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

Maintaining the health of your I.T. system
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
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\(^2\)

Maintaining the health of your I.T. system
What does teamwork look like for you today?

Disjointed collaboration and file sharing
- Delays in development and implementation of content and ideas
- Inefficient co-authoring and file sharing
- Difficult to involve outside contributors

Security Concerns with Third Party Apps
- No multi-factor authentication
- Shared files outside IT control

Dispersed resources
- Increased IT support workload
- Tools used inconsistently across the organization
- Dispersed resources

Increased on-boarding time
- Lack of centralized hub for information

Challenges for mobile workforce
- Hard to integrate vendors and contractors
- Difficult to access and share files remotely
- Challenging to access conversations and notes across platforms or devices

Maintaining the health of your I.T. system

Bring Your Own Devices
- Need to involve a growing remote workforce

Security Concerns
- Shared files outside IT control
- Unsecured chat

Cloud storage accessible by hyperlink
- Cloud storage accessible by hyperlink
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.

Maintaining the health of your I.T. system
Collaboration – why?

- SHAREPOINT
- ONEDRIVE
- MICROSOFT TEAMS
- PLANNER & TO DO
- DELVE
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
- Syncs 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
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
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<th>Feature</th>
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<tr>
<td>Video Streaming Service</td>
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<td>Secure to your organisation</td>
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<td>Location for viewing Recorded Teams Calls</td>
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<td>Ability to auto transcribe</td>
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<td>Currently not available for third parties</td>
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Quick ‘Stream’ Demo
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 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.

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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Power Automate
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

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<td>Get a push notification with updates from the Flow blog</td>
<td>Get updates from the Flow blog</td>
<td>Get a daily digest of the top CNN news</td>
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<td>Click a button to email a note</td>
<td>Get updates from the Flow blog</td>
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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

Form id: Purchase Order/Credit Card Charge Request

Apply to each

Select an output from previous steps
- List of responses

Get response details

Get user profile (V2)

Send an email

Condition

Send an email 6
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
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
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Request Time: 3/17/2020 7:32:32 PM

Reject
Add a comment (optional)

We don't need these
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?

Visualize and share data in the office or on the go.
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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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!

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

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