

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

28th Jan 2021

Thank you for joining - we'll be starting soon





# WHAT WE WILL COVER TODAY?

#### **Licensing Options**

**Collaboration – why is it increasingly important?** 

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

Automation – how can new tools simplify your operation?

- Power Automate
- Microsoft Forms



# WHAT WE WILL COVER TODAY?

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





#### About the I.T. team

- Formed in 2011
- Office 365 since its inception
- Managed Services/IT support
- A wide range of IT services
- Major NFP base of customers
- Providing IT services to NZ & Australian organisations

#### the IT team Maintaining the health of your I.T. system

#### STARTING OUT - LICENSING

#### **Existing Plans**

- Business Essentials (Now Basic)
- Business Premium (Now Standard)
- Enterprise 1
- Enterprise 3
- Microsoft 365 Business
- Connecting Up/Tech Soup approval

Office 365 Business **Essentials**Cloud services

Office 365 Business **Premium**Cloud services and desktop apps

Microsoft 365 **Business**Cloud services, desktop apps, and advanced security

Office 365 Business
Cloud-connected Desktop Apps

Office 365 **ProPlus**Cloud-connected Desktop Apps

Microsoft 365 Business Basic \$5/user/month

Microsoft 365 Business Standard \$12.50/user/month Cloud services and desktop apps

Microsoft 365 Business Premium \$20/user/month

Cloud services, desktop apps, and advanced security

Microsoft 365 Apps for business \$8.25/user/month Cloud-connected Desktop Apps

Microsoft 365 Apps for enterprise \$12/user/month

Cloud-connected Desktop Apps





#### WHO AM I?



## Collaboration – and 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

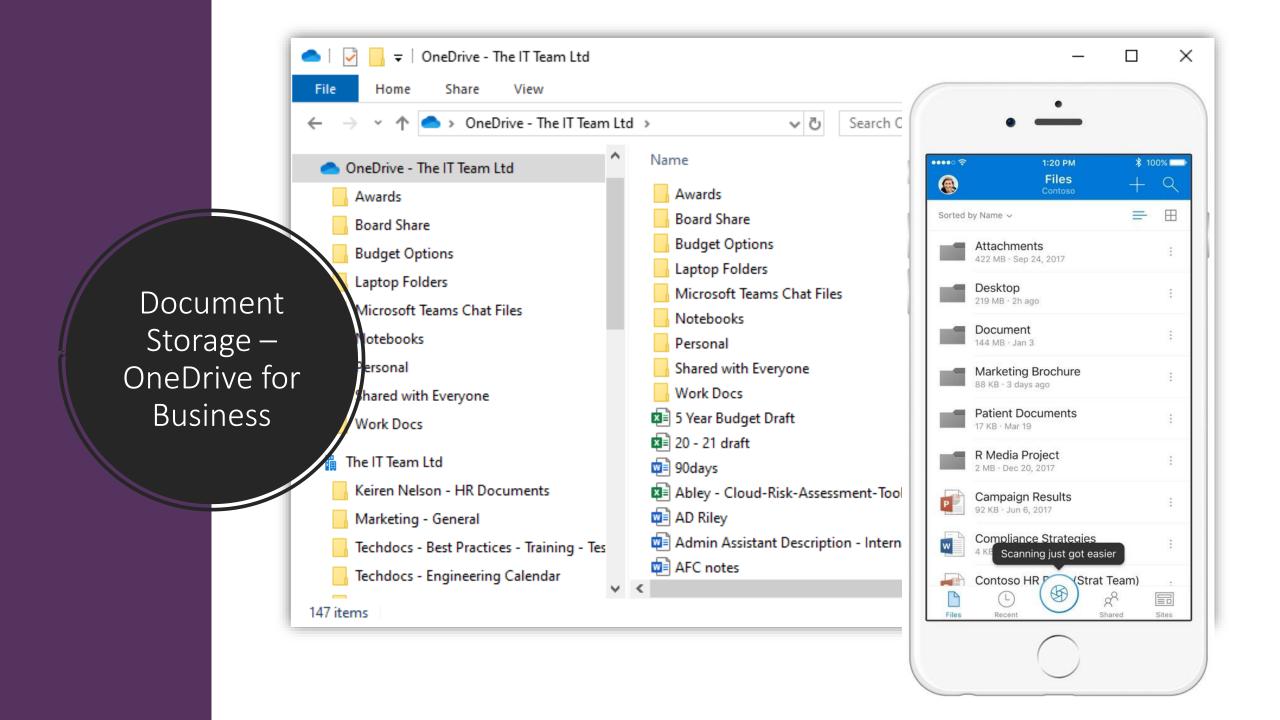
SHARING WITH COLLEAGUES AND EXTERNAL PARTIES





SYNC'S WITH MOBILE AND WEB

ALT. TO DROPBOX, GOOGLE DRIVE, ETC



#### 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

#### 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



It's an employee directory with "Linkedin-like bells and whistles" really designed for larger organisations.

#### Delve



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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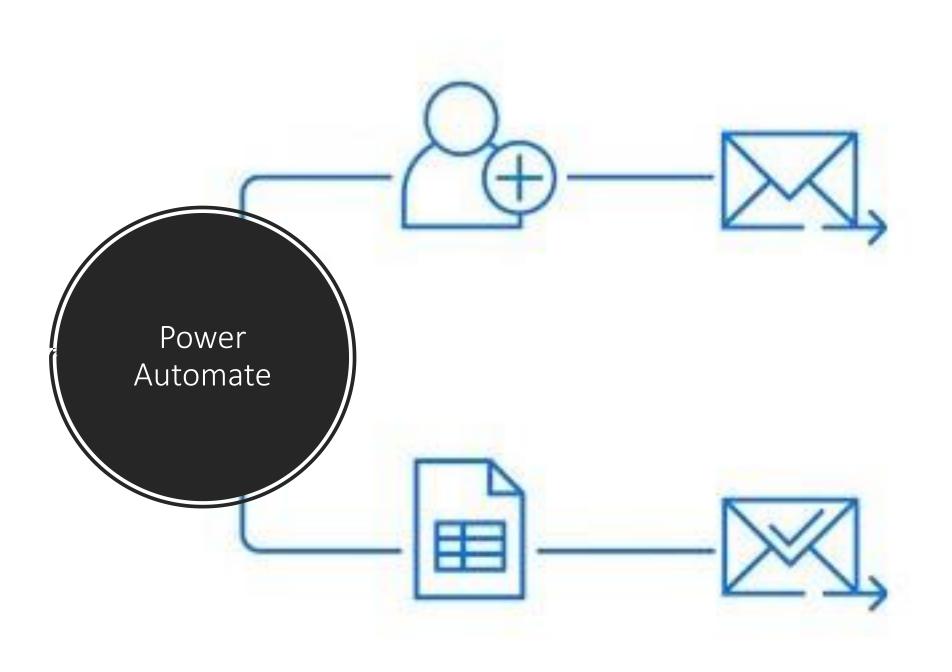
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Workflows can be simple or complex



Build your own or download?



#### Microsoft Forms

Microsoft Forms is an online forms and survey creator

Easily create surveys and polls to collect customer feedback, measure employee satisfaction, and organise team events.

Little to no technical know-how required

Simple but fast – a less sophisticated version of Survey Monkey

# 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.

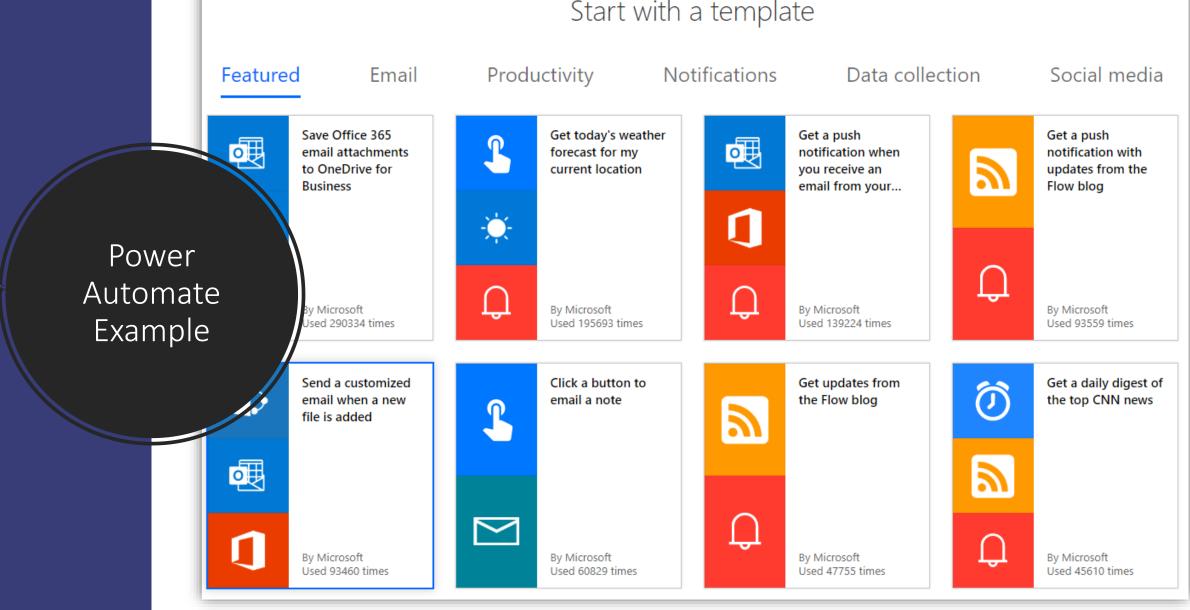


Engage with social media (auto-connect, add to newsletters)



Automate other approval processes.

#### Start with a template



#### The I.T. Team Expense Claims — Old Way



Paper form



Single approver



Often bypassed for expediency

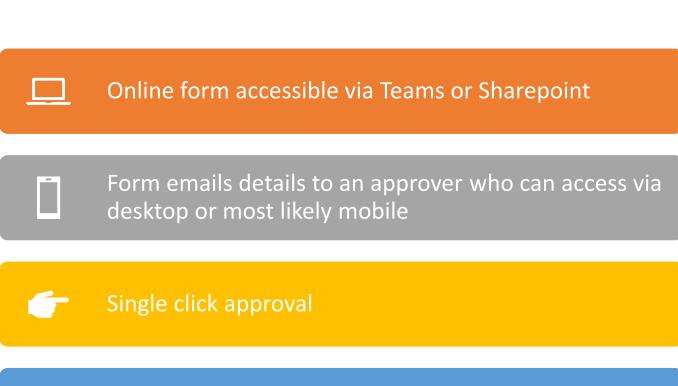


Forms lost or buried on busy desks



Create challenge for our finance team.

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





**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).



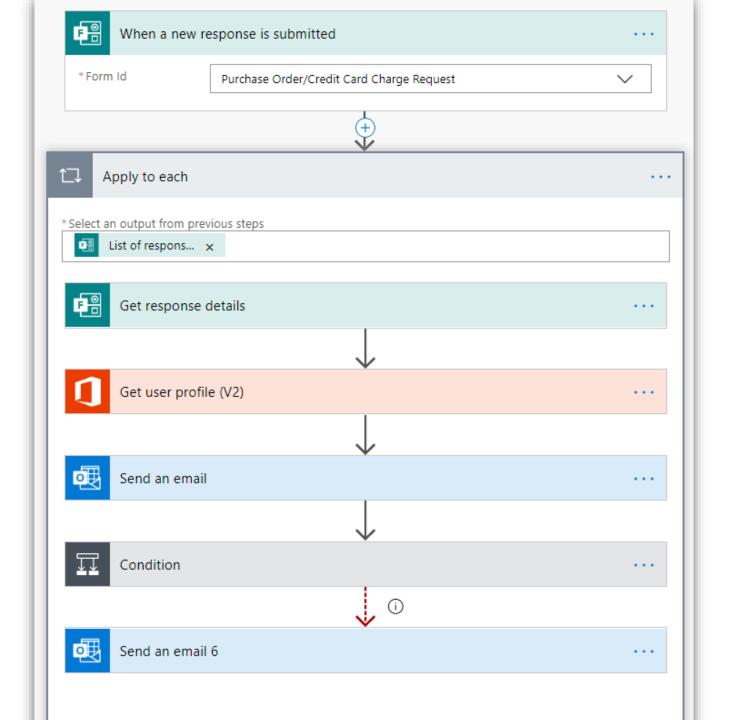
Gets the details submitted, and the person who submitted it

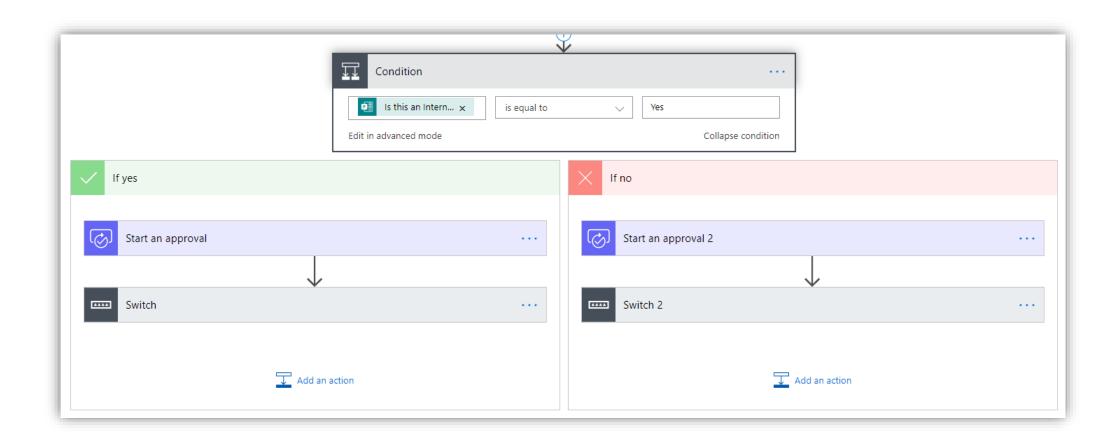


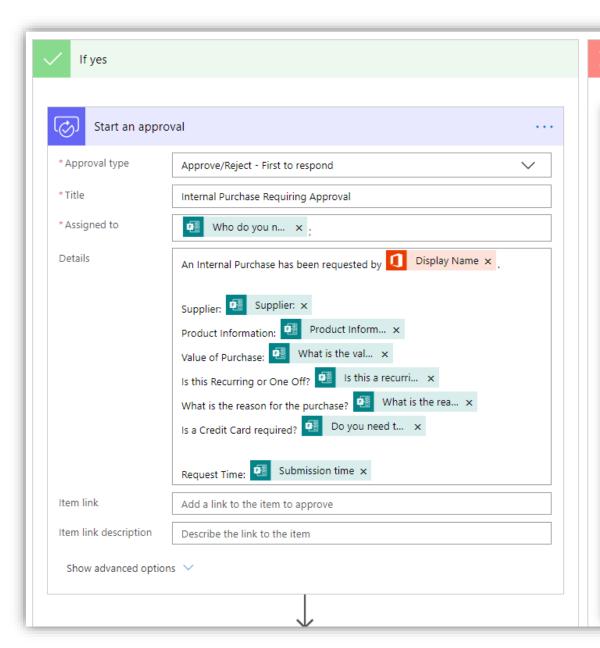
Sends an email to the person submitting to confirm what they have done.

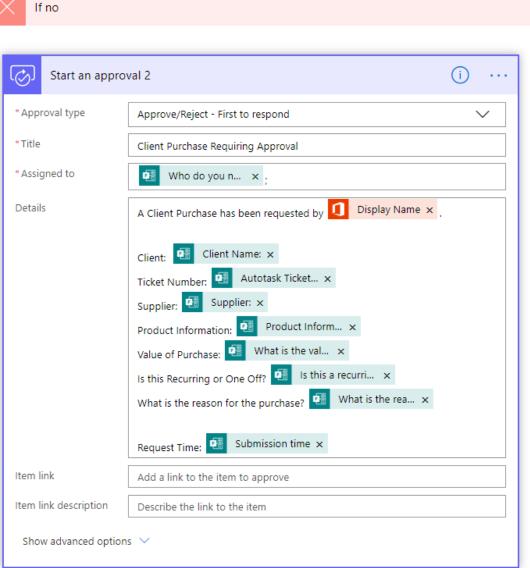


Then starts a condition > if it's an internal purchase, vs if it's a client purchase.









### **Pending approval**

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

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.

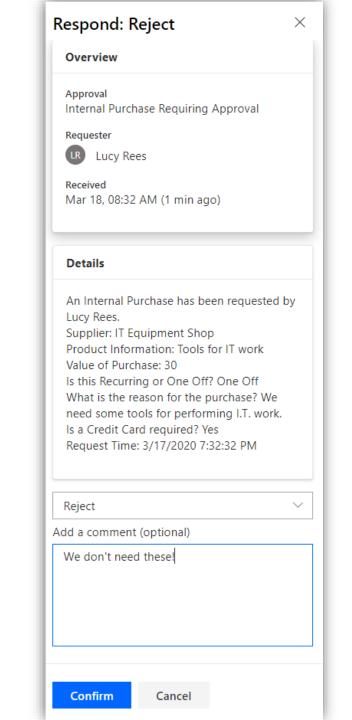
work. Is a Credit Card required? Yes

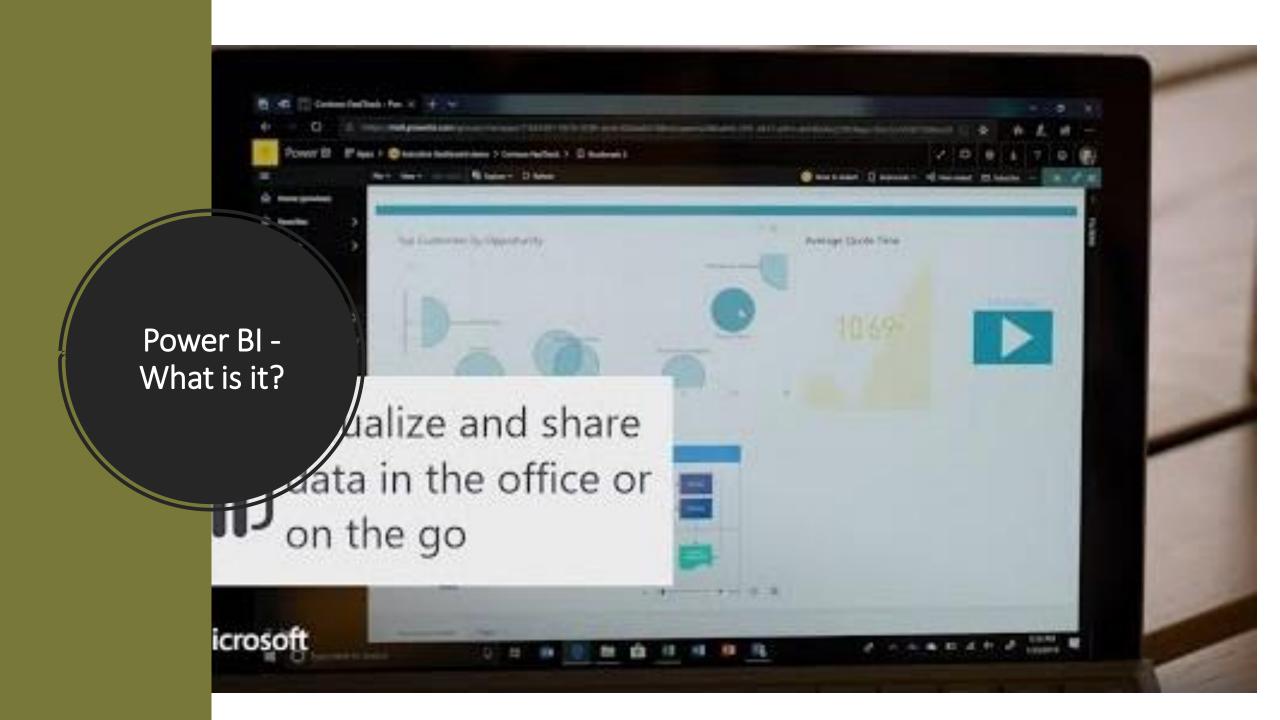
Request Time: 3/17/2020 7:32:32 PM

Approve

Reject

Get the Flow app to receive push notifications and grant approvals from anywhere. <u>Learn more</u>
This message was created by an automated workflow in Microsoft Flow. Do not reply. Microsoft Corporation 2020.





## PowerBI - Key Benefits

It helps to process huge data that other platforms struggle

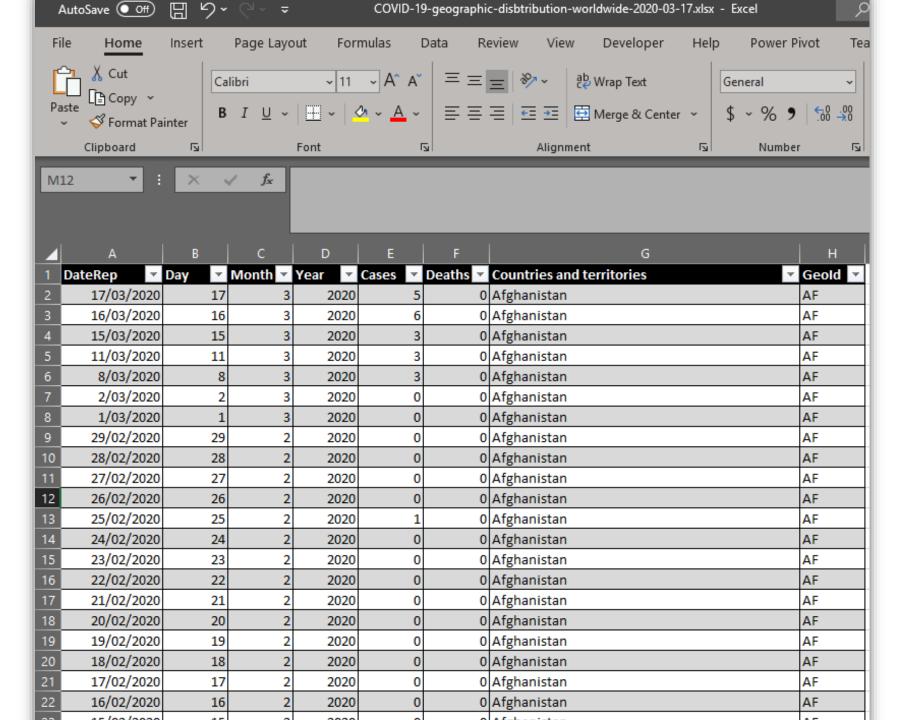
In-built with AI prediction capabilities

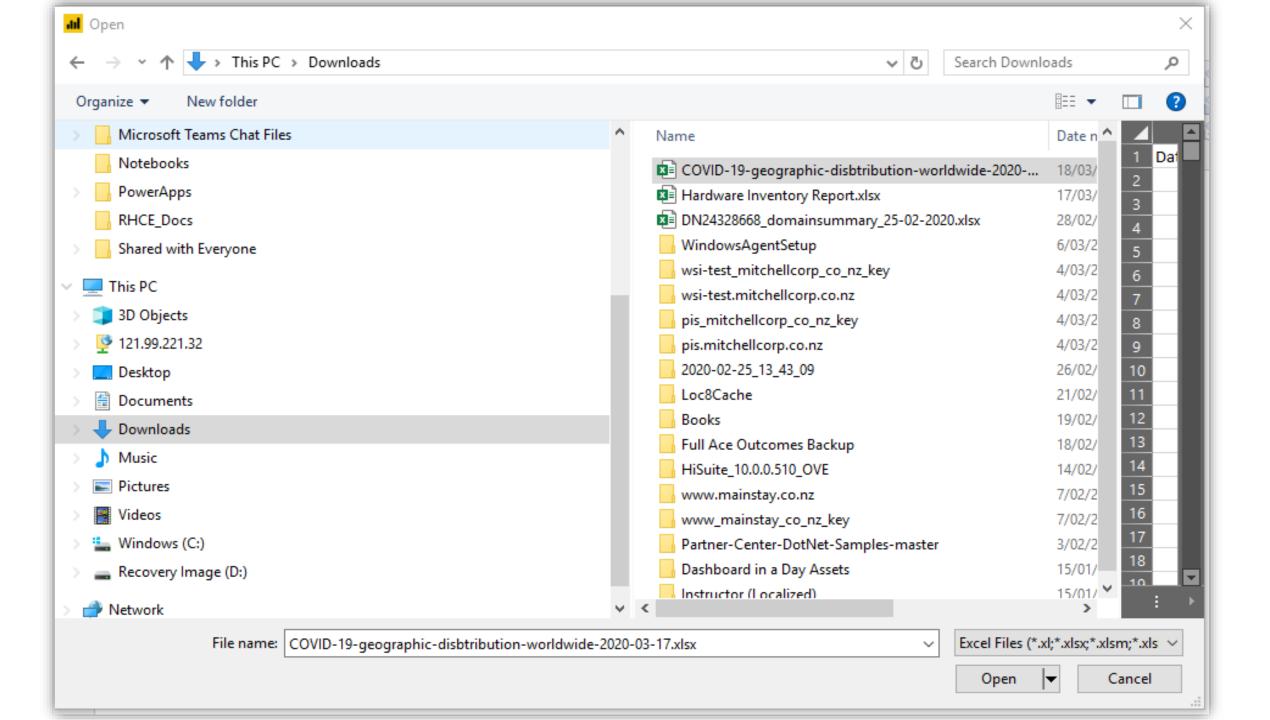
Powerful visualisations help to understand data better

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.





#### Navigator

Display Options 
COVID-19-geographic-disbtribution-worldwid...

COVID-19-geographic-disbtributi

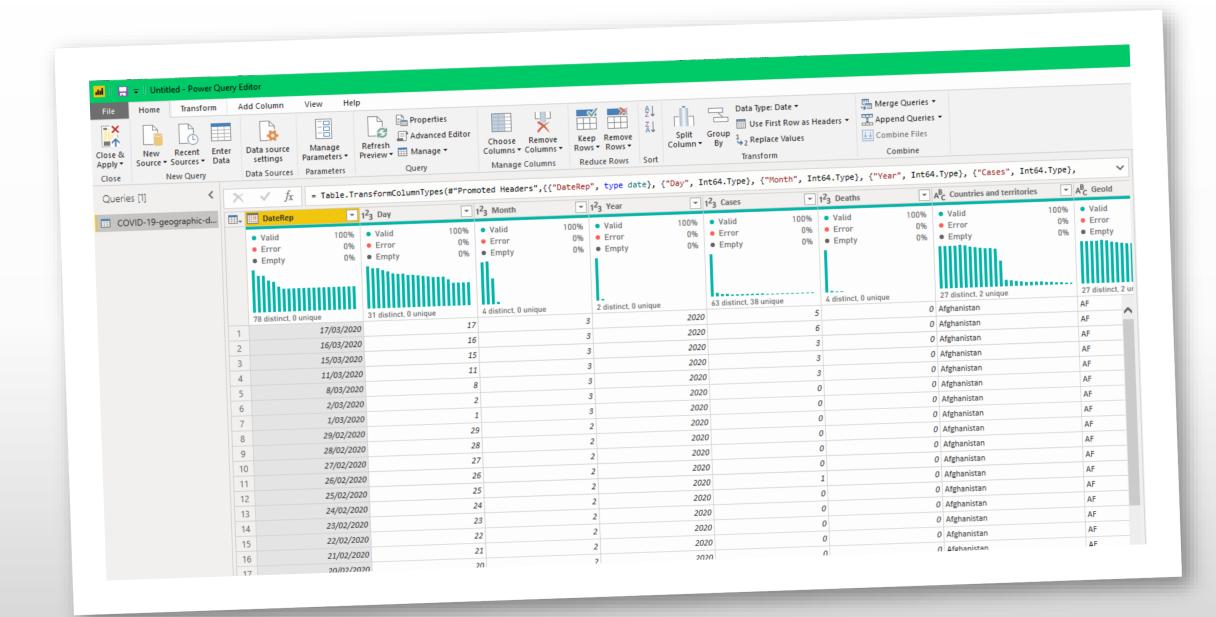
#### COVID-19-geographic-disbtributi

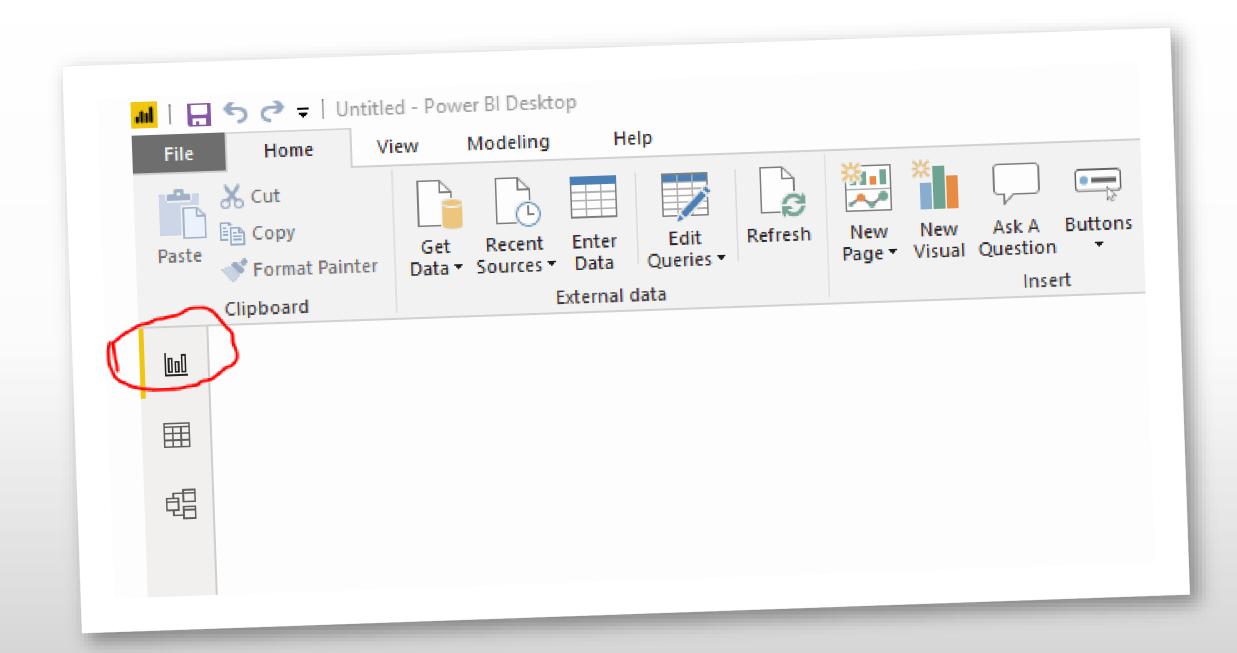
Load

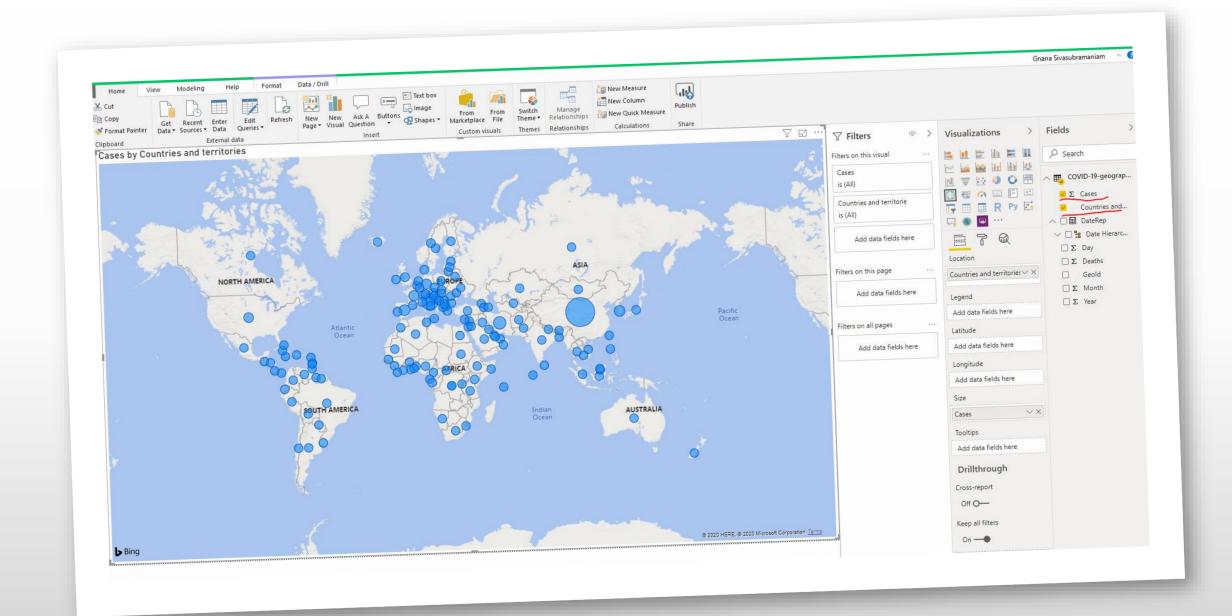
Transform Data

Cancel

P







## 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 Bl 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 Al for insights

Can be used across organisation





Works well for individuals

Both insights and an assistant!

# Quick 'MyAnalytics' Demo

## POSSIBLE TIMELINE/PATHWAY

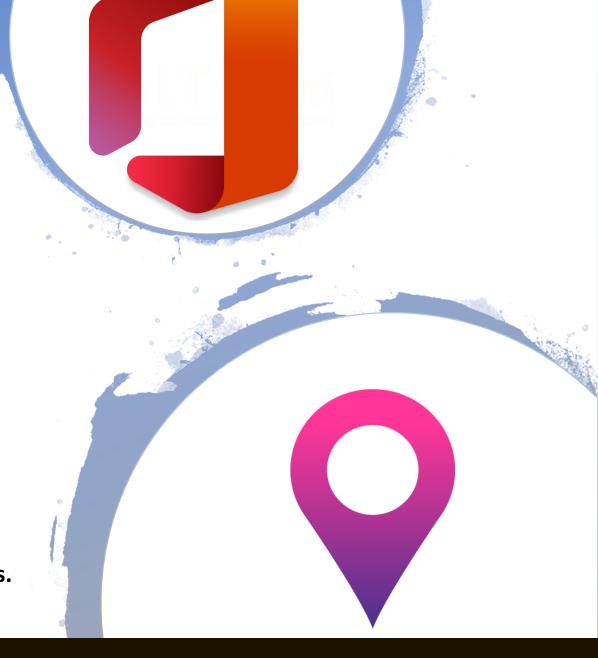
- Email to Exchange Online
- User Documents to OneDrive for Business
- Company documents to Sharepoint
- Zoom/Skype etc to Microsoft Teams
- Transfer Identities from DC (if applicable) and use Azure AD for Authentication
- Teams usage for internal communications
- Decommission Servers and other Services
- Start evaluating the lesser known 365 services





### WHERE TO FROM HERE

- QA coming up
- Check out our Ebook on Teams www.theitteam.co.nz/msteamsebook
- Link to Teams Webinar -<u>https://www.connectingup.org/learn/articles/introduction-microsoft-teams-next-generation-of-collaboration-webinar</u>
- Link to previous Webinar -<u>https://www.connectingup.org/learn/articles/moving-your-organisation-cloud-introduction-office-365-webinar</u>
- 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.



theitteam.co.nz

