

# Discover SharePoint & Microsoft 365 - The Ultimate Starter Kit

Daniel Glenn | @DanielGlenn

SPFest & TeamsFest Chicago 2021



# Agenda

**Introduction to Microsoft Cloud Services**

**Collaboration in Microsoft 365**

**Services:** Exchange, SharePoint, OneDrive, Teams, Yammer, Forms, Planner, To-Do, Project, Stream, Lists, Whiteboard, Sway, Delve, Microsoft Viva, Search

**Permissions and Provisioning Basics in Microsoft 365**

**Build a SharePoint Site!**

**Teams Dive**

**Keeping Up With Change in Microsoft 365**

# Schedule

10:30am (ish) – Morning Break

12:30pm – Lunch

1:30pm – Afternoon session start

3:00pm – Afternoon Break

5:00pm (ish) – Close out

# Daniel Glenn



[D-G.ME / HELLO](https://d-g.me/hello)

Consultant  
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Microsoft MVP



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# Introduction to Microsoft Cloud Services

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# Microsoft Cloud Platforms



Microsoft Azure



Microsoft 365



Microsoft Dynamics  
365

# Microsoft Cloud Platforms



Infrastructure as a Service solutions  
Platform as a Service solutions



Software as a Service productivity solutions



Software as a Service ERP and CRM solutions

# What is Azure?

## AI + Machine Learning

Create the next generation of applications using artificial intelligence capabilities for any developer and any scenario

[Learn more >](#)

### Anomaly Detector

Easily add anomaly detection capabilities to your apps.

### Azure Cognitive Search

AI-powered cloud search service for mobile and web app development

### Azure Machine Learning

Bring AI to everyone with an end-to-end, scalable, trusted platform with experimentation and model management

### Azure Cognitive Services

Deploy high-quality AI models as APIs

### Computer Vision

Distill actionable information from images

### Custom Vision

### Azure Bot Services

Intelligent, serverless bot services that scale on demand

### Azure Databricks

Fast, easy, and collaborative Apache Spark-based analytics platform

### Azure Open Datasets

Cloud platform to host and share curated open datasets to accelerate development of machine learning models

### Azure Video Analyzer PREVIEW

An AI service for quickly building video analytics solutions

### Content Moderator

Automated image, text, and video moderation

### Data Science Virtual Machines

## Virtual Machines

Provision Windows and Linux virtual machines in seconds

## Azure SQL

Managed, always up-to-date SQL instance in the cloud

## Azure Cosmos DB

Fast NoSQL database with open APIs for any scale

## Azure Kubernetes Service (AKS)

Simplify the deployment, management, and operations of Kubernetes

## Azure Cognitive Services

Deploy high-quality AI models as APIs

## Azure Virtual Desktop

The best virtual desktop experience, delivered on Azure

## App Service

Quickly create powerful cloud apps for web and mobile

## PlayFab

The complete LiveOps back-end platform for building and operating live games

## Azure Functions

Process events with serverless code

## Azure Quantum

Experience quantum impact today on Azure

# What is Dynamics 365

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- Recycle
- New
- Delete
- Refresh
- Collaborate
- Qualify
- Process
- Disqualify
- Add to Marketing List
- Assign
- Share
- Email a Link

**DL David Li**  
Lead · Lead

Landing page: Lead source  
 Warm Rating  
 New Status  
 SYSTEM Owner



- Summary
- LinkedIn lead info
- Insights
- Details
- Files
- Lead Conversion Process
- LinkedIn Sales Navigator
- Related

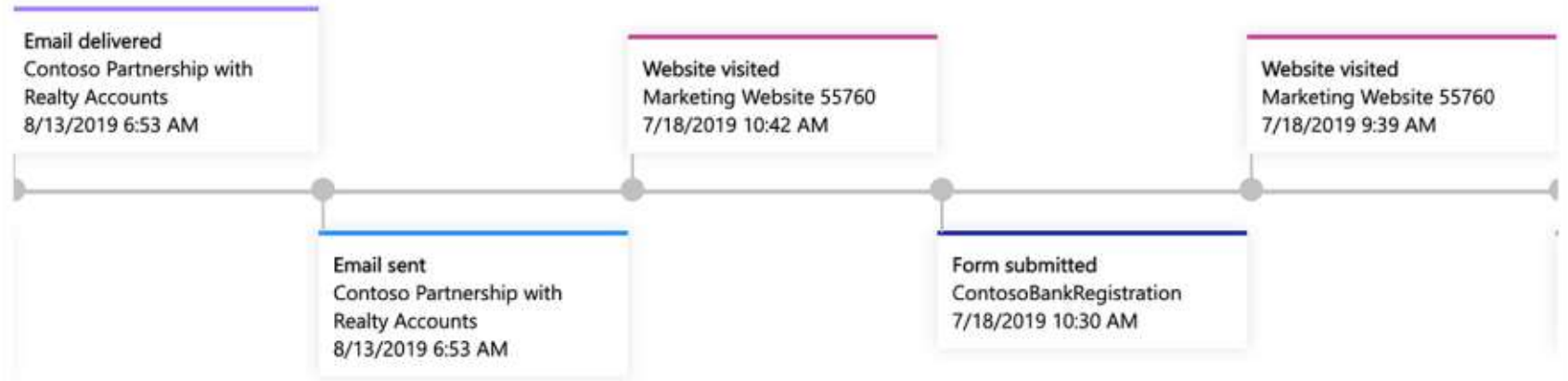
- Overview
- Email interactions
- Web interactions
- Event interactions
- Marketing form interactions
- Subscription list interactions

Overall data

Lead age in days

**127**

Interactions timeline



Summary Agent Topics

Last refresh (UTC) 2/7/2021 12:07:26 pm

Key insights discovered

KPI insights

- There was 36% increase in CSAT for High priority cases.
- There was 18% volume increase in the Email channel
- Average case age increased by 2.6 hours in the returns queue

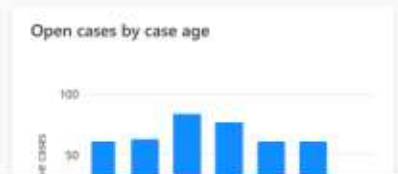
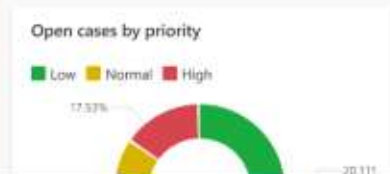
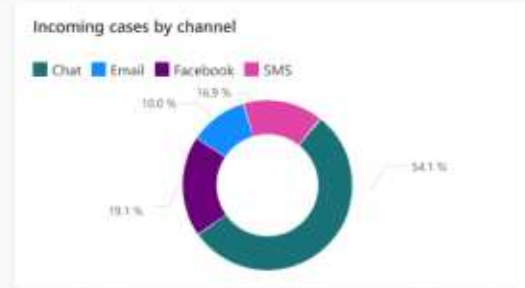
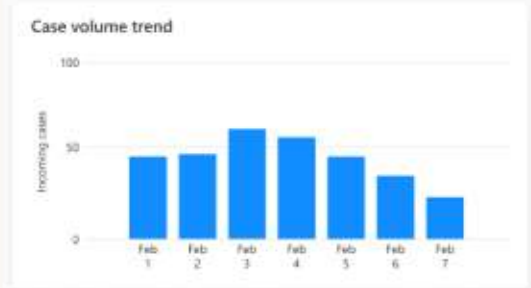
Topics to watch

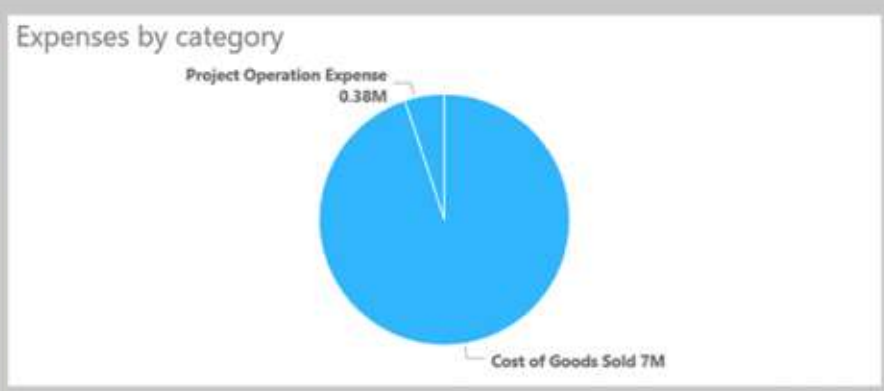
- Buy an extended manufacturer's warranty
  - #1 Volume driver
  - #19 Negative CSAT impact
  - 38 New cases
- User was charged for a membership they do not have anymore
  - #1 Volume driver
  - #19 Negative CSAT impact
  - 2188 New cases
- Customer cannot see if his promo code expired online
  - #1 Volume driver
  - #19 Negative CSAT impact
  - 2188 New cases

Duration: Last 30 Days | Channel: All | Queue: All | Agent: All

2/1/2021 - 2/7/2021

<b>Incoming cases</b> 397 19.1% ▲	<b>Active cases</b> 113 23.7% ▲	<b>Escalated cases</b> 7.3% -4.1% ▲	<b>Avg. resolve time (hrs)</b> 73.3 7.1% ▲	<b>Avg. CSAT</b> 4.3 5.1% ▲	<b>Avg. survey sentiment</b> 71% 4.7% ▲
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# Production performance

<b>642</b> Total orders	<b>82%</b> On-time & in full %	<b>6%</b> Incomplete %	<b>6%</b> Early %	<b>8%</b> Late %
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## Reported as finished

01/02/2016 - 28/02/2017

## Item group

- Select all
- (Blank)
- Audio Products
- Audio Raw Materials
- Car Audio Products

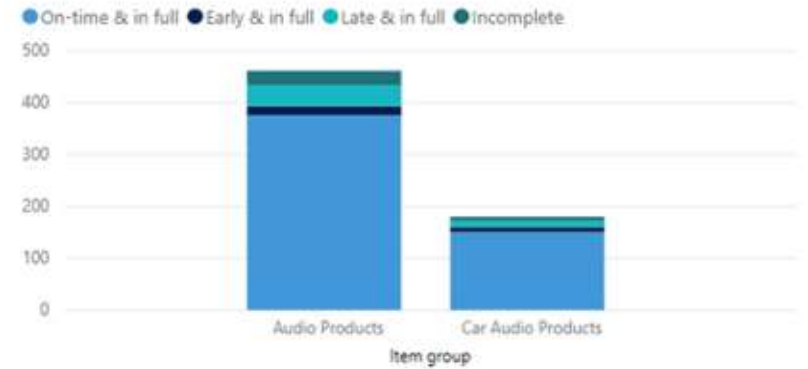
## Product

- Select all
- A. Datum 50W Car Ra...
- AcousticFoamPanel
- Active speaker
- Aluminium Cabinet
- Amplifier
- Bass cabinet
- Binding posts
- Black paint - Gallon c...
- Cabinet

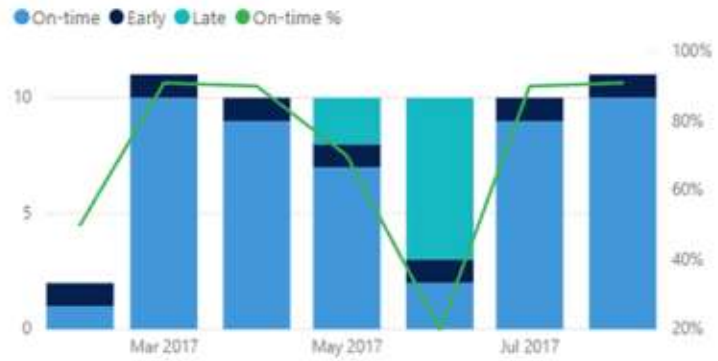
## Number of productions by date



## Number of productions by product



## Number of planned productions by date



## Bottom 10 products by on-time & in full

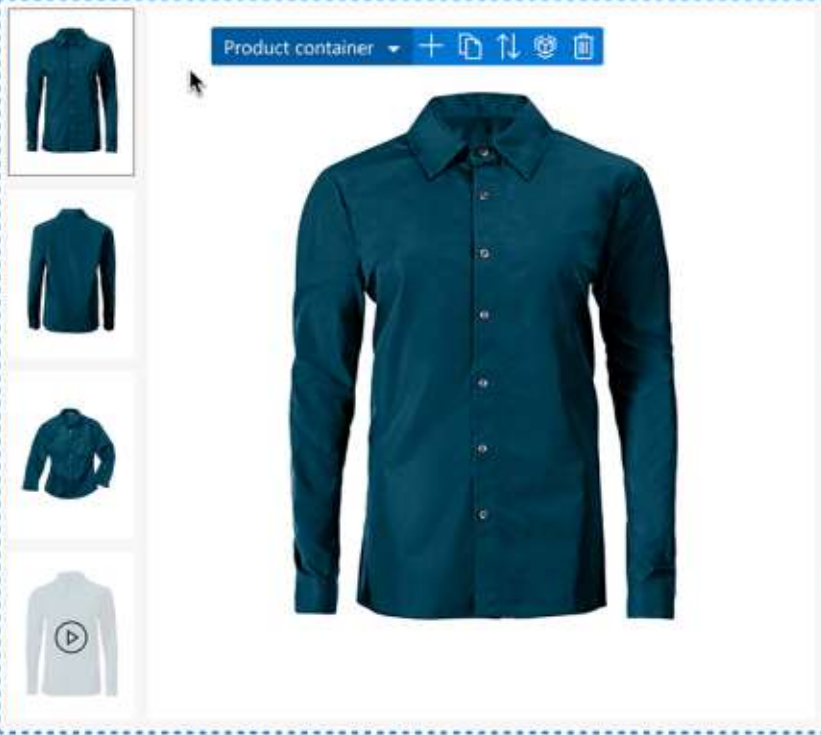
Item ID	Product name	On-time & in full	Total orders	On-time & in full %
D0111	Ruggedized Laser Projector	35	52	67.3 %
D0002	Cabinet	186	230	80.9 %
D0005	Car Audio System	151	180	83.9 %
D0001	MidRangeSpeaker	155	180	86.1 %

15% off all our Forest Series! Free shipping on orders of \$200 or more

# Fabrikam

🔍 Search Hi, Adriana ▾ ❤️ 🛒 (0)

Forest Series Men Women Accessories



## Classic-Fit Shirt

\$420.00

Our wrinkle-free classic-fit dress shirt provides you with convenience and sleek style that suits your modern lifestyle.

★★★★★ (88)

Color

Black ▾

Size

M ▾

Quantity

- 1 +

### Product container

Layout

Media aside ▾

Media-text split ratio

36

Stack on mobile  On

Width

Fill screen  
 Fill container

Media

Layout

Thumbnail aside ▾

Max number of items

6

Lazy load  on

Search people ...

 **Charlie Carson**  
President

 **Karl Bystrom**  
Materials Manager

 **Inga Numadutir**  
Purchasing Manager

 **Alicia Thornber**  
Purchasing Agent

DIRECT REPORTS

 **Claire Kennedy** 7  
Director of Human Resources Directs



# Alicia Thornber

Purchasing Agent | Operations | Full-time | Employee  
Contoso Entertainment System USA  
[Email] [Phone]

**13.3**  
YEARS OF SERVICE

Personal Leave and absence

[Edit](#) [Verify employment](#) [Refresh](#) ...

**Personal information** ...

 **Name**  
Alicia Thornber

<b>Marital status</b> Married	<b>Language</b> English
<b>Gender</b> Female	<b>Birth date</b> 4/1/1976

**Certificates** ...

<a href="#">Visa for internatio...</a> Expires: 4/8/2025	
<a href="#">Logistics certificati...</a> Expires: 11/1/2019	Expiring
<a href="#">Chartered account...</a> Expires: 10/12/2018	Expired

**Emergency contacts** ...

[Devon Robertson](#)  
Domestic partner

[Ray Cavillari](#)  
Family contact

**Identification numbers** ...

<a href="#">SSN</a> 888-99-9335	Expires: 12/31/2154
<a href="#">Passport</a> 123456789	Expires: 9/28/2025

**Tests** ...

<a href="#">Physical ability</a> Due: 11/1/2022	Not complete
<a href="#">Situational judgm...</a> Due: 11/20/2021	Not complete
<a href="#">Physical ability</a> Completed: 11/1/2019	Pass

[More](#)

# Microsoft 365

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**Documents**

**Videos**

**Lists**

**Workflows**



Microsoft

**SharePoint** 2007

**Search**

**Forms**

**Business Intelligence**

Small team site or project site?

... We used SharePoint

Intranet, Extranet, Public Facing?

... We used SharePoint

Reporting or Archiving?

... We used SharePoint

Planning, Tasks, File Server, Social

... We used SharePoint

Large team site or project site?

... We used SharePoint

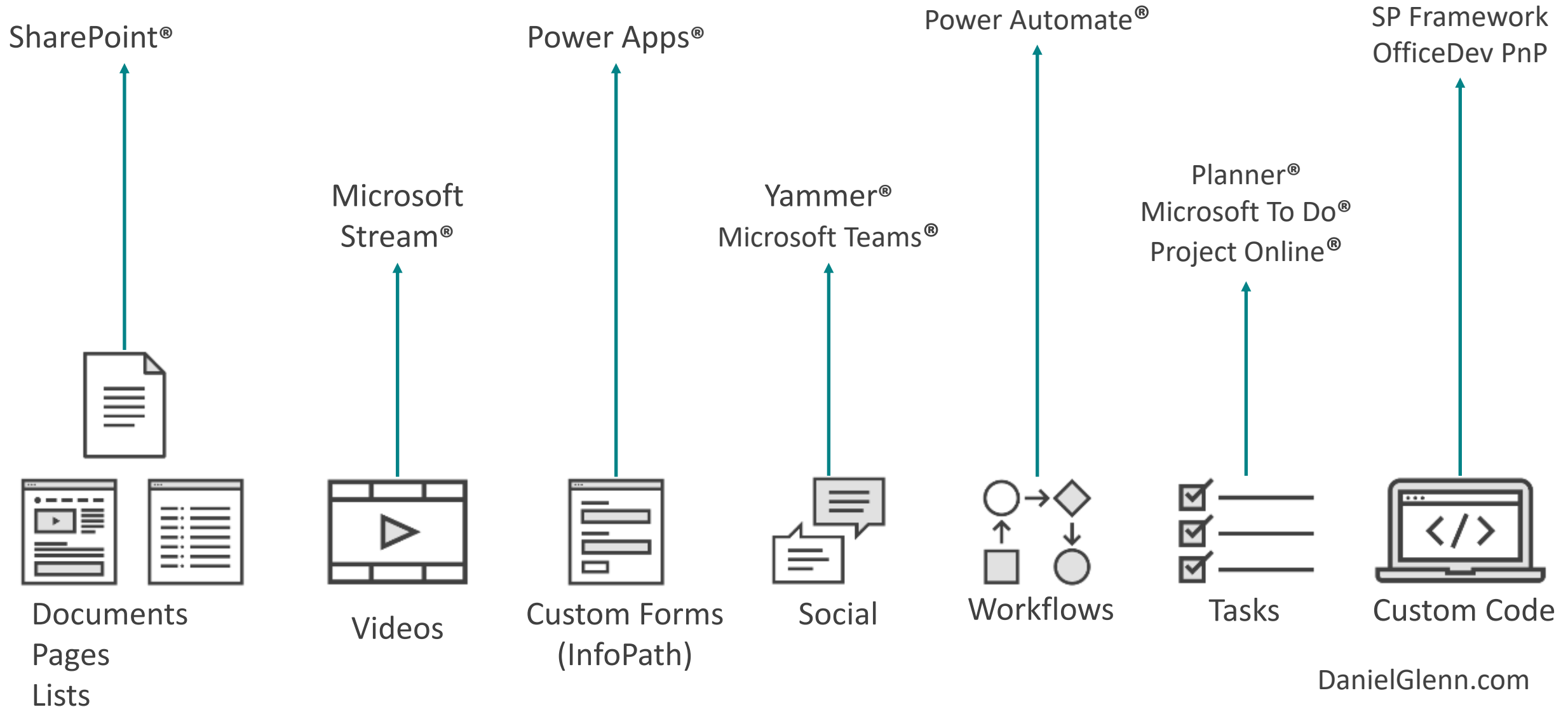
Enterprise Social Network?

... We used SharePoint

Collaboration is  
**not** just files  
anymore



# Where should each type of item go in Microsoft 365?



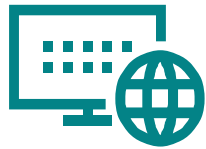
# Microsoft 365: Universal Toolkit for Teamwork

Outlook



Email & Calendar

SharePoint



Intranets &  
Content Management

Yammer



Connect Across  
the Organization

Office Apps



Co-Author

Teams



Hub for Teamwork

## Microsoft 365 Groups

Single team membership across  
apps and services

## Microsoft Graph

Suite-wide intelligence  
connecting people and content

## Security and Compliance

Centralized policy management

# Embrace a new way of work with Microsoft 365

## Content easily and safely shared

Access & work on files from anywhere  
Track with activity & notifications

## Information helps your workflow

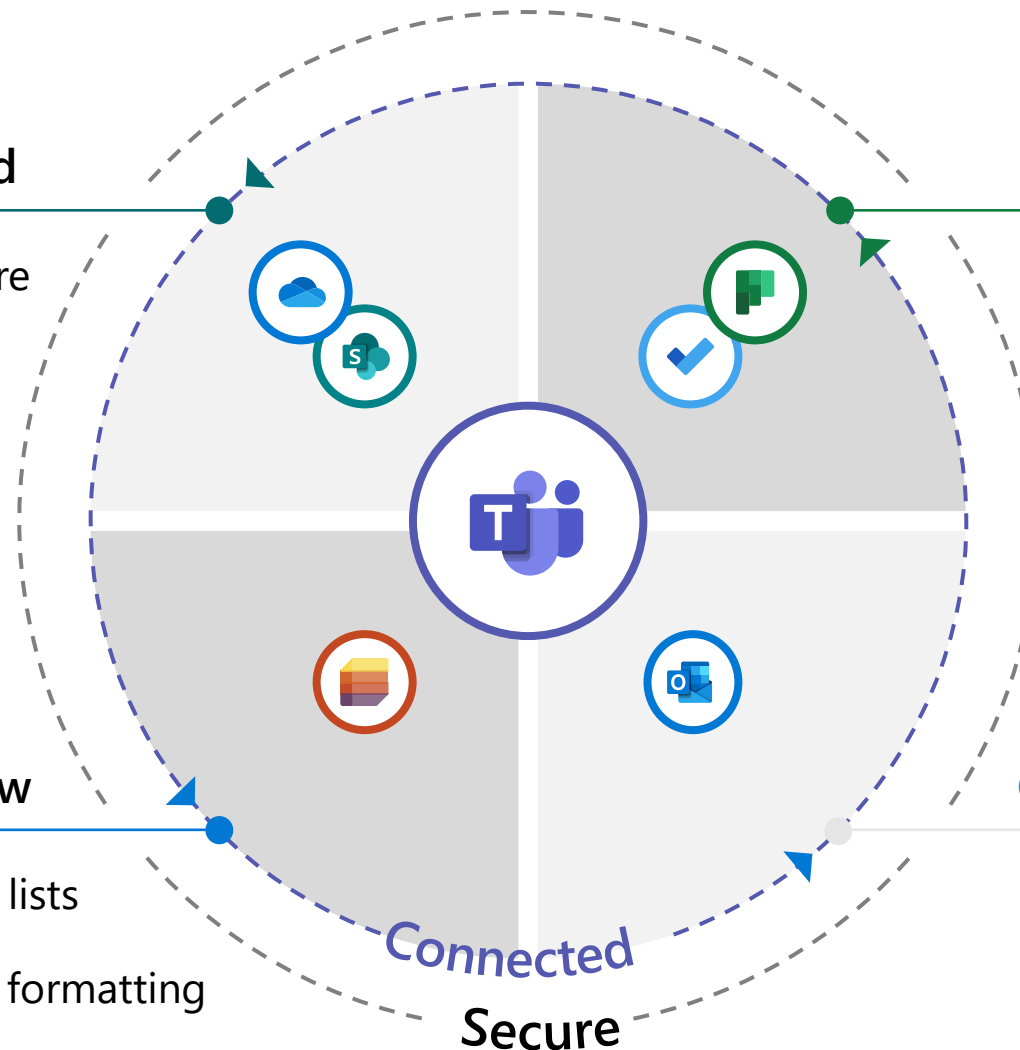
Organize work into simple, powerful lists  
Track with rules, views & conditional formatting

## Tasks are managed across apps

Drive team & personal accountability  
Create and assign tasks

## Communications are in one place

Coordinate over chat, audio, video  
Quickly schedule and attend meetings



# Exchange Online & Outlook

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# Exchange Online



An invisible hero inside Microsoft 365

The e-mail service we use daily

Also helps many other Microsoft 365 services

- Microsoft 365 Groups
- Teams

# Outlook

## Quick Start Guide

New to Outlook? Use this guide to learn the basics.

# Outlook

**Quick Access Toolbar**  
Keep favorite commands permanently visible.

**Explore the ribbon**  
See what Outlook can do by selecting the ribbon tabs and exploring available tools.

**Find whatever you need**  
Search all your mail boxes and commands with a keyword or phrase.

**Customize the ribbon display**  
Choose whether Outlook should auto-hide the ribbon.

**Your inbox, your way**  
Sort and filter messages, and group messages by subject in conversation view.

**Show or hide the ribbon**  
Select arrow to switch between the Simplified and Classic ribbons.

**Navigate your mail folders**  
Select a folder to see its contents. To turn this pane on or off, select View > Folder Pane.

**Display what you need**  
Switch between the different Outlook features like Mail, Calendar, and People views.

**Read emails faster**  
Dock the reading pane on the side or at the bottom to view messages where you want to.

**Manage Outlook Groups**  
Communicate with teams and share conversations, messages, calendars, and events.

**View connection status**  
See your folder sync status and server connection status here.

# Outlook on the web Mail



## Organize your Inbox

The screenshot shows the Outlook on the web interface. The left sidebar contains navigation options: Favorites, Folders (Inbox with 46 items, Drafts with 1, Sent Items, Deleted Items with 18, Junk Email, Archive), and a 'New message' button. The main area shows the 'Focused' and 'Other' (13) inbox tabs. A 'Filter' dropdown menu is open, showing options: All (checked), Unread, To me, Flagged, Mentions, Attachments, and Sort. Callouts point to these features:

- Switch between **Focused** and **Other** inbox.
- Filter, sort, and turn on **Conversations** and **Focused Inbox**.
- See only your **Unread** messages.
- Show only messages you are @mentioned in.
- Sort mail by **Date, From, Size, Importance, and Subject**.

## Outlook on the Web

# SharePoint

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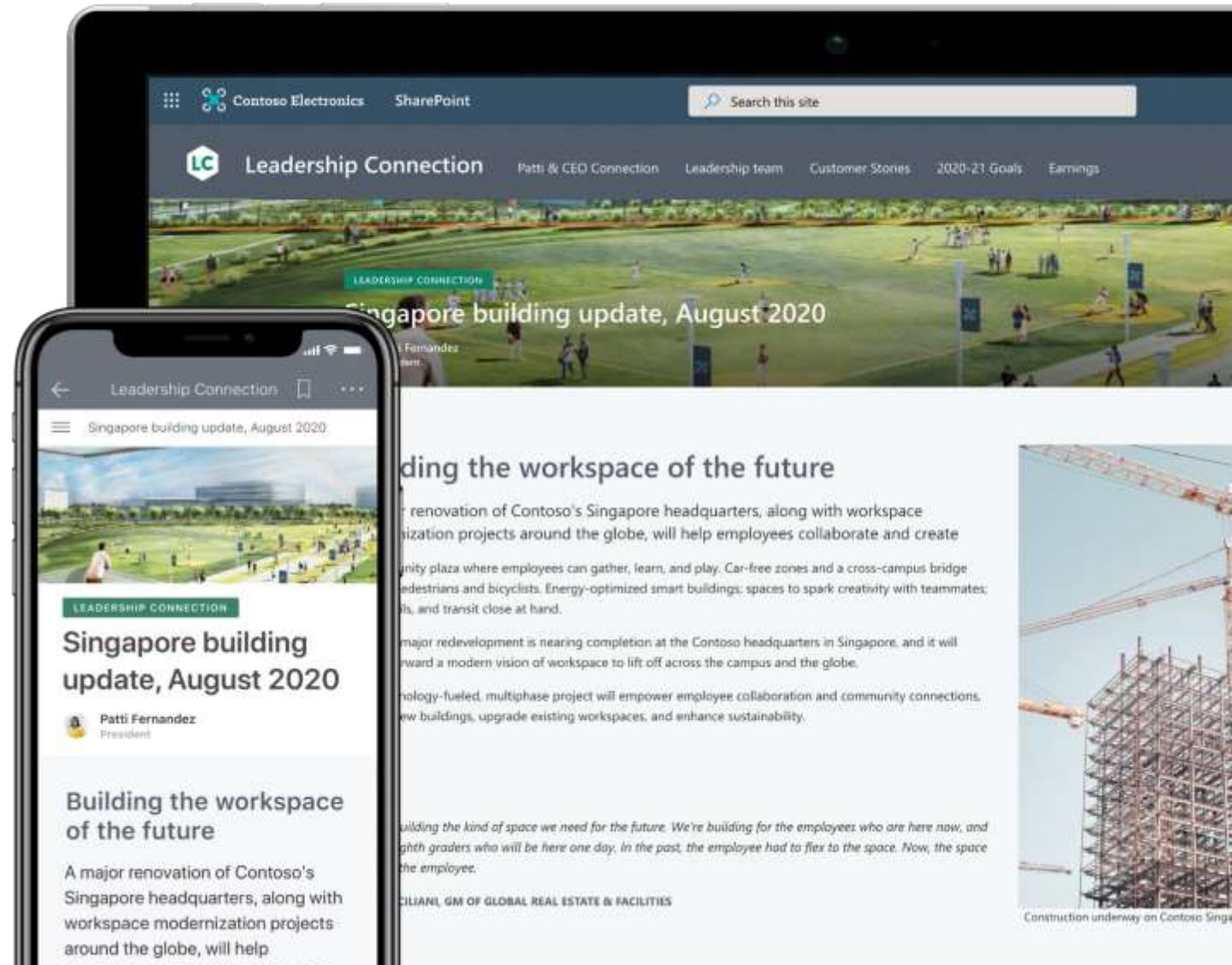
# SharePoint – Your Intelligent Intranet

Employee engagement and communications

Connect people, news, knowledge, and apps

Knowledge and content management

Shared content and solutions for any group



# Intelligent intranet

## The building blocks

### Organizational news

transform internal communications to keep people informed and engaged

### Communication sites

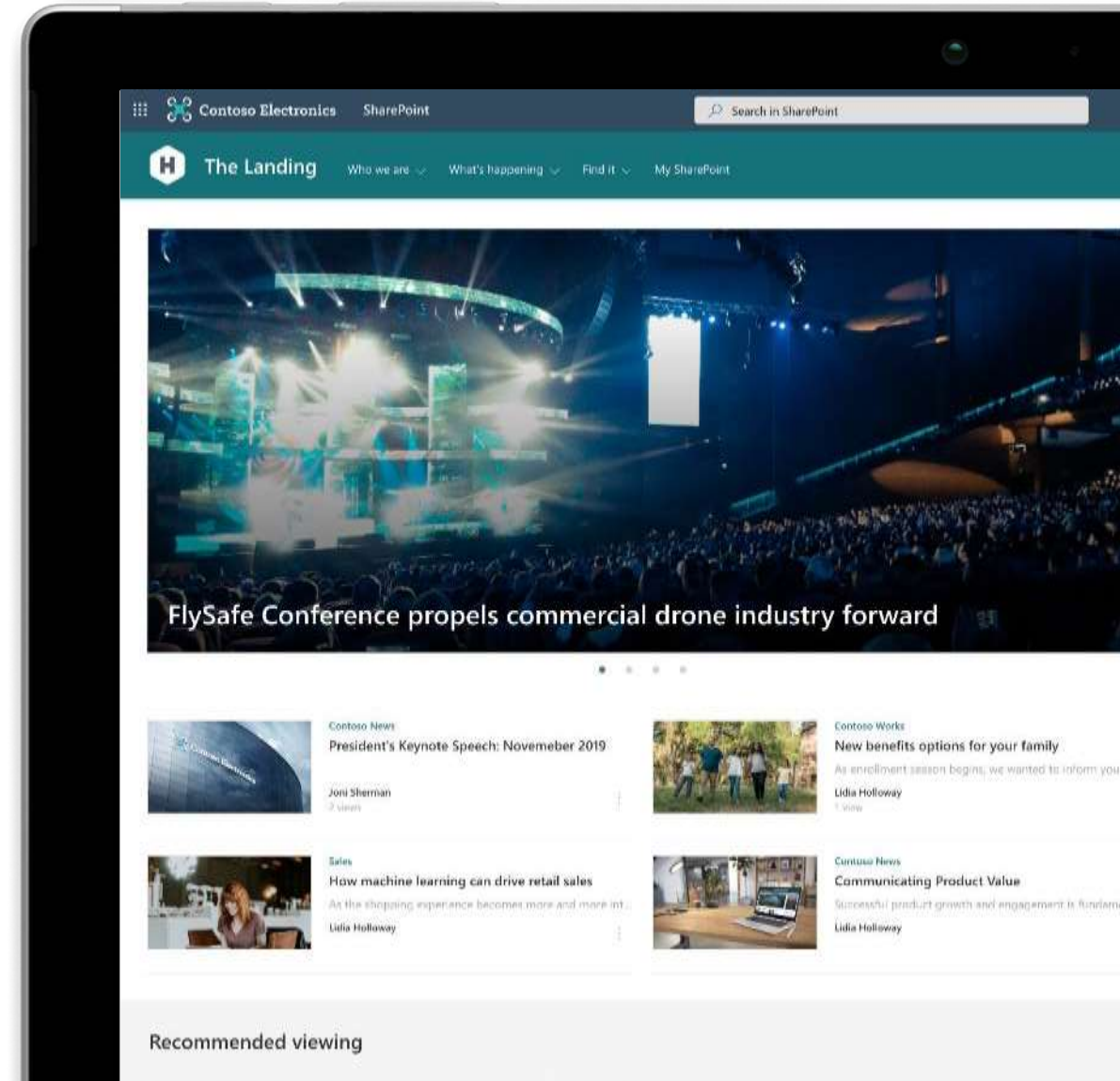
reach a broad audience across the organization with a dynamic intranet site

### Home sites

create an engaging home for your organization, division, or function

### Hub sites

organize related sites & teams to centralize news, search and content management



# SharePoint news

Inform and engage your team and your organization

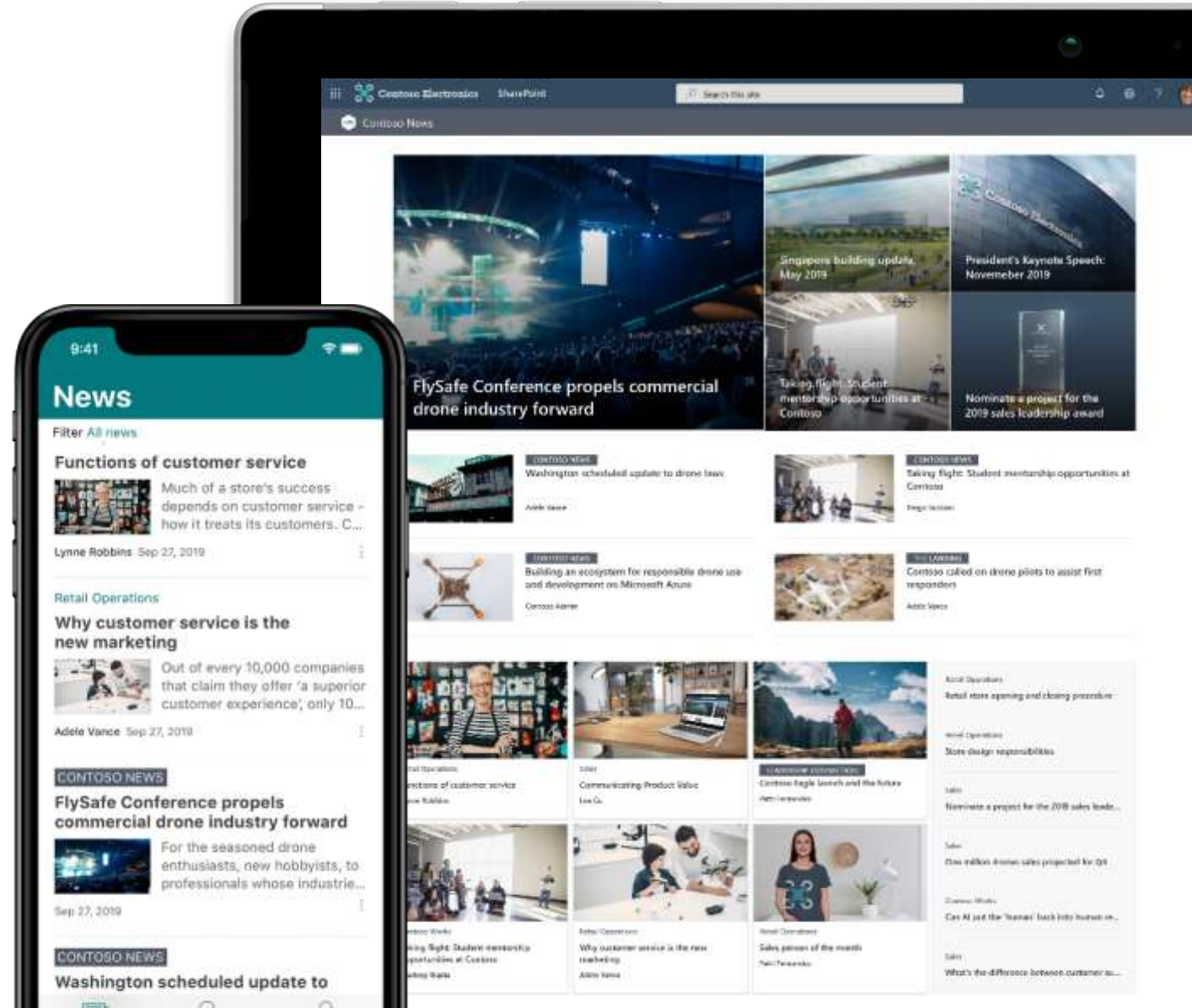
Stay in the know with important and personalized relevant news across devices

Create compelling communications with multimedia and dynamic content from Microsoft 365 and beyond

Scale the reach of your story with automatic news distribution and promotion to your audience

Engage your audience with likes, comments, and social re-sharing

Schedule, target, publish, distribute and measure organizational news and communications



# SharePoint sites

Share with your team & across the organization

## Share vision

to guide and align your organization with leadership engagement

## Share knowledge

in community sites that bring together content, conversation & people

## Share resources and services

with microsites

## Share news

updates and stories to inform your organization with SharePoint news



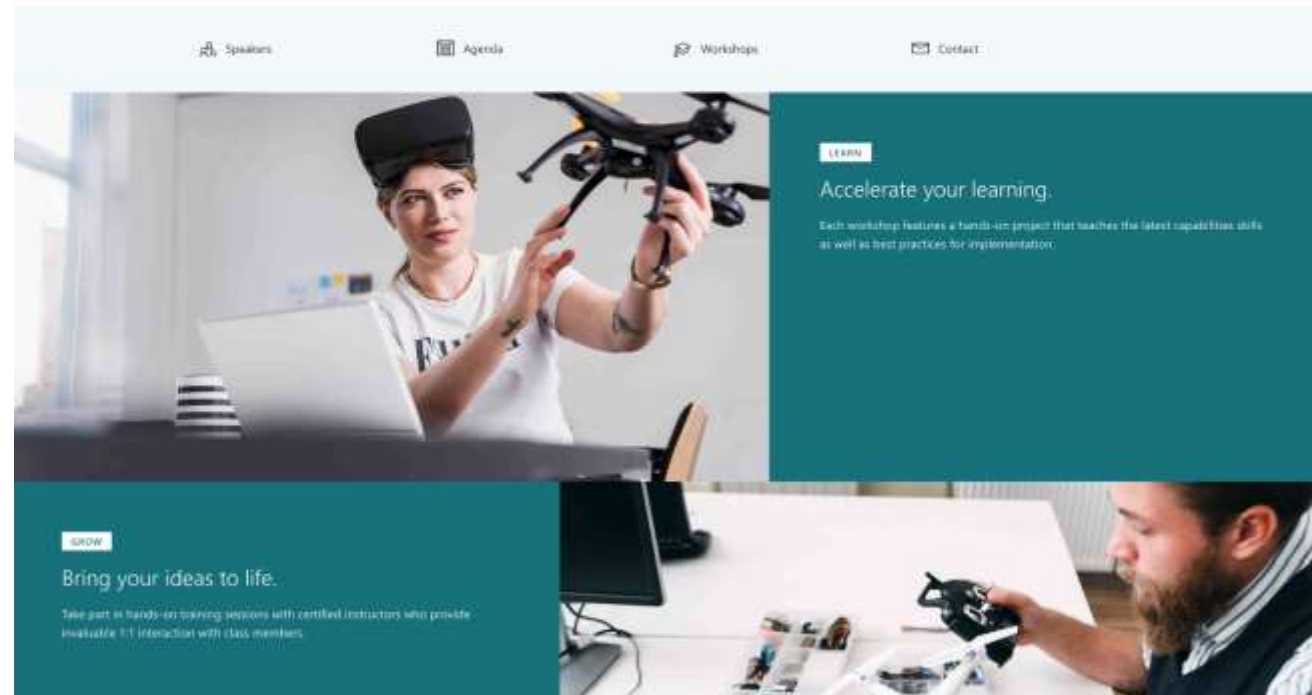
### DRONE PRODUCT TRAINING

## Get trained by the experts

Consumer Quadcopter training workshops are instructor-led classes that combine the best in quality, expertise, and convenience to increase your drone knowledge. Learn the latest features across our product line up or expand into new content areas like 3D modeling or how we utilize recycled materials in our drone components. Schedule a private training to get a new team up to speed or find a public class for yourself.



RESERVE YOUR SEAT



# SharePoint home sites

Create a personalized landing experience for your organization

Connect the workplace with intelligent search and rich navigation to sites and applications

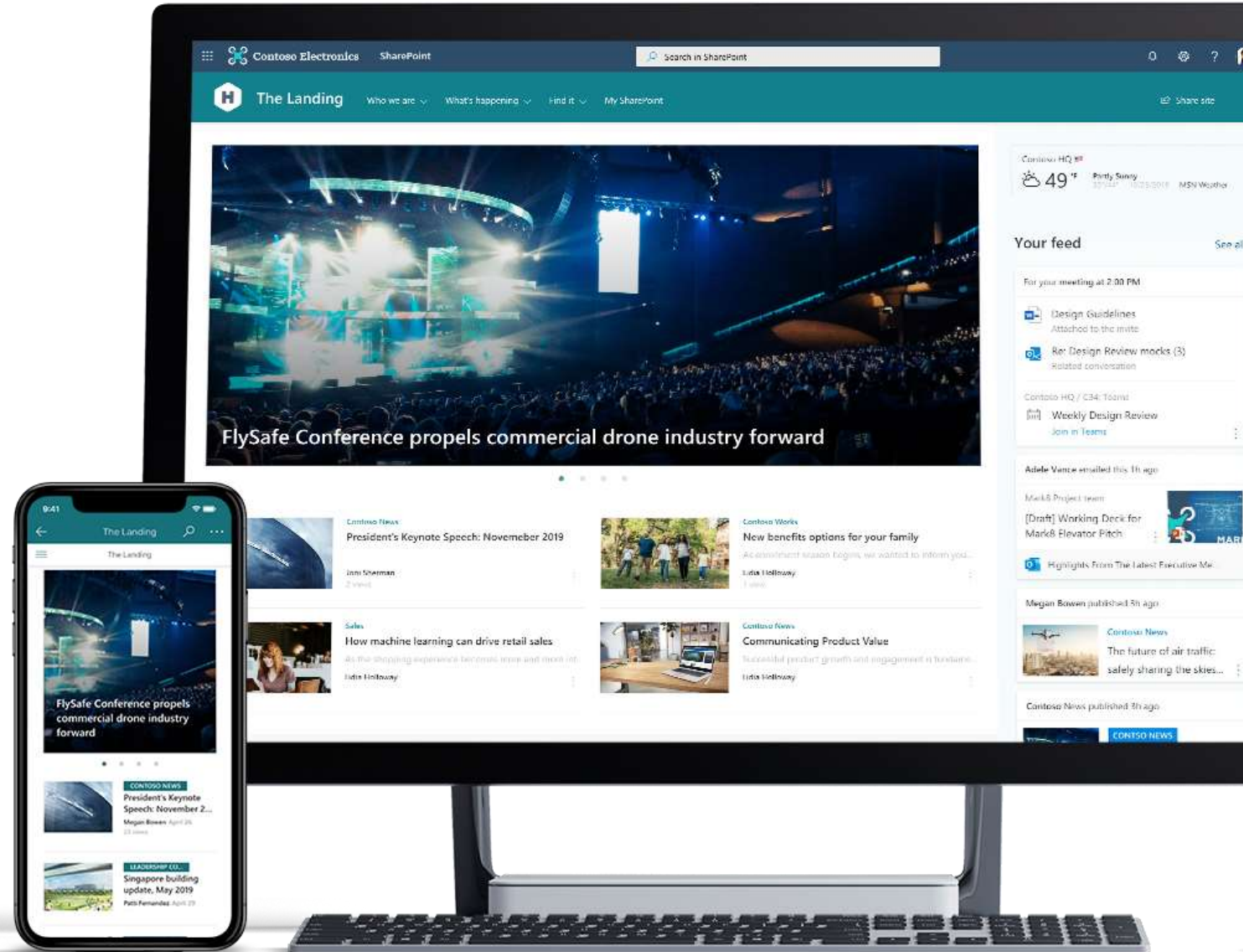
Showcase news and information to the right people with audience targeting

Discover personalized, relevant content from Microsoft 365 and across your digital estate

Foster connections across the organization with social conversations

Share compelling communications with intelligent video

Create a beautiful, dynamic employee experience that is accessible and available across devices



# SharePoint hub sites

Organize your intranet

## Associate related sites

Create a hub with any site  
Associate any site to a hub  
Change associations at any time

## Provide a hub for users

Hub navigation is shared to associated sites  
Hub rolls up news, activities and events  
Search from hub across all associated sites

## Create consistency across sites

Associated sites inherit the theme of the hub  
Hub drives consistency across associated sites  
with site designs

## Govern site creation

Attach a workflow to site join  
Create a site from hub

Contoso Electronics | SharePoint

Search across sites

Contoso HR | Benefits | Work & Life | Give

Contoso Works | My Benefits Dashboard | Our Mission | New Employee Orientation

One Million Drones Sold in 2018

Contoso Eagle launch and the future

4 reasons why branding is important

The importance of branding at Contoso

Corporate Communications Define Your ...

President's Keynote Speech: August 2019

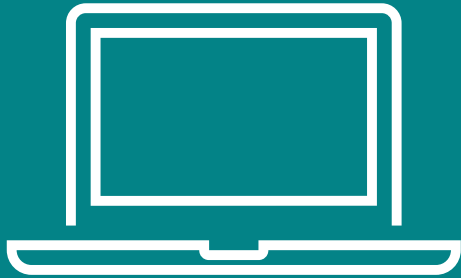
Financial status

U.S. corporate holidays

New Year's Day  
Wed, Jan 1, All day

Martin Luther King Day  
Mon, Jan 20, All day

# Demo



OneDrive

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# Work on your files wherever, however with OneDrive

Teams   Outlook   Planner   Lists  
Office   SharePoint   OneNote   Power BI



## Working on your own

Maintain your local files workflow while adding cloud collaboration and security

AND

## Working with others

Share and access files from any app to collaborate on them with anyone



## Microsoft OneDrive

Powering files experience and collaboration across Microsoft 365



# OneDrive is the files app for Microsoft 365



View and capture all files and photos from any device



Work together with anyone in real-time



Organize and find files that matter most



Keep files backed up, secured and protected

# View, co-author and share files from any device



## Access individual and shared files

- OneDrive, Microsoft Teams, SharePoint and SharePoint Server on-premises

## Full fidelity web experience

- 320+ file previewers and growing

## Files On-Demand

- Desktop and offline (PC & Mac)

## Work from anywhere

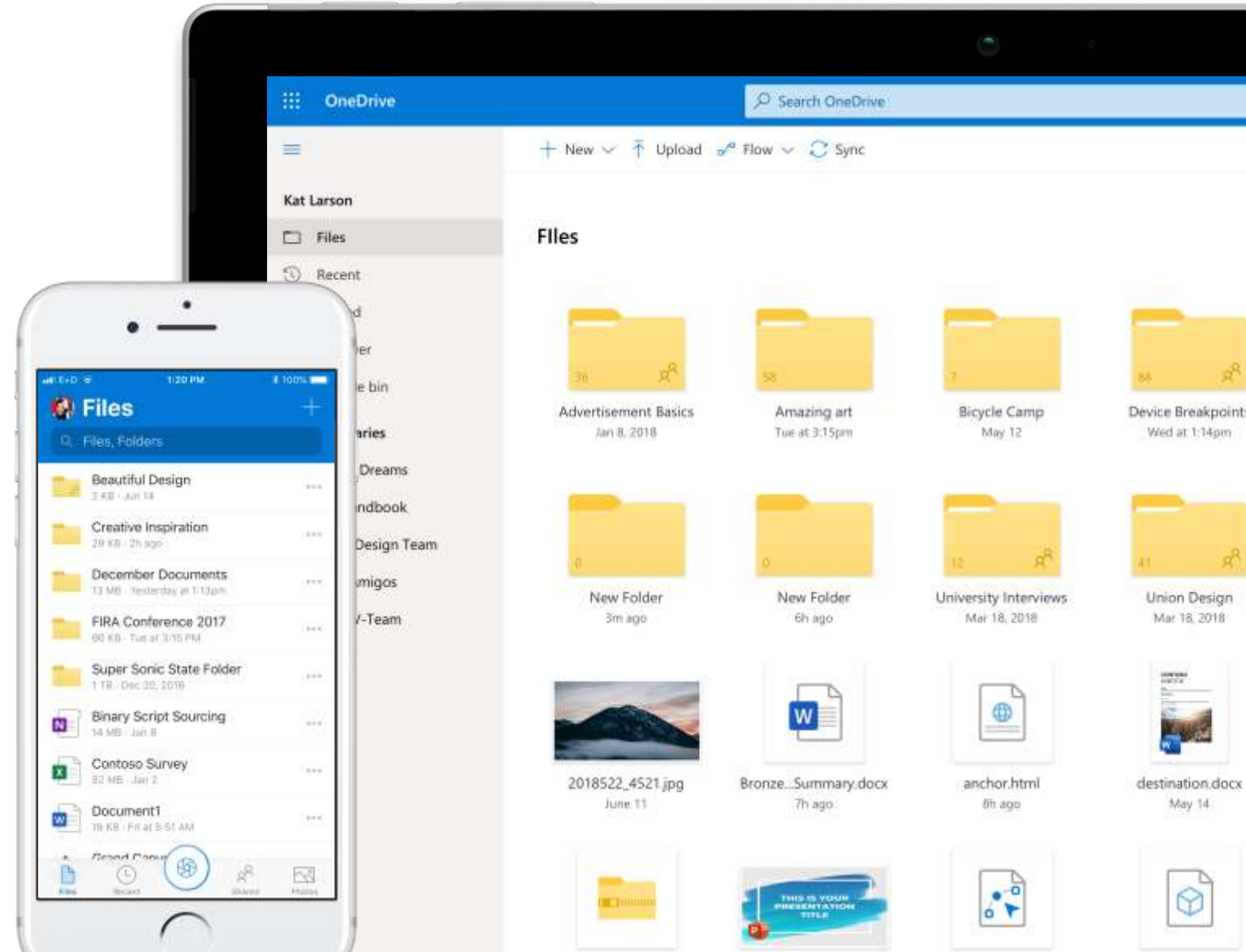
- Mobile apps (iOS and Android)

## Backup your photos

- Automatic on iOS and Android

## Protect files on your Windows PC

- Known Folder Move



# Work together with anyone in real-time



## Share inside and outside your organization

- Consistent share dialog across apps and services

## Securely share externally without a Microsoft account

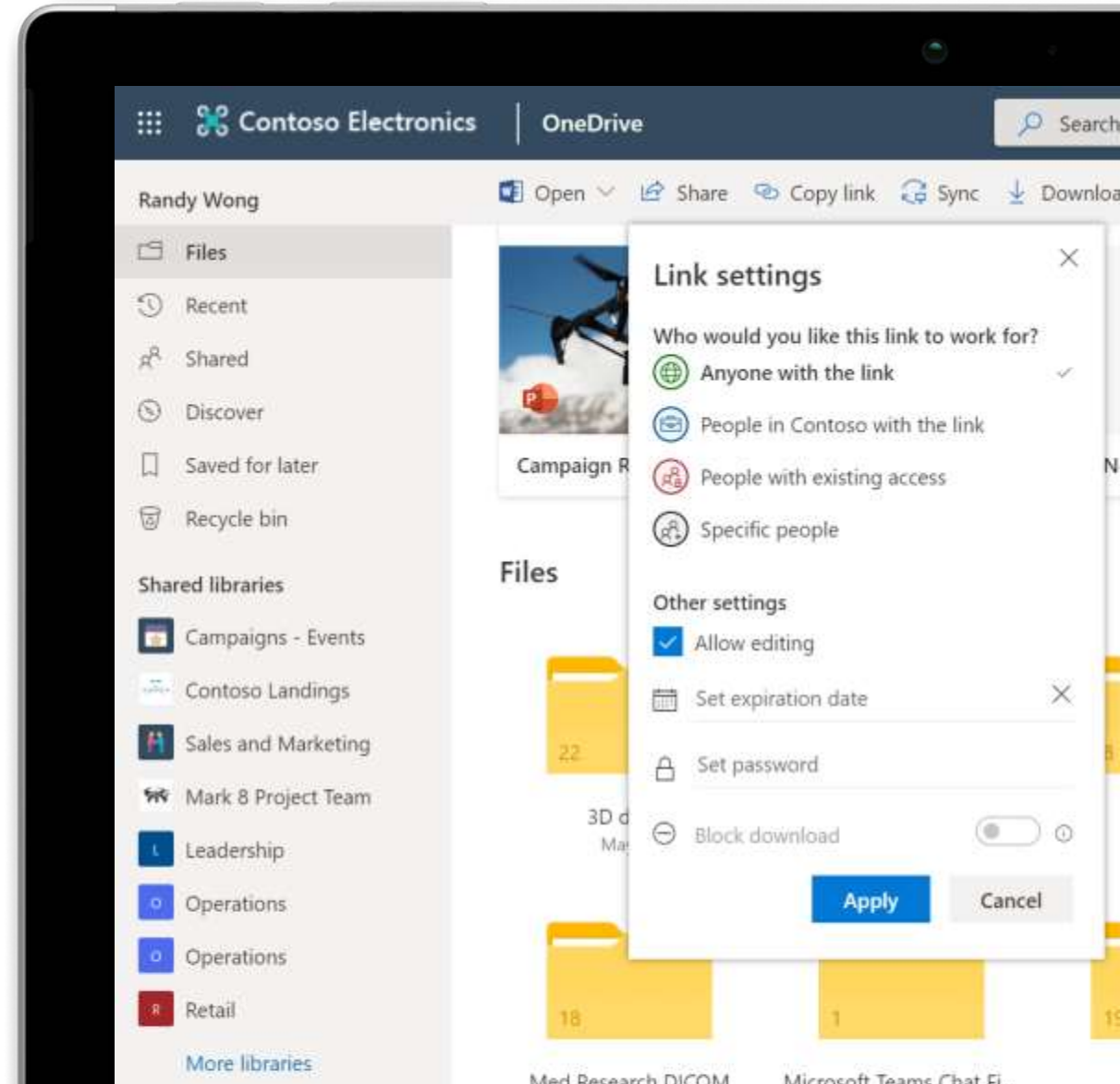
- Using one-time pass code

## Co-author documents in Office web apps, desktop clients, and mobile apps

- In real-time with multiple people

## Stay up-to-date with @mentions, activity, and notifications

- Across email, mobile, and desktop



# Organize and find files that matter most



## Intelligent file discovery

- Personalized recommendations and insights into what files are popular around you. Images are automatically tagged & indexed

## Get back to your recent and pinned files

- Web, mobile, and directly within Office

## Shared with and Shared by

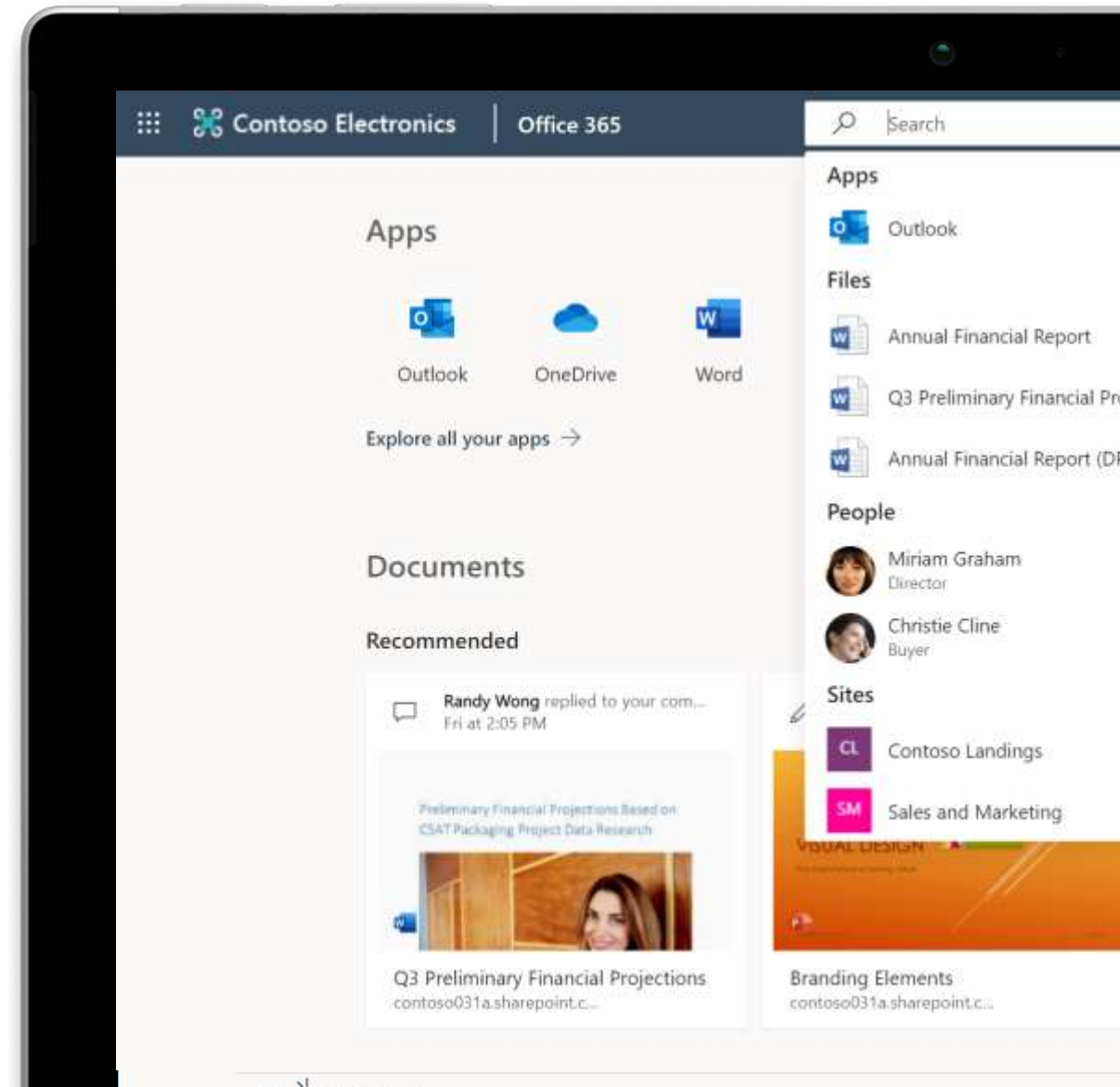
- Work with all shared files + “Popular around me”

## Organized libraries

- Custom metadata

## Automate document reviews

- Publishing approvals with Power Automate



# Share and work together on files throughout Microsoft 365

## OneDrive

Work with all your files



## Teams

Work with your team



## SharePoint

Work across your organization



Intelligent file experiences

Intelligent content services

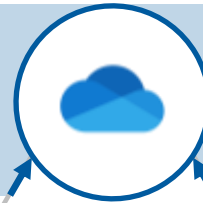
# Share and work together on files throughout Microsoft 365

## OneDrive

Work with **all your files**

Create, view & edit files on any device  
Scan documents, receipts and whiteboards

Organize and share your files  
Sync files to PC & Mac and work offline



Intelligent file experiences  
Intelligent content services

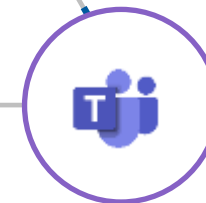
## SharePoint

Work across your organization



## Teams

Work with your team



# Share and work together on files throughout Microsoft 365

## OneDrive

Work with **all your files**



### Intelligent file experiences

View 320+ file types

Share and collaborate in real-time

Find files that matter to you

Streamline processes

### Intelligent content services

AI-powered content processing

Access controls and DLP

Records and retention management

MIP and intelligent encryption

## SharePoint

Work across **your organization**



## Teams

Work with **your team**



# OneDrive scenarios



## GENERAL

Easily and securely store and access your files from all your devices

Access files from all your devices

Work with anyone inside or outside your organization

Protect your work with enterprise grade security and compliance

Quickly find files that matter most



## FINANCE

To conducting analysis and sharing insights

Data gathering

Secure your reports

Access impactful analysis and provide actionable insights



## HUMAN RESOURCES

Recruit

Employee onboarding

Develop people and retain top talent

Streamline personnel planning and reporting



## MARKETING

Conduct and analyze research

Develop business and marketing plans

Create successful marketing projects

Review campaign performance



## SALES

You identify new customer

Modernize selling products

Generate better solutions, personalized sales experience

Analyze industry trends, optimize sales performance

# What else can OneDrive do?

Files restore to restore files to any point in the last 30 days

Recycle bin holds files for 93 days

Office 365 | OneDrive

## Restore my OneDrive

If something went wrong, you can restore your OneDrive to a previous time. Select a preset date or use the slider to find a date with unusual activity in the chart. Then select the changes that you want to undo.

Select a date

Custom date and time ▼ All changes after 9/18/2017 10:20:03 AM will be rolled back

Move the slider to quickly scroll the list to a day

29 28 27 26 25 24 23 22 21 20 19 18 17 16 15 14 13 12 11 10 9 8 7 6 5 4 3 2 0  
Days ago

Select a change in the list below to highlight it and all the changes before it. Then select the Restore button to undo all the highlighted changes.

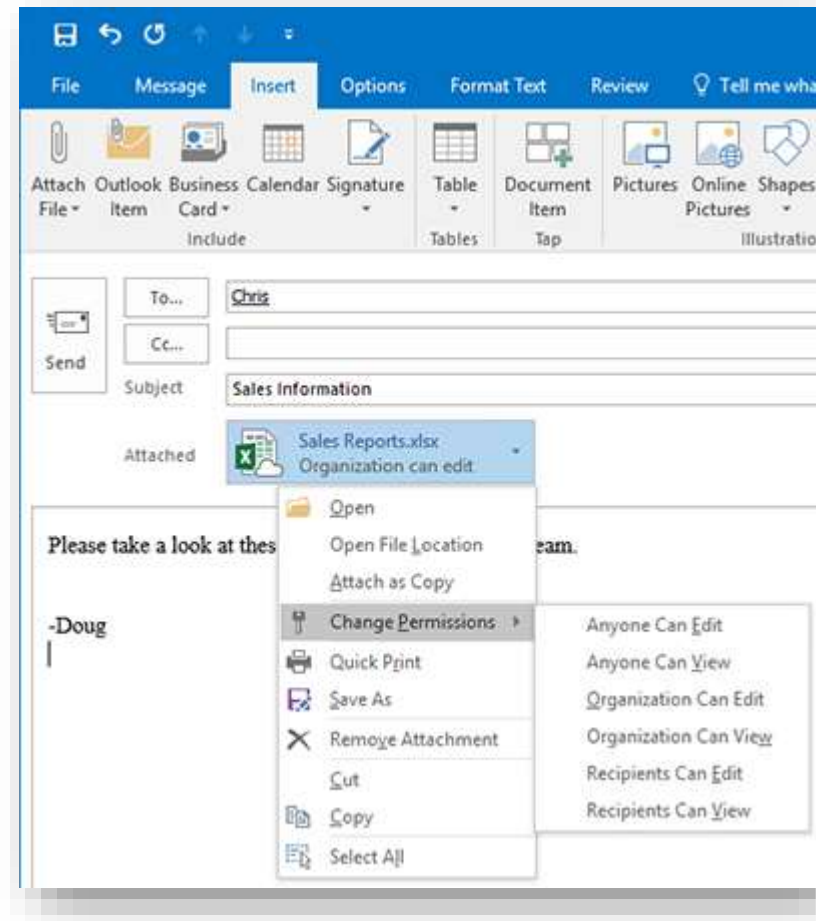
Change ↓	File name
<input checked="" type="checkbox"/> ^ 6 days ago - 9/18/2017 (12)	
<input checked="" type="checkbox"/> + Added by Kat Larson 11:19:03 AM	V3 Budget 2018
<input checked="" type="checkbox"/> ✎ Edited by Kat Larson 10:29:03 AM	Spring concepts models
<input checked="" type="checkbox"/> 🗑 Deleted by Kat Larson 10:20:03 AM	Personnel groups
<input checked="" type="checkbox"/> 📁 Moved by Kat Larson 10:19:03 AM	Beckett proposal
<input checked="" type="checkbox"/> ✎ Edited by Kat Larson 10:19:03 AM	Work on Personnel the Future of the Maltese Firm

**Restore** All changes after 9/18/2017 10:20:03 AM will be rolled back

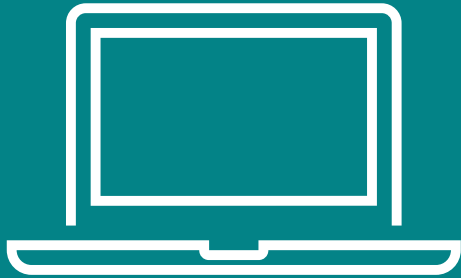
# What else can OneDrive do?

Modern attachments allow sharing of files links through Outlook vs attaching

Set default option in Outlook settings



# Demo



# Microsoft Teams

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# Chat-based workspace in Microsoft 365



## **Chat for today's teams**

Communicate in the moment and keep everyone in the know



## **A hub for teamwork**

Give your team quick access to information they need right in Microsoft 365



## **Customizable for each team**

Tailor your workspace to include content and capabilities your team needs every day.



## **Security teams trust**

Get the enterprise-level security and compliance features you expect from Microsoft 365.

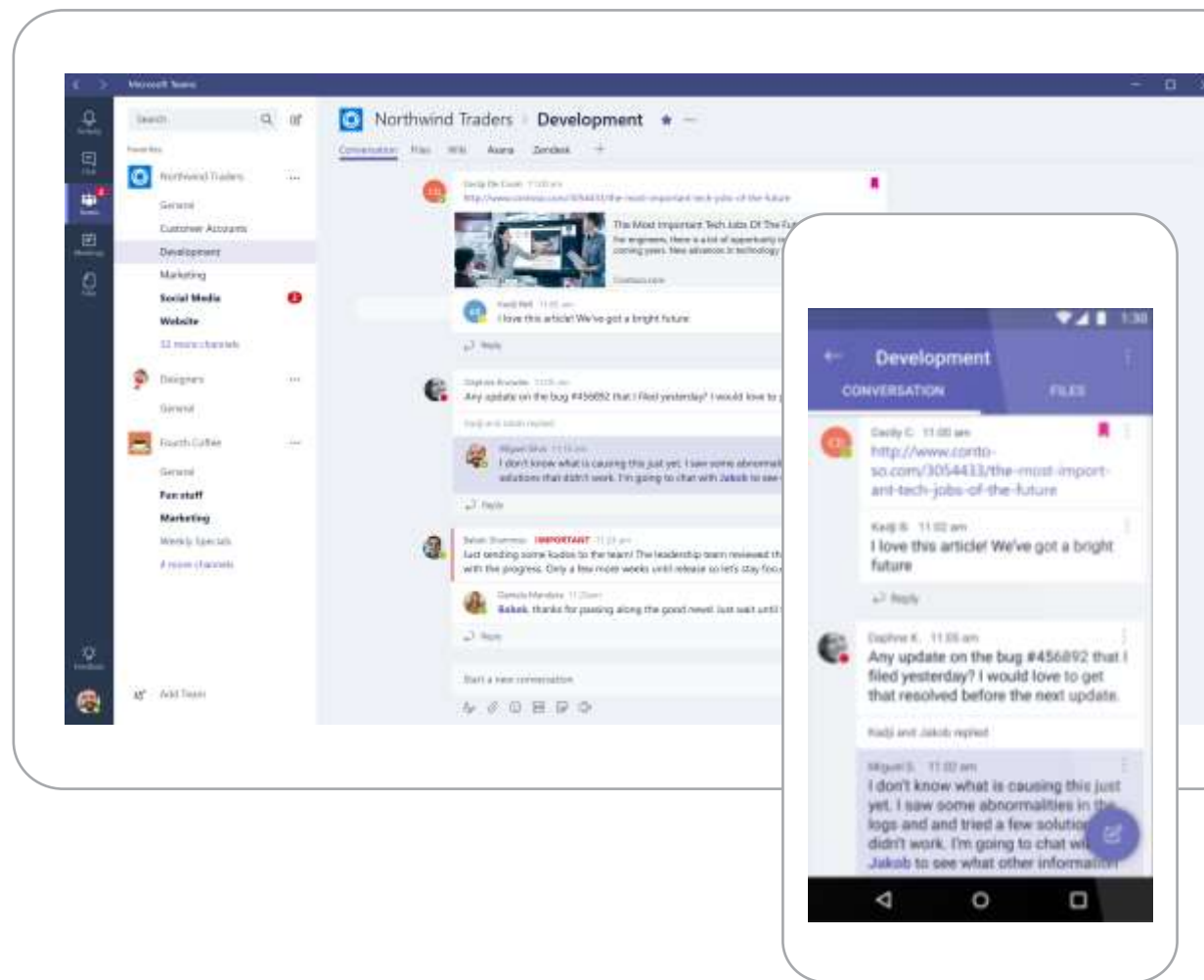
# Chat for today's teams

People can see content and chat history anytime

Team chats and activities are visible to the entire team

Use private chats for small group conversations

Mobile access on Android, iOS and Windows Phone



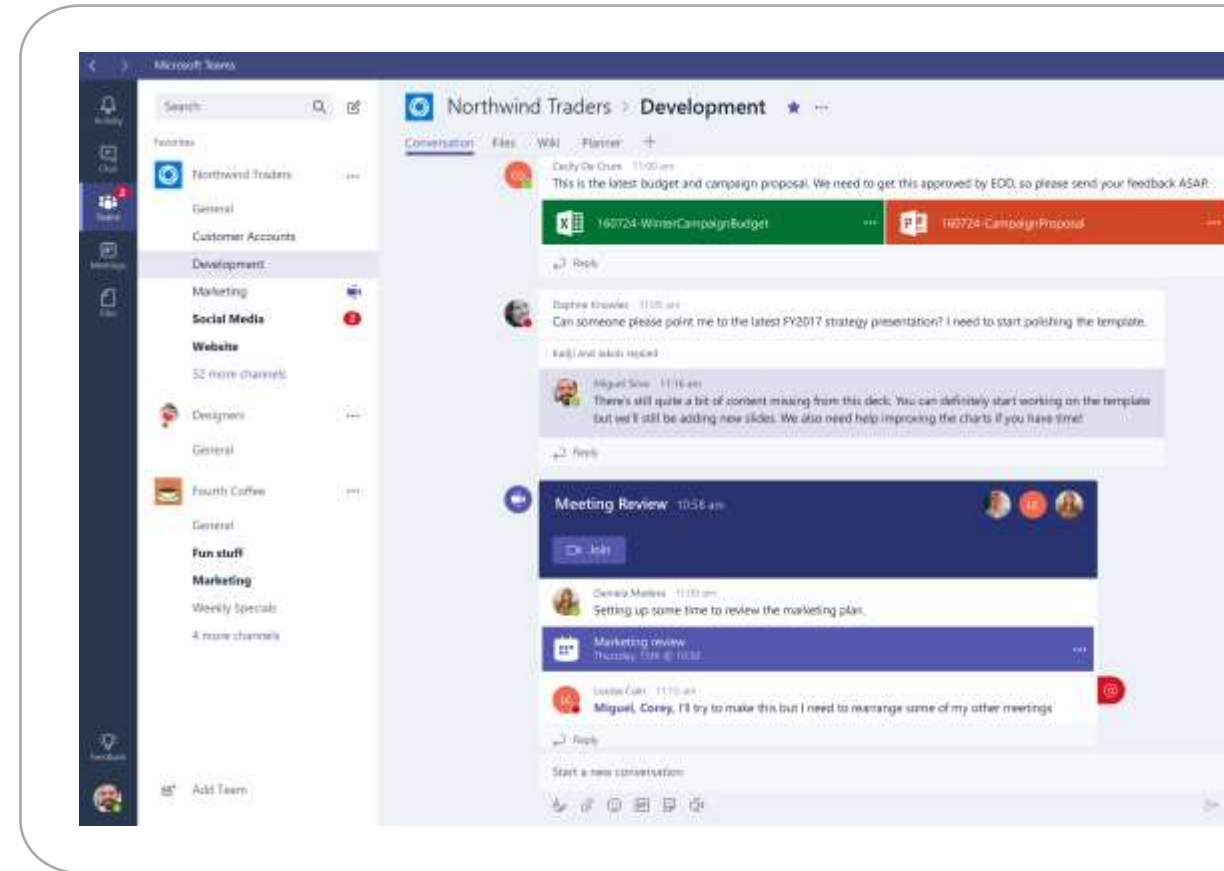
# A hub for teamwork

Chat, content, people, and tools live in a team workspace

Voice and video meetings right within Teams

Built-in access to SharePoint, OneNote and Planner

Work with Office and other documents right in the app



# Customizable for each team

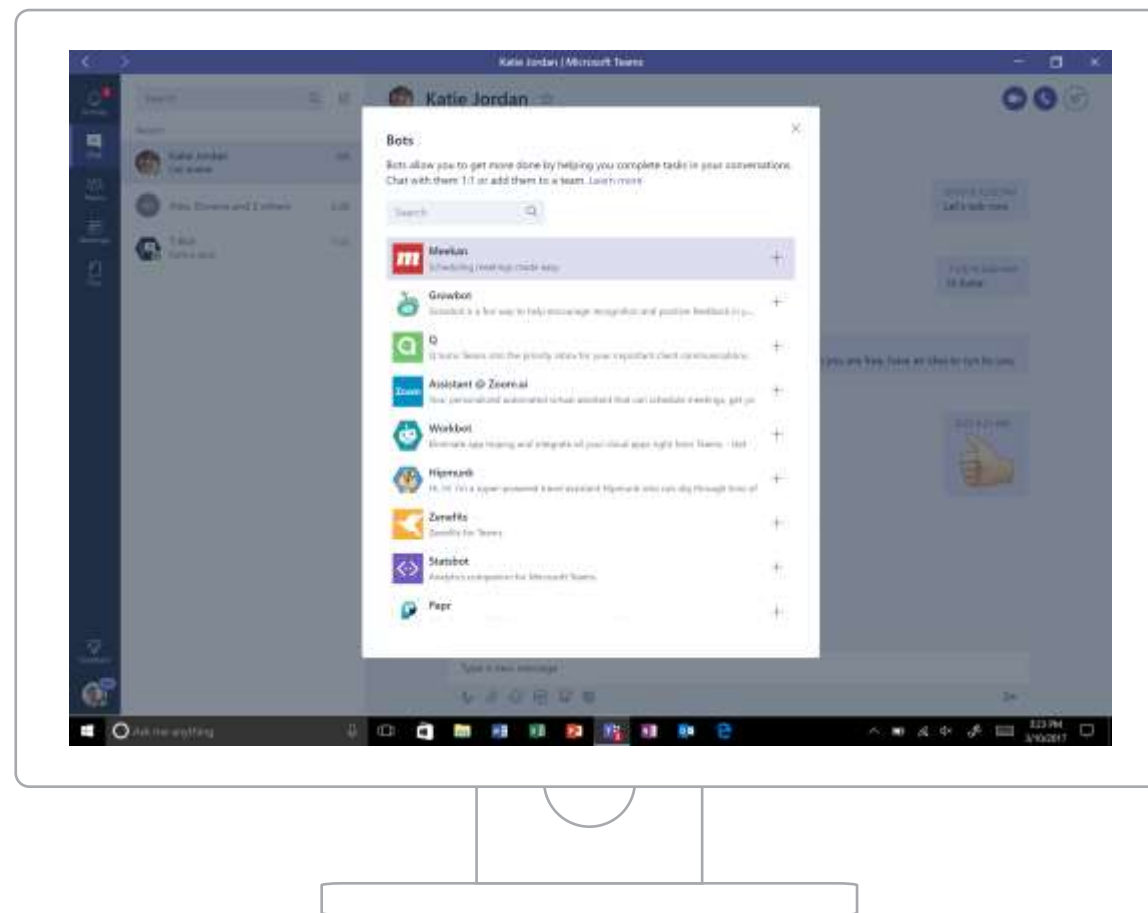
Create different channels for work streams and topics

Add tabs to frequently used files and cloud services

Get updates from the apps your team uses every day

Customize notifications so you don't miss important info

Build integrations with developer preview APIs



# Clients for Microsoft Teams



## Web

Full-functioned chat client that can be used from a variety of browsers.

Doesn't yet support conferencing.



## Desktop

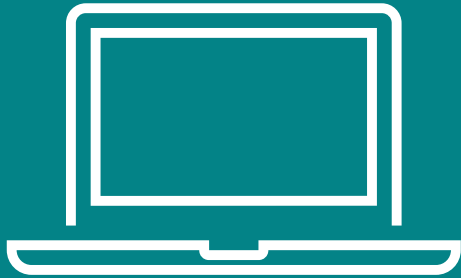
Provides support for audio, video, and content sharing for team meetings, group calling, and private one-on-one or private multi-party calls.



## Mobile

Geared at users participating in chat-based conversations while on the go , and currently allows users to have peer-to-peer audio call.

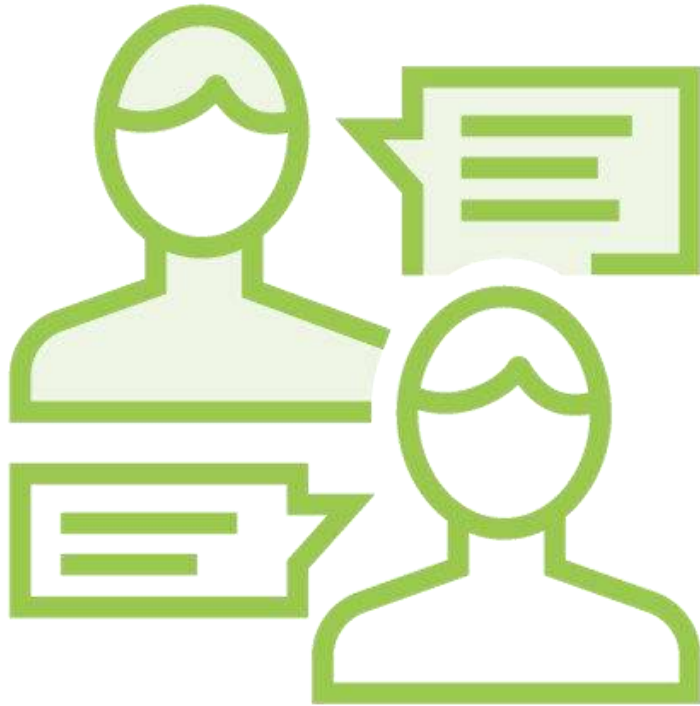
# Demo



# Introduction to Yammer

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# What Is Yammer



Enterprise social network

Allows users to collaborate with the whole company

Integrates with other Microsoft 365 services

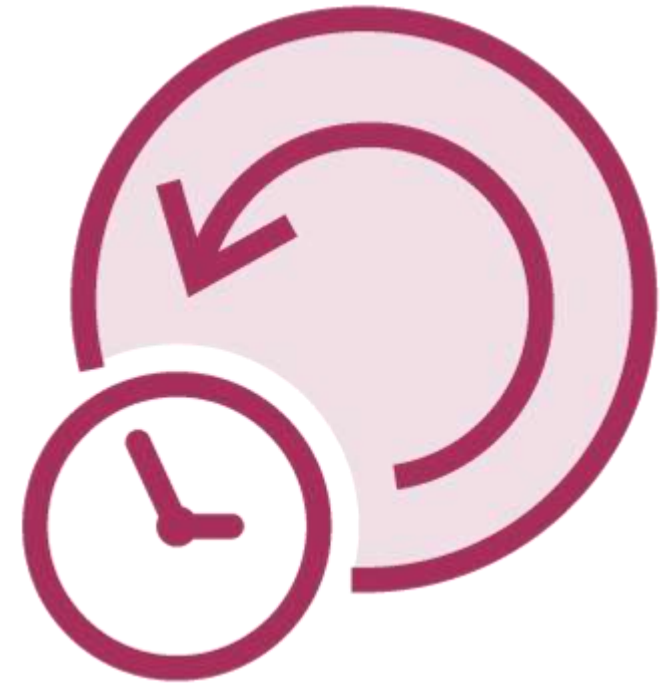
- SharePoint Online
- Teams
- Outlook

# A Bit of History

Yammer was built in 2008 for internal use by a company called Geni

- Split as an independent product afterwards

Acquired by Microsoft in 2012



# Yammer's Role in the Microsoft Stack



It took some time for Yammer to find its place & role

Before Yammer, social was done in SharePoint

Now we also have teams

Fastest adopted Microsoft product

# The New Yammer

In 2019/2020 Microsoft has massively invested in Yammer

- Full redesign
- Integration with other M365 services
  - Outlook / Teams / SharePoint
- Integration with compliance features
  - eDiscovery
- Every Yammer group is an Microsoft 365 group
  - All Yammer files hosted in SharePoint Online



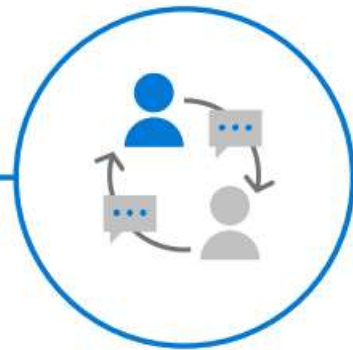


# The new Yammer

## Communities. Knowledge. Engagement.



Leadership engagement



Company-wide communication



Knowledge sharing



Employee experience

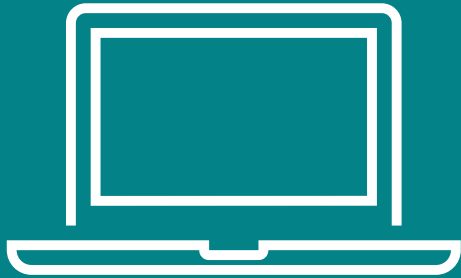
Open, inclusive, discoverable conversation

On web. On mobile. Across Microsoft 365.



Enterprise-grade security, privacy, and compliance

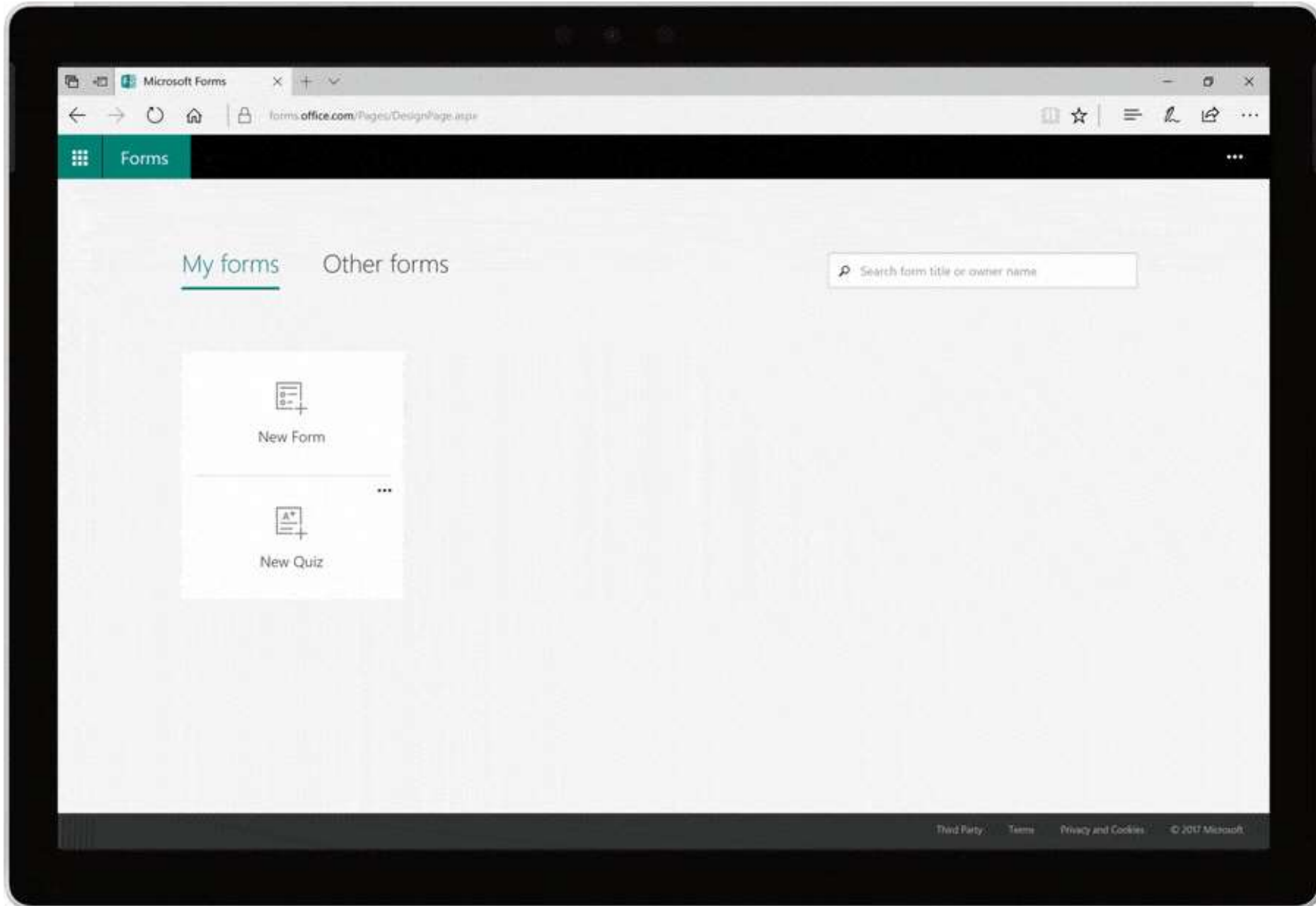
# Demo



# Microsoft Forms

---

# Collect information with surveys, quizzes and polls



# Simple, powerful analysis and Microsoft Excel integration

The screenshot shows the Microsoft Forms interface for a form titled "Contoso Annual Retreat". The top navigation bar includes "Forms", "Preview", "Theme", "Share", and a menu icon. The main content area is divided into "Questions" and "Responses" tabs, with the "Responses" tab selected. A summary card displays "5 Responses", "00:15 Average time to complete", and "Active Status". Below this, there are two buttons: "View results" and "Open in Excel". The first question, "1. Name and Department", has 5 responses and shows a "Latest Responses" list: "Keri, Sales", "Michelle, IT", and "Cece, HR". The second question, "2. Which weekend will work for you? (Select all that apply)", is visualized with a pie chart and a legend. The legend shows four options: "April 8 to 9" (3 responses), "April 15 to 16" (3 responses), "April 29 to 30" (2 responses), and "April 22 to 23" (1 response). The pie chart shows the distribution of these responses.

Forms Preview Theme Share

Questions Responses 5

Contoso Annual Retreat

5 Responses 00:15 Average time to complete Active Status

View results Open in Excel

1. Name and Department Details

5 Responses Latest Responses

- "Keri, Sales"
- "Michelle, IT"
- "Cece, HR"

2. Which weekend will work for you? (Select all that apply) Details

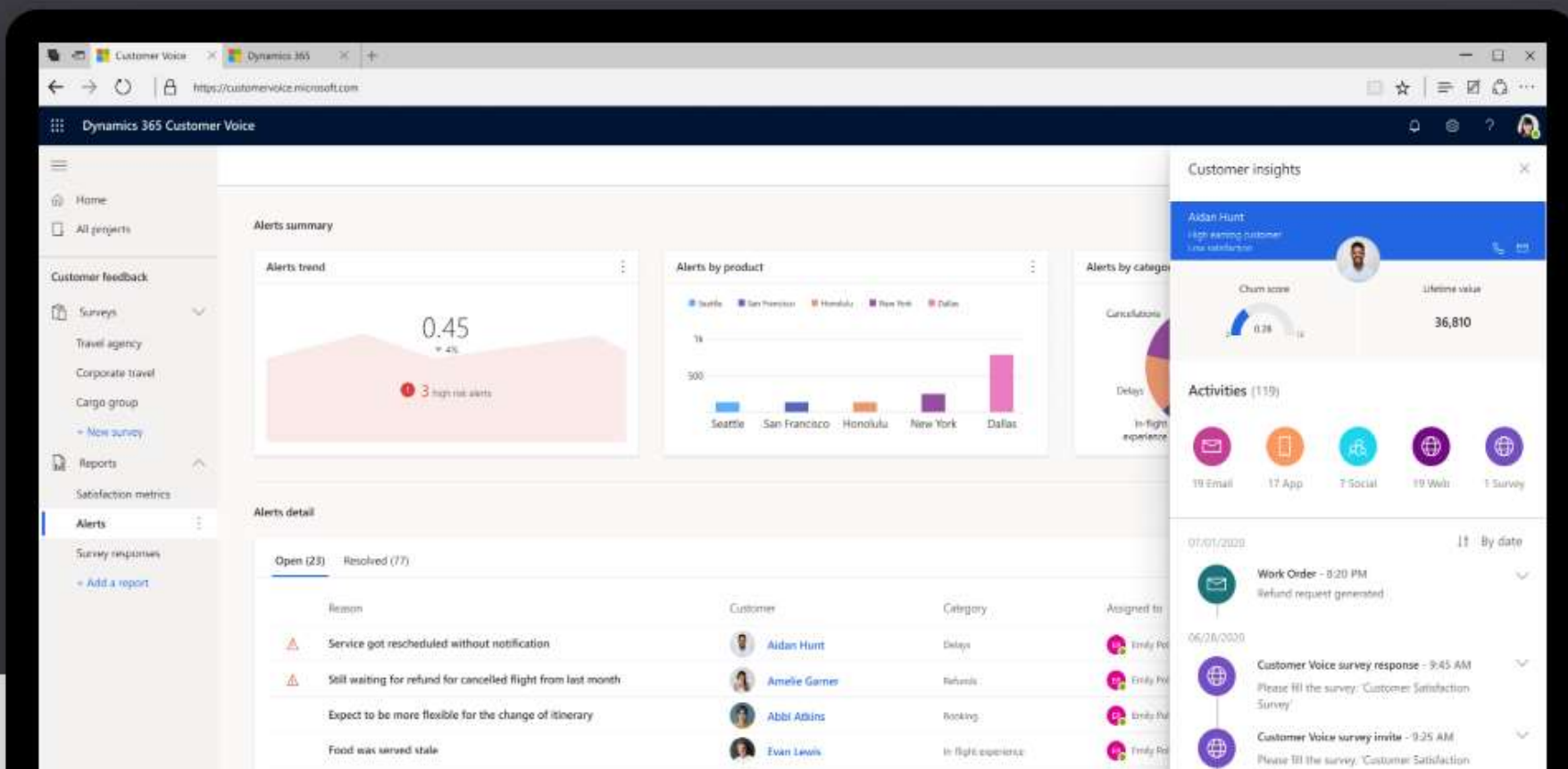
- April 8 to 9 3
- April 15 to 16 3
- April 29 to 30 2
- April 22 to 23 1

com

# Microsoft Forms Pro is now Microsoft Dynamics 365 Customer Voice

Dynamics 365 Customer Voice empowers you to capture and analyze feedback with advanced branding, AI-analysis, and data integration so you can foster meaningful customer relationships and make intelligent decisions across your organization.

[Explore Customer Voice >](#)



# Dynamics 365 Customer Voice Advantages

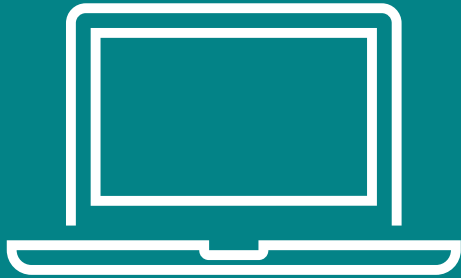
Enhanced Analytics

Personalization

Targeted and Dynamic Question  
Builder

Advanced Sharing Options

# Demo



# Planner, To Do, and Project

---



# Planner: work management for all



Natural, organized experience  
Build plans in minutes and organize tasks the way you want in a familiar Office environment



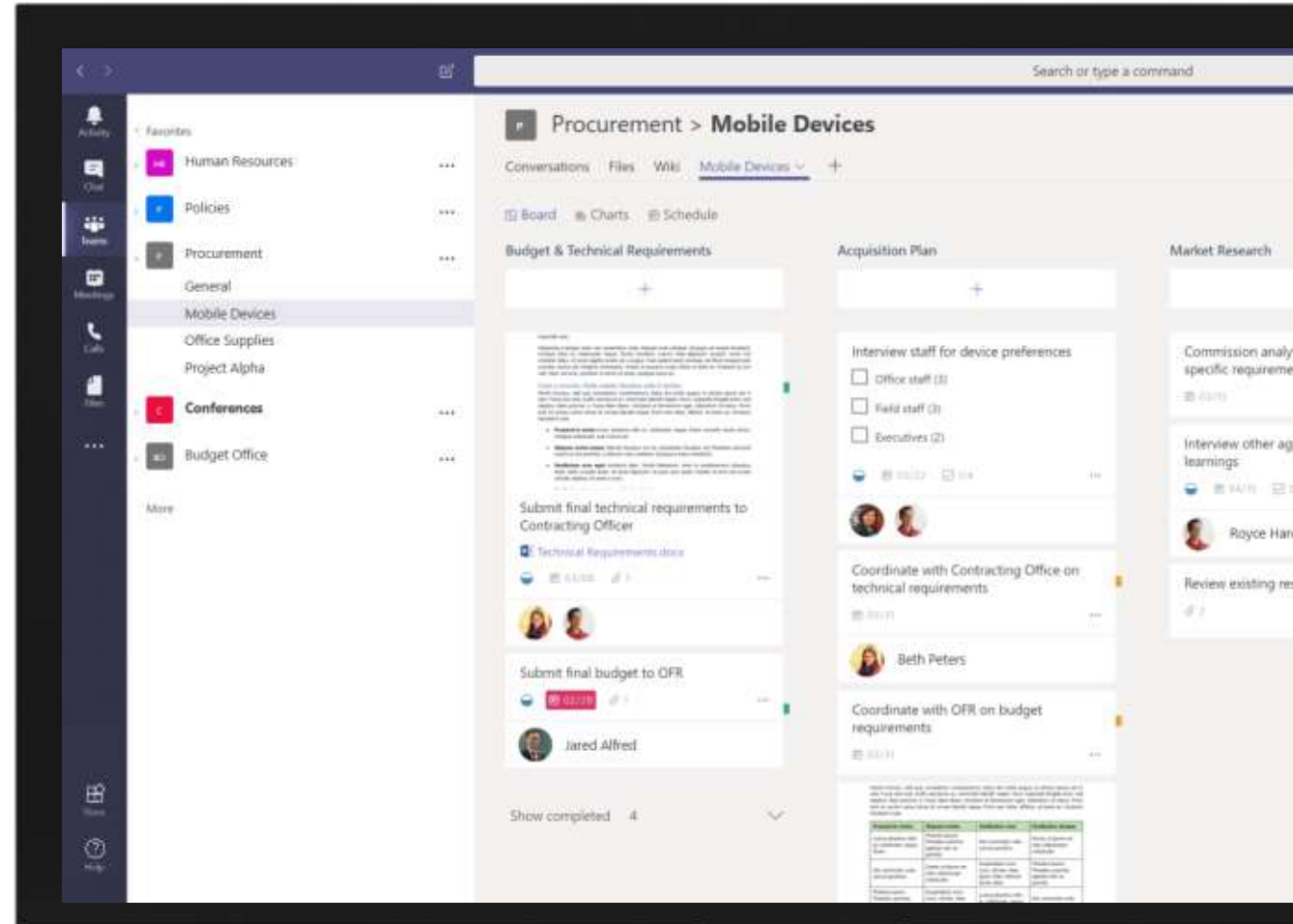
Familiar, collaborative teaming  
Manage your plan in Teams and access relevant assets through robust task cards



Fast, visual insights  
See your plan's visualized status, down to who's assigned to what task, in a single click



Microsoft 365 parity platform  
Get all the same security, compliance, scalability, and performance benefits as other Microsoft 365 solutions





# To Do: all your to-dos in one place



## Plan and manage your day

Be more intentional about what you want to get done with the My Day list



## Focus on what's most important

See your most important tasks with Suggestions to prioritize your day



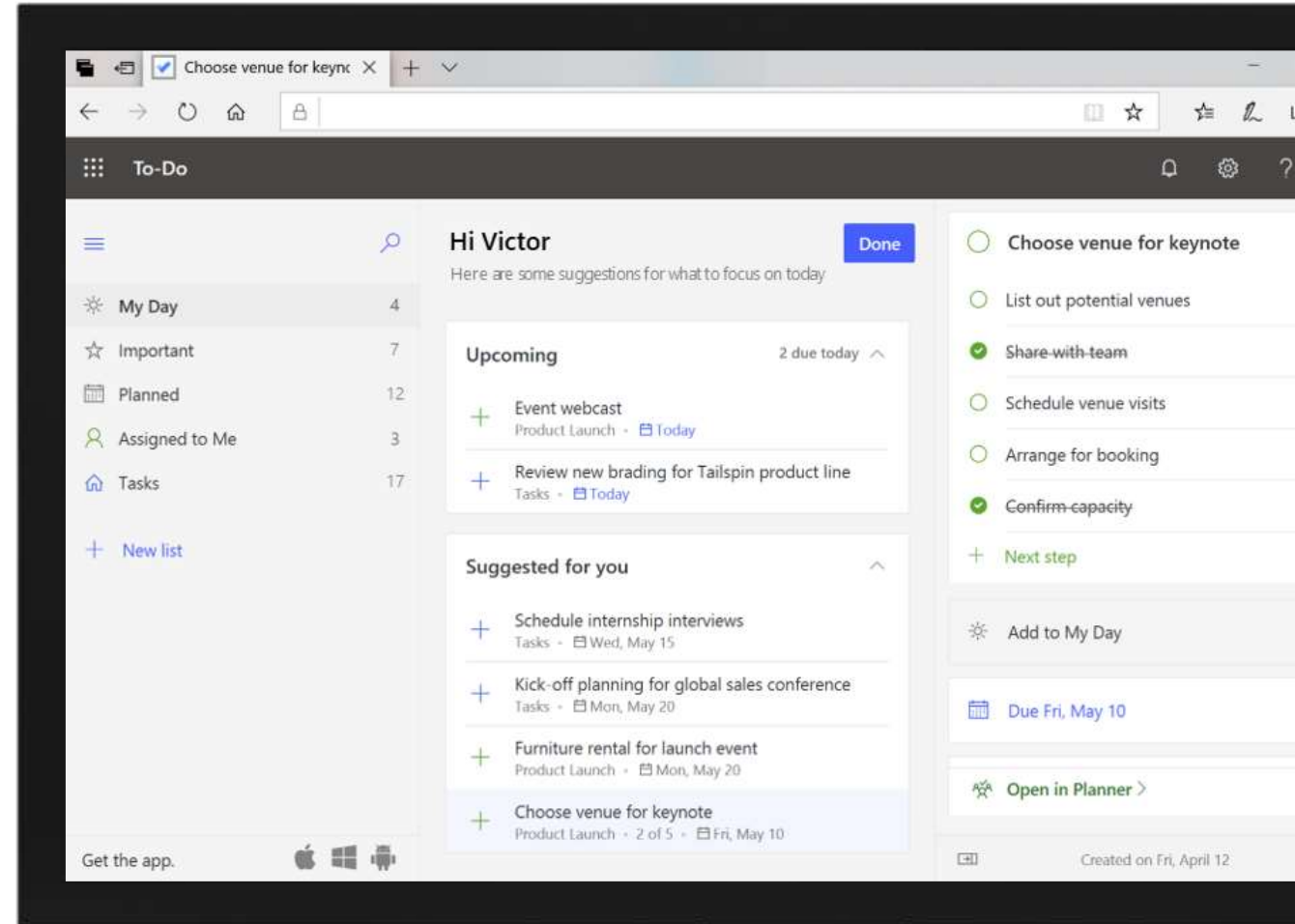
## Never miss a beat

Keep track of deadlines by adding reminders, due dates, and notes to your to-dos



## Get more done, together

Share lists with colleagues to collaborate on projects and get things done faster





# Project: work the way you want, get the results you need



## Fresh new experience

Start fast and use a variety of approaches and familiar Office tools to get more done



## Collaboration made easy

Encourage all team members to work on tasks simultaneously; plus, use Project in Teams



## Intelligent planning

Automate resource management and scheduling and get real-time budget analysis



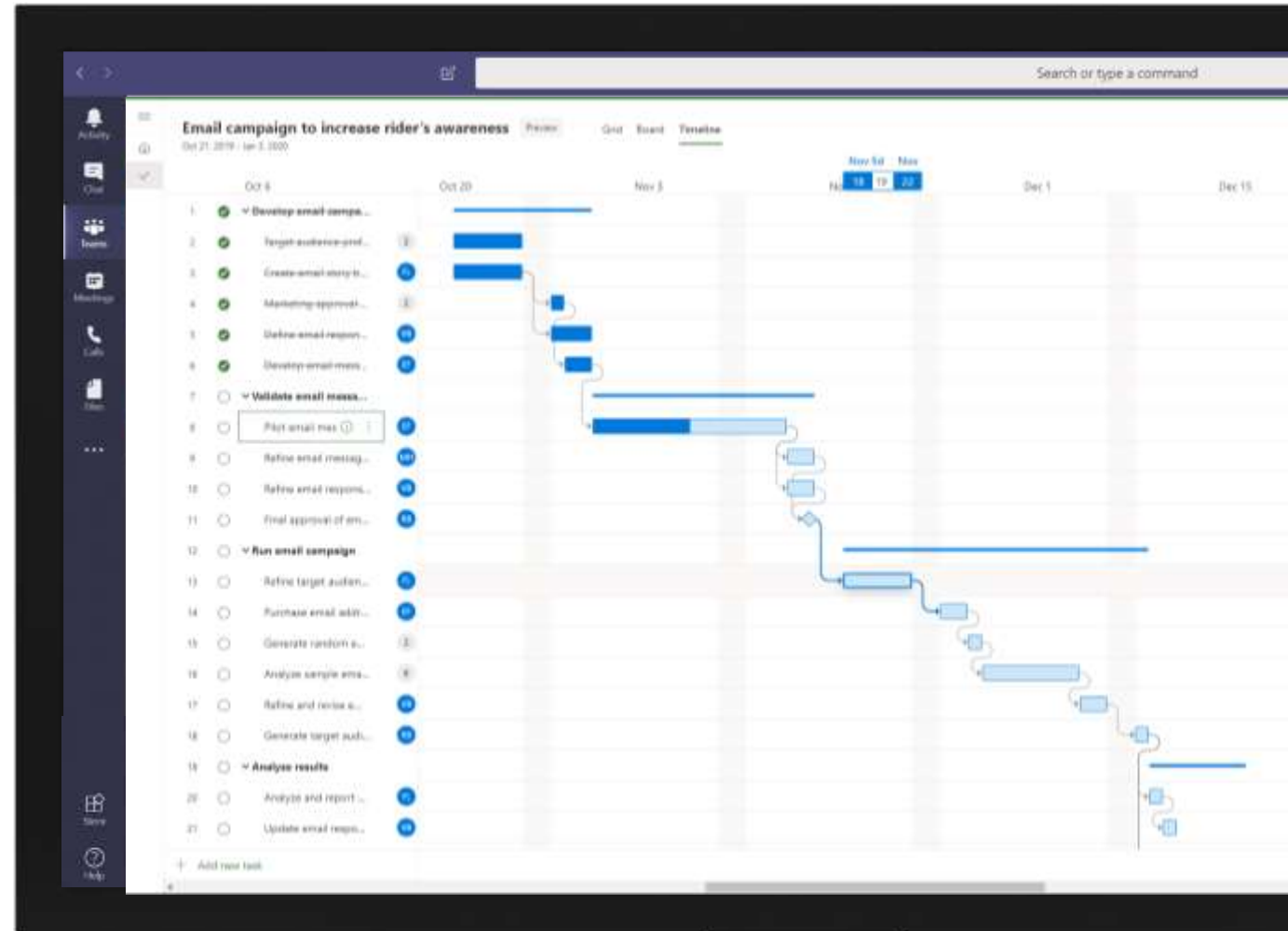
## AI-powered insights

Use Power BI and powerful AI models to surface insights on all aspects of your project



## Innovation platform

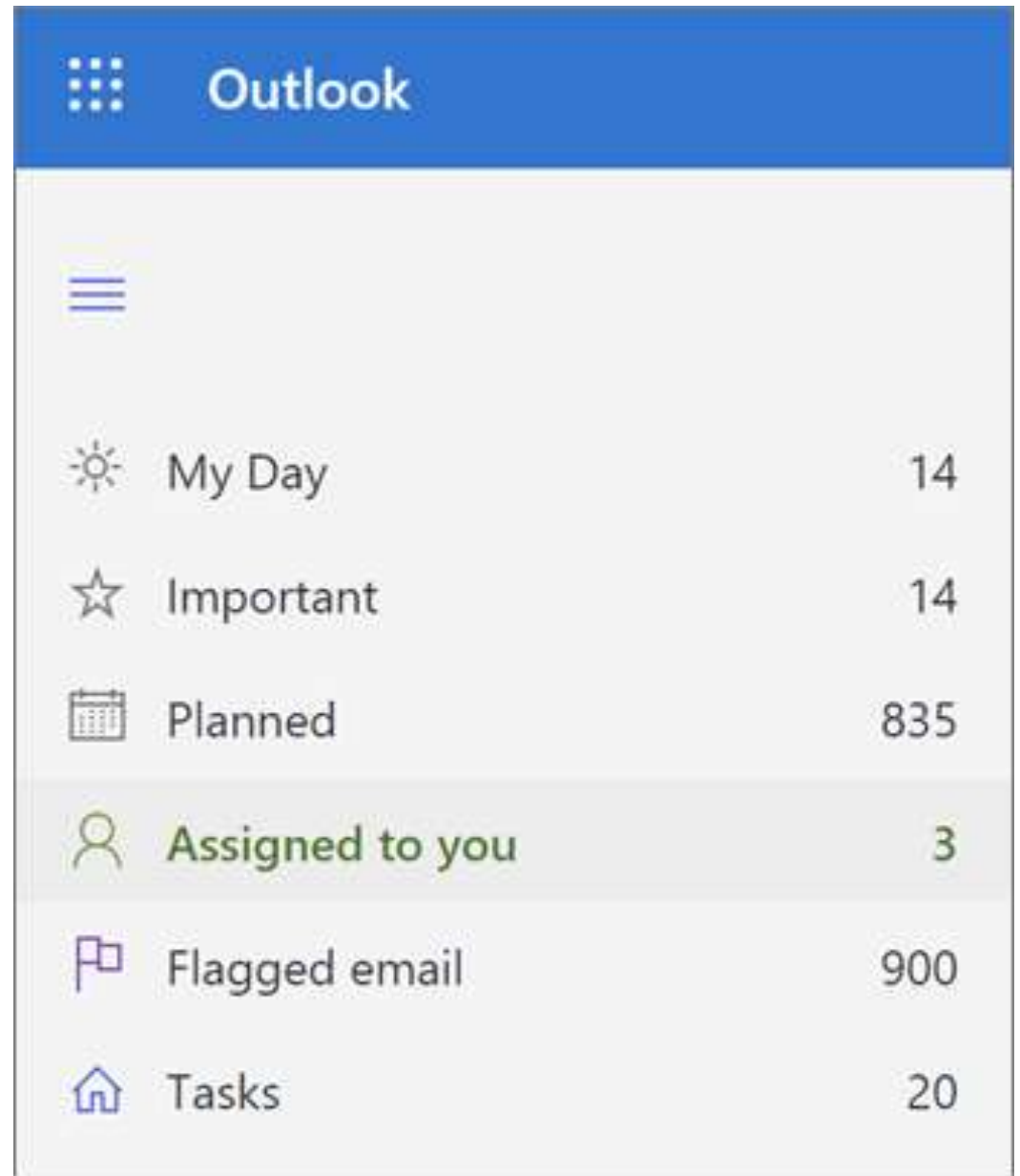
Build custom apps (PowerApps), automate workflows (Flow), and work confidently on the Microsoft Power Platform



# Planner & To Do Together

Planner tasks in To Do

Microsoft Teams Tasks App



The screenshot shows the Outlook 'To Do' list interface. At the top, there is a blue header with the Outlook logo and the word 'Outlook'. Below the header is a list of task categories, each with an icon, a label, and a count. The categories are: 'My Day' (14), 'Important' (14), 'Planned' (835), 'Assigned to you' (3), 'Flagged email' (900), and 'Tasks' (20). The 'Assigned to you' category is highlighted with a light green background.

Category	Count
My Day	14
Important	14
Planned	835
Assigned to you	3
Flagged email	900
Tasks	20

# WHEN TO USE



HOW DO I GET THEM?

- PLANNER** is available:
- in the Tasks app
  - as a tab in Teams (Tasks app)
  - on the web
  - on mobile
- LISTS** is available:
- as a tab in Teams
  - on the web
  - on mobile
- PROJECT** is available:
- as a tab in Teams
  - on the web

WHERE CAN I LEARN MORE?

- Websites**
- aka.ms/**PLANNER**
  - aka.ms/**LISTSWEB**
  - aka.ms/**MICROSOFTPROJECT**
- Support sites**
- aka.ms/**PLANNERHELP**
  - aka.ms/**LISTSTRAINING**
  - support.microsoft.com/**PROJECT**
- Demos**
- aka.ms/**PLANNERDEMO**
  - aka.ms/**MICROSOFTLISTS**

HOW SHOULD I USE IT?

WHAT'S IT BEST FOR?

HOW'S IT DIFFERENT?

**PLANNER** task management

Organize your team's tasks into a visual Kanban board. Each task is presented as an information-rich card that contains preset but optional attributes, like labels and checklists.

For visually managing simple, task-based efforts, regardless of team size.

- Organizing your team around a set of tasks
- Keeping all the information you need about a task, like working docs and team input, in the task card itself so it's easy to find
- Getting visual, automatic status updates about your tasks

- What distinguishes **PLANNER** from ...**LISTS** and **PROJECT**:
- Built-in visual charts that provide basic status information
  - Limited customizations, making it easier to start using fast
- ...**LISTS**:
- Kanban board view for organizing your tasks
  - Formal task assignments
- ...**PROJECT**:
- More optional task attributes, like labels and checklists
  - Dedicated mobile app

**LISTS** information tracking

Present your information as items in a simple but intelligent list. Each list can have hundreds of line items, and each line item can be customized to hold the files and information you need.

To track large, ongoing work efforts that comprise lots of information as individual items. Also, when there's a shared responsibility for the work.

- Compiling lists of actionable, data-rich information items
- Keeping everyone in sync, informed, and on track with notifications and built-in rules
- Organizing and customizing information to meet different work needs

- What distinguishes **LISTS** from ...**PLANNER** and **PROJECT**:
- Lots of customization options, like templates, views, and colors
  - Robust sorting and formatting to prioritize information
  - Ready-made templates for real-life scenarios, like asset tracking and recruitment tracker
  - Linked lists to auto-populate information
- ...**PLANNER**:
- Visible list items, even when they're completed

**PROJECT** work management

Get powerful work management using simple tools. Tasks can be managed in multiple views, while dynamic scheduling optimizes your plan when you change task attributes.

For managing more complex work efforts that require dynamic scheduling, sub-tasks, and/or dependent tasks, regardless of team size.

- Managing work efforts that require nuanced planning through added duration, effort, customizations, and extensibility
- Working in a tool designed for project management
- Getting detailed insights on the status of your tasks and plans

- What distinguishes **PROJECT** from ...**PLANNER** and **LISTS**:
- Timeline (Gantt chart) view
  - Dynamic scheduling engine that optimizes your work plan to reduce repetition, manual work
  - Sub-tasks and dependent tasks to capture duration and effort
  - Cross-project status in Roadmap
  - Detailed, premade reports through Power BI
  - Built on Power Platform, enabling extensibility with other platform apps and data
- ...**PLANNER**:
- Custom fields

<http://D-G.me/4nh7>

# WHEN TO USE

**MICROSOFT To Do**

**MICROSOFT PLANNER**

**TASKS APP**  
IN MICROSOFT TEAMS

for managing tasks

HOW DO I GET THEM?	<p><b>To Do</b> is available:</p> <ul style="list-style-type: none"> <li>in the Tasks app</li> <li>on the web</li> <li>on mobile</li> </ul> <p><b>PLANNER</b> is available:</p> <ul style="list-style-type: none"> <li>in the Tasks app</li> <li>as a tab in Teams (Tasks app)</li> <li>on the web</li> <li>on mobile</li> </ul> <p><b>TASKS APP</b> is available:</p> <ul style="list-style-type: none"> <li>in Teams (desktop/web)</li> <li>In Teams (mobile)</li> </ul>
	<p><b>Websites</b></p> <ul style="list-style-type: none"> <li>aka.ms/<a href="#">MICROSOFTTODO</a></li> <li>aka.ms/<a href="#">PLANNER</a></li> <li>aka.ms/<a href="#">TASKS</a></li> </ul> <p><b>Support sites</b></p> <ul style="list-style-type: none"> <li>aka.ms/<a href="#">TODOHELP</a></li> <li>aka.ms/<a href="#">PLANNERHELP</a></li> <li>aka.ms/<a href="#">TASKSAPP</a></li> </ul> <p><b>Demos</b></p> <ul style="list-style-type: none"> <li>aka.ms/<a href="#">PLANNERDEMO</a></li> </ul>

HOW SHOULD I USE IT?
WHAT'S IT BEST FOR?
HOW'S IT DIFFERENT?

To Do	individual tasks only
	<p>Prioritize your individual tasks in a just-the-basics app. Check your My Day list for what to focus on today and get smart suggestions for tasks from other lists and apps.</p>
HOW SHOULD I USE IT?	<p>To prioritize your individual tasks. To Do automatically recommends what you should focus on and sorts those tasks into the dedicated My Day list each night.</p>
WHAT'S IT BEST FOR?	<ul style="list-style-type: none"> <li>Getting automated suggestions to focus on what matters most</li> <li>Coordinating tasks in the context of your emails and calendar</li> <li>Focusing on your individual tasks without the distraction of larger team efforts</li> </ul>
HOW'S IT DIFFERENT?	<p>What distinguishes <b>To Do</b> from ...<b>PLANNER</b> and <b>TASKS APP</b>:</p> <ul style="list-style-type: none"> <li>Curated My Day list of tasks that are due soon, plus smart suggestions of tasks to add</li> <li>Seamless integration with Outlook for the web email and calendar, plus a My Day pane</li> <li>Separate list of tasks generated from flagged Outlook emails</li> <li>Scheduled task reminders and repeatable tasks</li> </ul> <p>...<b>TASKS APP</b>:</p> <ul style="list-style-type: none"> <li>Custom lists to organize your tasks by specific categories</li> <li>More task filtering options</li> </ul>

PLANNER	team tasks only
	<p>Manage task-based team efforts on a modern, highly aesthetic Kanban board. Enable your entire team to see their tasks in the context of the full plan and monitor progress to stay on track.</p>
HOW SHOULD I USE IT?	<p>To organize your team around a set of tasks for delivering a larger initiative. Planner keeps everyone up-to-date and encourages the team to help one another.</p>
WHAT'S IT BEST FOR?	<ul style="list-style-type: none"> <li>Adding structure to task-based teamwork</li> <li>Monitoring your team's progress with colorful visual cues and built-in status reporting</li> <li>Helping others on your team understand the full effort</li> </ul>
HOW'S IT DIFFERENT?	<p>What distinguishes <b>PLANNER</b> from ...<b>To Do</b>:</p> <ul style="list-style-type: none"> <li>Your tasks alongside the rest of your team's tasks</li> <li>Automated, built-in charts for basic status information</li> <li>More task customization options (e.g., labels, comments)</li> </ul> <p>...<b>TASKS APP</b>:</p> <ul style="list-style-type: none"> <li>Plans sorted under Favorites, Recent, and Recommended</li> <li>Ability to add new plan members directly</li> <li>Copy and export plan</li> </ul>

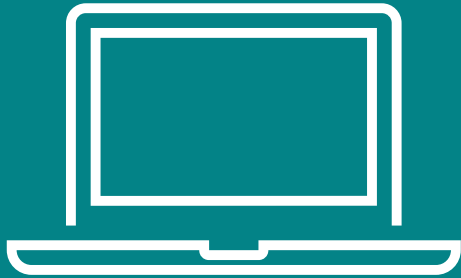
TASKS APP	all your tasks
	<p>Manage all your individual tasks from To Do and team tasks from Planner in Teams. Experience the same basic functionality of both apps without constantly toggling between solutions.</p>
HOW SHOULD I USE IT?	<p>To bring all your To Do and Planner tasks alongside your Teams chats, meetings and files; also, to push tasks from HQ to frontline locations.</p>
WHAT'S IT BEST FOR?	<ul style="list-style-type: none"> <li>Seeing all your To Do and Planner tasks together in one place</li> <li>Quickly communicating about tasks with your colleagues in the same app</li> <li>Managing frontline tasks from corporate</li> </ul>
HOW'S IT DIFFERENT?	<p>What distinguishes <b>TASKS APP</b> from ...<b>To Do</b> and <b>PLANNER</b>:</p> <ul style="list-style-type: none"> <li>Access to all your Teams chats, files, etc., in the same app</li> <li>Task publishing to push tasks from HQ to frontline locations</li> </ul> <p>...<b>To Do</b>:</p> <ul style="list-style-type: none"> <li>Task priorities</li> <li>Filtering for completed tasks</li> </ul> <p>...<b>PLANNER</b>:</p> <ul style="list-style-type: none"> <li>List view in addition to Board, Charts, and Schedule views</li> <li>Bulk editing in the List view</li> </ul>

If you're torn between Planner and the Tasks app, use the Tasks app.

Besides small feature and aesthetic differences, the apps are similar.

<http://D-G.me/5im5>

# Demo



# Introduction to Microsoft Stream

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# Microsoft Stream



Enterprise video service

Users can upload/view/share videos

- Recording of classes
- Meetings
- Presentations
- Training sessions
- Etc

# Microsoft Stream Continued

Users can comment on videos

Videos are automatically transcribed to make audio searchable

Facial detection in timeline

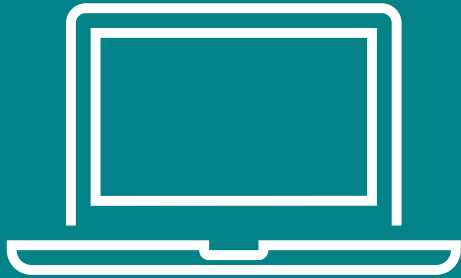
Integrates with other Microsoft 365 apps

- SharePoint
- Teams
- Etc

Also available on iOS and Android



# Demo





# Track what matters most with Microsoft Lists



## Simple

Easily create, share, and track lists with anyone, on any device



## Smart

Keep everyone in sync with rules and quick edits



## Flexible

Customize your lists for whatever your business needs





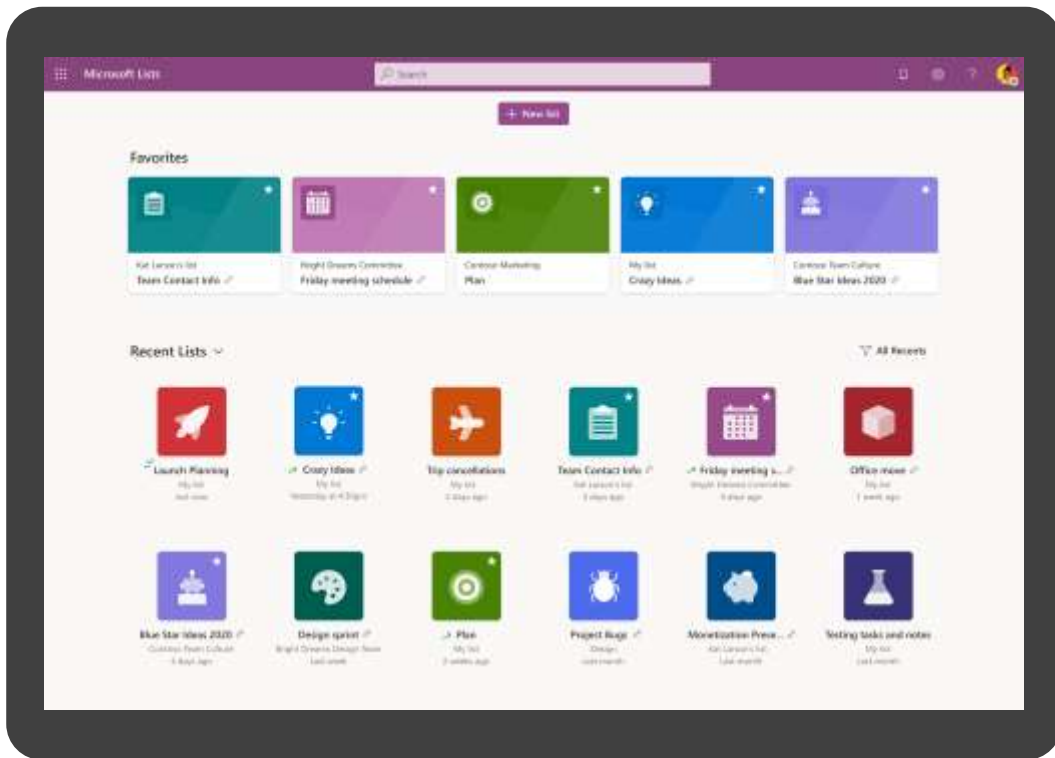
# Simple

Easily create, share, and track lists  
with anyone, on any device

Smart

Flexible

# Create a new list and share it with colleagues



- Start from anywhere:
  - Lists app
  - Import a data table from Excel
  - Lists app in Teams
  - SharePoint
- Track issues, assets, activities and more
- Configure and refine with:
  - Filters and views
  - Color formatting
  - Ready-made templates

# Jumpstart your new list using ready-made templates

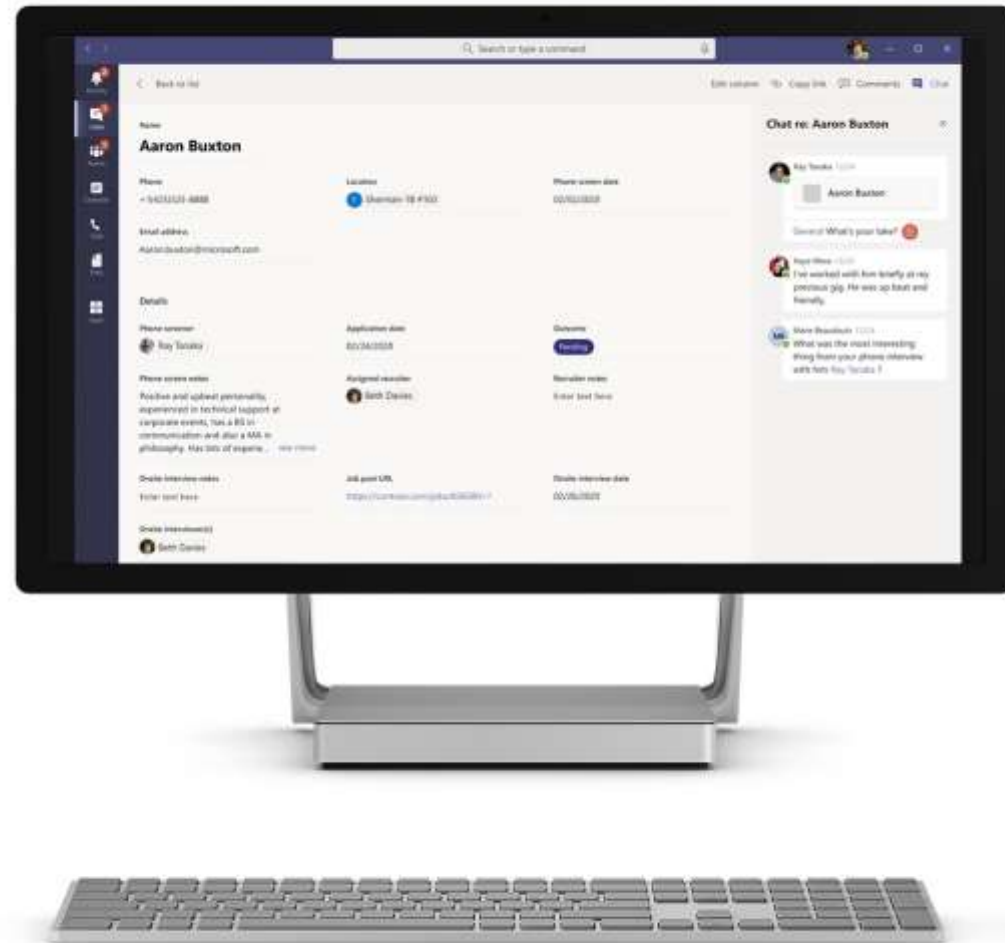
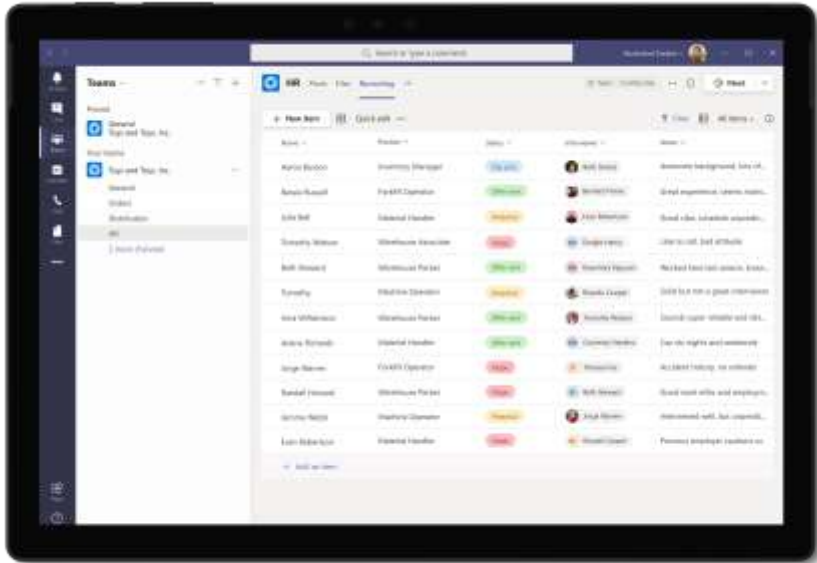


## Start with a ready-made template

- Issue tracker
- Employee onboarding
- Event itinerary
- Asset manager
- Recruitment tracker
- Travel requests
- Work progress tracker
- Content scheduler

- Issue tracker: bring issues to a close by setting priorities and sending notifications
- Event itinerary: organize event details in one place and show as a calendar view
- Asset manager: track physical assets' location, status, users, etc.

# Start and use a list from within in Microsoft Teams



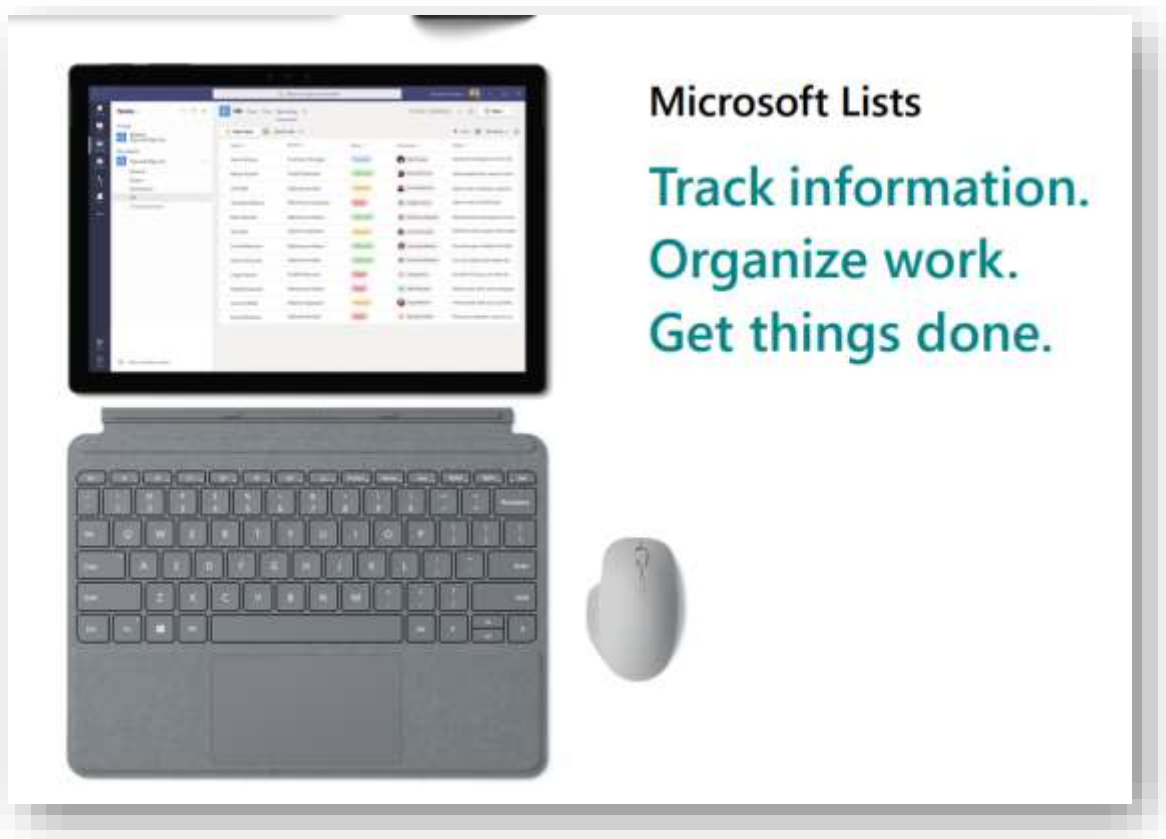
- Create new or bring in existing
- Start from a ready-made template
- Chat, @mention, and collaborate
- Share individual list items

Demo:  
Lists home & create new

Microsoft Teams  Microsoft Lists



# Microsoft Lists Look Book

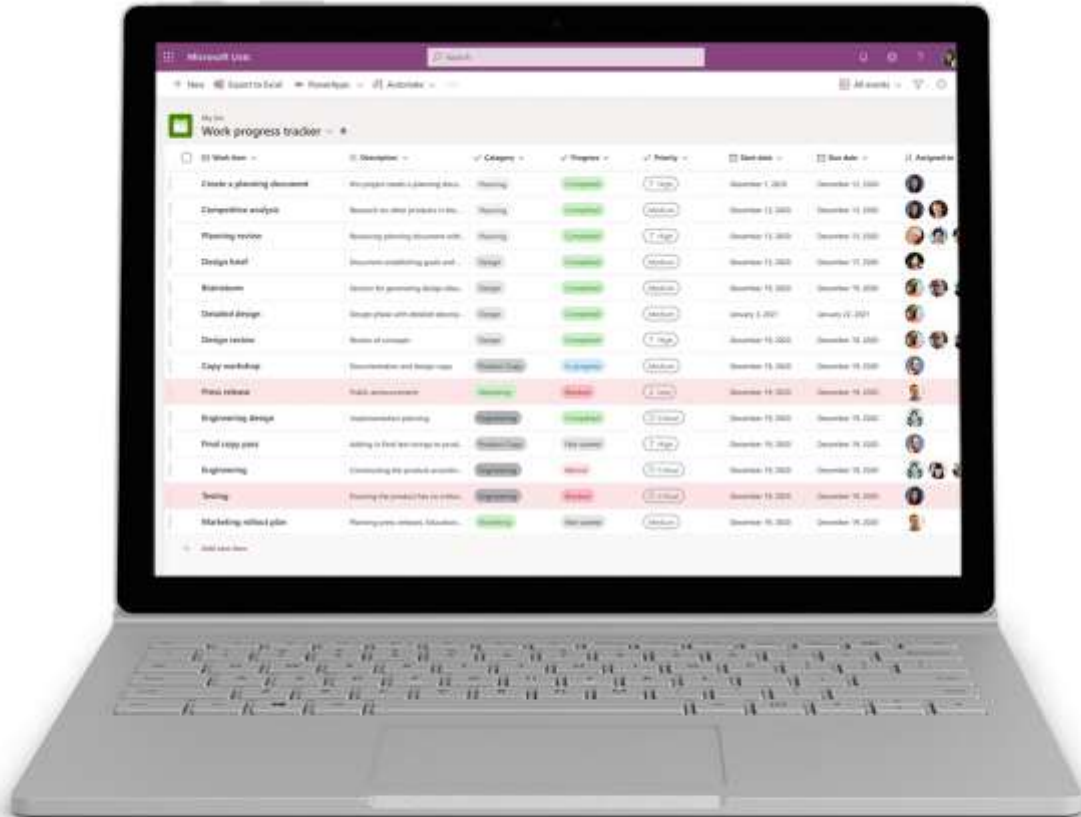


<http://D-G.me/svuz>





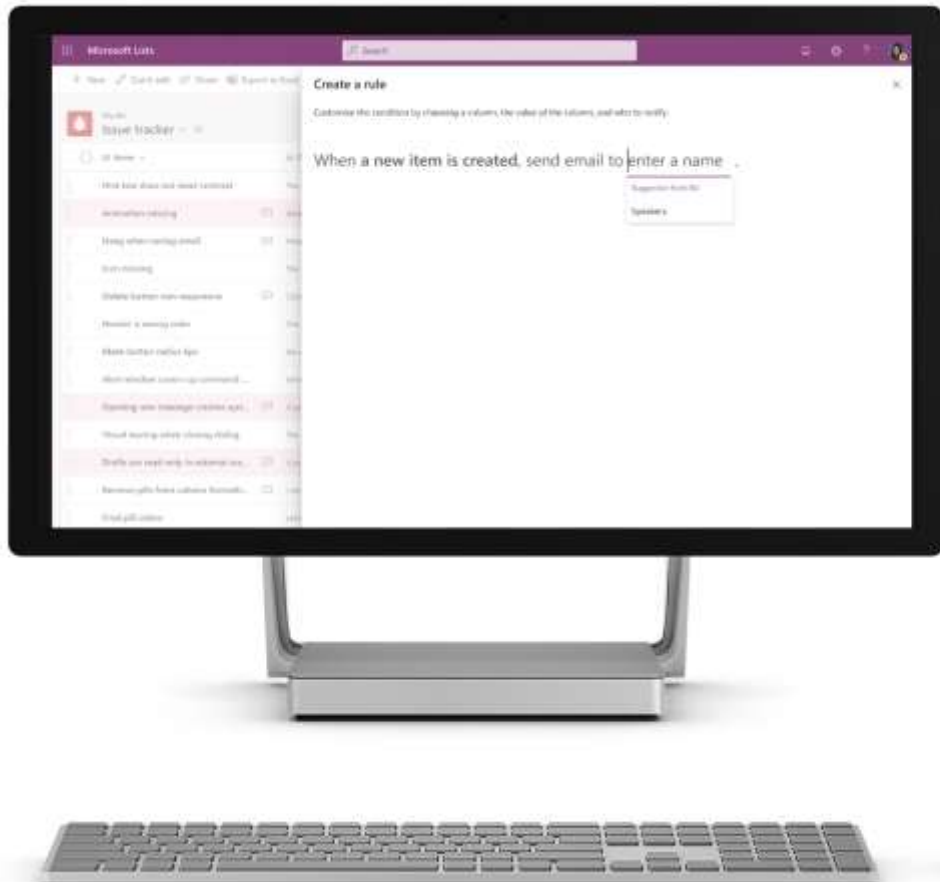
# Your lists just got a whole lot smarter



Do more, work smarter:

- Quick Edit provides bulk edit operations
- Conditional formatting highlights data and focuses attention
- Rules and notifications keep everyone informed

# Surface important information using rules and notifications



Set rules to stay up-to-date on list progress

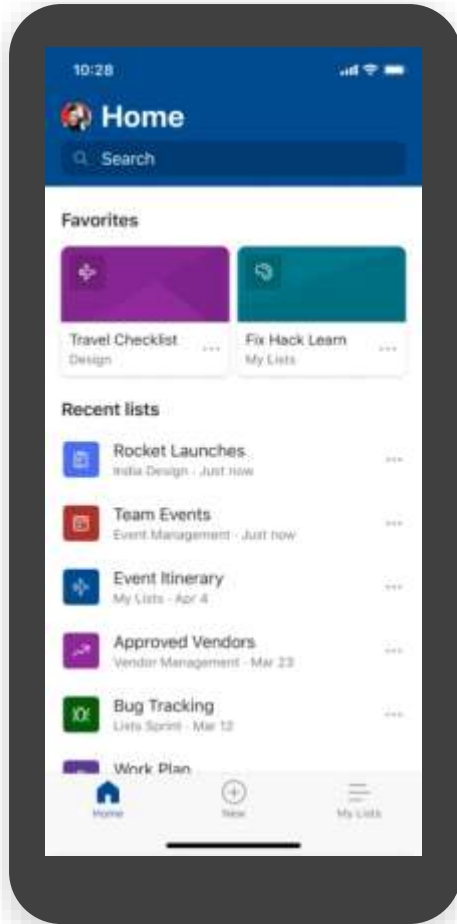
Turn on notifications for when an item is:

- Created
- Modified
- Deleted

Assign notifications to specific recipients

Demo:  
Quick Edits, Lists rules, and  
Conditional formatting

# Check your list anywhere with the Lists mobile app



- The full power of Microsoft Lists - in your pocket
- Access all your recent and favorited lists
- Create new lists using ready-made templates
- Adjust columns, edit list items, and share as links
- Availability update
  - iOS (available now: [aka.ms/MSLists/app/iOS](https://aka.ms/MSLists/app/iOS))
  - Android (coming later in 2021) [roadmap ID: 70704]



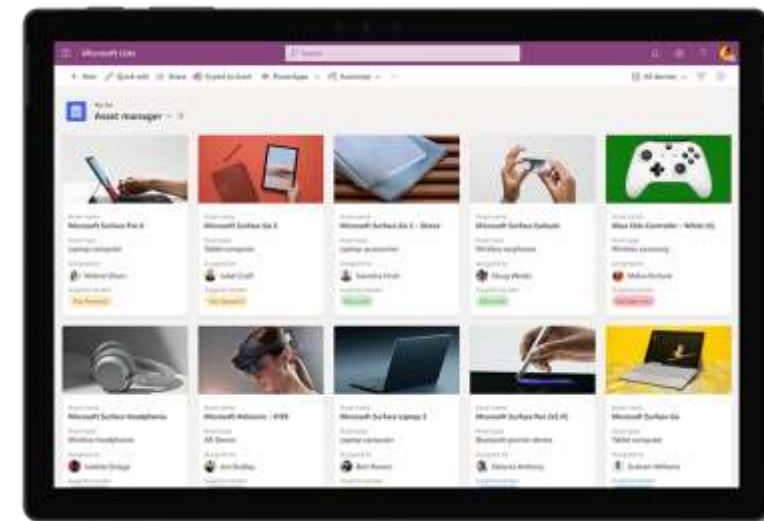
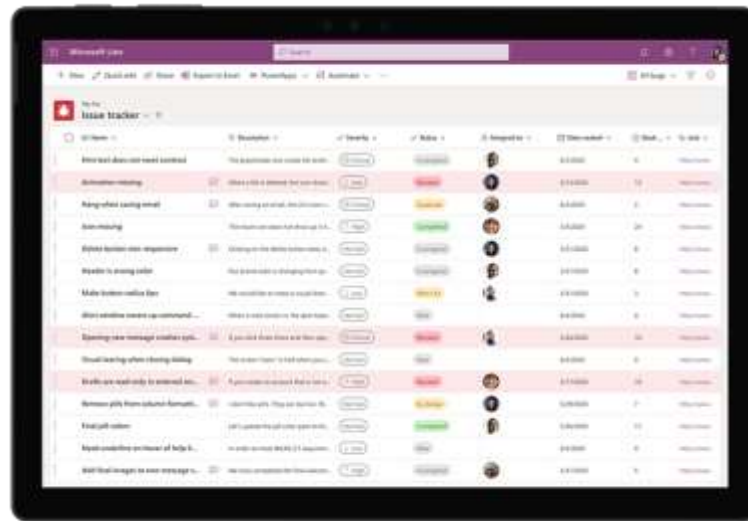
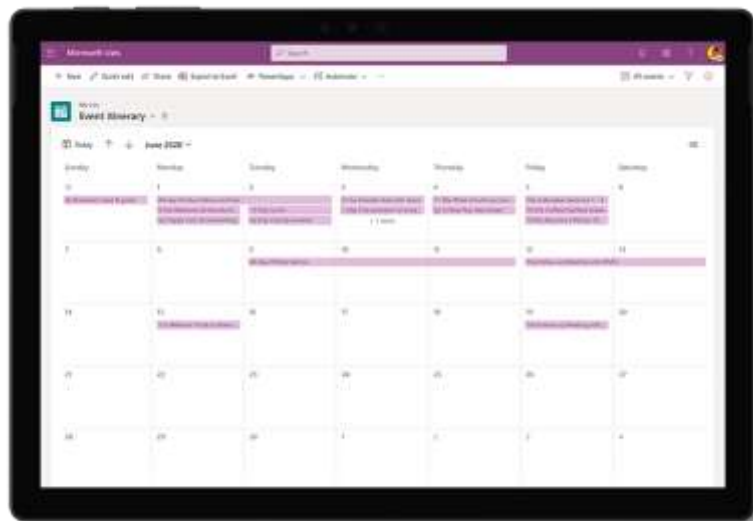
# Personalize your list with a few clicks

Default views help visualize your information:

- Calendar
- Grid
- Gallery

Configurable formatting, views and forms promote your data with personality:

- Conditional formatting
- Show/hide filters
- Header and footer customization



Demo:  
Mobile access

Views and forms

# Microsoft Whiteboard

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**Create**

Search

Wanda Howard

- Notes
- Text
- Shapes
- Stickers
- Templates
- Images



# Collaborate in Remote Meetings

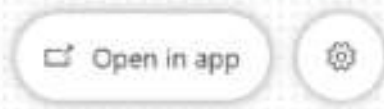
Weekly planning

Marketing Strategy Brainstorming

Fall Launch

- Email marketing
- Mother's Day e-mail blast
- Update website headers
- Take photos of all new products and update website
- Come up with video production plan
- SUMMER (20%) SALE!
- Plan social media posts 6 weeks in advance

Nile Booker Charlotte de Crum Babak Shammis Ray Tanaka Aadi Kapoor



# New Product Launch

## Agenda

- ★ Discuss action items from last meeting
- ★ Verify remaining tasks for the launch
- ★ Confirm that launch activities will be completed

## Follow ups

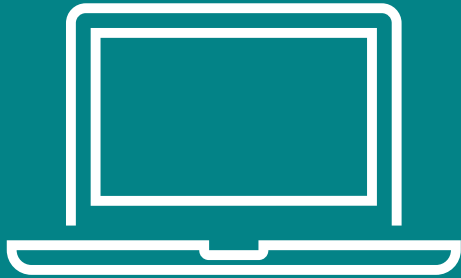
- Feature list for website
- Updated documentation
- Decide on campaign and release options
- Research insights shared with team
- Type here...

## Launch tasks

Upload changes to the website	Update launch video	Staggered release of features
New version comparison	Schedule feedback review and next version brainstorming	



# Demo



Sway

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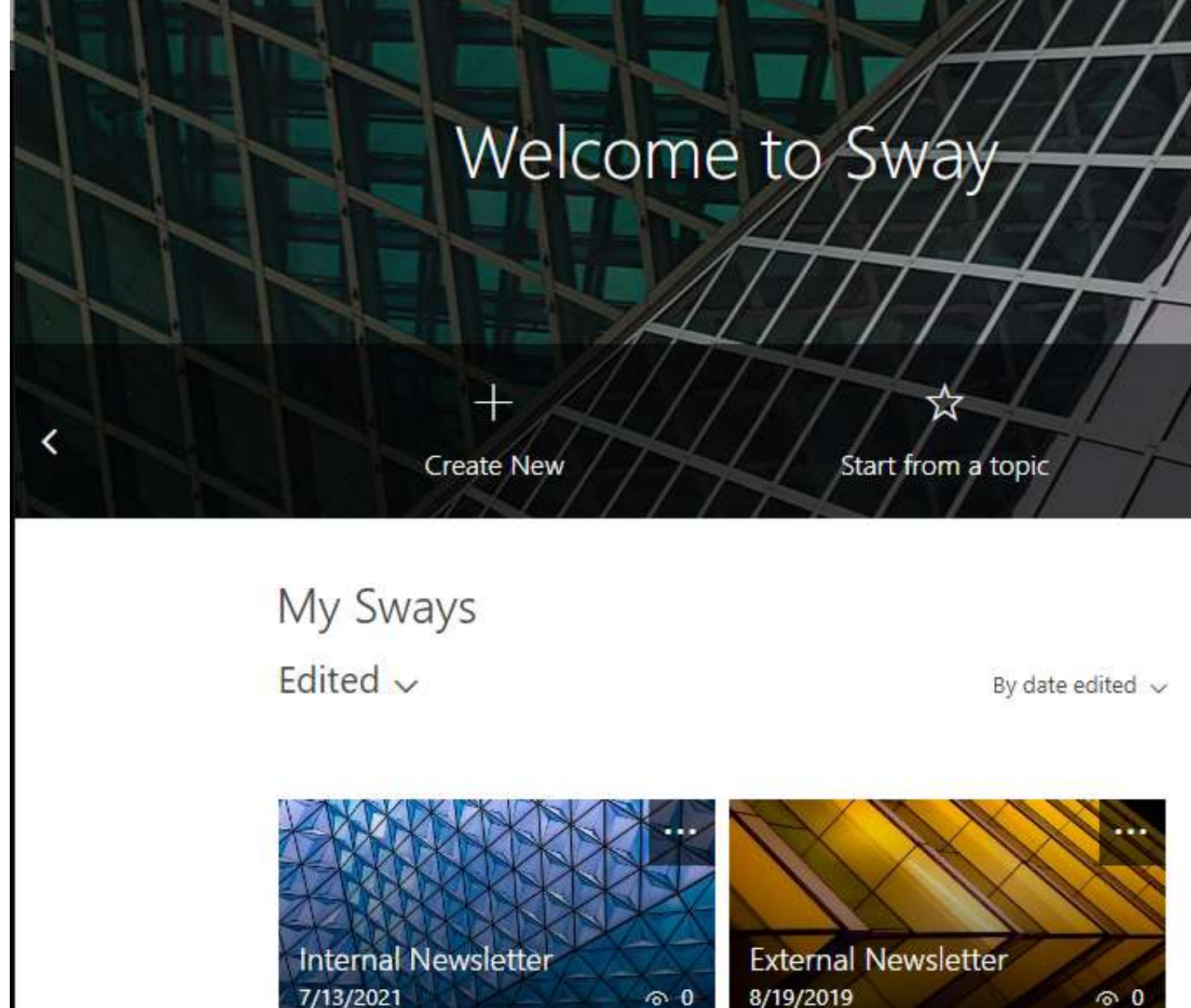
# Sway

Presentations

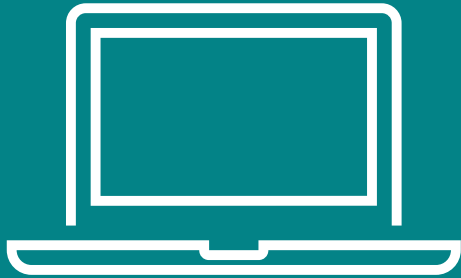
Reports

Newsletters

Stories



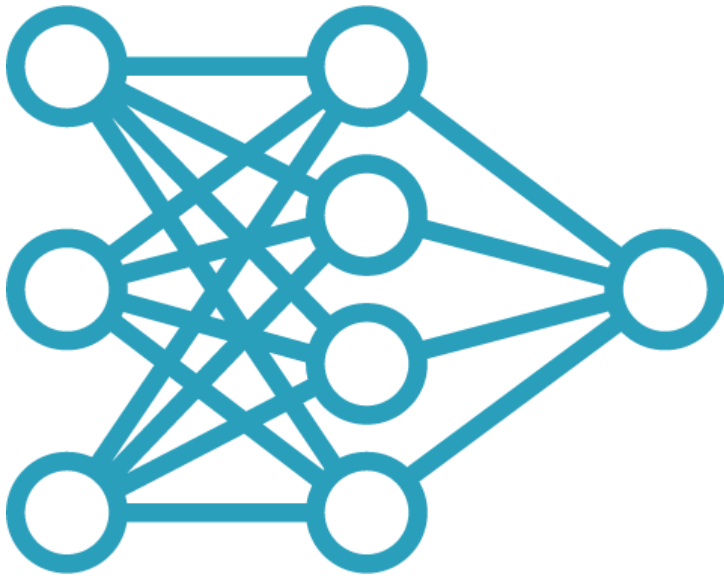
# Demo



# Introduction to Delve

---

# Office Delve



Manage your Microsoft 365 Profile

Quick access to recent documents across Microsoft 365

- SharePoint
- OneDrive
- E-mail attachments

Access to organizational chart

- Auto-built based on info from user profile

# History of Office Delve

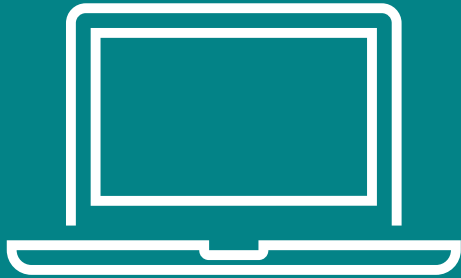
Announced at SharePoint Conference 2014

First service leveraging the Office Graph by Microsoft

- Gather “signals” from across the organization
- Show you documents before you’re looking for them
- Uses “Machine Learning / AI”



# Demo



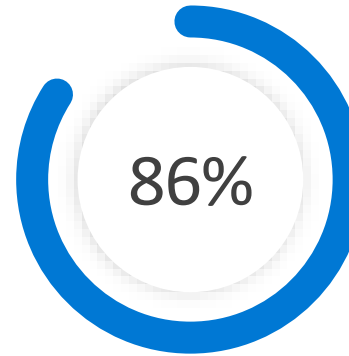
# Microsoft Viva

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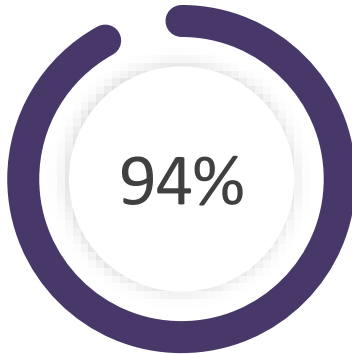
# The driving force for any business is its people.



Organizations with highly engaged employees have **21%** greater profitability.<sup>4</sup>



**86%** of top-performing companies reported that digital training programs boosted employee engagement and performance.<sup>2</sup>



**94%** of employees say they would stay at a company longer if it invested in their learning and development.<sup>3</sup>

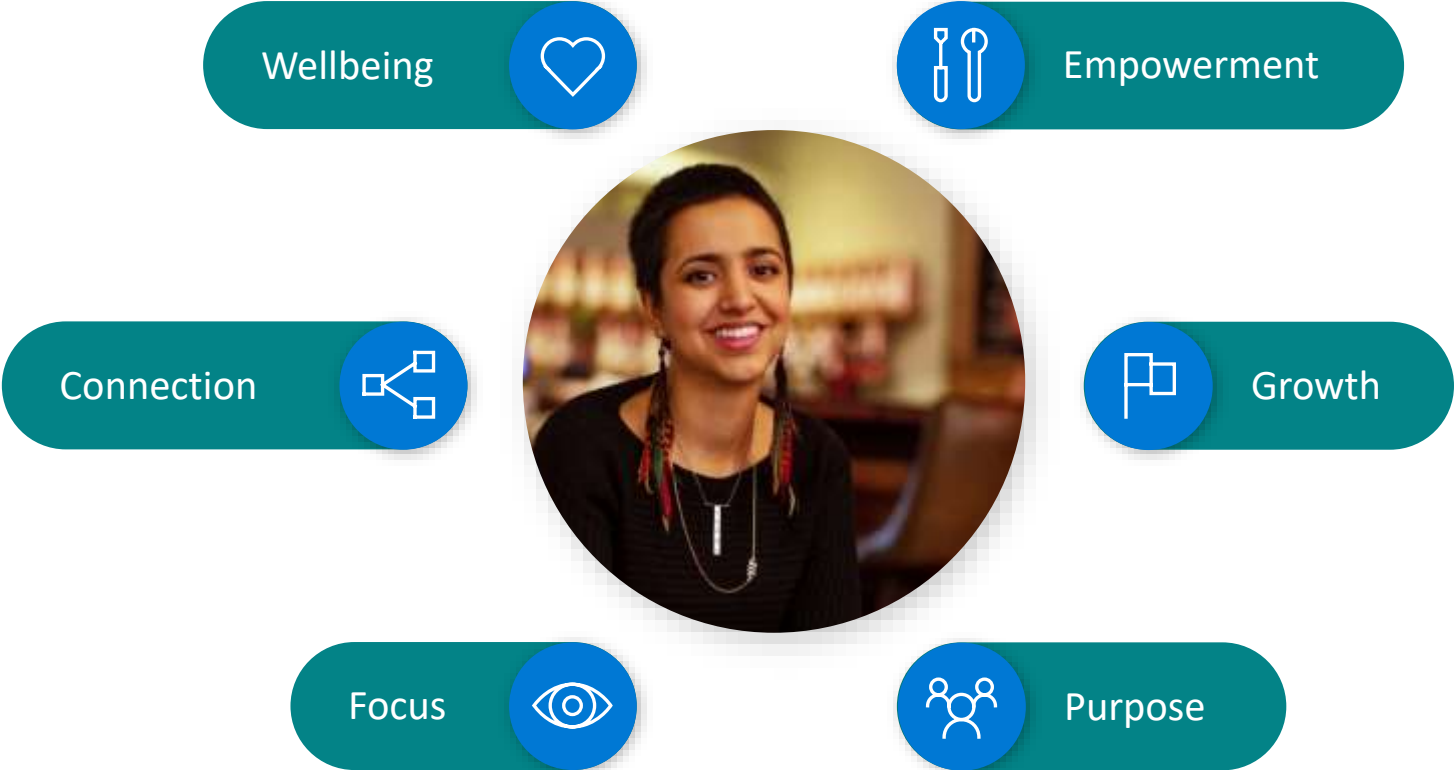
Highly engaged employees are

**12x**

less likely to leave their company than those who are not engaged.<sup>1</sup>



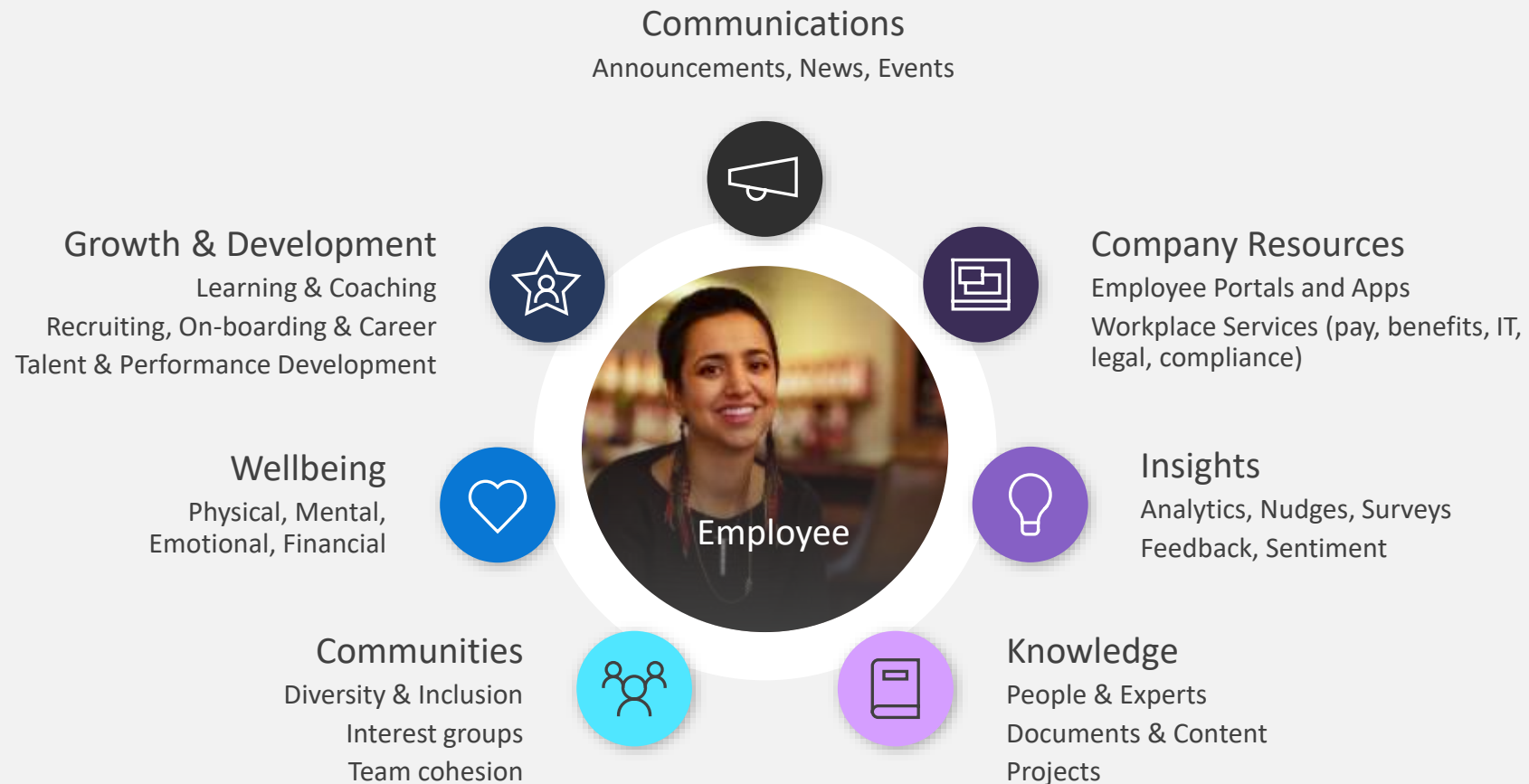
# Six key elements of a great employee experience



Source: Adapted from Glint's People Success Pillars

# What is an Employee Experience Platform (EXP)

A system of experiences that help organizations create a thriving culture with engaged employees and inspiring leaders



# Microsoft Viva

Empower people and teams to be their best

Culture & communications

Productivity & wellbeing

Knowledge & expertise

Skilling & growth



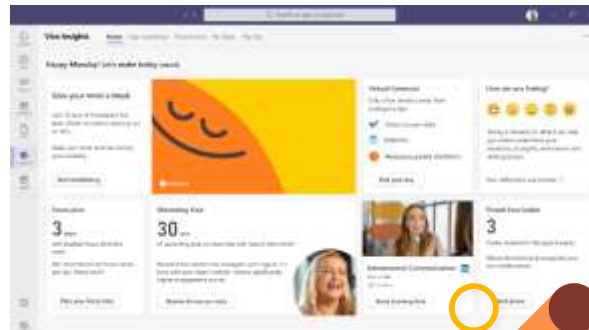
Dan

# Microsoft Viva

Empower people and teams to be their best



**Connections**  
Culture and  
communications



**Insights**  
Productivity and  
wellbeing



**Topics**  
Knowledge and  
expertise



**Learning**  
Skilling and  
growth

# Microsoft Viva

## What makes it unique?

**Organization layer** for employee experiences through Microsoft Teams

**People at the center** with skills, resources in the flow of work

**Powerful insights** that are actionable

**Privacy and security** that you can trust

**Platform and ecosystem** with customization and extensibility





Microsoft Viva

# Ecosystem



## Microsoft 365

Teams  
Sharepoint  
Yammer

Linkedin  
Microsoft Search  
Glint  
& more

## CRM

Dynamics 365

Salesforce

## Content providers

Coursera  
edX  
LinkedIn Learning

Microsoft Learn  
Pluralsight  
Skillsoft

## Communications

Teams  
Outlook  
Yammer

Slack  
Zoom

## Wellbeing

Glint

Headspace

## Digital workflows

ServiceNow

## HR & Learning

Cornerstone OnDemand  
Dynamics 365  
Saba

SAP SuccessFactors  
Workday

And many more coming...

# Microsoft Viva

## Product Experiences Overview



**Connections**  
Culture and  
communications



**Insights**  
Productivity and  
wellbeing



**Topics**  
People and  
expertise



**Learning**  
Skilling and  
growth



**Nearly 60%**

of people say they feel less connected to their team after shifting to remote work.

Microsoft Work Trend Index, 2020



# Viva Connections Communications and culture

## Keep everyone connected

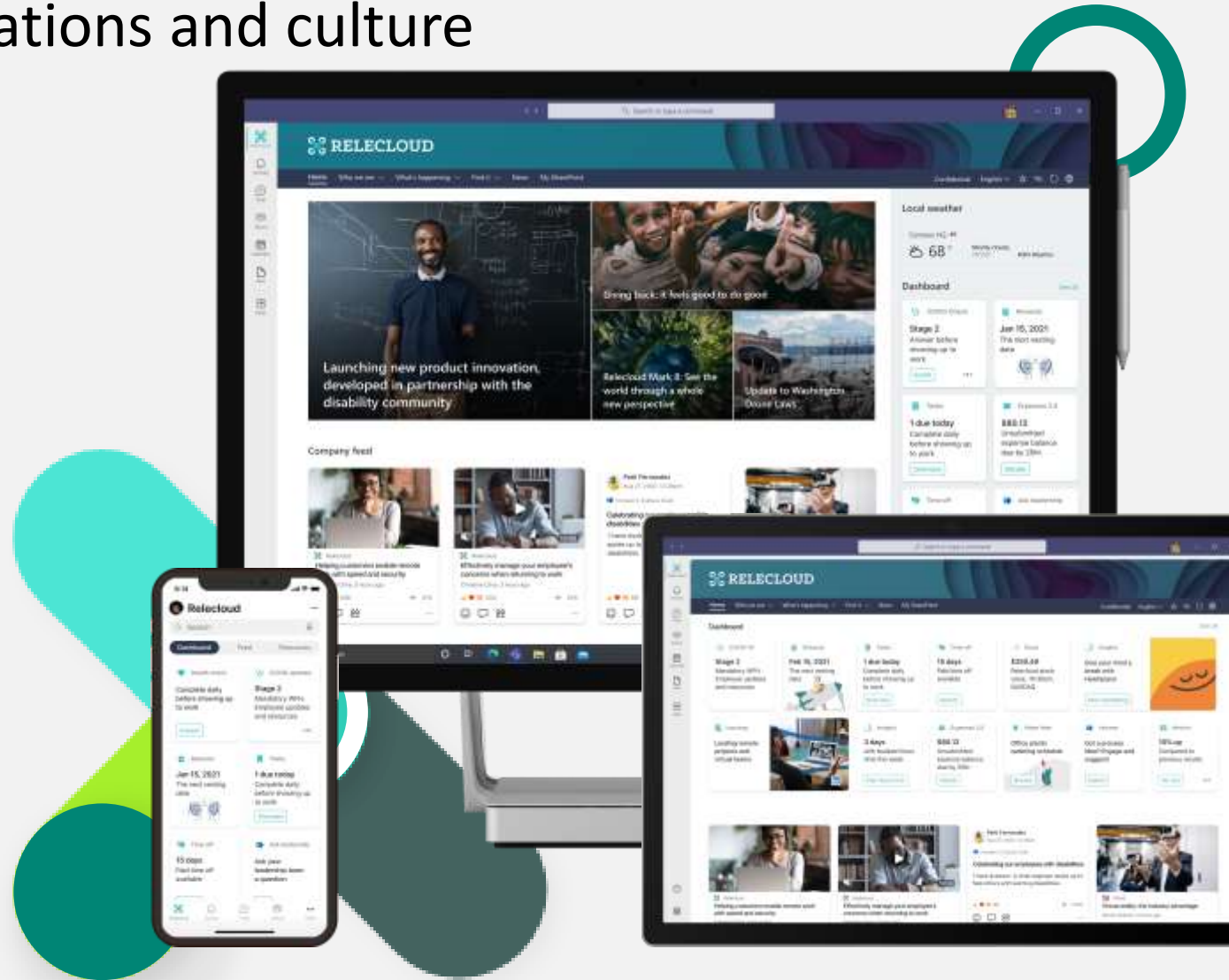
Encourage meaningful connections across the organization by enabling employees to easily discover relevant communications and communities.

## Make it easy for people to contribute

Foster a culture of inclusion by empowering every employee to contribute ideas and share feedback.

## Unite and inspire your organization

Align the entire organization around your vision, mission, and strategic priorities



## 70% of employees

reported higher stress levels and 40% are experiencing decreased mental health

The Other COVID-19 Crisis: Mental Health, Qualtrics, 2020



# Viva Insights

## Productivity and wellbeing

### Deliver personalized and actionable insights

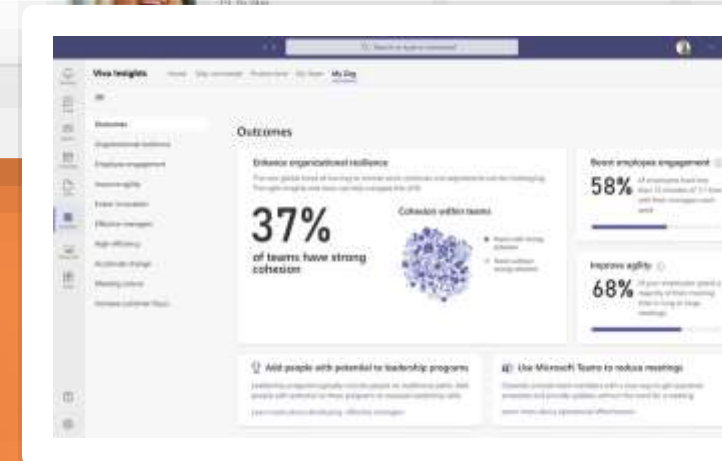
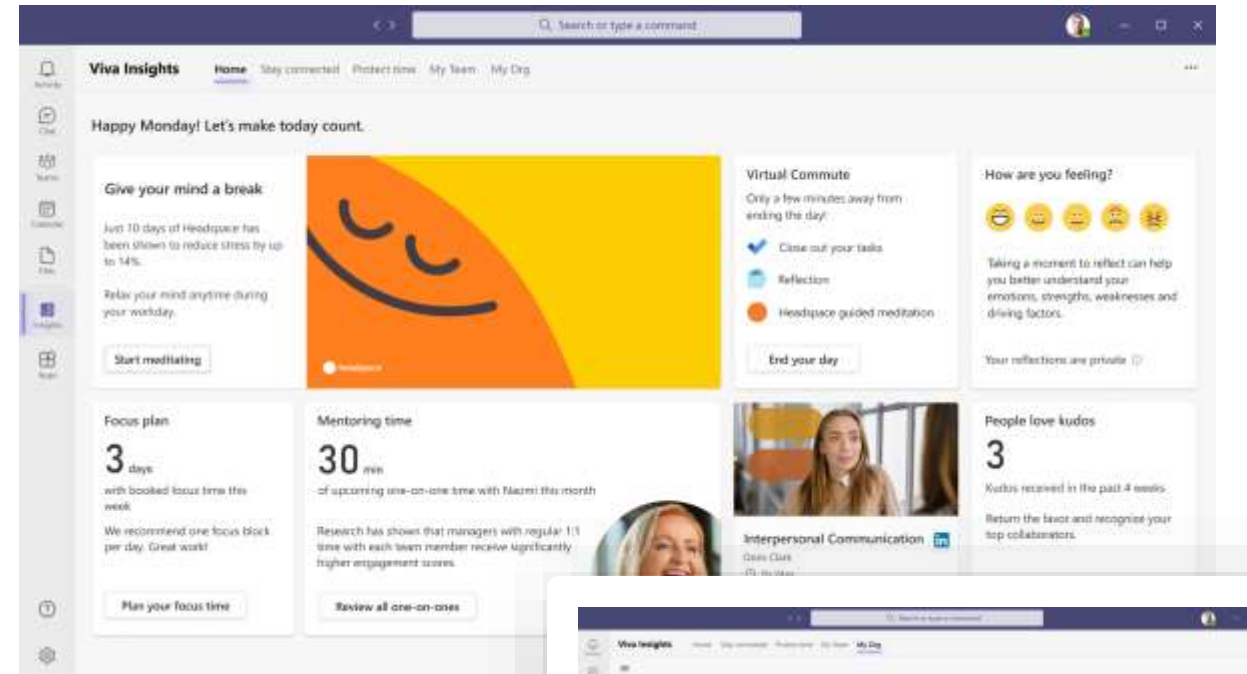
Empower individuals, teams, and orgs to achieve balance, build better work habits, and improve business outcomes with personalized insights and recommended actions.

### Quantify the impact of work on people and business

Gain data-driven, privacy-protected visibility into how work patterns affect wellbeing, productivity, and results.

### Address complex business challenges

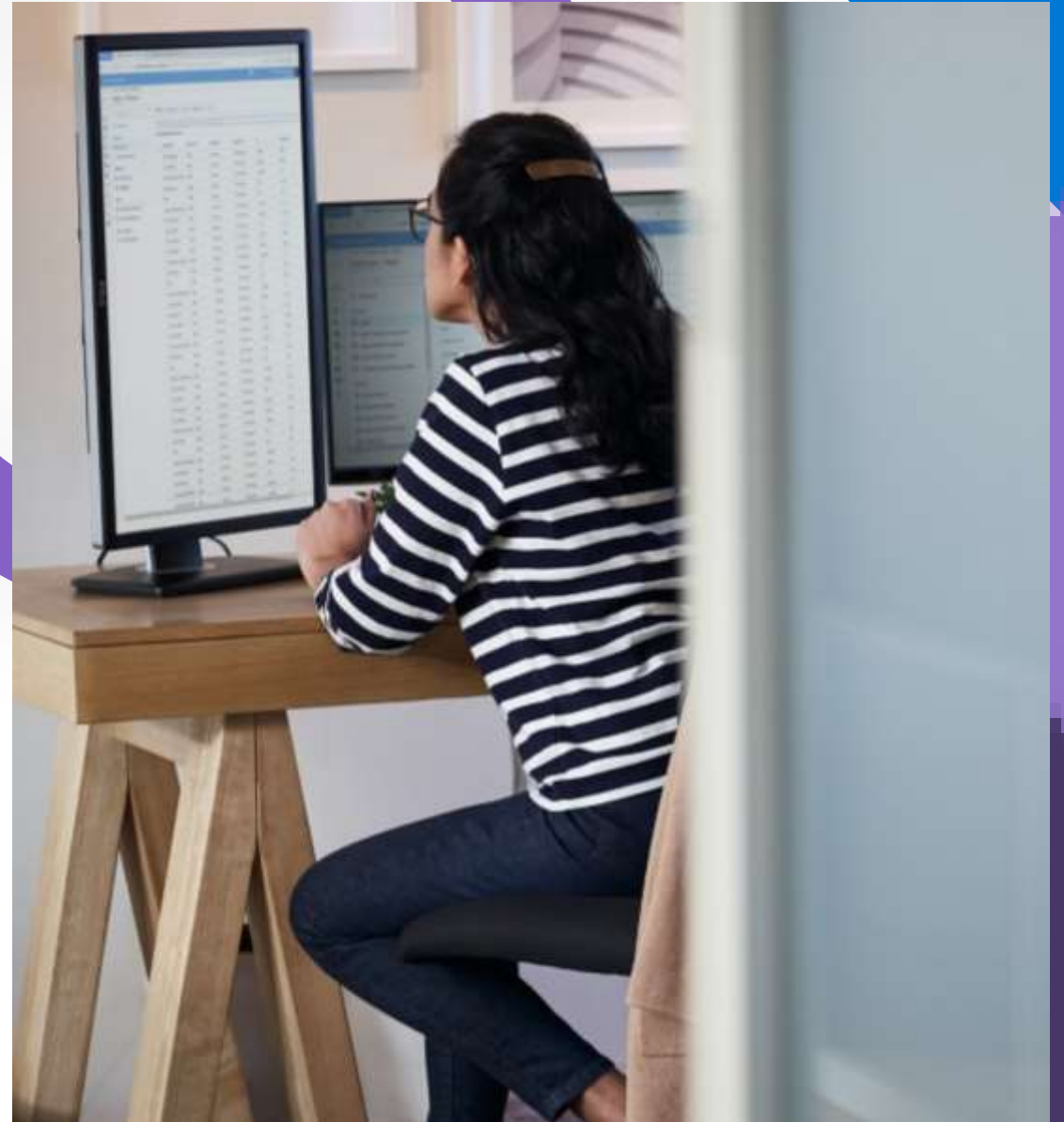
Use advanced tools and additional data sources to perform deeper analysis, address challenges important to your business, and respond quickly to change.



# People spend about an hour

a day – or up to seven weeks a year – searching for or recreating information

Spiceworks/Ziff Davis survey  
commissioned by Microsoft, 2021



# Viva Topics

## Knowledge and expertise

### Turn content into usable knowledge

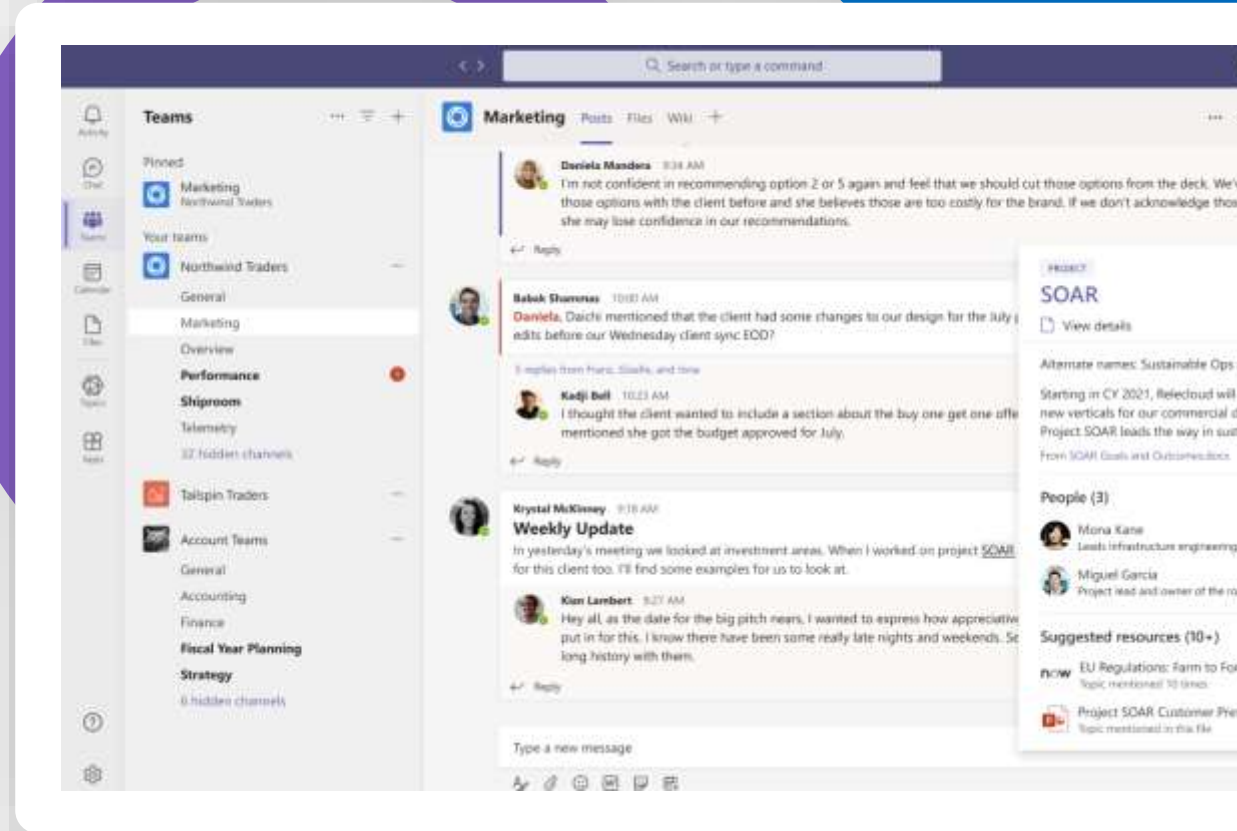
Use AI to reason over your organization's content and automatically identify, process, and organize it into easily accessible knowledge

### Organize knowledge into topic pages

Enable your organization's experts to share and refine knowledge through curated topic pages, automatically generated and updated by AI

### Make knowledge easy to discover and use

Deliver relevant topic cards in the apps people use everyday



## 79% of CEOs worldwide

are concerned that a lack of essential skills in their workforce is a barrier to future growth<sup>1</sup>

Meanwhile, employees only have 1% of their workweek to focus on learning new skills<sup>2</sup>

<sup>1</sup>PwC CEO Survey, 2019

<sup>2</sup>Leading in Learning, Bersin by Deloitte



# Viva Learning Skilling and growth

## Make learning a natural part of your day

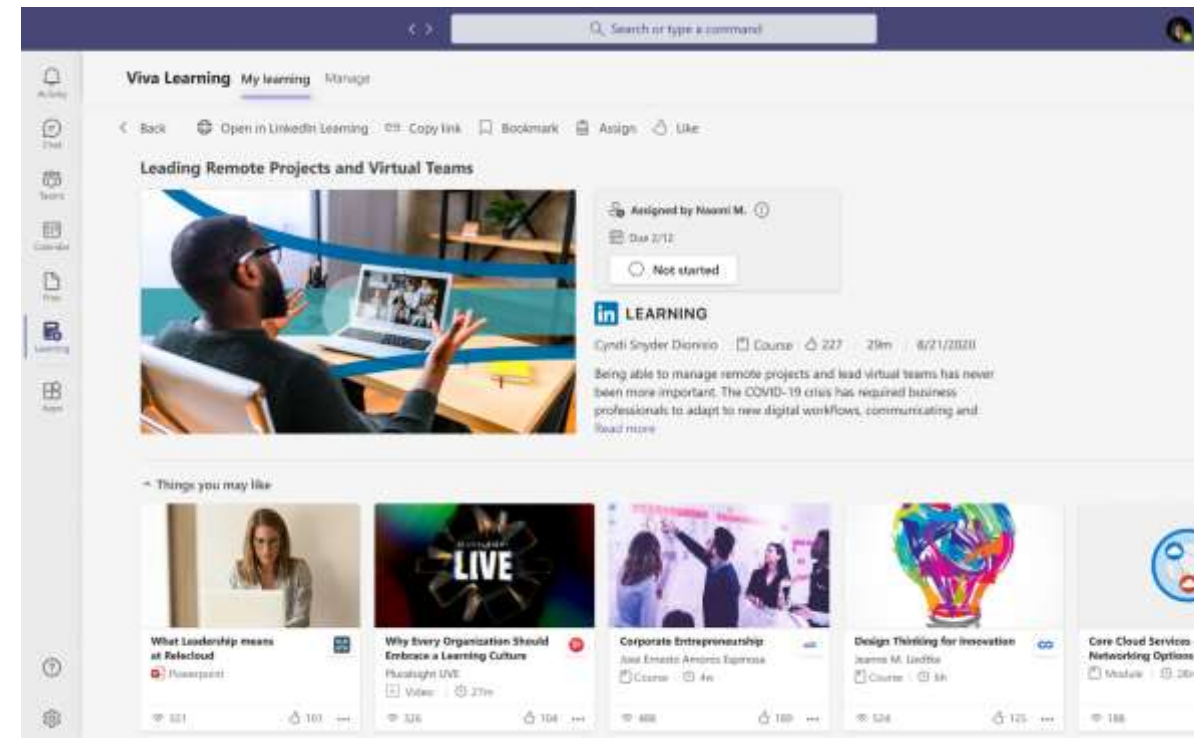
Foster a culture of learning by enabling people to easily discover, share, and engage with learning integrated into Microsoft Teams.

## Make all your learning content available in one place

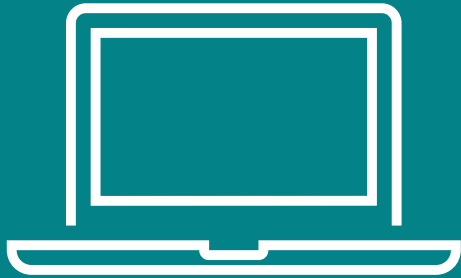
Simplify the learning experience by bringing together world class content from LinkedIn Learning, 3<sup>rd</sup> parties, Microsoft Learn, and your own content.

## Drive results that matter

Empower your leaders and employees to curate, assign and track learning aligned with business outcomes.



# Demo



# Microsoft Search in Microsoft 365

---

# We all struggle finding information...

I need to find the most current industry research data for this client proposal.

Can you send me the link to the PowerPoint you presented yesterday?

Where did I put that spreadsheet for the sales call?

Hang on, I think it's on my hard drive...or was it OneDrive? Maybe it's on SharePoint instead?"

I can't find our health insurance claim form.

Where did I put that document I was working on?

Where did I put that spreadsheet for the sales call?

I need directions to Building 34 for tomorrow's meeting.

# Why?



Inundated by **too much data and content**

Searching at work is **frustrating**

Our **expectations have changed**

# How much is too much?



44

zettabytes of data by 2020

76%

of data is unstructured

## Stored in multiple locations:

- Company intranets
- Cloud services
- SharePoint
- OneDrive
- Line of business applications
- On-premises servers

<sup>1</sup> [IDC](#) The Digital Universe of Opportunities: Rich Data and the Increasing Value of the Internet of Things

<sup>2</sup> [Deloitte](#) Overview of emerging technologies

# Why is searching at work frustrating?



We are faced with multiple, distinct search experiences:

- **Context** and **application-switching** to find information
- Each entry point has a **different search UX**
- Results are **partial**, and **inconsistent** across applications

and there are just **too many results** to dig through to find the right one.



One capability.  
Every search experience.  
Microsoft Graph + Bing  
technology

# Microsoft Search in Bing

Finding what you need at work just got easier with Microsoft Search

Find work results as simple as a search, including:

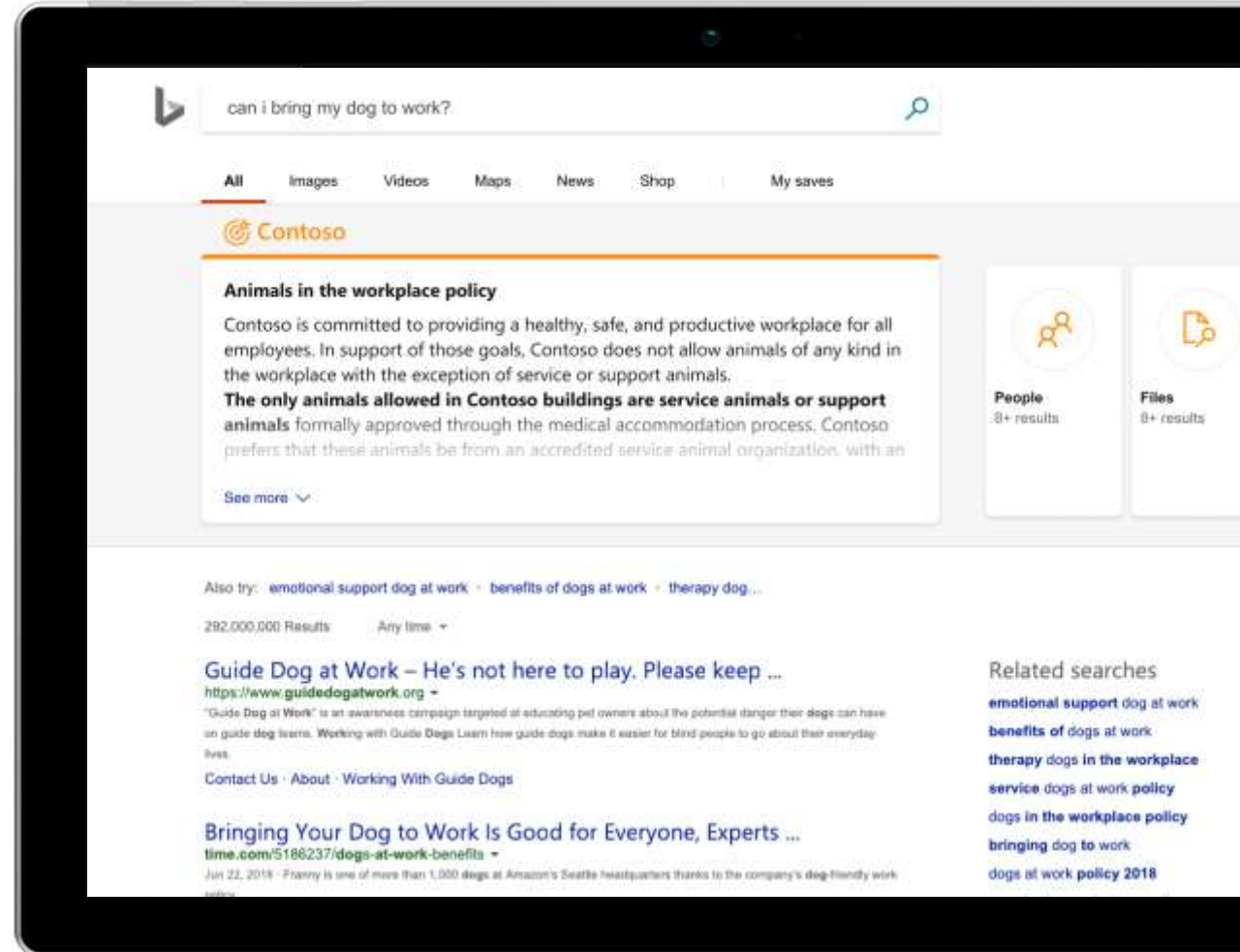
Search for people and conversations within your company

Search for files and groups across Microsoft connected services

Search for bookmarks to internal sites and tools

Search for building locations and direction within organization

Search for Q&As for work-related questions

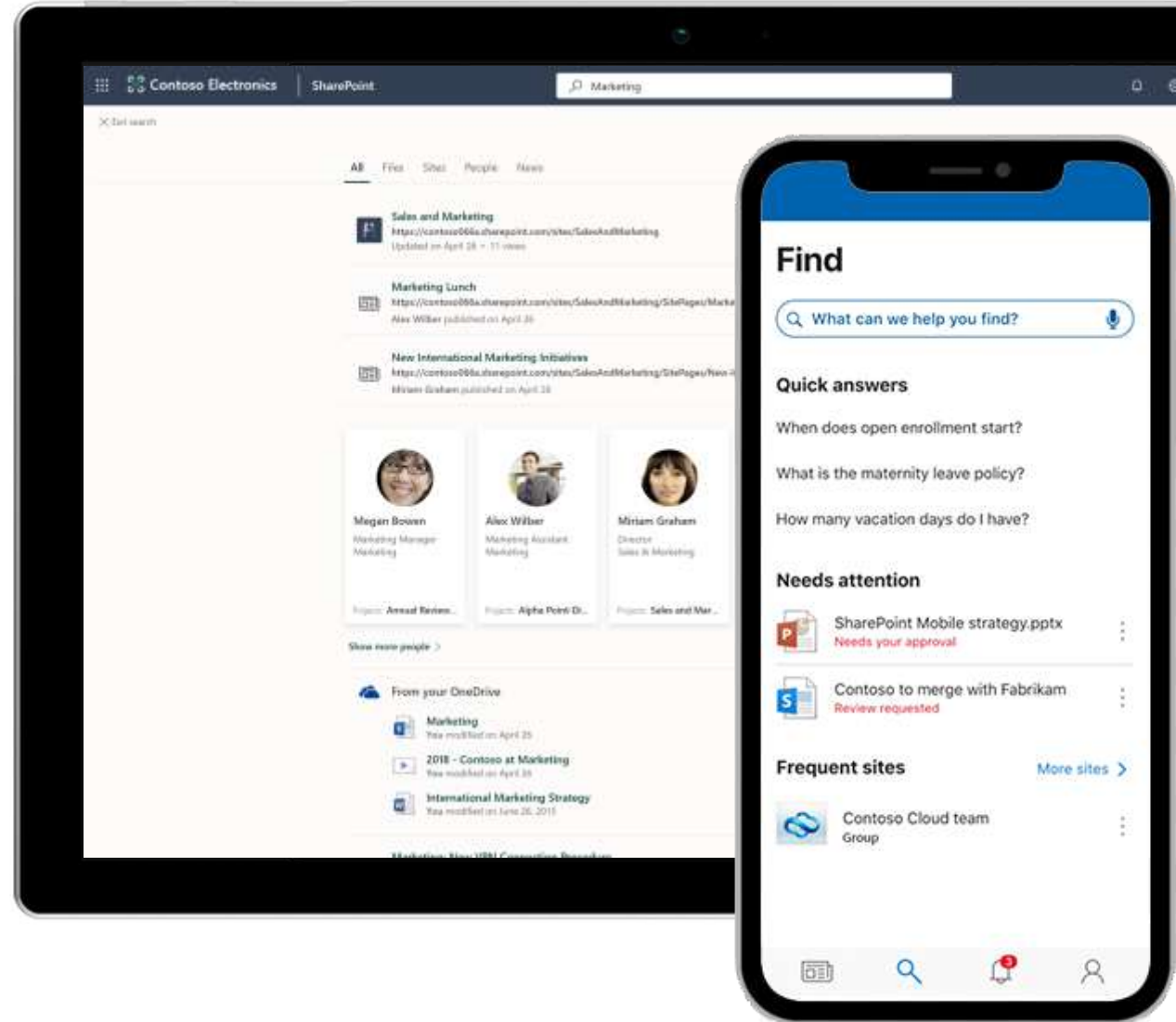


# Microsoft Search in SharePoint

Tap your organization's knowledge

Find files, people, and news from your organization

Discover relevant content for you, as well as actions from your colleagues across web and mobile



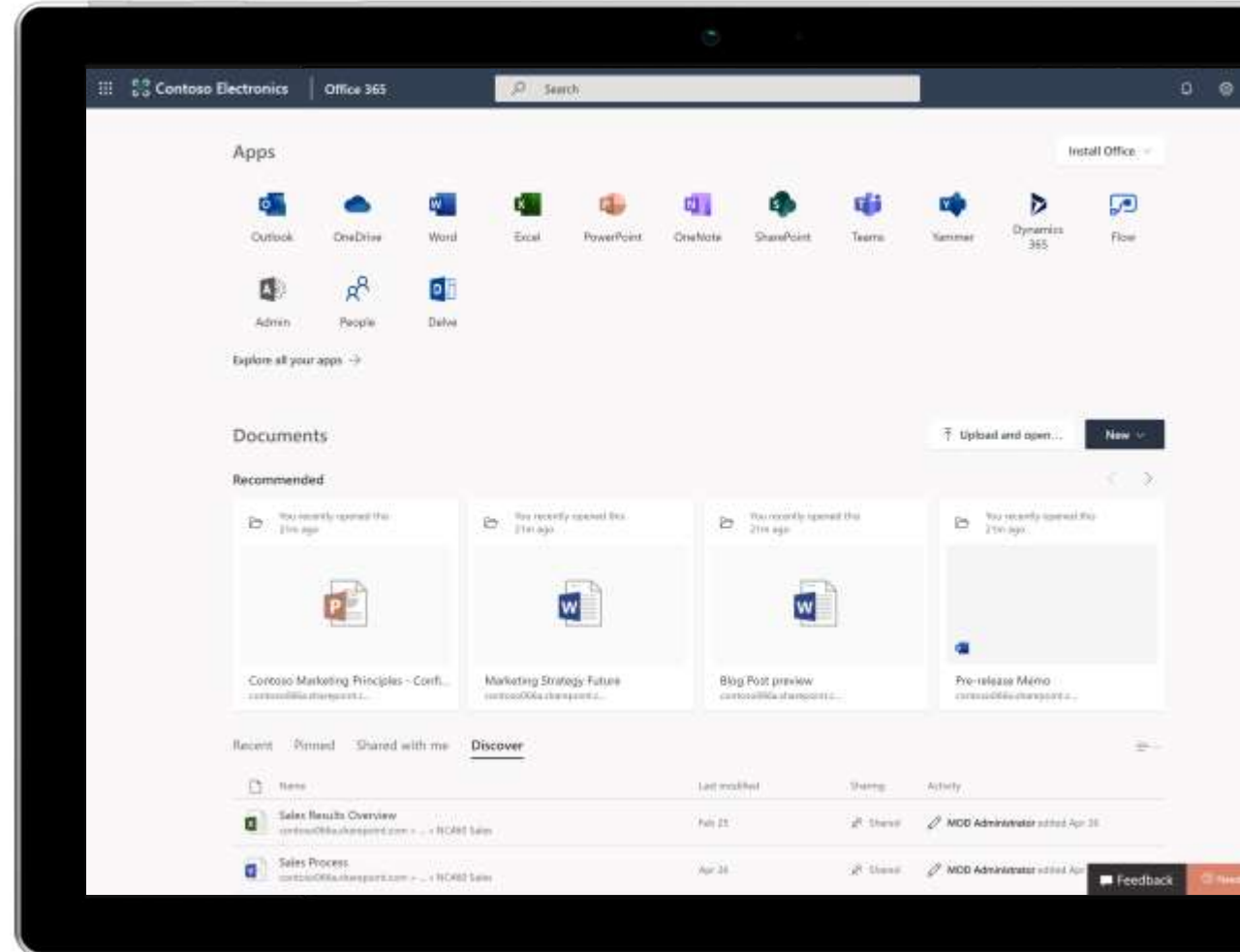
# Microsoft Search in Office.com

Find and get back to your work faster

Get started and create a new document, or easily return to your work after a meeting

Find apps from your organization, content, people, and sites

Discover relevant content for you, as well as actions from your colleagues



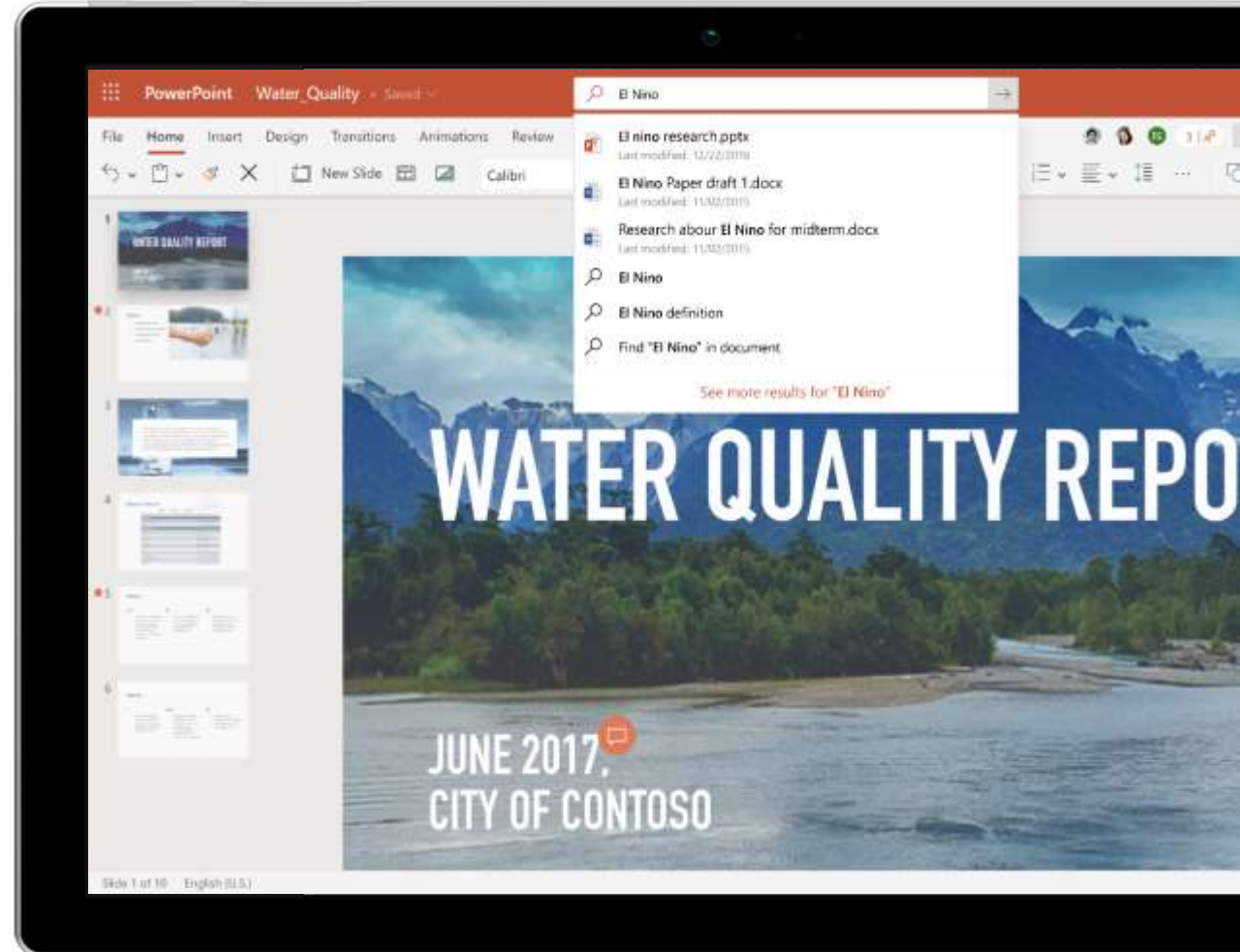
# Microsoft Search in Office Apps

Get your work done faster with the power of search

Delivers relevant results across all of Office, including Word, Excel, and PowerPoint

Find actions, services, and content that help you complete your task

Bring the power of Office and the web to you in the app, without needing to switch apps



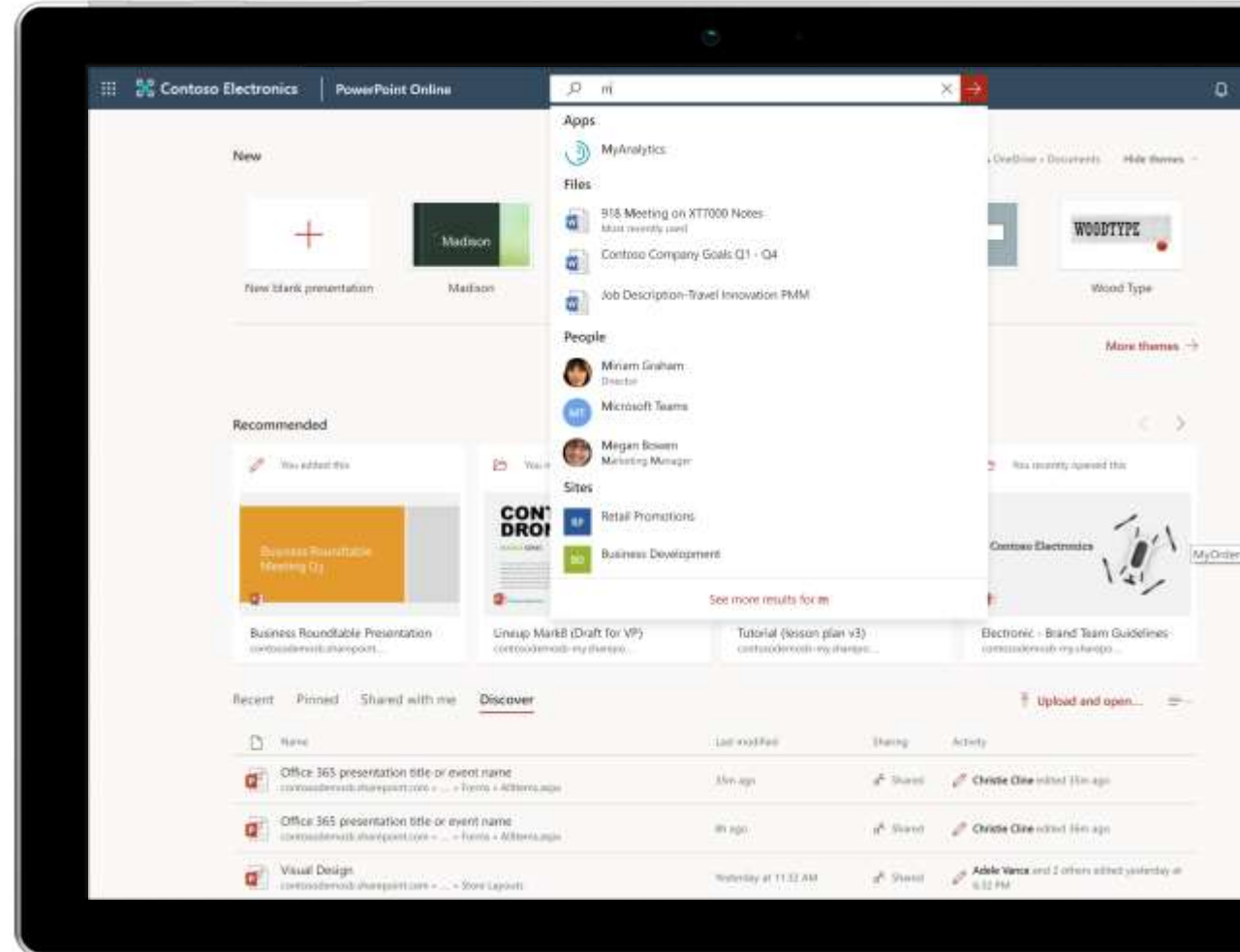
# Microsoft Search in Office Online

Extending the power of search to Office Online

Stay in the know, and discover relevant people and important content when you need it most

Gain an intuitive start page, bringing you closer to what is important right now

Discover relevant, recommended content, where people and content find you



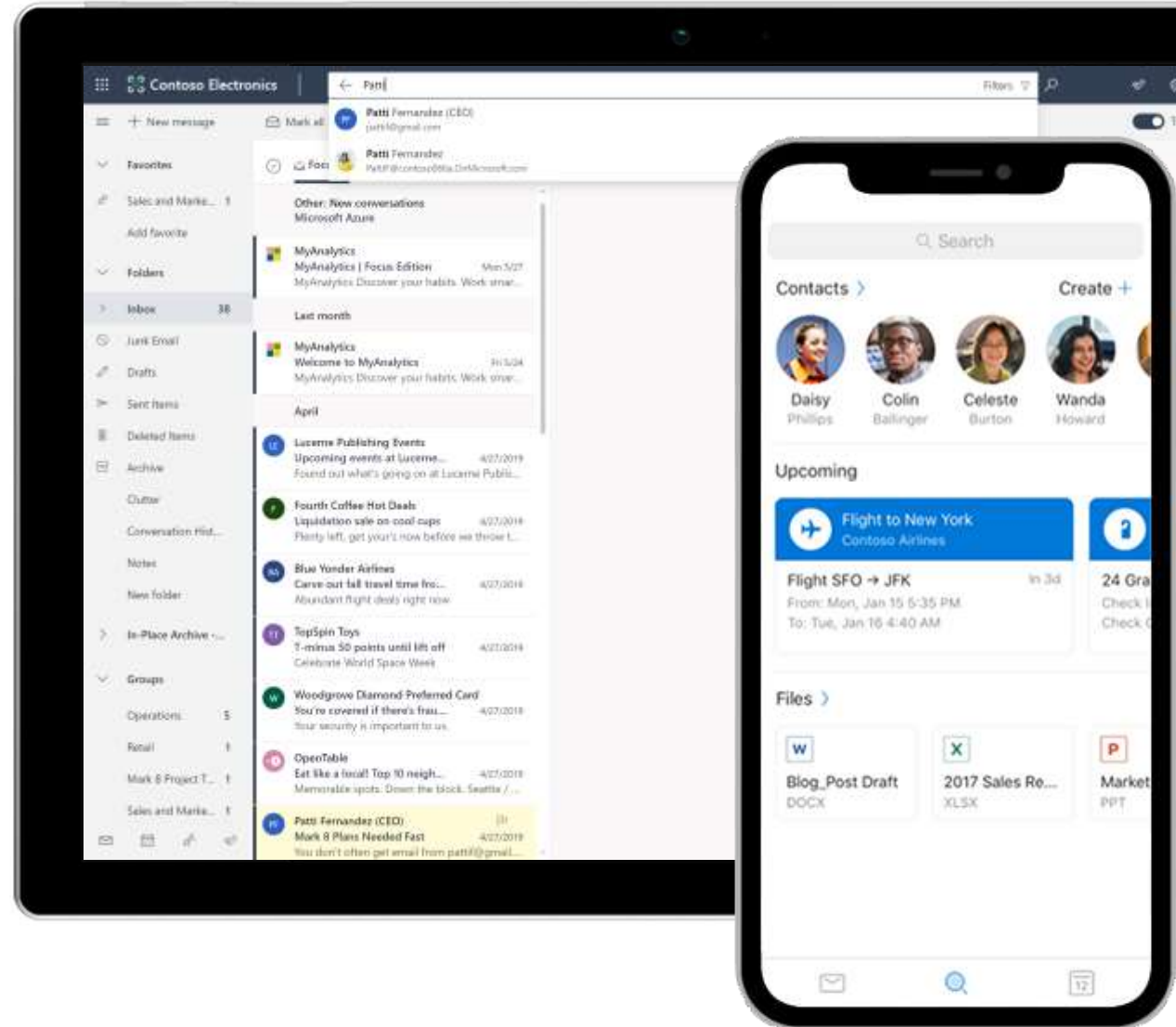
# Microsoft Search in Outlook

Search you can depend on in Outlook – on any platform

Find the right item faster with top relevant results, quick result suggestions, and proactive recommendations

Increase search success with guided suggestions and better intent understanding (spelling correction, implied filtering, etc.)

Search with confidence beyond email across your calendar, people, attachments, and links



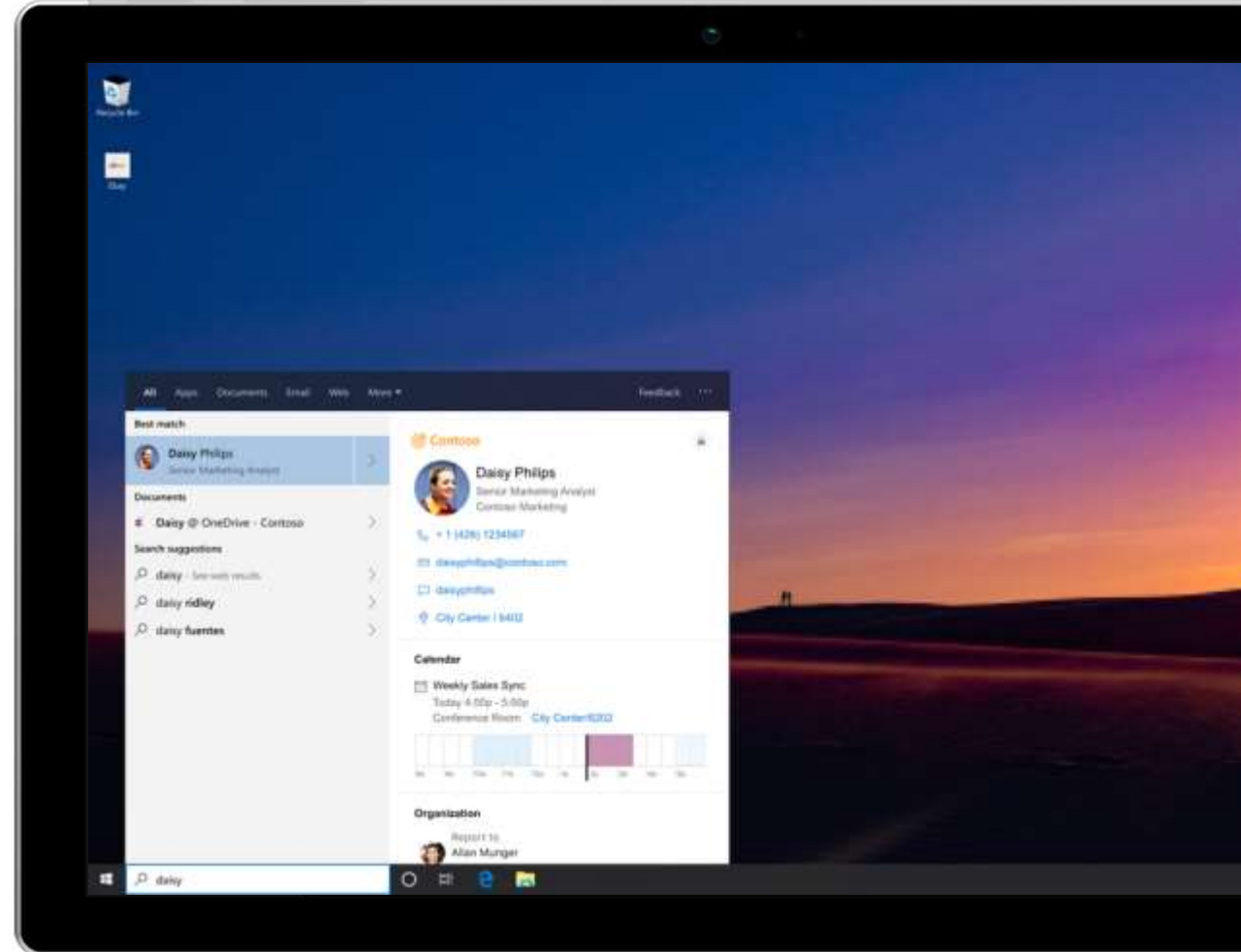
# Microsoft Search in Windows

Your organization's knowledge, right from your desktop

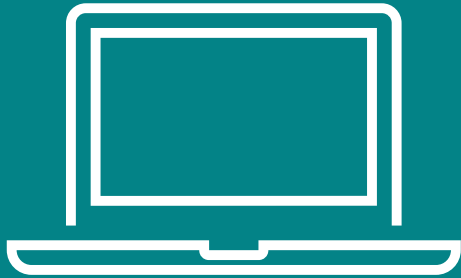
Get answers right from the search bar across local, organization, and web content

Collective knowledge from your organization

Search Windows and the web to find people, files, apps, and locations with the same experience



# Demo



# Permissions & Provisioning Basics

---

# Microsoft 365 Groups

Group of Microsoft 365 resources with a shared membership

Resources can include:

- A shared Outlook inbox
- A shared calendar
- A SharePoint site
- A Planner Plan
- A Power BI Workspace
- A Yammer Feed
- A Microsoft Teams Team
- and more!



# Why Did We Need Microsoft 365 Groups?

Not that long ago  
in the Microsoft  
ecosystem ...

SharePoint = Collaboration

Used SharePoint for

- Files
- Lists
- Discussions
- Communities
- Tasks
- Videos
- Business Intelligence
- etc

# Why Did We Need Microsoft 365 Groups?

Today in Microsoft  
365...

Specialized tools / services for different types of collaboration

- Files > SharePoint
- Tasks > Planner
- Videos > Stream
- Discussion Board > Yammer
- Instant Messaging > Teams
- Business Intelligence > Power BI
- Surveys > Microsoft Forms

Too many individual tools make it hard for users to have a good digital workplace experience

# Where Are Microsoft 365 Groups Created From?

Microsoft 365 Groups can be created from:

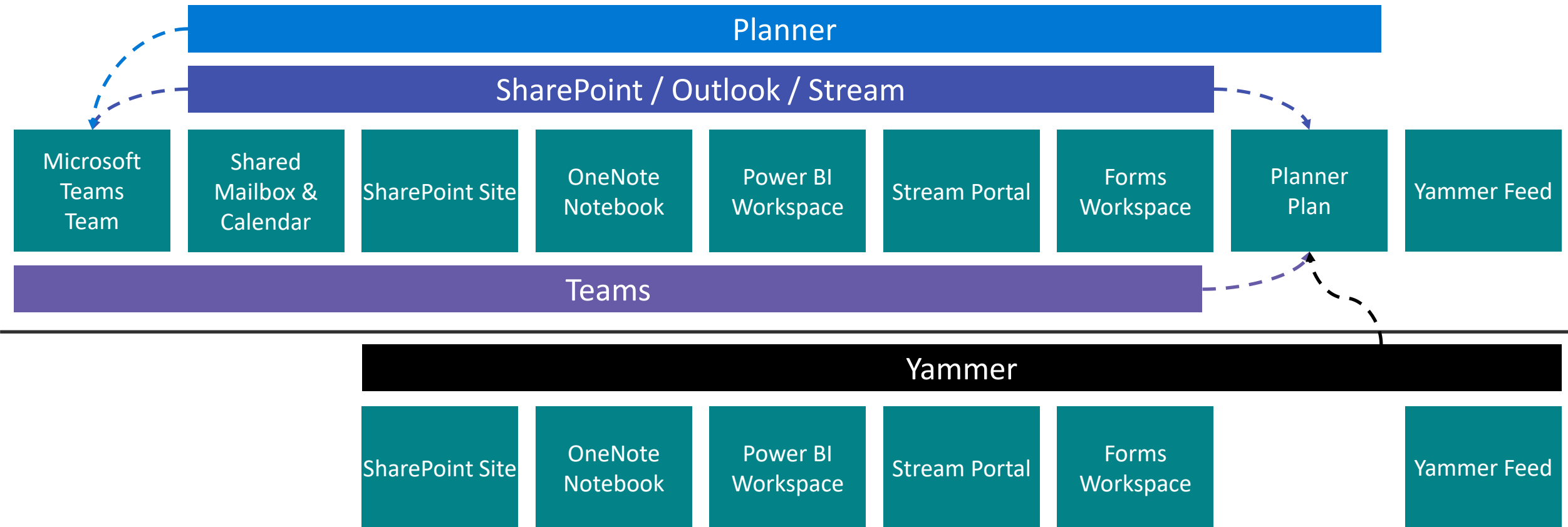
- SharePoint (New Team Site)
- Planner (New Plan)
- Yammer (New Group)
- Outlook (New Group)
- Teams (New Team)
- Stream (New Group)

Users often don't know everything they are creating

Different resources are provisioned based on from where the group is created



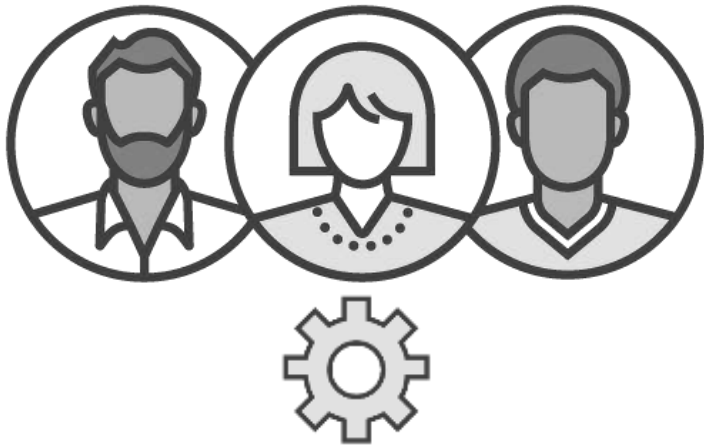
# Microsoft 365 Groups: Services Created Summary



Legend

- - - - = Can be added after

# Microsoft 365 Group Membership and Settings



Group Membership and Settings are stored in Azure Active Directory

There are three membership roles in Microsoft 365 Groups

- Group Owners
- Group Members
- Group Guests

Settings can include

- External Sharing
- Expiration
- Naming Convention
- And more

# Microsoft 365 Group Creation



Microsoft 365 Groups can be created from many locations

Group level settings are the same in the end

- Except Microsoft 365 Connected Yammer Communities

Creating from certain locations might give you more or less initial options

- You can always configure them in the Group Settings

# Who Can Create Microsoft 365 Groups?

Any Microsoft 365 users can create an Microsoft 365 Group

You can limit group creation to a specific set of people

- **Pluralsight Course:** Configuring Governance and Compliance for Microsoft Teams and Microsoft 365 Groups



# Group Creation From Outlook – Part 1

Display Name of the Group

New group

Working together on a project or a shared goal? Create a group to give your team a space for conversations, shared files, scheduling events, and more.



Email address of the mailbox. Autogenerated but can be changed

Group name  
Globomantics Intranet Refresh

Email address  
globomanticsintranetrefresh  
globomanticsintranetrefresh@globomantics.org

Group Description (Optional)

Description

This group will be used to collaborate on the 2021 Globomantics Intranet Refresh

Settings

Privacy  
Private - Only approved members can see what's inside  
Public - Anyone in your organization can see what's inside  
Private - Only approved members can see what's inside

Group Privacy - Who can see what's inside

More settings

Create

Discard

# Group Creation From Outlook – Part 2

## New group

Working together on a project or a shared goal? Create a group to give your team a space for conversations, shared files, scheduling events, and more.



Send copies of conversations to group members' inboxes

Globomantics Intranet Refresh

Email address

globomanticsintranetrefresh

globomanticsintranetrefresh@globomantics.org

### Description

This group will be used to collaborate on the 2021 Globomantics Intranet Refresh

### Settings

Privacy

Private - Only approved members can see what's inside

Members will receive all group conversations and events in their inboxes. They can stop following this group later if they want to.

[Fewer settings](#) ^

Language for group-related notifications

English (United States)

Language

Create

Discard

# Group Creation From Outlook – Part 3

Add members or guests to the group

## Add members to Globomantics...

Add members to your group to start collaborating. You can choose to add colleagues, members of existing groups or distribution lists, or guests.

### Who is a guest?

Guests are people from outside your organization. Guests will get all email messages sent to the group in their inbox, and can collaborate on files in the group



### Add members

Enter a name or email address

### 2 members to be added

*You're adding a guest to this group. They'll have limited access to group resources.*

 globomanticsvlad@gmail.com  
globomanticsvlad@gmail.com

 John Smith  
john.smith@globomantics.org

Add

Not now

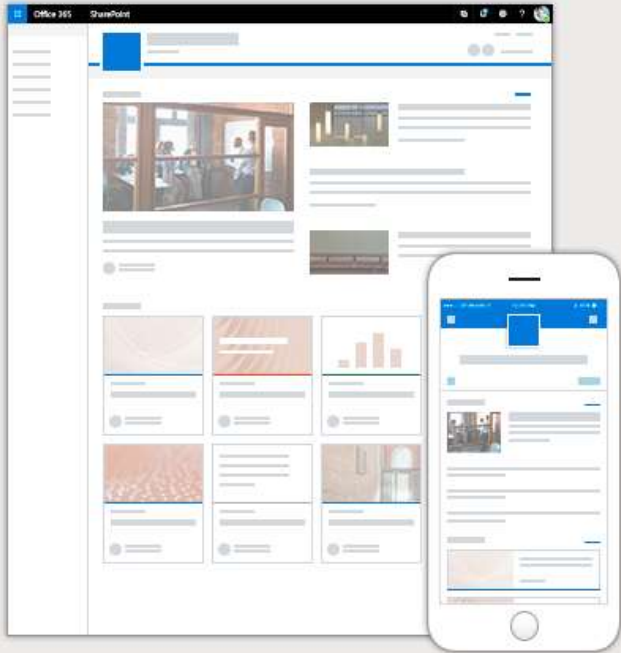
# Group Creation From SharePoint

## Team site

Choose a design

Team site

Use this design to collaborate with your team. Share documents, track events in a shared calendar, and manage project tasks.



### Site name

Globomantics Pay System Refresh

The site name is available.

### Group email address

GlobomanticsPaySystemRefresh

The group alias is available.

### Site address

https://globomanticsorg.sharepoint.com/sites/GlobomanticsPaySystemRefresh

### Site description

Collaboration Group to discuss the Pay system refresh for Globomantics in 2021

### Privacy settings

Private - only members can access this site

### Select a language

English

Select the default site language for your site. You can't change this later.

Next

Cancel

## Add group members

Group members will receive an email welcoming them to the new site and Office 365 group.



GP

Globomantics Pay System Refresh  
Private group

Who do you want to add?

You can also add more people later.

Add additional owners

John Smith

Add members

Jeff Collins

Finish

# Group Creation From Planner

New Plan ✕

---

## Globomantics Marketing Refresh

Add to an existing Office 365 Group

Privacy

Public - Anyone in my organization can see plan contents

Private - Only members I add can see plan contents

Options ^

Group description

Optional group description for new members

Create plan

# You Might See Other Options In Your Environment

Create Discard

## Create a group

A group provides a space for shared conversations, files, a group calendar, and more.

Group name

Description

Tell people the purpose of your group.

Privacy

Public - Anyone in your organization can see what's

Classification ⓘ

Confidential

- Restricted
- Confidential
- Secret
- Top Secret

Create Discard

## Create a group

A group provides a space for shared conversations, files, a group calendar, and more.

Group name

Description

Tell people the purpose of your group.

Privacy

Public - Anyone in your organization can see what's

Classification ⓘ

Confidential

Language for group-related notifications

English (United States)

Send all group conversations and events to members' inboxes. They can stop following this group later if they want to.

[Group usage guidelines](#)

## Create a group

A group provides a space for shared conversations, files, a group calendar, and more.

Group name

Project XYZ

GRP Sales Project XYZ United States ⓘ

Group email address

projectxyz

GRPSalesprojectxyzUnitedStates@office365po...

Available

Description

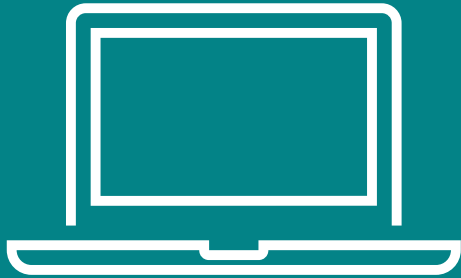
Tell people the purpose of your group.



**Pluralsight Course:** Configuring Governance and Compliance for Microsoft Teams and Microsoft 365 Groups

DanielGlenn.com

# Demo



# Microsoft 365 Group Membership



Groups have the following roles

- Owners
- Members
- Guests

# Adding Users to Your Groups

Users can be added from any service part of that Microsoft 365 Group

Some exceptions

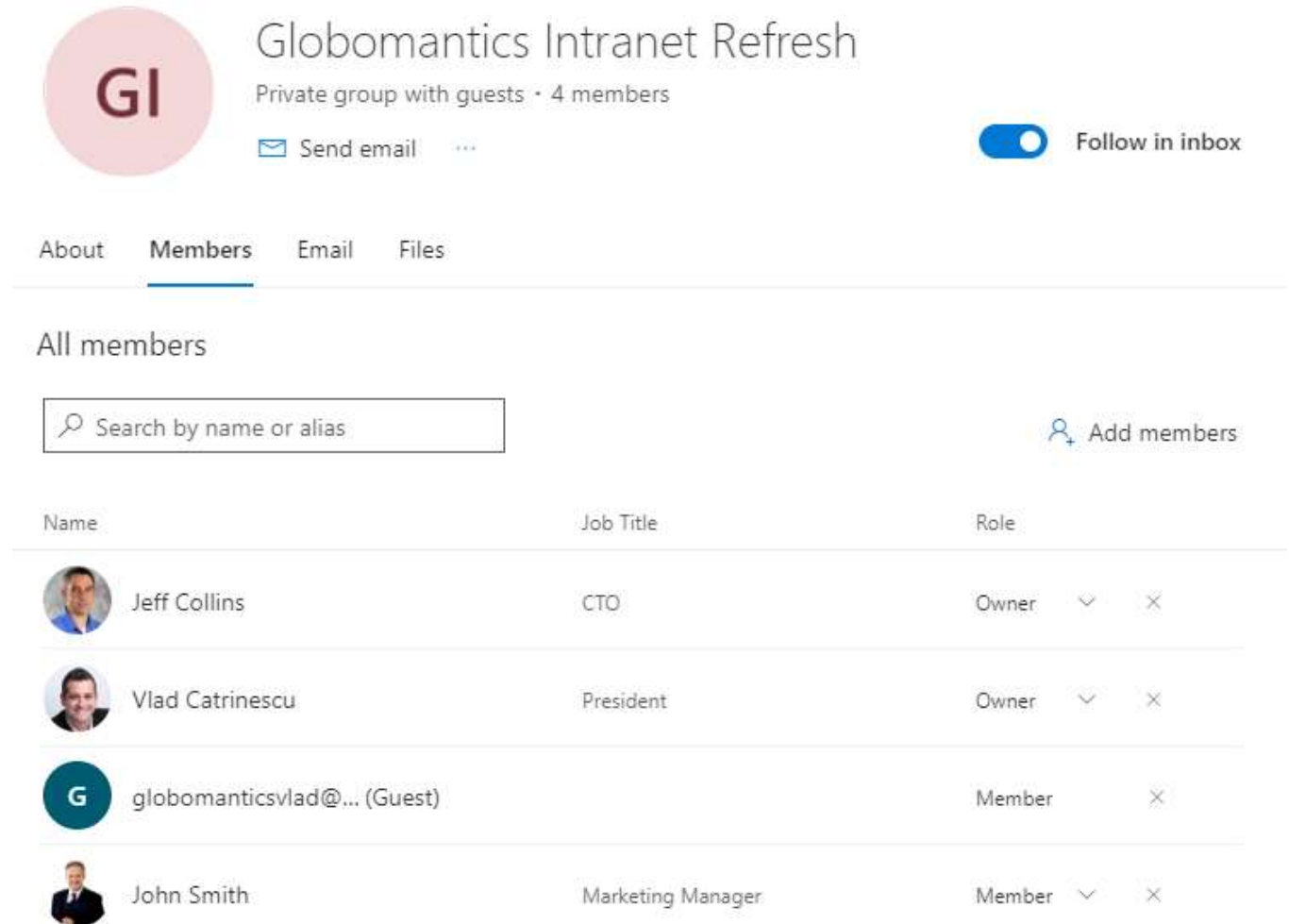
- You cannot currently add guests in Stream
- Power BI simply redirects towards Outlook







You can view and add members from Outlook Web / client

Add members button

Users always added as members first



The screenshot shows the 'Members' tab of a Microsoft 365 group named 'Globomantics Intranet Refresh'. The group is a private group with 4 members. The interface includes a search bar for members, an 'Add members' button, and a table listing the current members with their names, job titles, and roles.

Name	Job Title	Role
 Jeff Collins	CTO	Owner <span>▼</span> <span>✕</span>
 Vlad Catrinescu	President	Owner <span>▼</span> <span>✕</span>
 globomanticsvlad@... (Guest)		Member <span>✕</span>
 John Smith	Marketing Manager	Member <span>▼</span> <span>✕</span>

# Promoting or Deleting members



Name	Job Title	Role
 Jeff Collins	CEO	Owner <span>▼</span> <span>✕</span>
 Vlad Catrinescu	President	Owner <span>▼</span> <span>✕</span>
 globomanticovlad@... (Guest)		Member <span>✕</span>
 John Smith	Marketing Manager	Member <span>▼</span> <span>✕</span>
 Vanessa Le		Member <span>▼</span> <span>✕</span> Owner

You can quickly promote members to Owners from the same interface

You can also delete members from the same interface

# Similar Experience Across Services

The screenshot displays a SharePoint interface for managing group membership. On the left, a navigation bar includes 'Highlights', 'Videos', 'Channels', and 'Membership'. Below this is a 'Role' dropdown menu with 'Owner' selected, and a list of users: Vlad Catrinescu, Vanessa Le, and Jeff Collins. The main content area shows the 'SharePoint' header with a search bar, the group name 'Globomantics Intranet Refresh', and '5 members'. A 'New' button and 'Page details' link are visible. Below is a 'News' section with an 'Add' button and a placeholder image of a tablet and a plant. On the right, a 'Group membership' panel lists the members: Vlad Catrinescu (Owner), John Smith (Member), Vanessa Le (Owner), Jeff Collins (Owner), and globomanticsvlad@gmail.com (Guest). An 'Add members' button is located above the list.

Highlights Videos Channels Membership + Add member

Role

Owner

Owner

Member

Vlad Catrinescu

Vanessa Le

Jeff Collins

SharePoint Search this site

GI Globomantics Intranet Refresh Private group

+ New Page details

News + Add

Keep your team... From the site... author a new... Add New

Group membership

5 members

Add members

Vlad Catrinescu Owner

John Smith Member

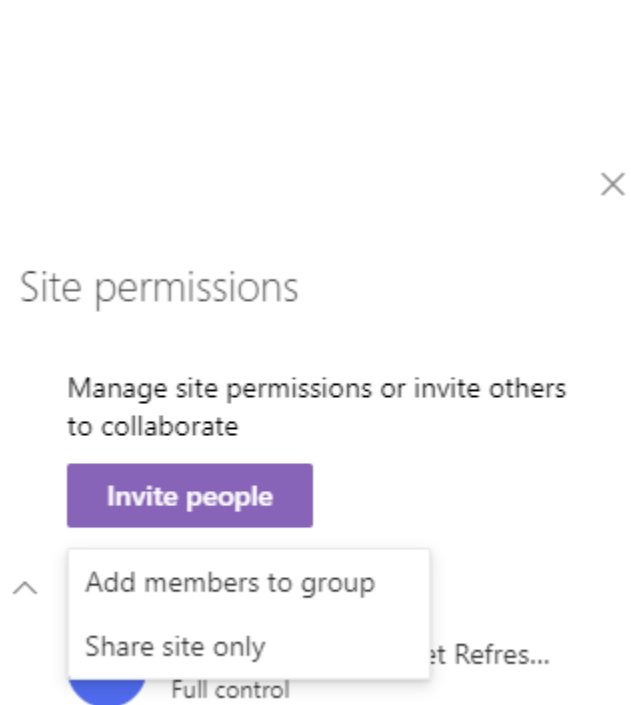
Vanessa Le Owner

Jeff Collins Owner

globomanticsvlad@gmail.com Guest

Activity

# The SharePoint Exception



SharePoint can have additional users added only to the site

All other services in Microsoft 365 Groups use the group membership

# Two Types of Membership Management

## Assigned

Members are managed manually by the Group Owner or Microsoft 365 Admin

## Dynamic

Members are added / removed automatically based on dynamic rules

Group Owners **cannot** manually add or remove users

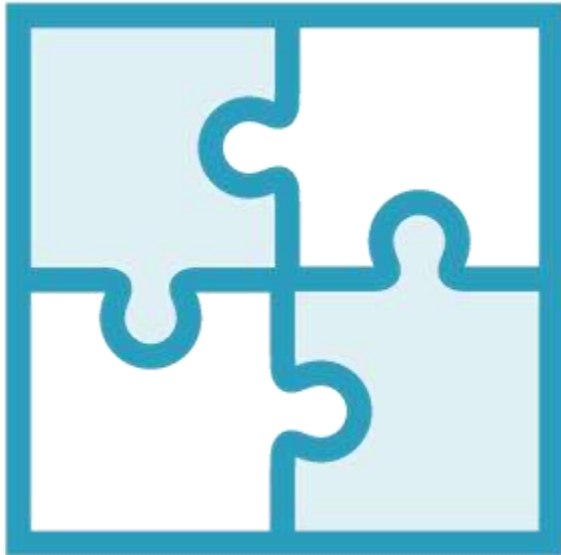
Users cannot leave the group



## “Groupify”

*Connect a standalone SharePoint site to a new Microsoft 365 Group*

# Groupify a SharePoint Site



Create a Microsoft 365 Group using an existing SharePoint Site

SharePoint site must be a team site

- Classic (#STS0)
- Modern Standalone (#STS3)

Original SharePoint permissions remain in SharePoint only

- Need to manually/programmatically move users to Group permissions

# Connect to New Microsoft 365 Group

Option only available to Site Collection Administrators if tenant admin did not disable it

The screenshot shows the top navigation bar of a SharePoint site with the 'SharePoint' logo, a search bar, and user profile icons. Below the navigation bar, the site title 'ST SharePoint Team Site' is displayed. A '+ New' dropdown menu is open, showing options like 'News' and 'Add'. The settings menu is also open, listing various options such as 'Shared with...', 'Edit page', 'Add a page', 'Add an app', 'Site contents', 'Change the look', 'Site settings', 'Connect to new Microsoft 365 Group', and 'Getting started'. The 'Connect to new Microsoft 365 Group' option is highlighted with a red box. A red line connects this option to the text box on the left.

# Bulk *Groupify* SharePoint Sites

Microsoft provides several PowerShell cmdlets & Scripts

Need to be a SharePoint Online admin and have PnP PowerShell

- <https://docs.microsoft.com/en-us/sharepoint/dev/transform/modernize-connect-to-office365-group>
- <https://docs.microsoft.com/en-us/sharepoint/dev/features/groupify/groupify-overview>



# Microsoft 365 Groups Application Membership

Most applications part of an Microsoft 365 Group use only the group membership

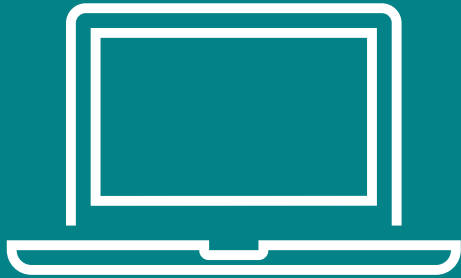
- Ex: You cannot add a users to Teams without adding them to the Microsoft 365 Group

SharePoint is an exception to that rule

- You can **add** users only to the SharePoint Online site that's connected to a Group



# Demo



# Let's Build an Intranet!

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## Summary

# Organizing Teams

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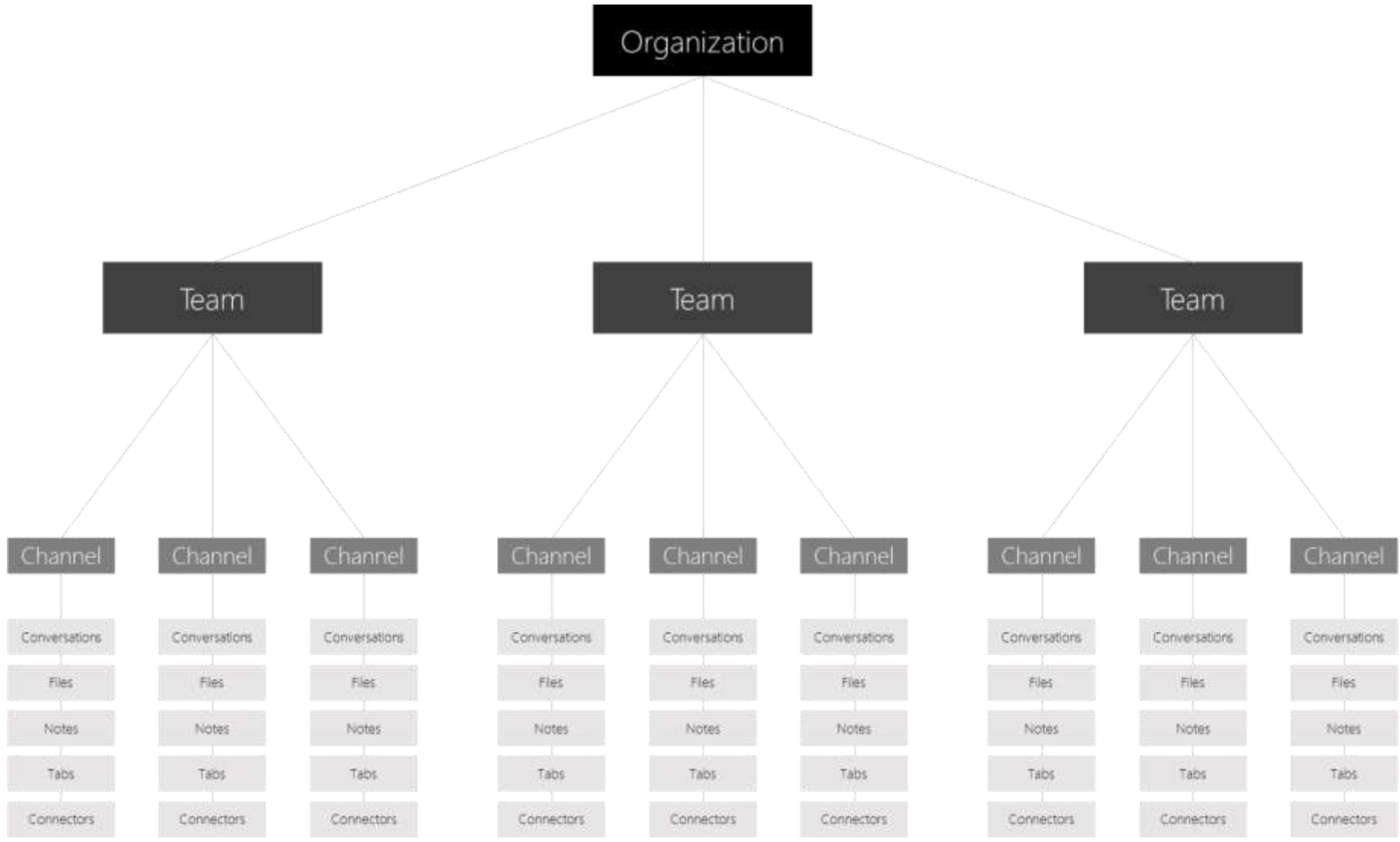
# Structure

## Teams

- Collection of people, content, and tools surrounding different projects

## Channels

- Dedicated sections within a team to keep conversations organized
- Places where everyone on the team can have open conversations
- Can be extended with Tabs, Connectors and Bots



# Memberships and Roles

Team owners are able to invite anyone in the organization they work

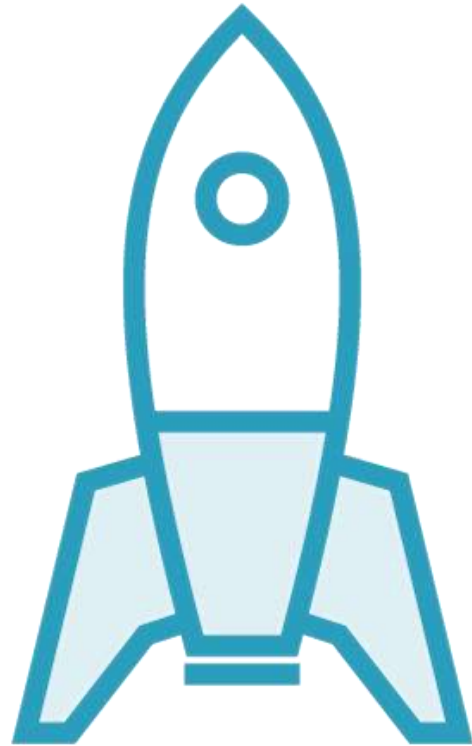
Three roles in Teams:

- **Owner:** person who creates the team or assigned the role.  
Responsible for managing team-wide settings and membership, including invitations
- **Team member:** the people that have been invited to join the team
- **Guests:** Microsoft 365 users who are outside of your tenant can be added to the team by team owners (more info @ [aka.ms/guestaccesshelp](https://aka.ms/guestaccesshelp))

# Guest access

- Guest access is a tenant-level setting in Teams and is turned off by default
- Once enabled, a team owner in Teams can add and manage guests in their teams via the web or desktop.
- Only Azure Active Directory or Microsoft 365 work or school account are supported at the moment

# Channels in Microsoft Teams



Team Owners are responsible of the different channels inside the team

Three\* types of channels

- General (default)
- Standard (available to everyone in the team)
- Private (subset of people in the team)

\* Shared channels coming!

# Memberships and Roles (cont.)

	Team Owner	Team Member	Team Guests
Create team	✓	-	-
Leave team	✓	✓	✓
Edit team name/description	✓	-	-
Delete team	✓	-	-
Add channel	✓	✓*	✓*
Edit channel name/description	✓	✓*	✓*
Delete channel	✓	✓*	✓*
Add members	✓**	-	-
Add tabs	✓	✓*	-
Add connectors	✓	✓*	-
Add bots	✓	✓*	-

\* Can be restricted through Teams settings by the owner

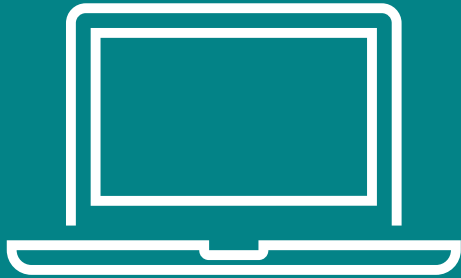
# Private Channels – Who Can Do What

Action/Role	Team owner	Team member	Team guest	Private channel owner	Private channel member	Private channel guest
Create private channel	✓	✓	✗			
Delete private channel	✓	✗	✗	✓	✗	✗
Leave private channel				✓	✓	✓
Edit private channel	✗			✓	✗	✗
Restore deleted private channel	✓	✗	✗	✓	✗	✗
Add members	✗			✓	✗	✗
Edit settings	✗			✓	✗	✗
Manage tabs and apps	✗			✓	✓	✗

# Private Channels – Who Can See What

Item	Team owner can see	Team members can see
Name and description	All private channels in the team	Only the private channels that they are added to
Conversations and tabs	Only when added to the private channel	Only when added to the private channel
Files and content	Only when added to the private channel	Only when added to the private channel
Private channel owner	All private channels in the team	Only when added to the private channel
Last activity time stamp	All private channels in the team	Only when added to the private channel

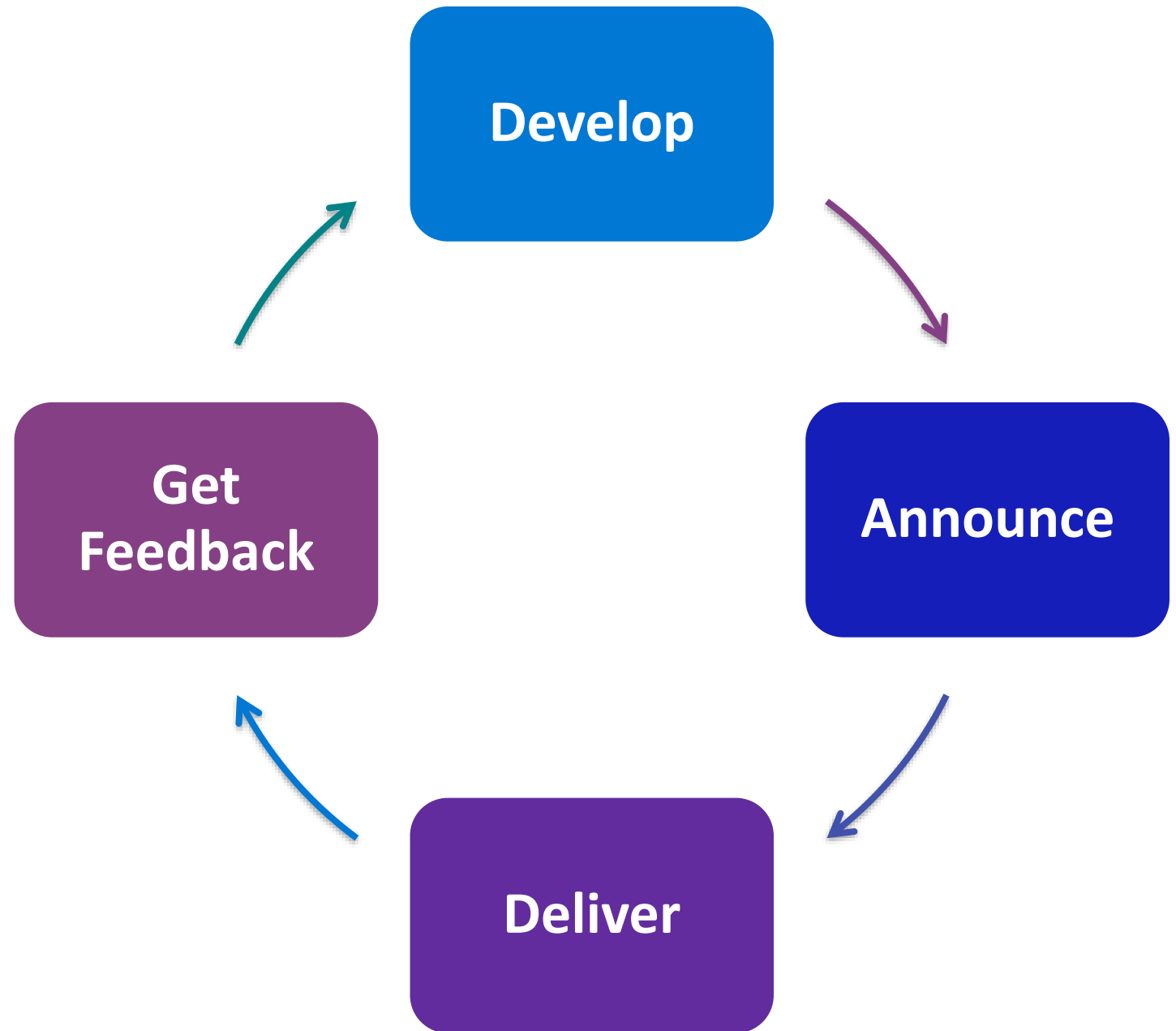
# Demo



# Keeping up with change in Microsoft 365

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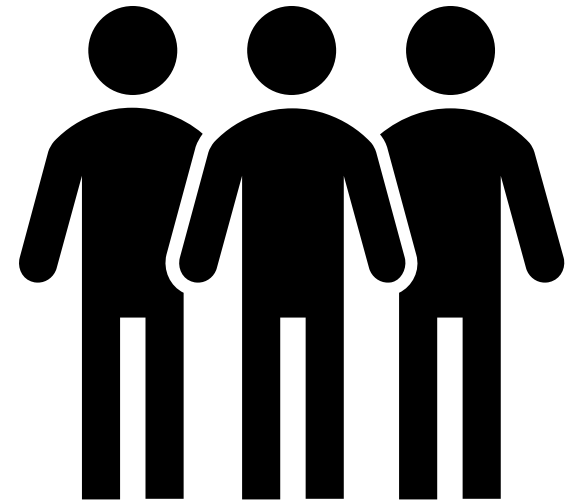
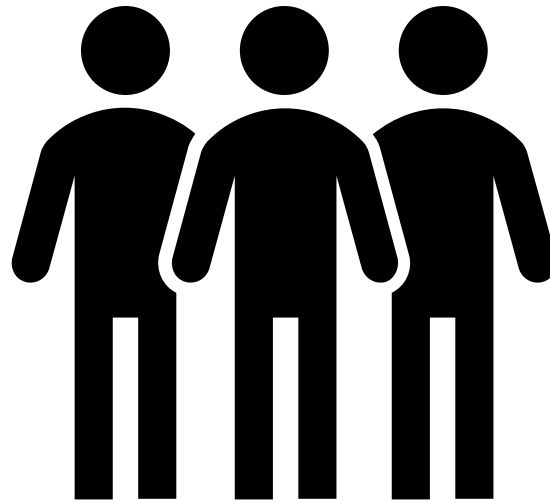
What change?



# Who needs to know?

Who is keeping up with it now?

Who should be alerted to changes?



# Microsoft 365 Roadmap

Microsoft 365 Roadmap

## Get the Latest Updates

Microsoft 365 is a complete, intelligent solution, including Office 365, Windows 10, and Enterprise Mobility + Security, that empowers everyone to be creative and work together, securely.

Search for a product, release or specific update

Filters | Clear all

- Products
  - Enterprise Mobility + Security
  - Office 365
  - Windows 10
- Platform
- Cloud Instance

Showing 579 updates: O365

Download Share RSS

In development	Rolling out	Launched
183	59	337


Description	Status	Products	Release
Service Health Dashboard Update: Report an Outage (preview)	In development	O365	Q3 CY2019
Service Health Dashboard Update: User level details	In	O365	Q3 CY2019

# Message Center

The screenshot displays the Microsoft Message Center interface. At the top, there are navigation links for 'Preferences' and 'Planner syncing', a count of '263 items', and a search bar. Below this, a 'Filters' section includes dropdown menus for 'Service', 'Tag', and 'Message state'. The main content area is a list of messages, each with a title, a star icon, a vertical ellipsis menu, and a service icon.

Message title	Star	Service
<b>Power Platform admin center Data Export to Azure Data ...</b>		Microsoft Power Automate in Microsof...
<b>Power Platform performance and diagnostics monitorin...</b>		Power Apps in Microsoft 365
<b>Power Platform admin center cross-tenant analytics</b>		Microsoft Power Automate in Microsof...
<b>Removing the option to use 'Office Presentation Service'...</b>		Microsoft 365 Apps
Search across images with Microsoft Search	★	Microsoft 365 Apps
Actionable items in Microsoft Search	★	Microsoft 365 Apps
<b>(Updated) Release of new Yammer Desktop experience a...</b>		Yammer



REgarding 365 

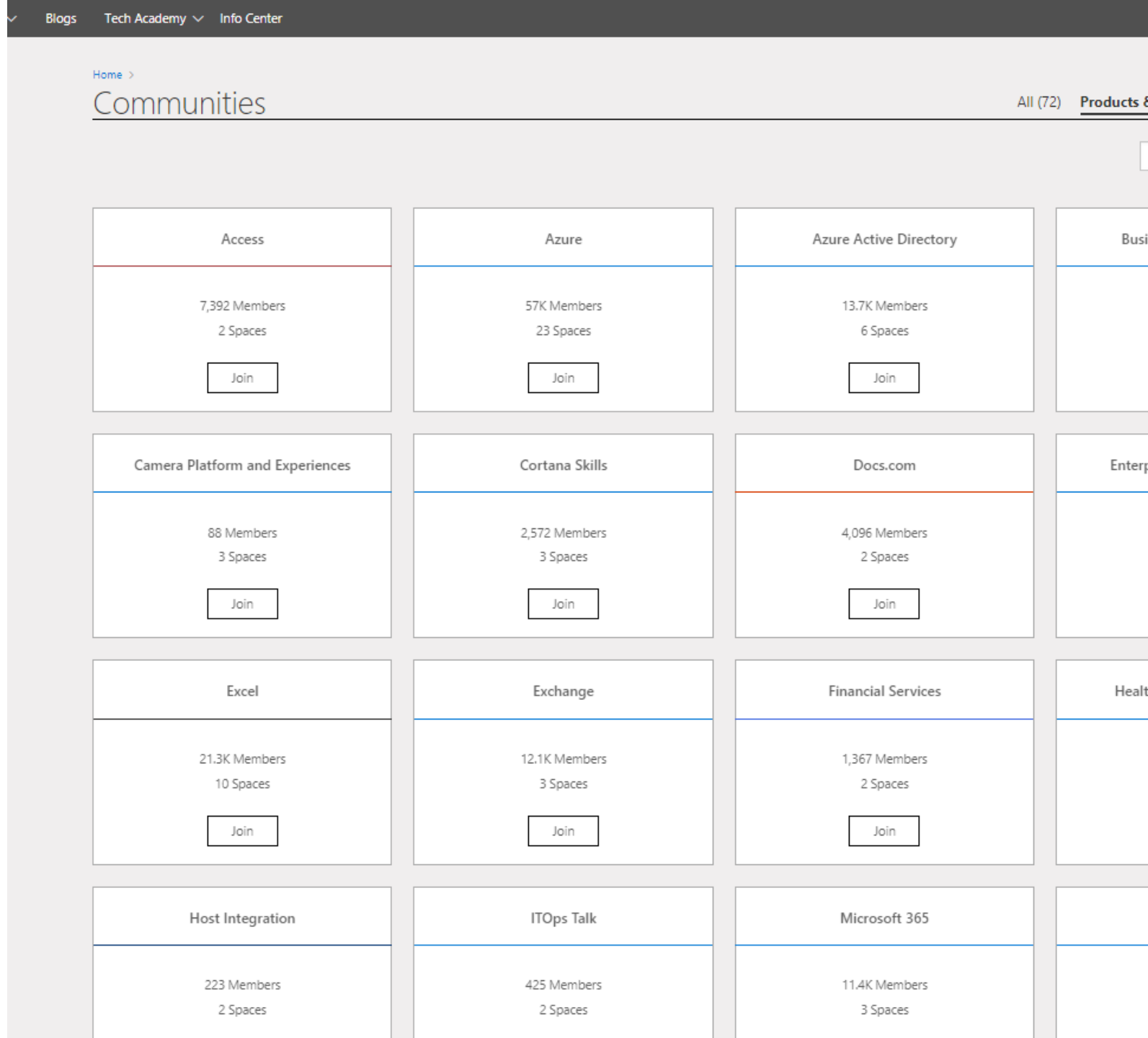


# Tech Community Communities

- Engage with Microsoft and other experts

## Blogs

- Learn announcements and details on roadmap items



# Two Tenants, One Goal



## Development

Targeted release for everyone



## Production

Standard Release  
or Targeted release for selected users (developers)

# Keys to Success



## Monitor Updates

- Roadmap
- Message Center
- MSFT Blogs



## Learn About Changes

- MessageCenter.Show
- User Groups
- Twitter & Blogs



## Share Information

- Newsletter
- Internal User Group
- Lunch & Learn

# Introduction to Power Automate

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# Microsoft Power Automate

Microsoft Power Automate is a cloud-based tool that's part of the Power Platform and allows business users to create and automate workflows and tasks across multiple applications and services.

# Workflows

Workflows are pre-programmed mini-applications that streamline and automate a wide variety of business processes — from collecting signatures, feedback, or approvals for a plan or document, to tracking the current status of a routine procedure. Workflows are designed to save you time and effort, and to bring consistency and efficiency to tasks that you perform on a regular basis.

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# Available Tools for Workflows in the Microsoft Stack

## SharePoint Designer

Original workflow creation tool in the Microsoft stack. Depreciated today, but still the only tool for purely On-Premises environments

## Microsoft Power Automate

Cloud-Based tool to create workflows in Microsoft 365 and hybrid environments. Can connect to over 275 services!

## Azure Logic Apps

Cloud-Based platform to create workflows aimed at developers

## 3<sup>rd</sup> Party Products

Business Process Automation solutions sold by Microsoft partners. Provide powerful solutions... For a price!

# Power Automate Terms and Concepts

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# Power Automate and *flows*



Microsoft Power Automate was called Microsoft Flow

- Renamed to Power Automate in November 2019

In Power Automate you create flows

- *Lowercase f*

- Home
- Action items
- My flows**
- Create
- Templates
- Connectors
- Data
- AI Builder
- Solutions
- Learn

Start approval when a new item is added

Save Flow checker Test

Trigger

**When a new item is created**

\* Site Address: Project Central -   
 https://globomanticsorg.sharepoint.com/sites/ProjectCentral

\* List Name: Purchase Request

Show advanced options

Actions

**Start an approval**

\* Title: Please Approve Purchase of Title

\* Assigned To: Vanessa.Le@globomantics.org

Details: Title costs Price

Item Link: Link to item

Item Link Description: Name

Conditions

**Condition**

Expand condition

✓ If yes

✗ If no

**Inform item creator of approval**

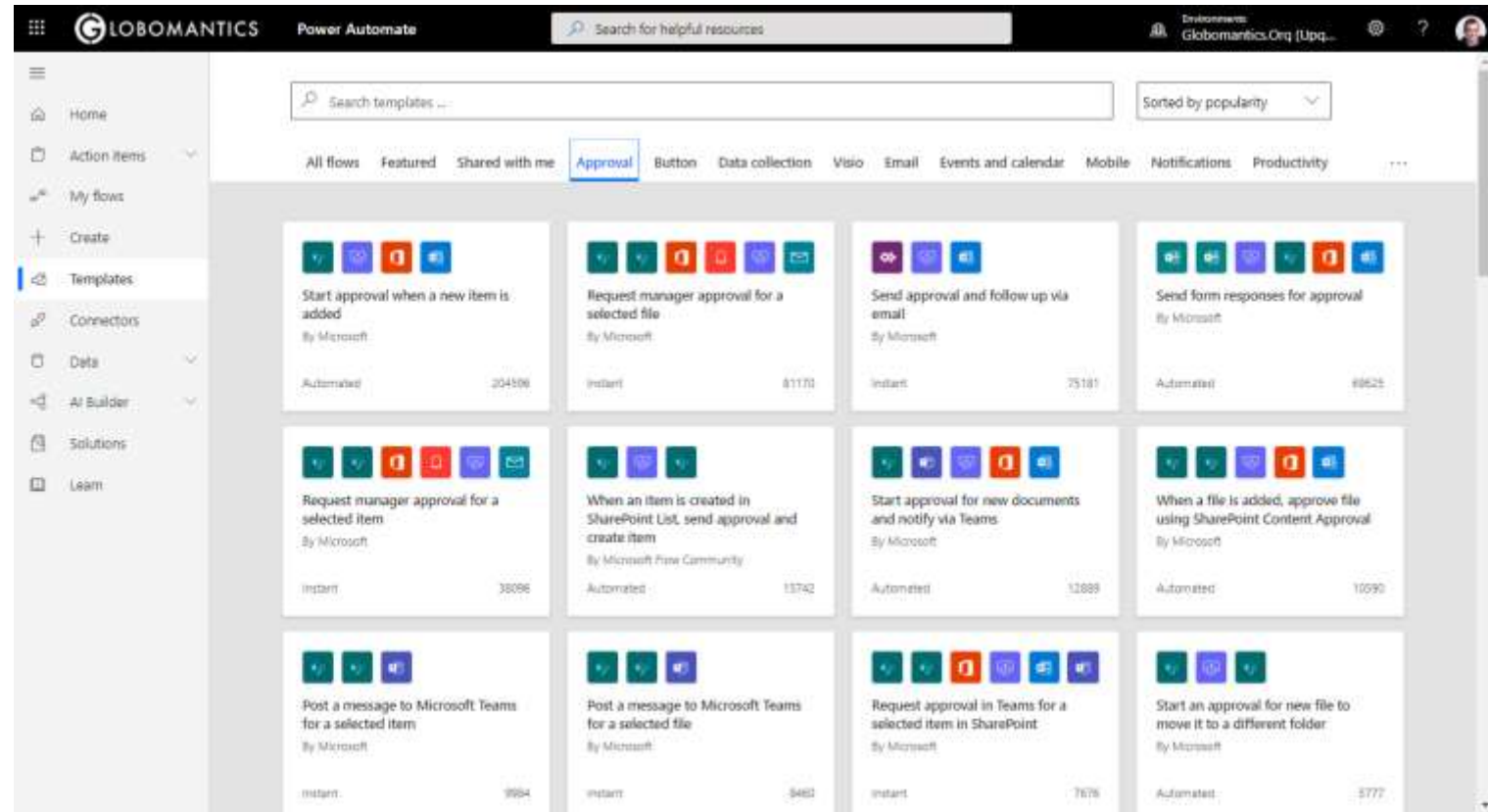
**Inform item creator of rejection**

# Templates

100+ templates available

Useful as a quick start for  
your flows

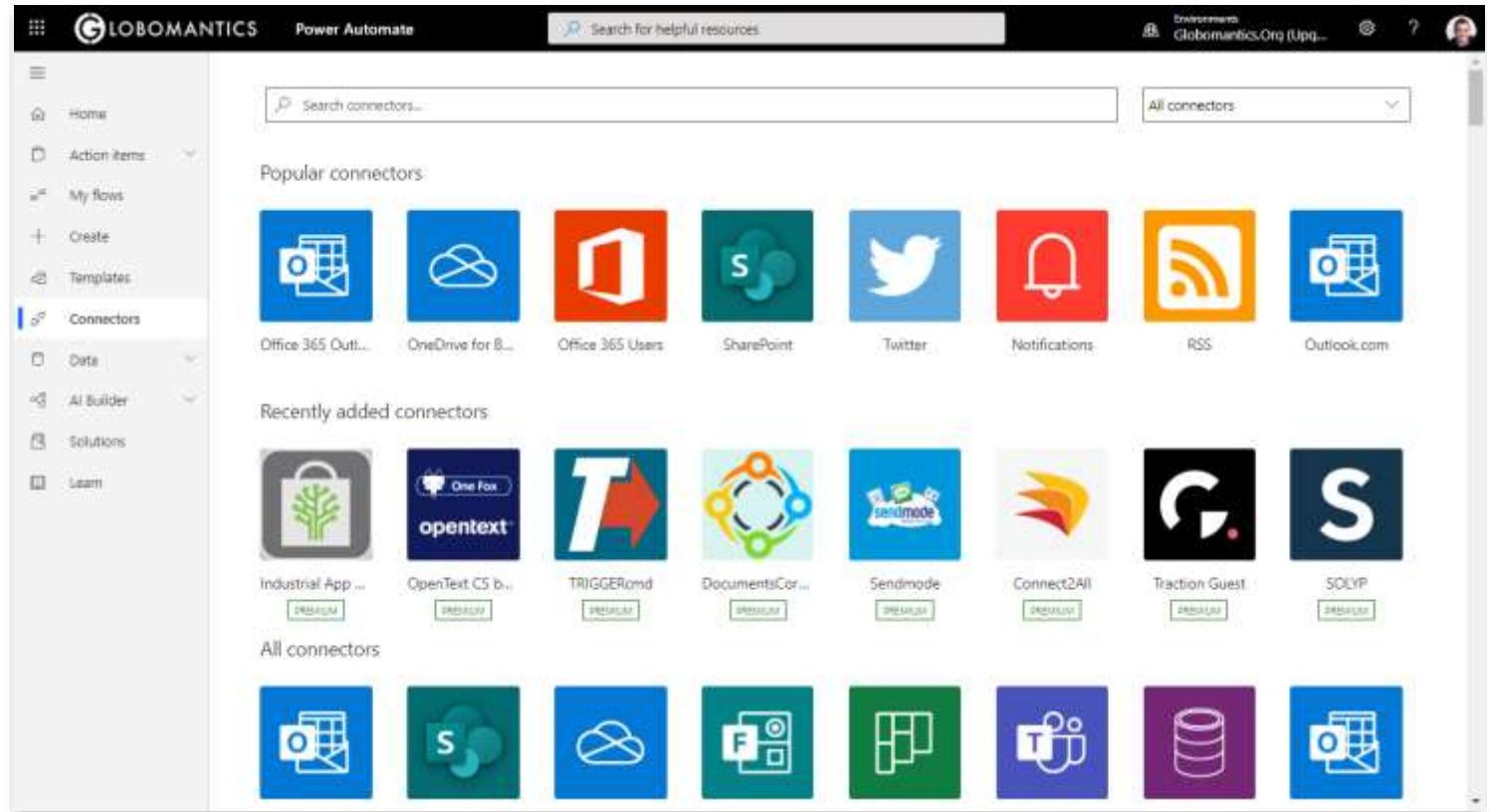
You can customize them to  
fit your needs



# Connectors

Services that Power Automate can connect to

Both internal (M365) and external (3<sup>rd</sup> party services)



Flows you shared with other people / other people shared with you

Robotic Process Automation

Those flows aren't shared with anyone

Advanced flows used mostly in Dynamics 365

The screenshot shows the Power Automate interface for a user named GLOBOMANTICS. The top navigation bar includes the logo, the text 'Power Automate', a search bar, and the environment name 'Globomantics.Org (org...)'. A left-hand navigation pane lists various options: Home, Action items, My flows (selected), Create, Templates, Connectors, Data, AI Builder, and Solutions. The main content area is titled 'Flows' and contains four filter tabs: 'My flows' (highlighted with a green box), 'Team flows' (highlighted with a blue box), 'Business process flows' (highlighted with a purple box), and 'UI flows' (highlighted with a black box). Below these tabs is a table of flows. The table has columns for 'Name', 'Modified', and 'Type'. Three flows are listed: 'Holiday Request Approval', 'Document Approval with Reminder', and 'New Site Added', all of which are 'Automated' and were modified '4 mo ago'. Annotations with arrows point from the text blocks to the corresponding tabs: 'Those flows aren't shared with anyone' points to 'My flows'; 'Flows you shared with other people / other people shared with you' points to 'Team flows'; 'Advanced flows used mostly in Dynamics 365' points to 'Business process flows'; and 'Robotic Process Automation' points to 'UI flows'.

Name	Modified	Type
Holiday Request Approval	4 mo ago	Automated
Document Approval with Reminder	4 mo ago	Automated
New Site Added	4 mo ago	Automated

# Flow name and Details

# Services used and accounts connected

**Details**

Flow	Document Approval with Reminder	Status	On
Description	This workflow is an sample approval workflow, that automatically sends reminders if the approver did not answer.	Modified	Apr 16, 05:24 PM
Owner	Vlad Catrinescu	Type	Automated
		Plan	Per-user plan

**Connections**

- Approvals
- Office 365 Outlook Permissions
- Office 365 Users Permissions
- Connections Multiple permissions

**Runs**

Start	Duration	Status
Apr 16, 05:27 PM (3 min ago)	00:02:02	Succeeded
Apr 16, 05:27 PM (3 min ago)	00:02:02	Succeeded
Apr 16, 05:27 PM (3 min ago)	00:02:02	Succeeded

**Owners**

- VL
- VC

# History of flow runs and durations

# Flow owners

# Recap



## Trigger

- Event that starts the flow

## Actions

- Everything your flow does

## Conditions

- Allows you to do different actions depending on a value

## Connectors

- All the services Microsoft Power Automate connects to

# Getting Started with Templates



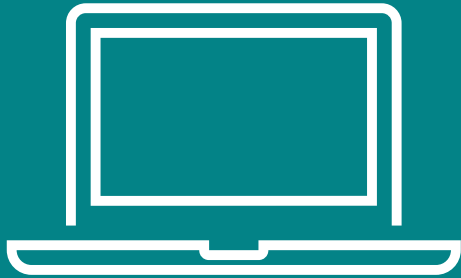
Great way to get started with Microsoft Power Automate

Templates can fully be customized

- Add / Delete actions

Hundreds of templates offered out of the box

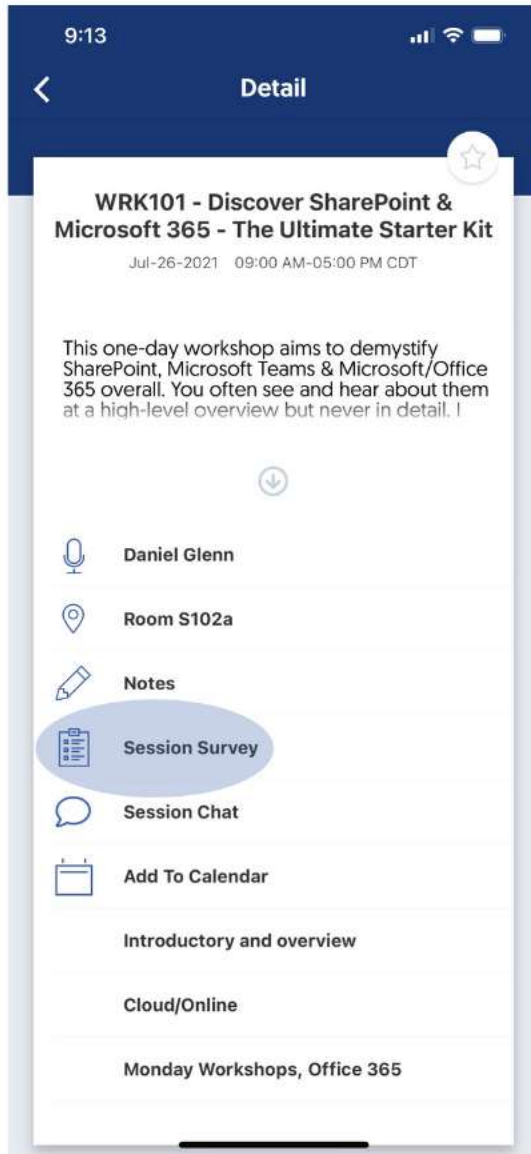
# Demo



# My SPFest & TeamsFest Chicago 2021

- WRK101 - Discover SharePoint & Microsoft 365 - The Ultimate Starter Kit - **Monday workshop**
- WRK503 - Transform Your Intranet in Less than 4 hours! - **Tuesday workshop**
- CM103 - Practical steps for migrating shares to Microsoft 365 - **2:00pm Wednesday**
- OFF105 - Use Your On-premises Data with Power Apps, Power BI, and Power Automate (Flow) - **4:40pm Wednesday**
- BI203 - Power BI sharing - your options for keeping everyone informed - **1:20pm Thursday**
- INT303 - Modern is Now! Transform Your Intranet - **1:00pm Friday**





## HOW WAS THE SESSION?

Fill out the session surveys in the SPFest Chicago app for your chance to win an Amazon gift card.\*

Search for **SPFest Events** in the App Store or Google Play Store.

Click on the session you'd like to review in the agenda, and then click on 'Session Survey'.

\*Prizes will be given out Friday at lunch. Must be present to win!

# Daniel Glenn



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