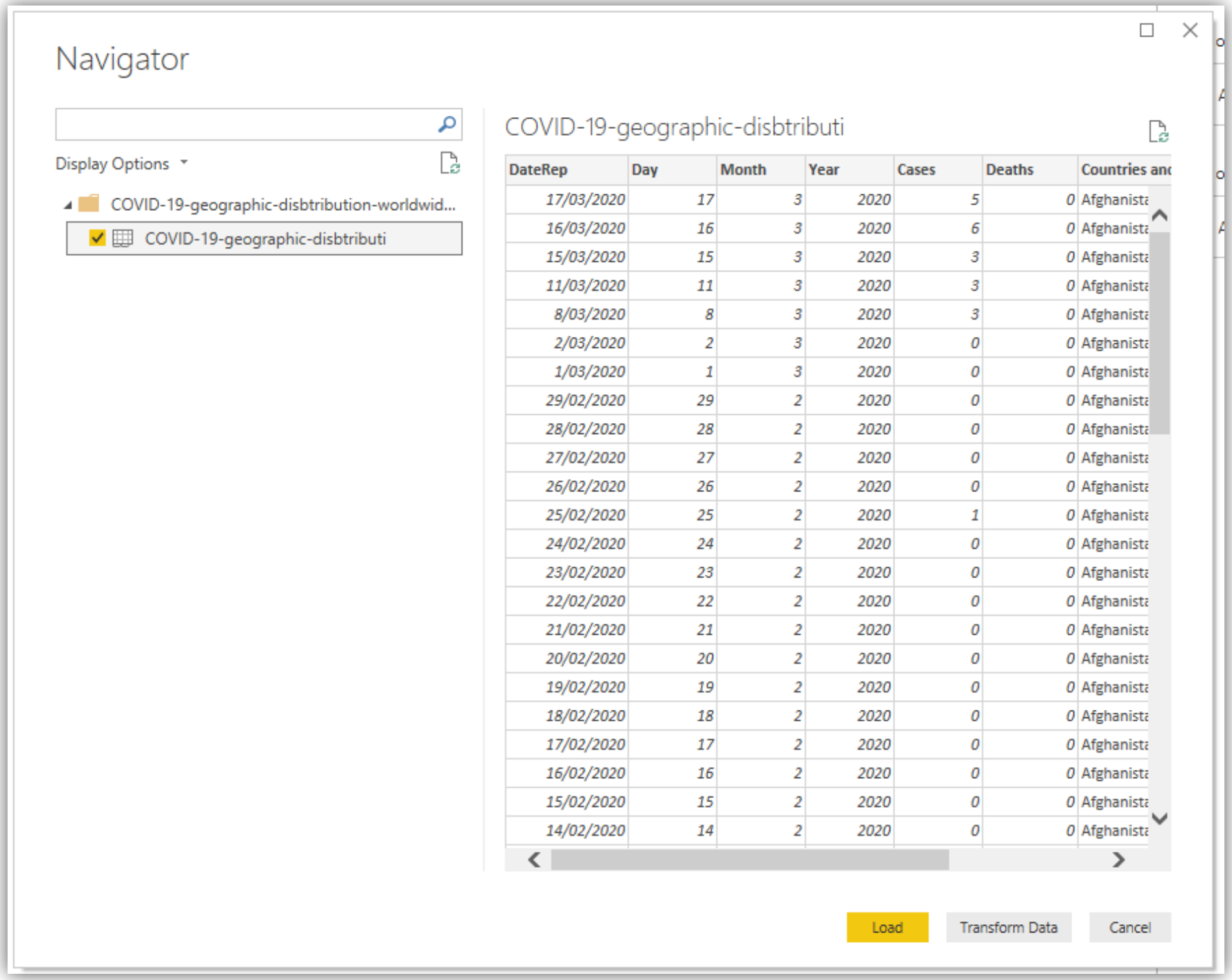
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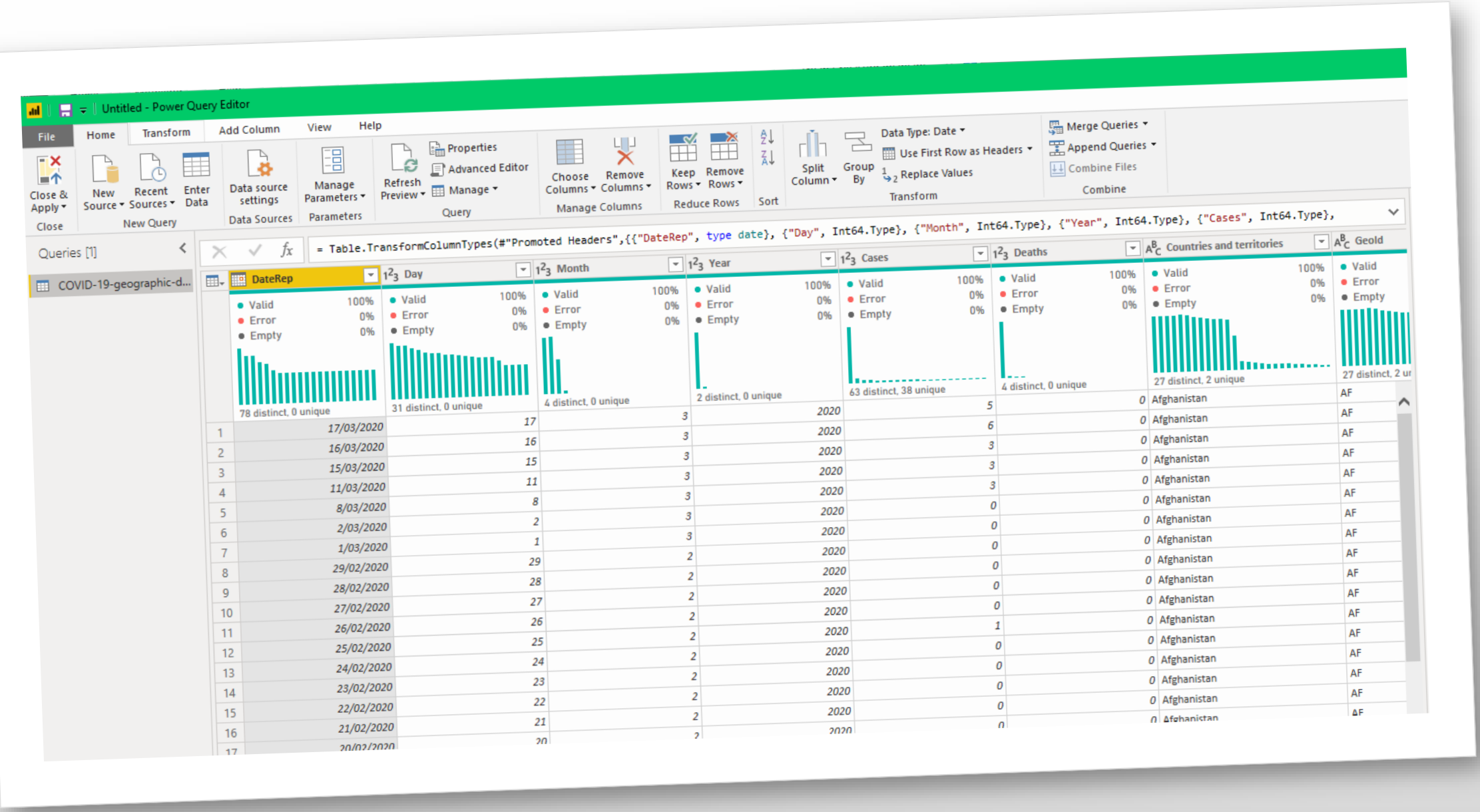
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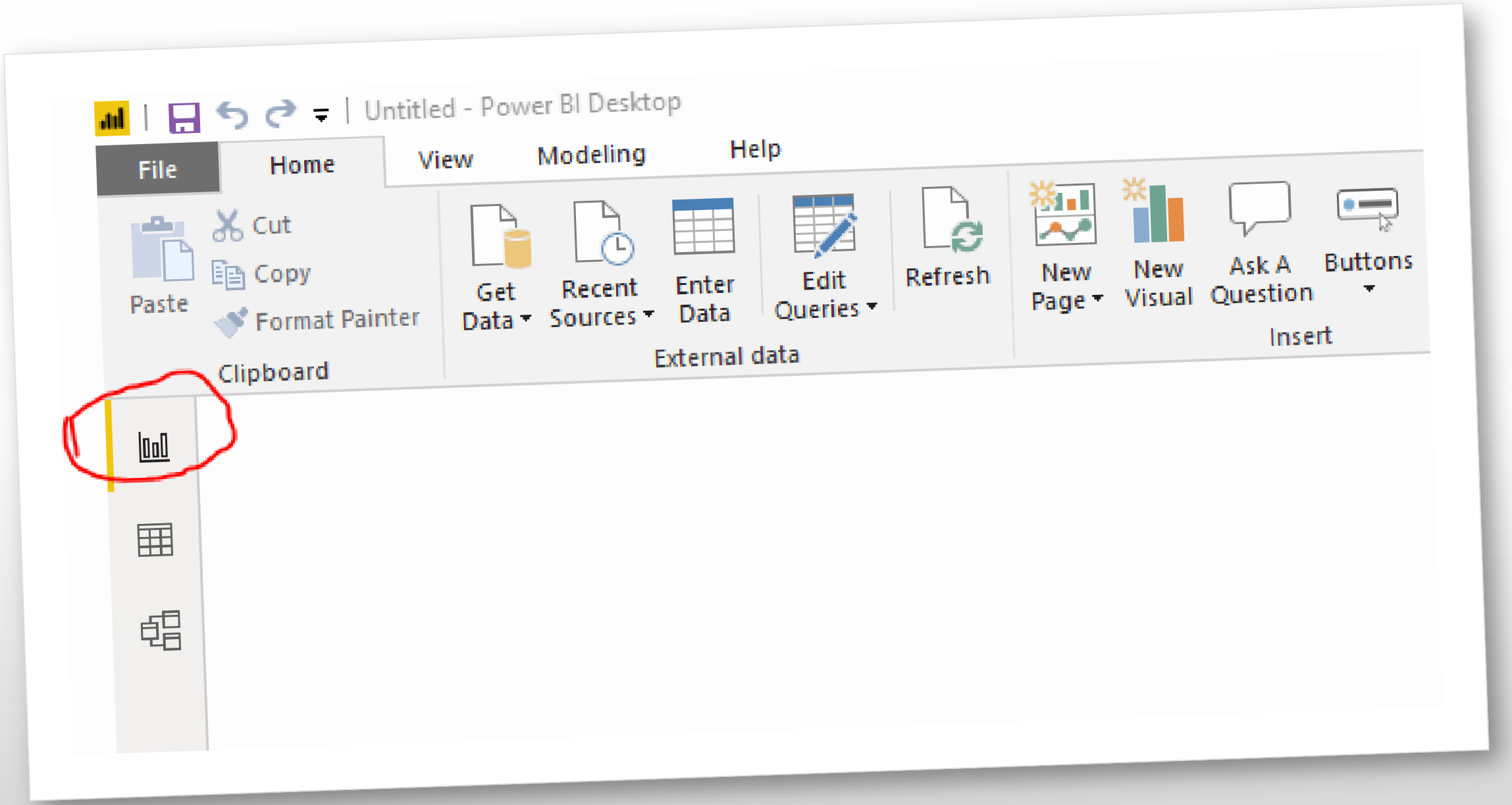
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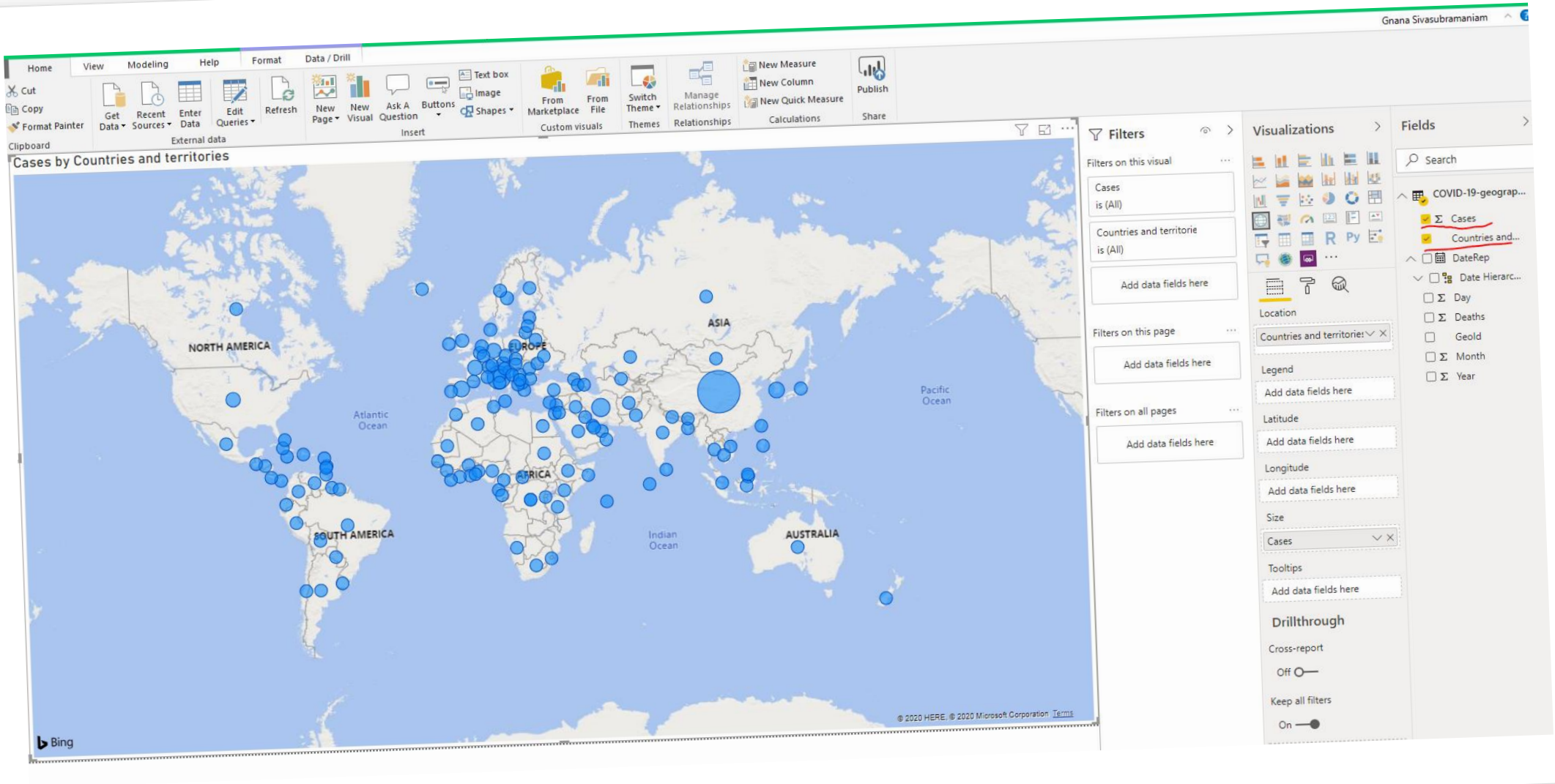
External data
New Page
New Visual
Ask A Question
Buttons
Insert


Gnana Sivasubramaniam
Home
View
Modeling
Help
Format
Data / Drill
Cut
Copy
Format Painter
Clipboard
Get Data
Recent Sources
Enter Data
Edit Queries
Refresh
External data
New Page
New Visual
Ask A Question
Buttons
Text box
Image
Shapes
Insert
From Marketplace
From File
Custom visuals
Switch Theme
Themes
Manage Relationships
Relationships
New Measure
New Column
New Quick Measure
Calculations
Publish
Share
Cases by Countries and territories
NORTH AMERICA
EUROPE
ASIA
AFRICA
SOUTH AMERICA
AUSTRALIA
Atlantic Ocean
Pacific Ocean
Indian Ocean
© 2020 HERE, © 2020 Microsoft Corporation Terms
Bing
Filters
Filters on this visual
Cases is (All)
Countries and territorie is (All)
Add data fields here
Filters on this page
Add data fields here
Filters on all pages
Add data fields here
Visualizations
Location
Countries and territories
Legend
Add data fields here
Latitude
Add data fields here
Longitude
Add data fields here
Size
Cases
Tooltips
Add data fields here
Drillthrough
Cross-report
Off
Keep all filters
On
Fields
Search
COVID-19-geograp...
Cases
Countries and...
DateRep
Date Hierarc...
Day
Deaths
Geold
Month
Year

Quick ‘PowerBI’ Demo

PowerBI - Key Use Cases

Medical or sales department can share powerful visualisations

Users can make educated decisions using the data live

Companies can consolidate reports in Power BI dashboards

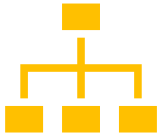
Users can bring in data from multiple sources and find relevance

Automated alerting can help on reaction on changes.

MyAnalytics

Very interesting (and cool) tool

Uses data and AI for insights



Can be used across organisation

Works well for individuals

Both insights and an assistant!

Quick ‘MyAnalytics’ Demo

Sway

Alternative to PowerPoint

Better for Dynamic Content

Combination of Webpage & Powerpoint

Quick ‘Sway’ Demo

Quick Wins: How Office 365 can support you with remote working

Strongly consider adopting Microsoft Teams

Digitise your paper forms using Microsoft Forms

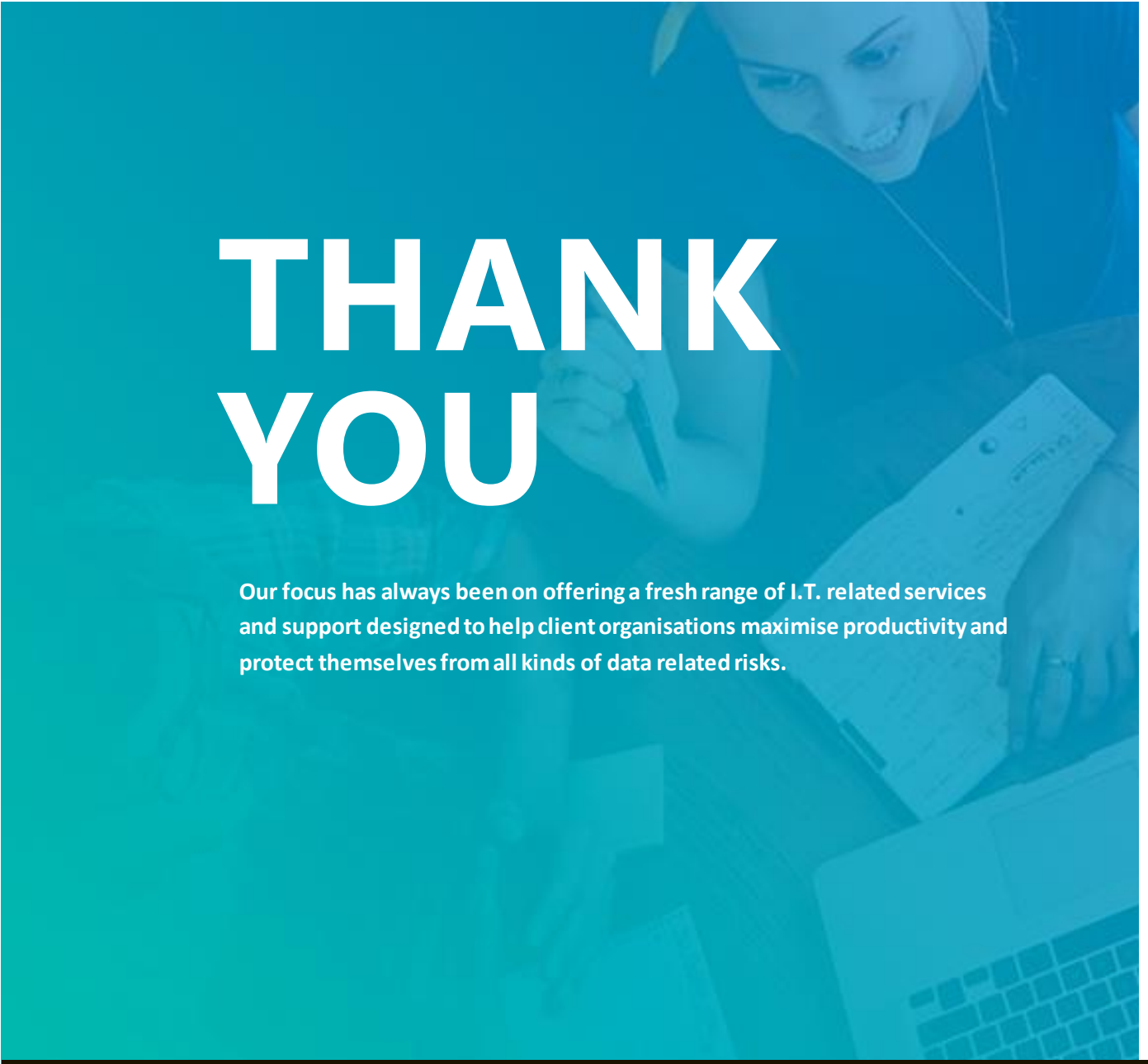
Download/Configure some simple workflows for approval flows using Microsoft Flows.

WHERE TO FROM HERE

- QA – coming up
- Check out our Ebook on Teams
  www.theitteam.co.nz/msteamsebook
- Link to Teams Webinar -
  https://www.connectingup.org/learn/articles/introduction-microsoft-teams-next-generation-of-collaboration-webinar
- Link to previous Webinar -
  https://www.connectingup.org/learn/articles/moving-your-organisation-cloud-introduction-office-365-webinar
- **If you want to start exploring or have further questions. Please let us know!**

QUESTION TIME

webinar@theitteam.co.nz



THANK YOU

Our focus has always been on offering a fresh range of I.T. related services and support designed to help client organisations maximise productivity and protect themselves from all kinds of data related risks.

the I.T. team™
Maintaining the health of your I.T. system

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