

MICROSOFT 365 CONFERENCE
Microsoft 365 Power User Masterclass

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@DanielGlenn

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The event invitation code is: **M365Spring22**

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2022

In-Person – April and December



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April 5 – 7, 2022

MGM Grand

Las Vegas, NV

December 2022

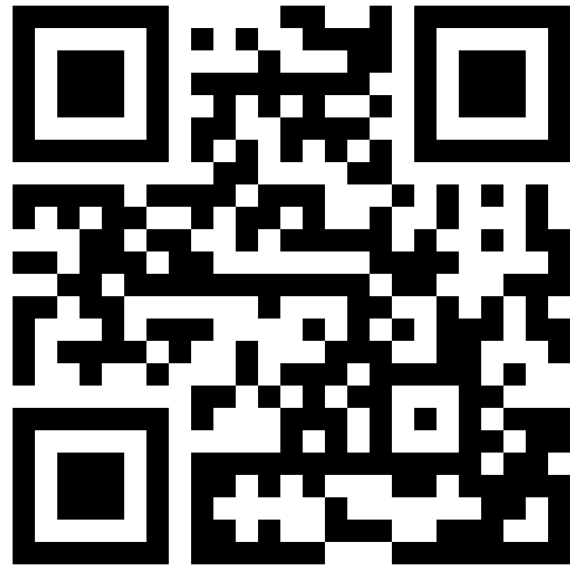
Check website for details

Icebreaker

- Name
- Organization
- Role
- Fun Fact?



Daniel Glenn



DanielGlenn.com/Hello

Consultant
Podcaster
Microsoft MVP



[@DanielGlenn](https://twitter.com/DanielGlenn)



DanielGlenn.com



[/DanielGlenn](https://www.youtube.com/DanielGlenn)



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Agenda

Document Management in SharePoint Online

Microsoft Lists

Building in SharePoint

Managing Microsoft Teams as a Teams Owner

Microsoft Viva

Microsoft 365 Collaboration Security AMA

Getting Started With Power Automate

Getting Started with Power BI

Keeping Up With Change in Microsoft 365

Schedule & Housekeeping

10:30am (ish) – Morning Break

12 pm – Lunch

1 pm – Afternoon session start

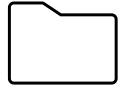
2:30pm (ish) – Afternoon Break

4:00pm (ish) – Close out

Slides will be shared with you 😊

Content Management in SharePoint Online

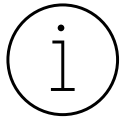
Content Management in SharePoint Online



Libraries



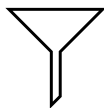
Lists



Columns












Content Types



Views

Libraries

Demo Docs

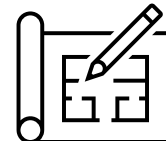
 Name ▾	Modified ▾	Modified By ▾
 Blog Post preview.docx	July 26	Provisioning User
 Contoso Purchasing Permissions.docx	July 26	Provisioning User
 Credit Cards.docx	July 26	Provisioning User
 Customer Accounts.docx	July 26	Provisioning User
 Customer Data.xlsx	July 26	Provisioning User
 Q3 Sales and Marketing Expense Report Au...	July 26	Provisioning User
 Q3_Product_Strategy.docx	July 26	Provisioning User
 Sales Memo.docx	July 26	Provisioning User



Documents

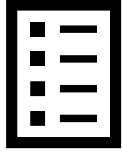


Videos



& More!

Lists



Track Information such as Tasks, Agenda, Inventory



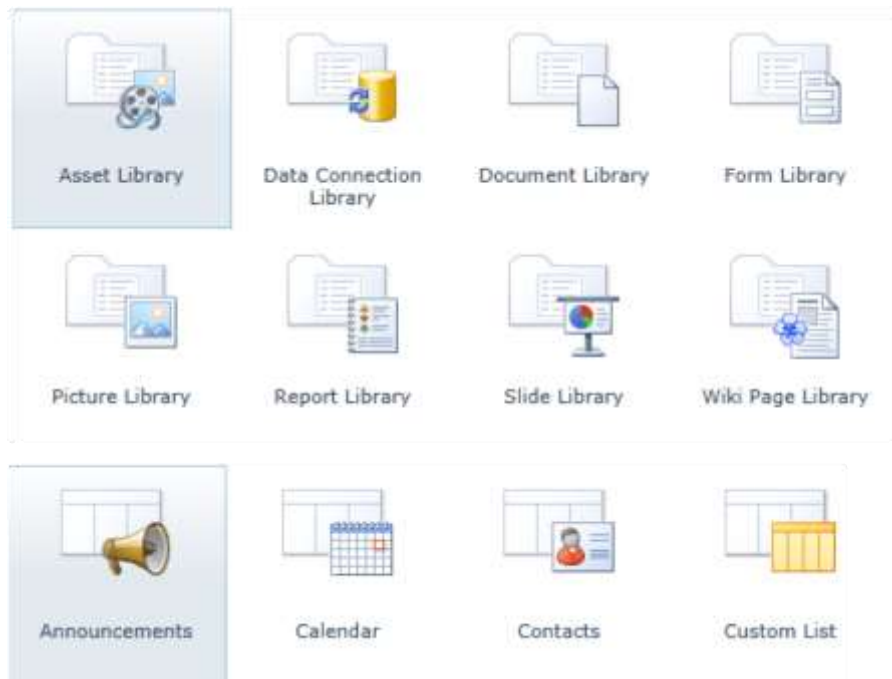
SharePoint Lists now fall under the Microsoft Lists Umbrella



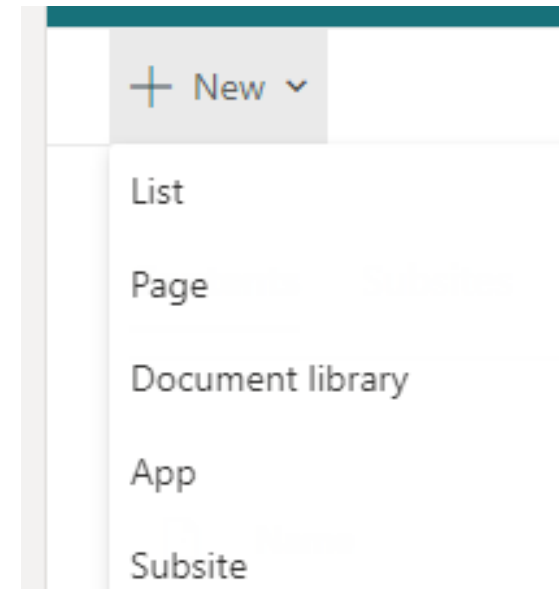
A lot of the same content management concepts are the same between lists & libraries

The Way We Create Lists & Libraries Has Changed

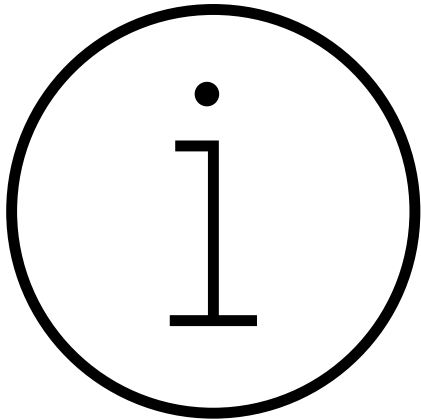
Then



Now



Columns



Columns are used to store metadata in SharePoint lists & libraries

Metadata = Information about Information

Example: a car

- Manufacturer
- Model
- Color
- Engine

Many types of columns depending on the type of information you want to capture

<u>Modern</u>	Classic
Overview	▼
Single line of text	▼
Multiple lines of text	▼
Location	▼
Number	▼
Yes/No	▼
Person or Group	▼
Date and time	▼
Choice	▼
Hyperlink	▼
Currency	▼
Image	▼
Managed Metadata	▼

Two Types of Columns

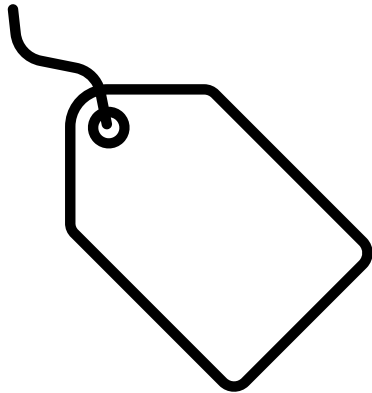
List / Library Columns

Available only in that specific list / library

Site Columns

Available for any list/library in the site

Managed Metadata



Manage terms at a central level

- Site
- Tenant

Term sets are collections of terms that are related

Terms and term sets can be created and managed independently from content types and site columns

Content Types

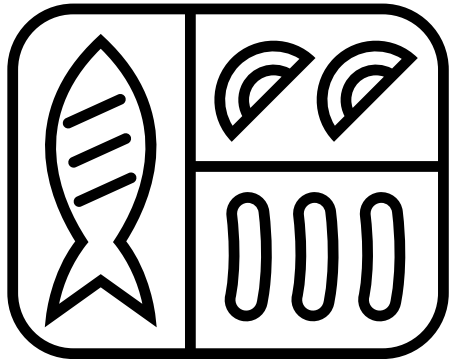
Re-usable group of metadata for a category of content

You can create one or multiple content types

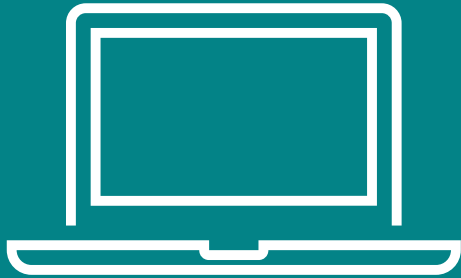
- Contract
- Contact
- Proposal

Can be created at site level

- Or at the tenant level and be used throughout your tenant
- Updating it at the tenant level can update it in all sites



Demo



Microsoft Lists in Depth



There is a lot of
information to
keep track of



98%

Of global information workers
communicate or collaborate with one or
more colleagues.¹

28%

Of a global information workers day spent,
on average, creating, reading, or searching
for information related to their job.²

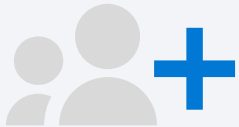
4 hours

Of time information workers saved per
week from improved collaboration and
information sharing.³



Simple

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



Smart

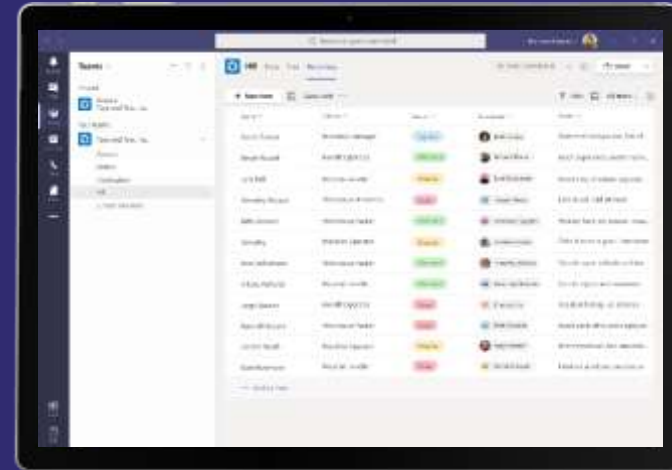
Keep everyone in sync with rules and quick edits



Flexible

Customize your lists for whatever your business needs

Track what matters most



Simple

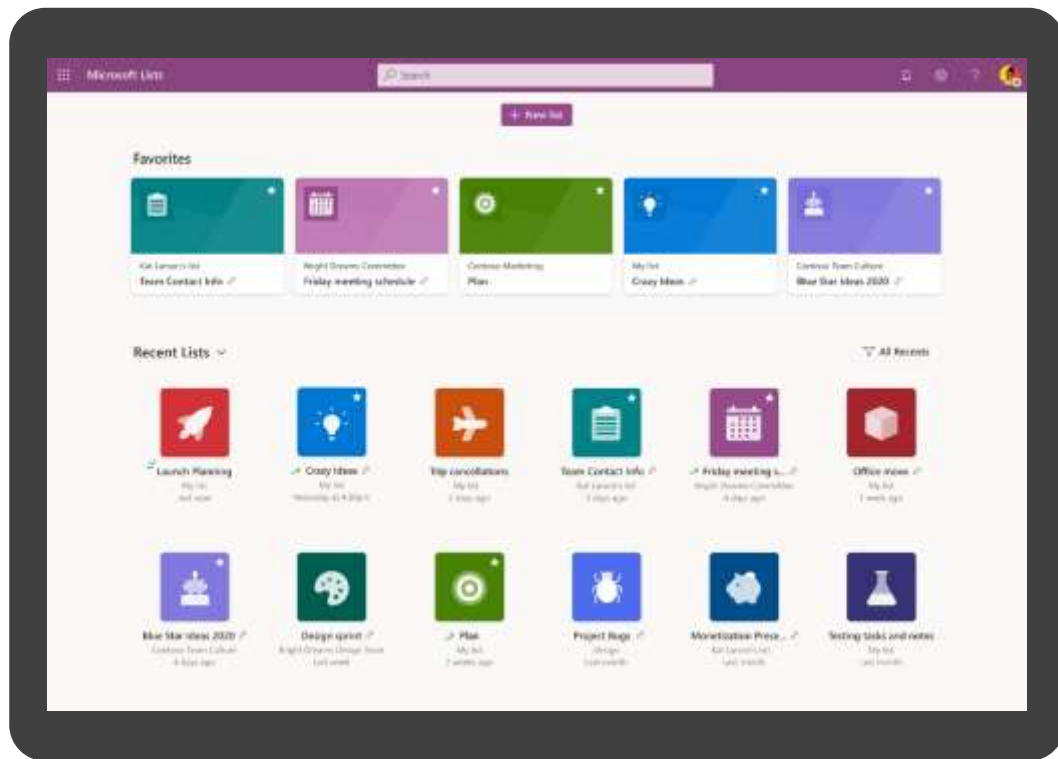
Easily create, share, and track lists
with anyone, on any device

Smart

Flexible

Simple

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

Simple

Jumpstart your new list using ready-made templates



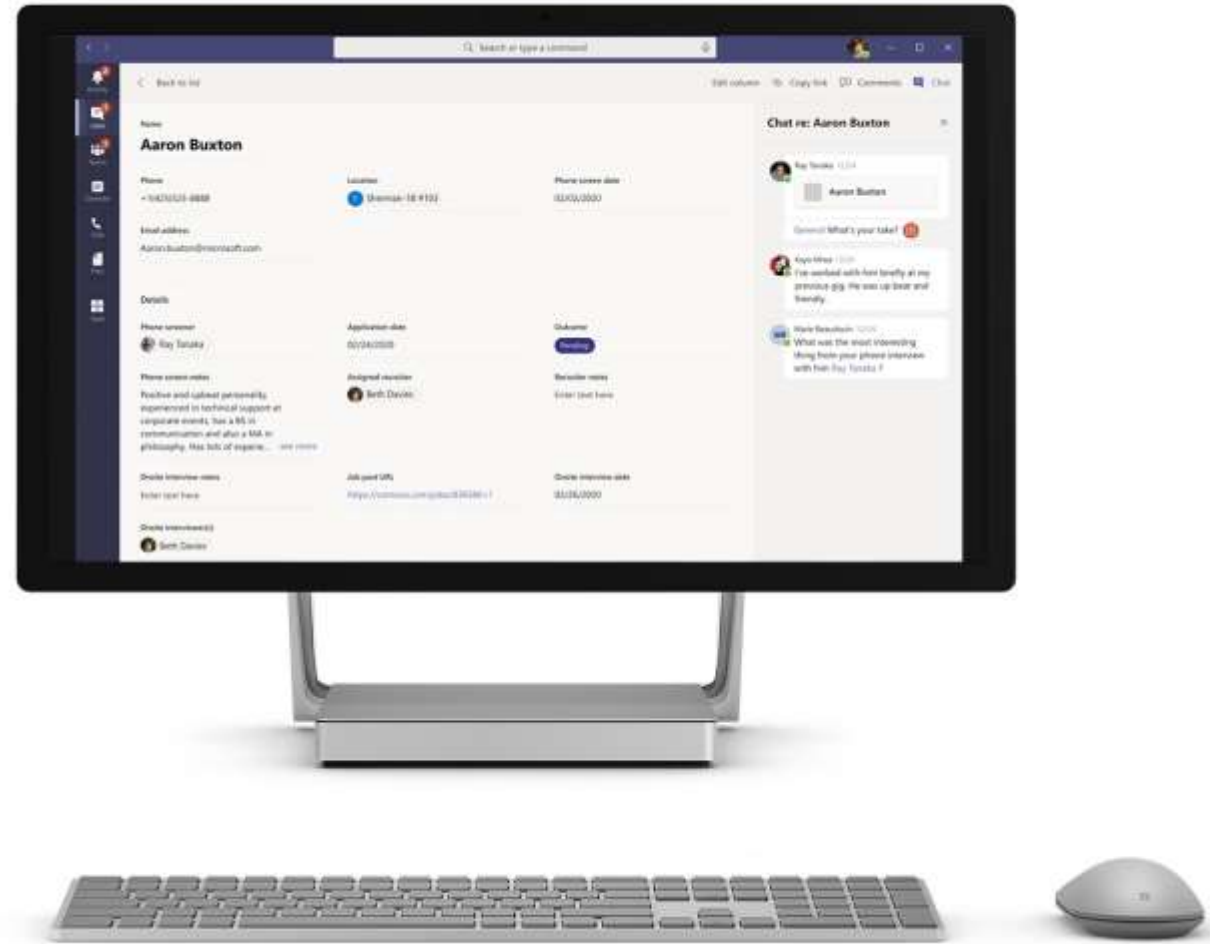
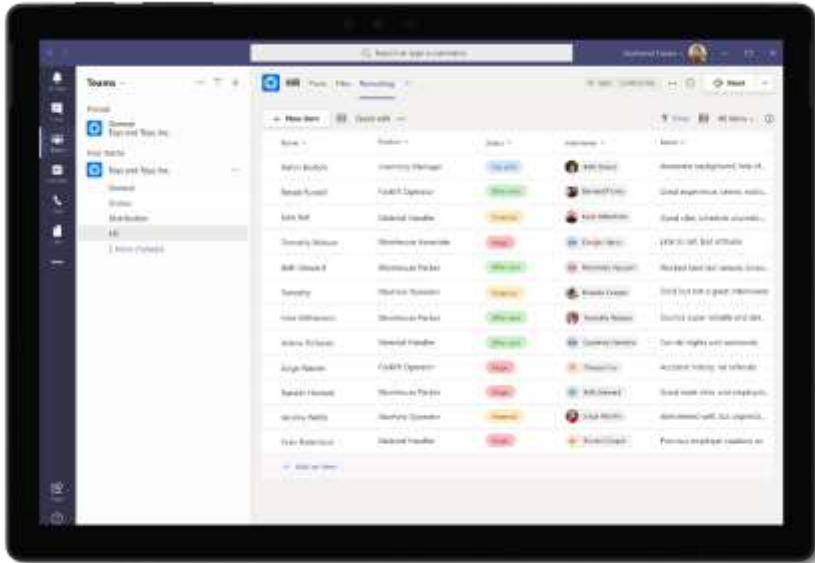
Start with a ready-made template

- 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.

Simple

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

Simple

Smart

Keep everyone in sync with rules and quick edits

Flexible

Smart

Your lists just got a whole lot smarter

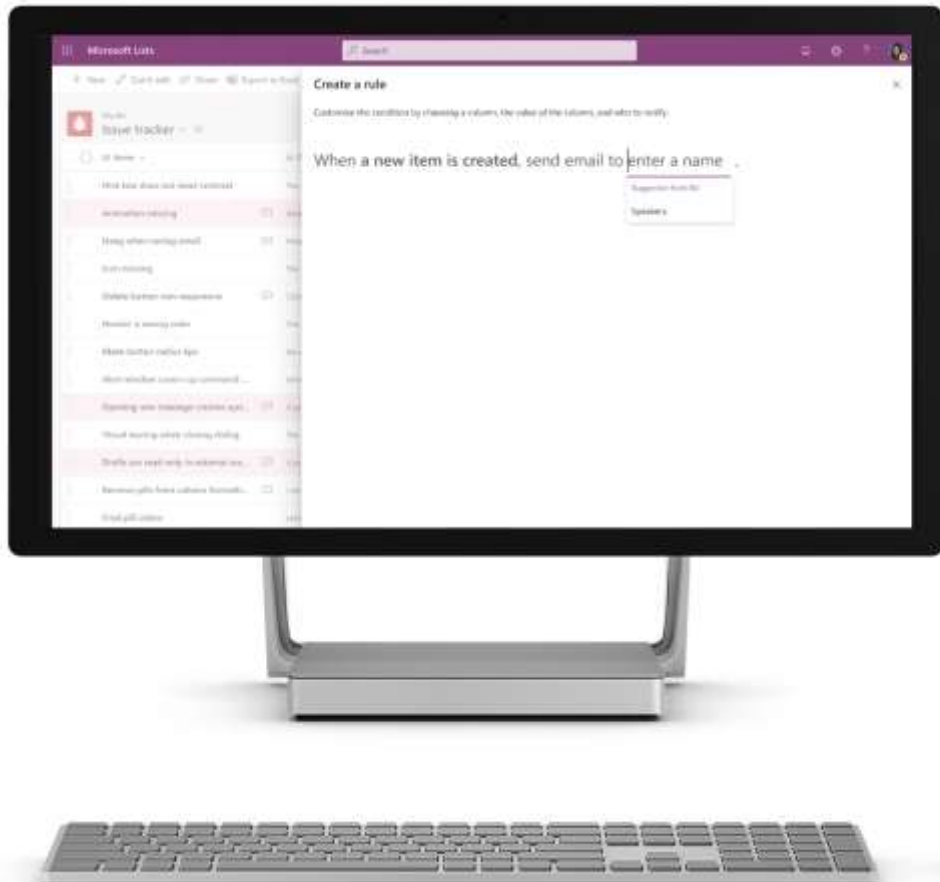


Do more, work smarter:

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

Smart

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



Simple

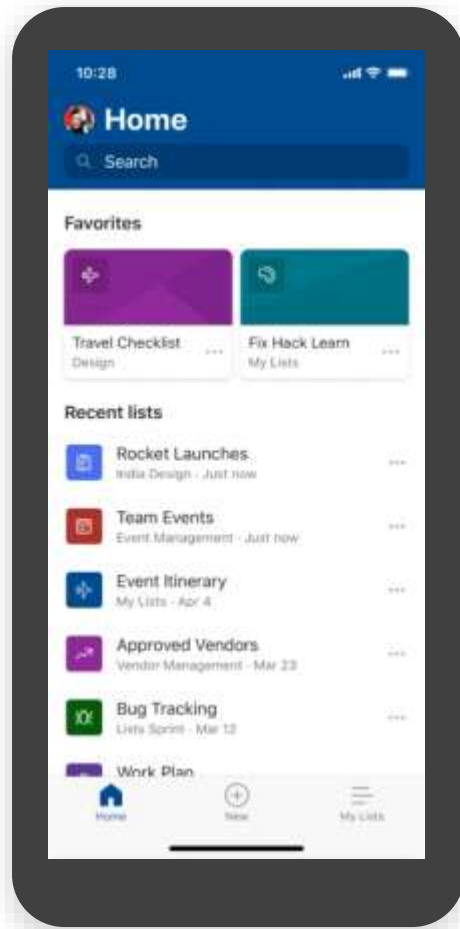
Smart

Flexible

Customize your lists for whatever your business needs

Flexible

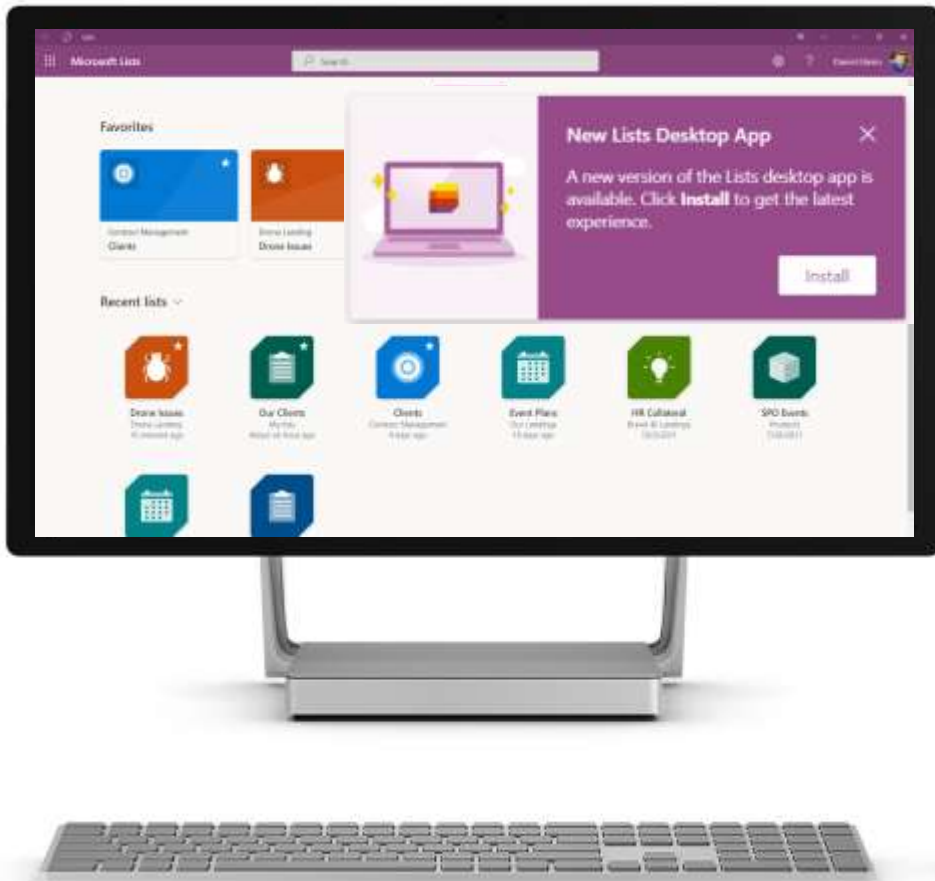
Check your list anywhere with the Lists mobile app



- 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)
 - Android (coming April 2022) [roadmap ID: 70704]

Flexible

Use your list with the Lists desktop app



- Easy access to all your lists online and offline
- Progressive web app (PWA) available to all your users
- Familiar interface – it IS the List app
- Easily add items, make edits, create new lists

Flexible

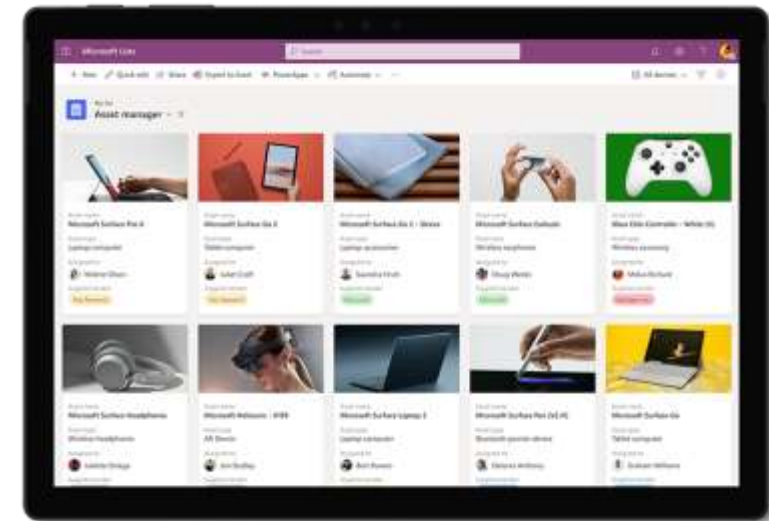
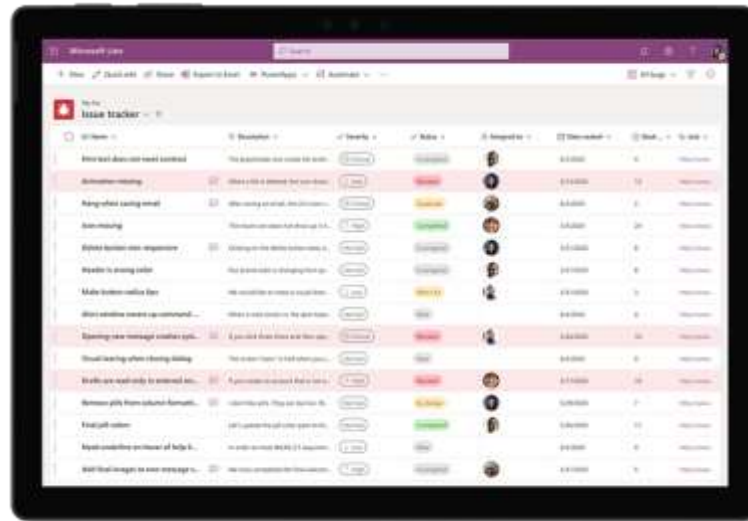
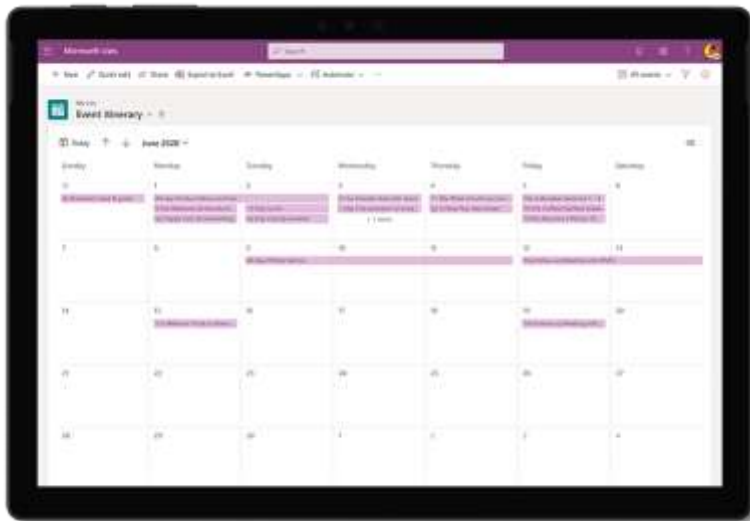
Personalize your list with a few clicks

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

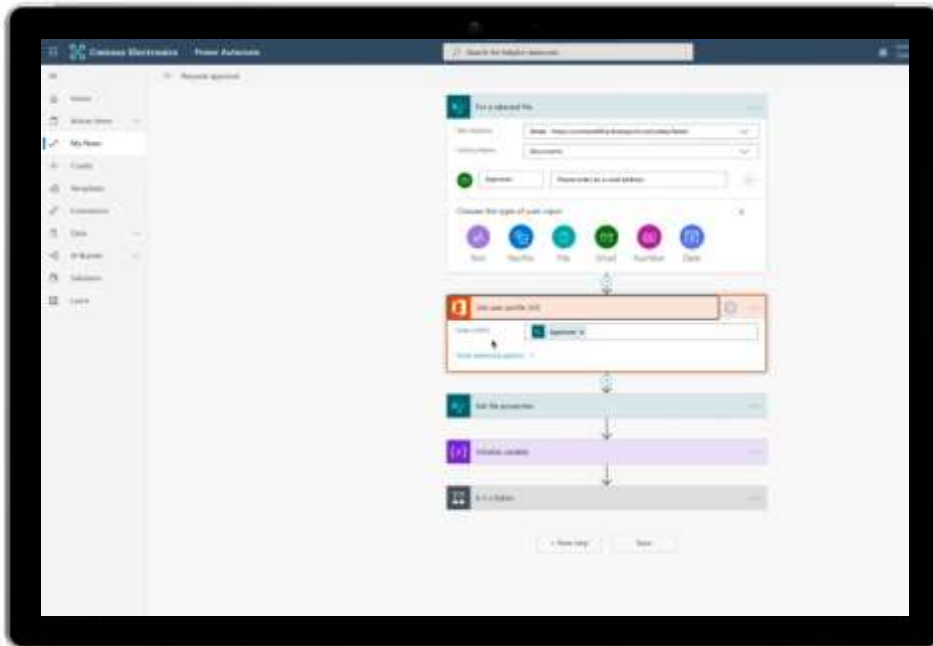


Flexible

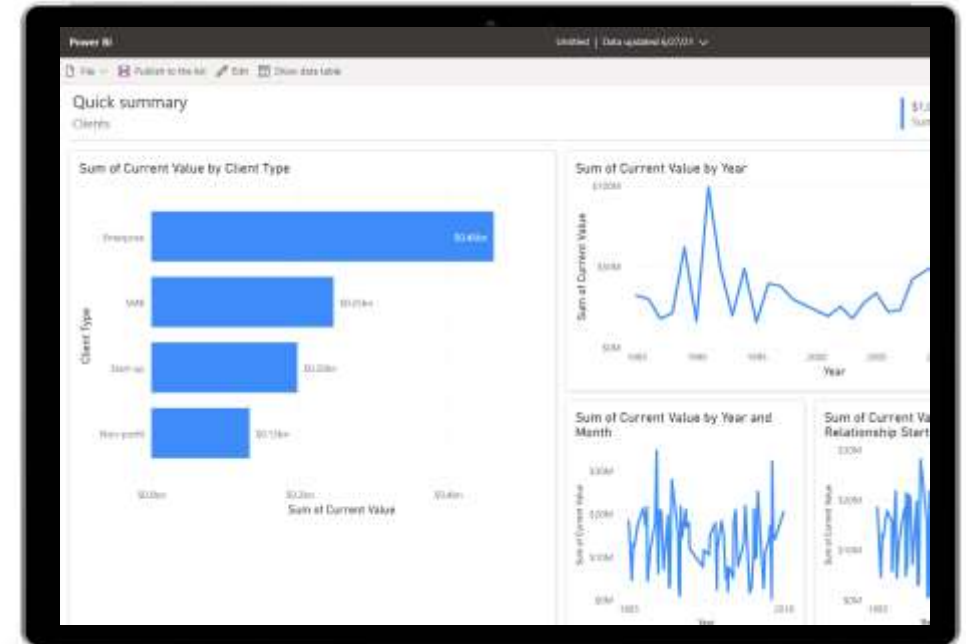
Power Platform Flexibility

Integrated across Microsoft 365, such as Excel, SharePoint, Power Platform, enabling customers to build powerful solutions at a fraction of the time.

Forms with **Power Apps** and custom flows with **Power Automate**



Visualize your lists with **Power BI**

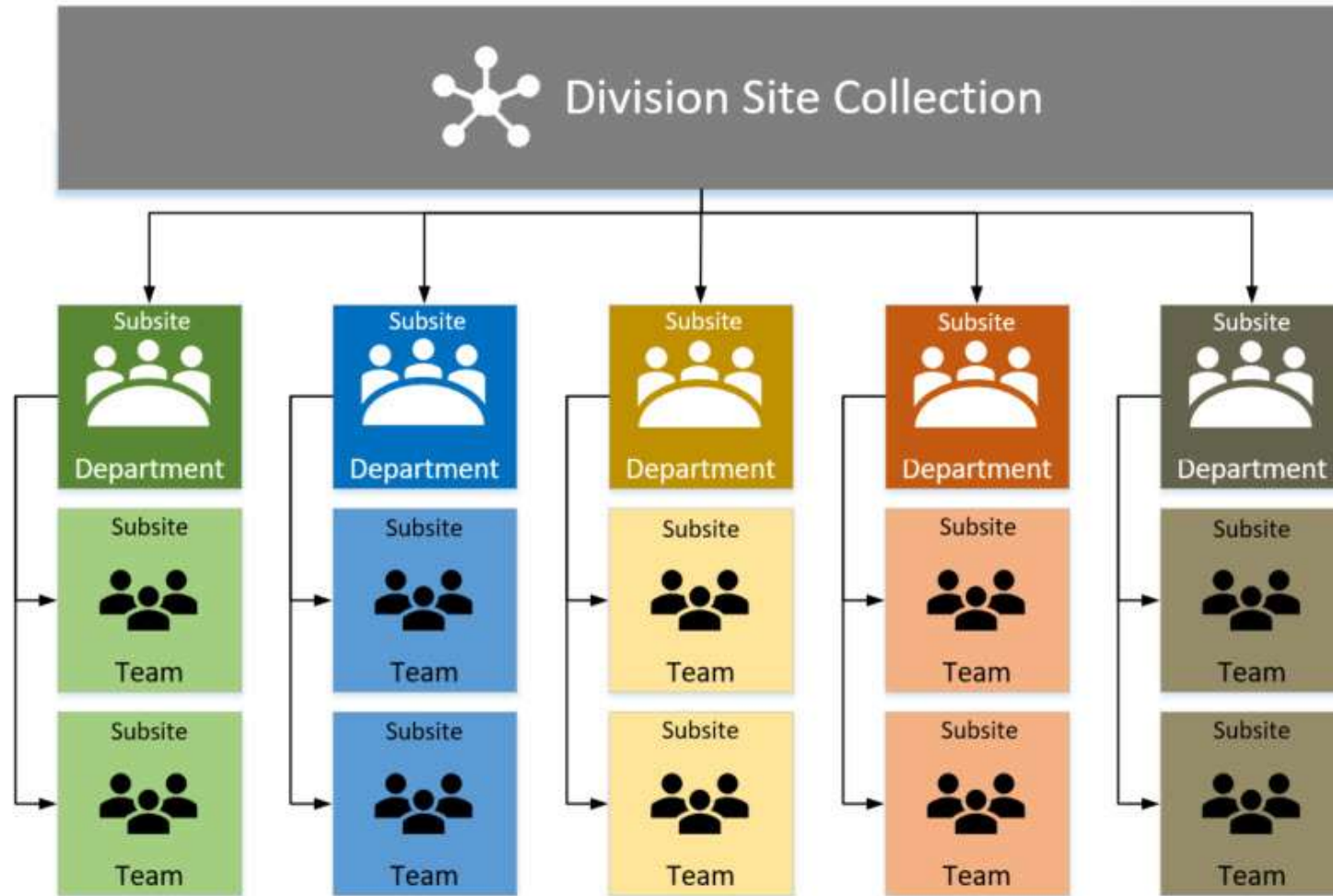


DEMO



Customizing SharePoint Online Sites & Pages

Classic Information Architecture



Modern Information Architecture



Division



Department



Team



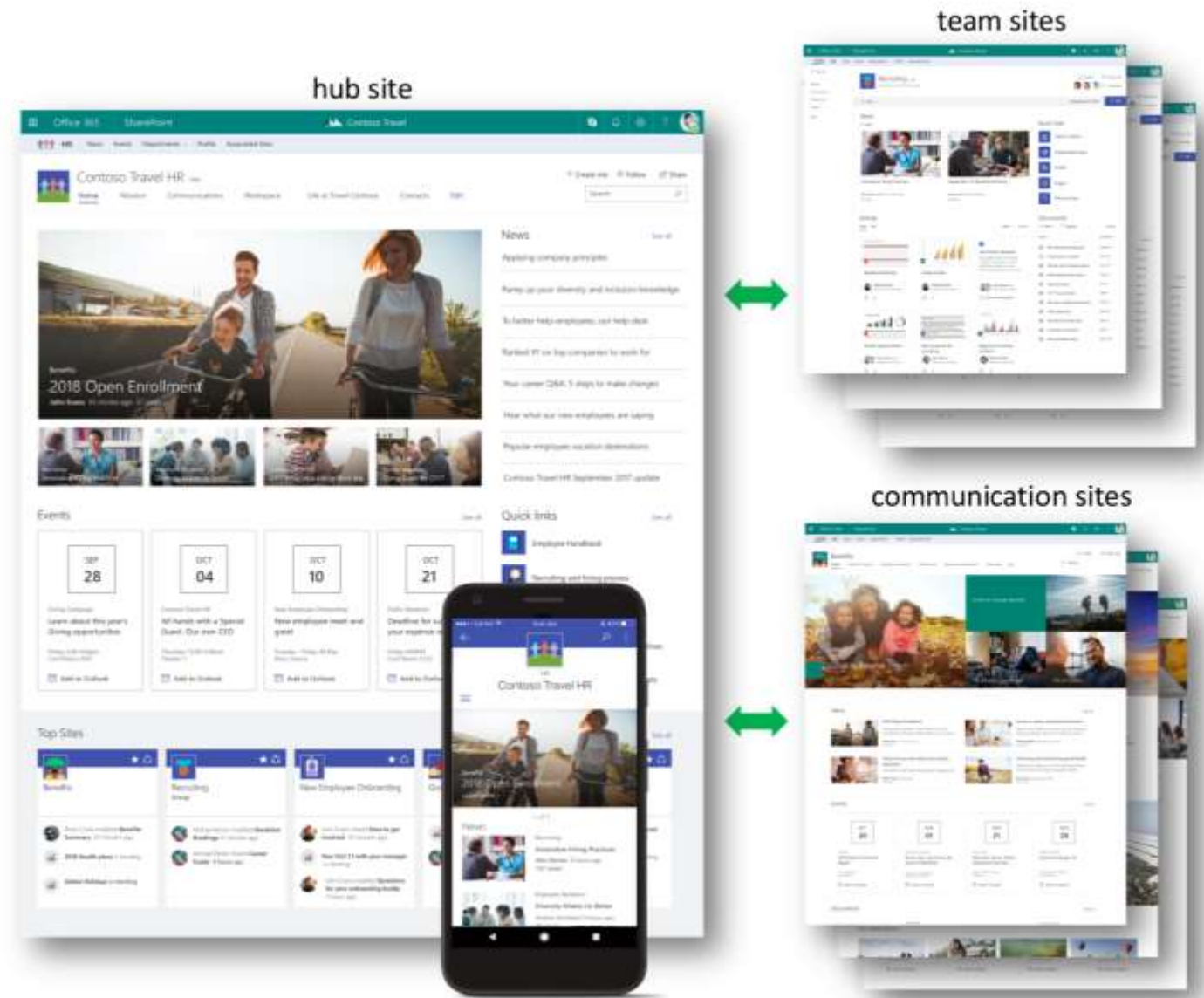
Team



Team

Hub Sites Keep Our Intranet Together

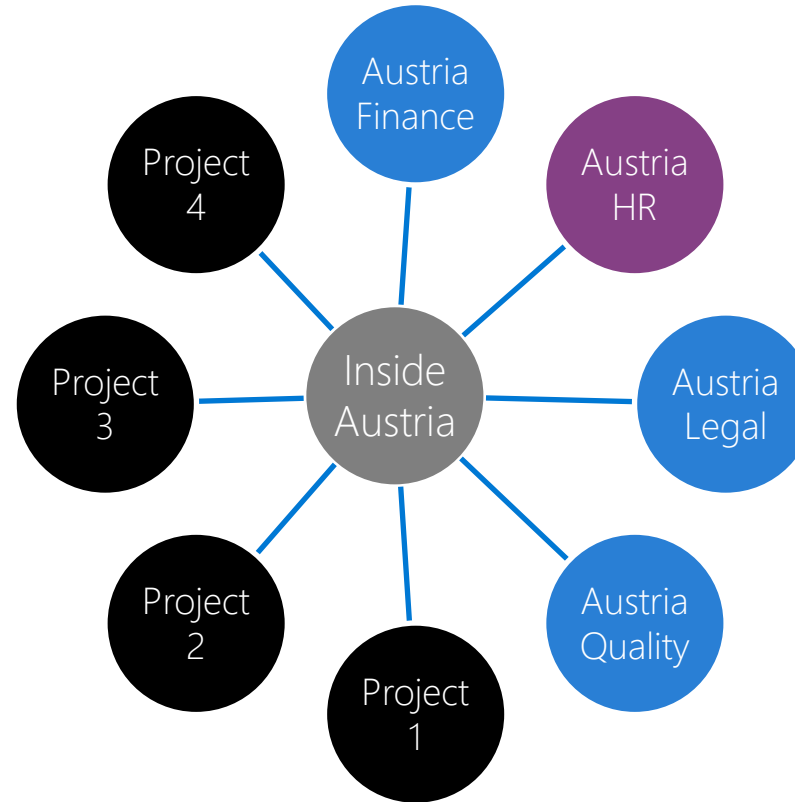
- Shared navigation and branding
- Roll-up of content and search
- Permissions sync



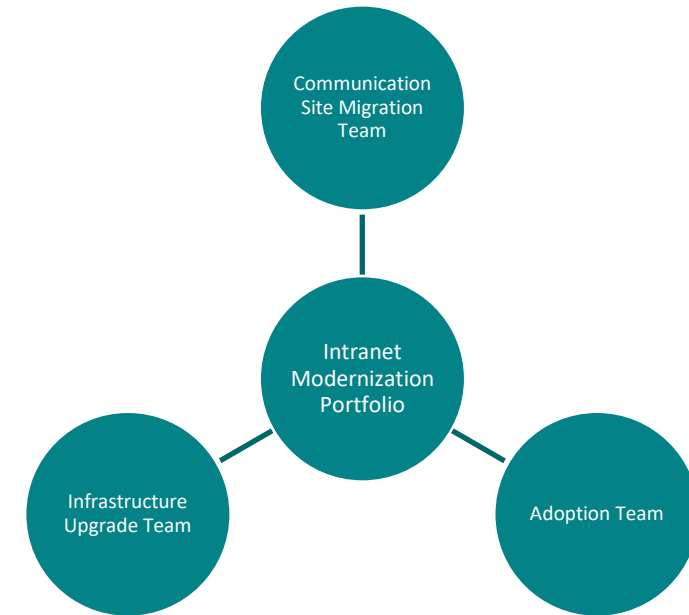
Functional



Geographic



Portfolio



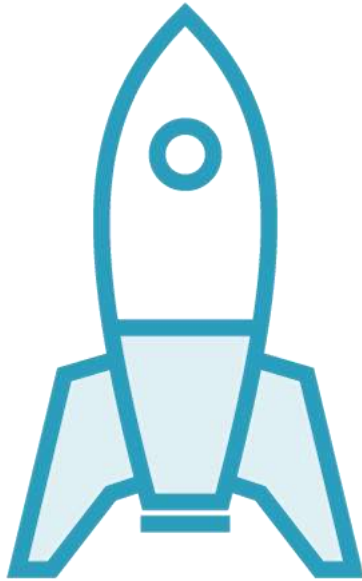
<https://aka.ms/PlanningSPhubsites>

Demo

Managing Microsoft Teams as a Teams Owner

Microsoft Teams Channel Types

Channels in Microsoft Teams



Team Owners are responsible of the different channels inside the team

Types of channels

- General (default)
- Standard (available to everyone in the team)
- Private (subset of people in the team)
- Shared Channels
 - Also called Teams Connect

Creating a Channel

Channel name

Description

Privacy

Automatically show this channel in everyone's channel list

Only for standard channels

Create a channel for "Project Alpha" team

Channel name

Letters, numbers, and spaces are allowed

Description (optional)

Help others find the right channel by providing a description

Privacy

Standard - Everyone on the team has access



Standard - Everyone on the team has access



Private - Specific teammates have access

Channel Management

Show for me

- Decide if you (as a user) want to see this channel

Show for members

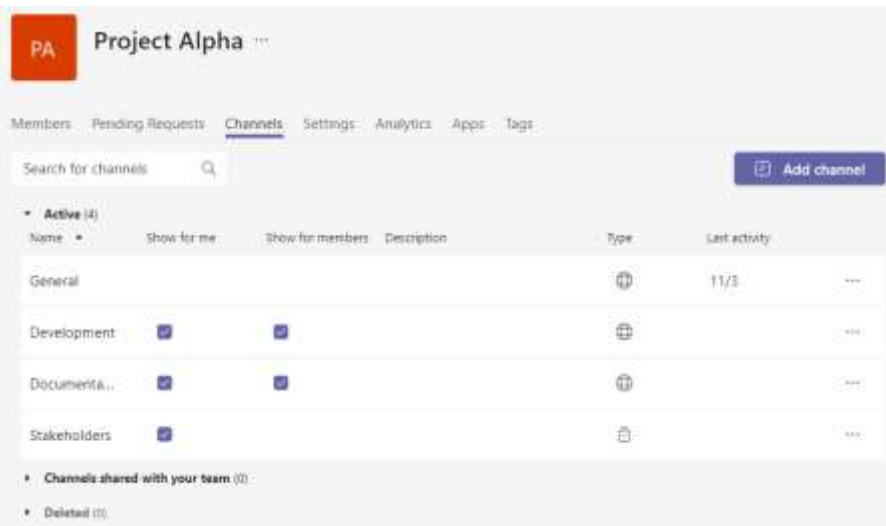
- Should it be shown to members by default?
 - Members can still hide it for themselves

Type

- Standard (globe)
- Private (lock)

Last Activity

- Last time there was action in the channel



Chanel Edit / Delete - Standard Channels

Edit/Delete every channel except default one

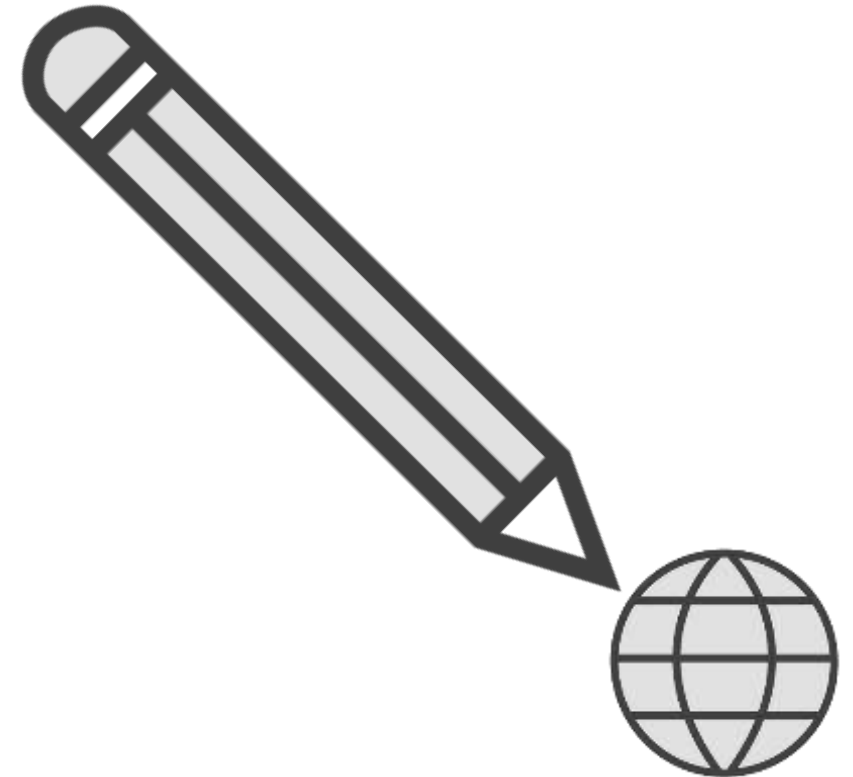
Default permissions:

- Members can edit/delete standard channels

- This can be blocked in the Team settings

Files are not deleted with the channel

- Still accessible in SharePoint



Channel Edit / Delete - Private Channels



Team Owners can delete every private channel

Private channel owners can delete the private channels they own

SharePoint Site associated with the private channel also gets deleted

- Everything can be restored within 30 days

Cloud Storage

Teams allows external cloud storage as an option

SharePoint will always be an option

Users will choose to upload in the 3rd party option or SharePoint

Permissions of 3rd party storage managed independently

Admins can turn off the option

Add cloud storage

Select your cloud storage provider to add a folder to this channel. Everyone with permissions to the original folder will be able to access it in Teams.



SharePoint

Empower individuals, teams and organizations to intelligently discover, share, and collaborate on content from anywhere and on any device.



Dropbox

Dropbox simplifies the way teams work together with secure, easy-to-use collaboration tools and the fastest, most-reliable file sync platform.



Box

Box is a secure content management and collaboration platform helping teams and organizations easily share, manage, and collaborate on their most important information.



Egnyte

Securely access, edit, and share content stored on-premises or in the cloud, anywhere, anytime, from any device.



ShareFile

Citrix ShareFile helps people exchange files easily, securely and professionally.



Google Drive

Get access to files anywhere through secure cloud storage and file backup for your photos, videos, files and more with Google Drive.

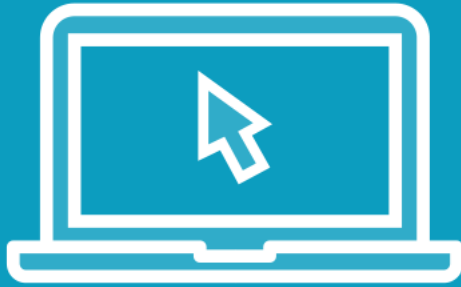


Microsoft 365
CONFERENCE

Microsoft Viva
Microsoft Teams
Microsoft SharePoint
Microsoft Power Platform

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Demo





Private Channels

Let's look at some of the differences in managing Private Channels

Private Channels Limitations



30 Private Channels per team

- Max 250 members per private channel

Limits change!

Always check the most up to date list

<https://docs.microsoft.com/en-us/microsoftteams/limits-specifications-teams>

Limits and specifications for Microsoft Teams

Article • 03/21/2022 • 13 minutes to read • 49 contributors • Applies to: Microsoft Teams



This article describes some of the limits, specifications, and other requirements that apply to Teams.

Teams and channels

Feature	Maximum limit
Number of teams a user can create	Subject to a 250 object limit ¹
Number of teams a user can be a member of	1,000 ²
Number of members in a team	25,000 ⁶
Number of owners per team	100
Number of org-wide teams allowed in a tenant	5 ²

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
------	--------------------	----------------------

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

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

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 Channels – Who Can See What

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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

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

Private Channel Membership



Private Channels have their own membership

- Owners
- Members
- Guests

Users need to already be part of the team

Settings at the Team Level

Edit Team

Edit "Project Alpha" team

Collaborate closely with a group of people inside your organization based on project, initiative, or common interest. [Learn more about teams and channels](#)

Team name

Description

Privacy

Private - Only team owners can add members

Private - Only team owners can add members

Public - Anyone in your organization can join

Org-wide - Everyone in your organization will be automatically added

Team Name

Description

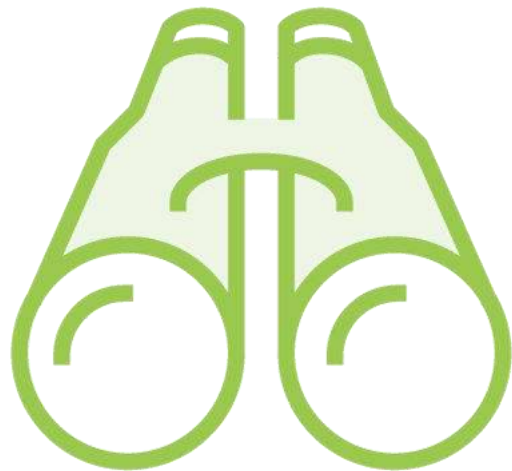
Privacy

Private

Public

Org-wide

Picture



Team Picture

- Same picture as the Microsoft 365 Group

Member Permissions

Allow members to:

Create and update channels

- Allow members to create private channels

Delete and restore channels

Add and remove apps

Upload custom apps

Create, update, and remove tabs

Create, update, and remove connectors

Edit their messages

Delete their messages

Guest Permissions

Allow guests to create and update channels

Allow guests to delete channels



Mentions



Allow members to mention the whole team

- This will send a notification to everyone on the team

Allow members to mention a channel

- This will notify everyone who's shown the mentioned channel in their channel lists

Fun Settings

Enable Giphy for this team

Moderate (rated G)

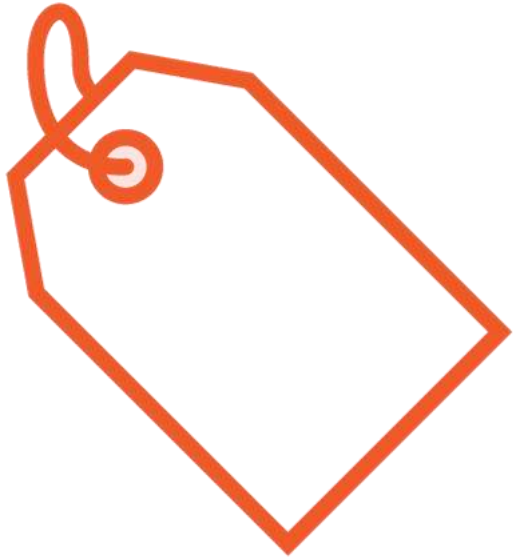
Strict (rated Y)

Enable stickers and memes

Enable custom memes



Tags



Decide who can create tags

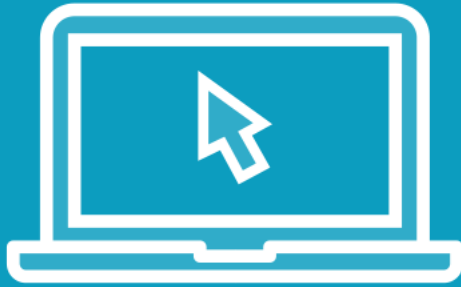
- Owners Only
- All Members

Enable or disable tagging by shift

- If you use the Shifts app

Tags are not yet supported in private channels

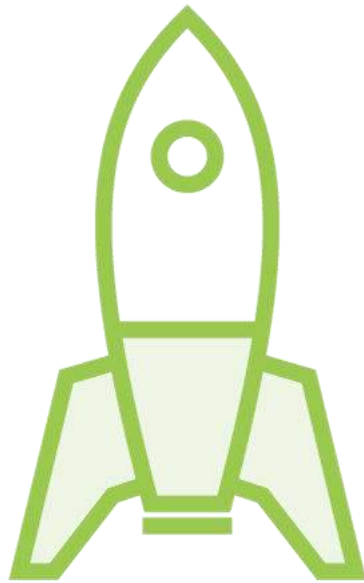
Demo



Team level settings

Settings at the Channel Level

Getting Started with Channel Settings



Different setting depending on the type of channel

- General (default) Channel
- Standard Channels
- Private Channels

General (default)
Channel

Standard Channels

Private Channels

Channel Moderation Preferences



Who can post messages inside the General channel

- Anyone
- Anyone but show alert that posting will notify everyone
- Only Owners

E-mail Integration

You can send an e-mail to a channel in teams

Each channel has their own e-mail address

Available settings

Anyone can send emails to this address

Only members of this team

Only email sent from a list of domains



General (default)
Channel

Standard Channels

Private Channels

Who Can Start a New Post?



Three options

- Everyone can start a new post
- Everyone except guests can start a new post
- Enable *moderation*

Channel Moderation

Channel Moderation

Allow only select group of people (moderators) to start new posts!

If moderation is enabled

Allow members to reply to channel messages

Allow bots to submit channel messages

Allow connectors to submit channel messages



E-mail Integration



Same settings as for the General channel

General (default)
Channel

Standard Channels

Private Channels

Membership



Manage Owners and Members of the Private Channel

Member Permissions

Allow members to create, update, and remove tabs

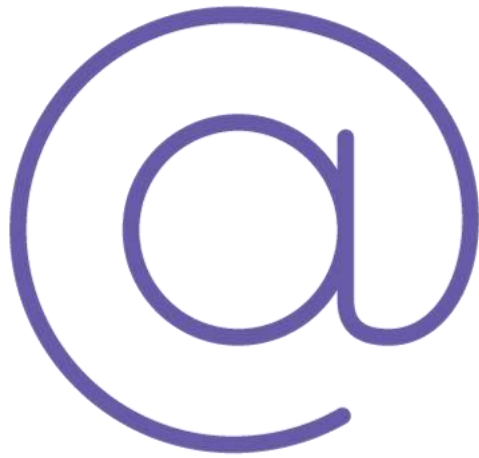
Give members the option to

Delete their messages

Edit their messages



Mentions



Allow members to mention the private channel

- This will notify everyone who's part of the private channel

Fun Settings

Enable Giphy for this private channel

Moderate (rated G)

Strict (rated Y)

Enable stickers and memes for this private channel

Enable custom memes for this private channel

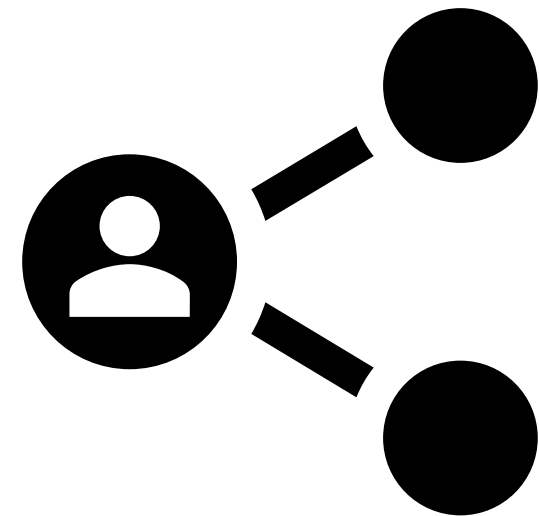


Shared Channels – Teams Connect

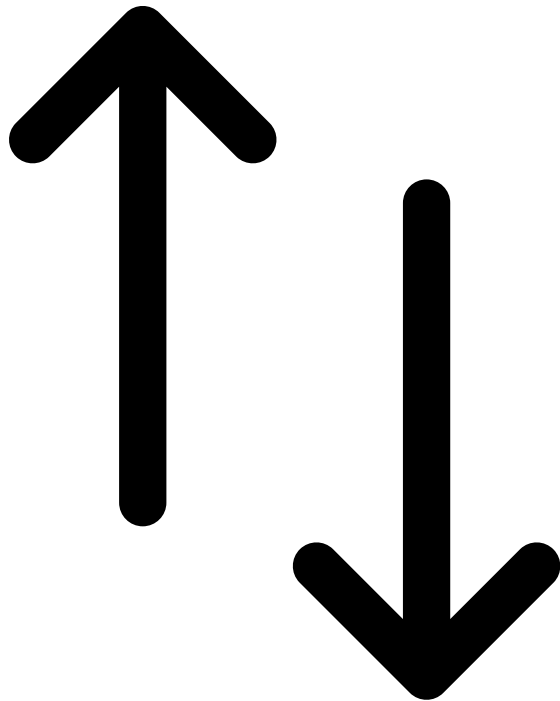
‘One channel’ sharing

Internal & External

Rolling out to public preview – April 2022



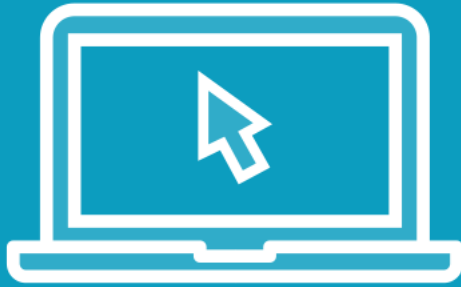
Shared vs. Private Channels



	<u>Shared channels</u>	<u>Private channels</u>
Creators (default)	Owners only	Owners/ members
Only team members?	No	Yes
Cross-team sharing	Yes	No
# of channels per team	200	30

[Shared channels in Microsoft Teams \(Preview\)](#)

Demo



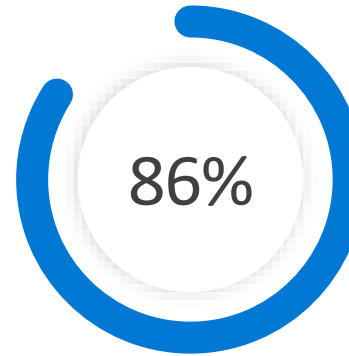
Channel Settings in Microsoft Teams

Microsoft Viva

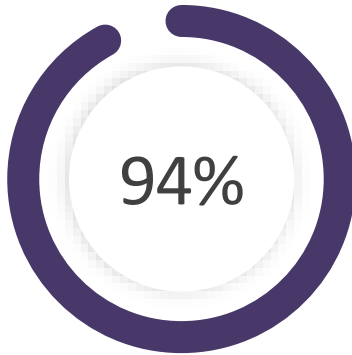
The driving force for any business is its people.



Organizations with highly engaged employees have **21%** greater profitability.⁴



86% of top-performing companies reported that digital training programs boosted employee engagement and performance.²



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

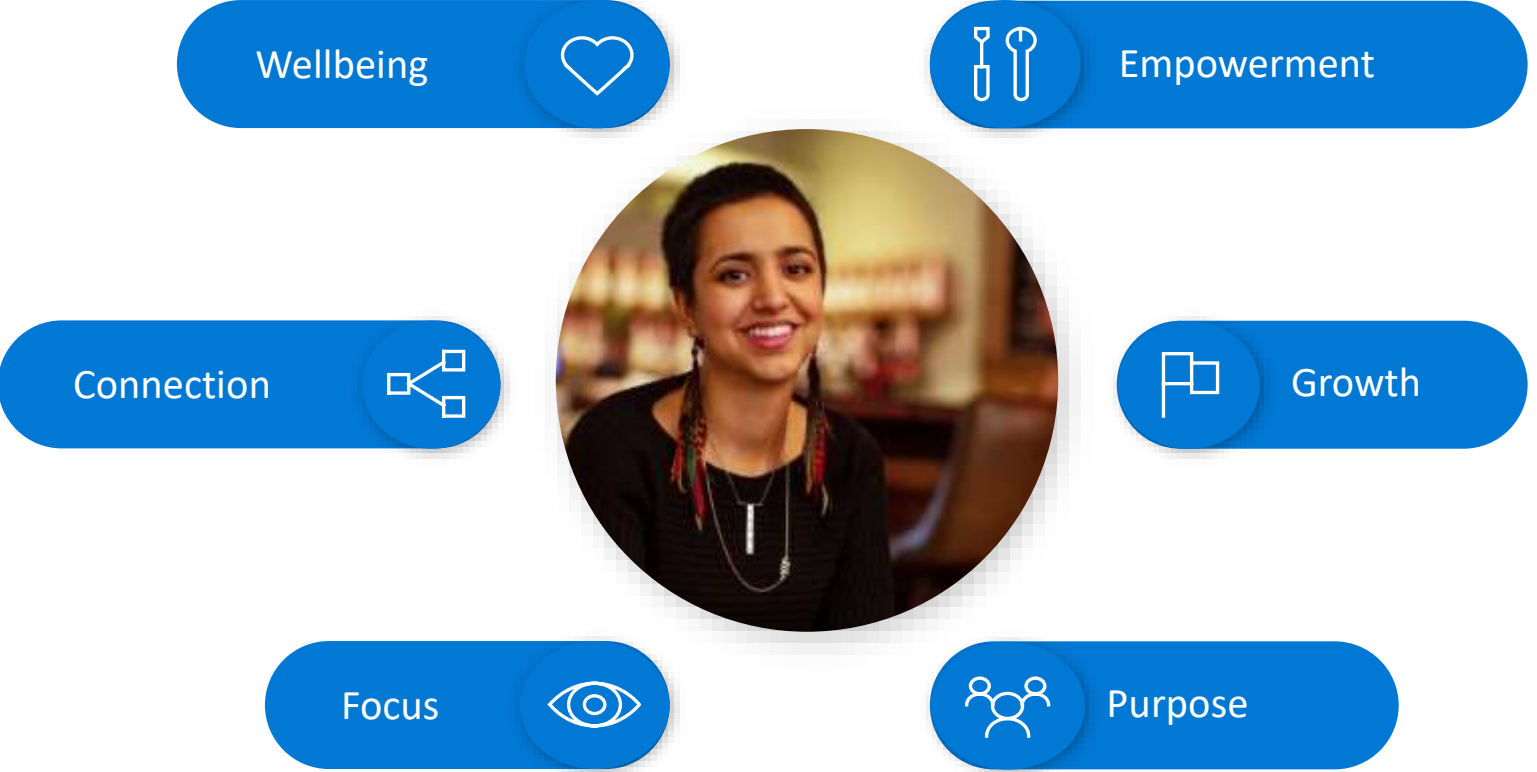
Highly engaged employees are **12x**

less likely to leave their company than those who are not engaged.¹



¹ Glint, ² PwC's Global Digital IQ survey, ³ LinkedIn Learning 2020 Workplace Learning Report, ⁴ Gallup

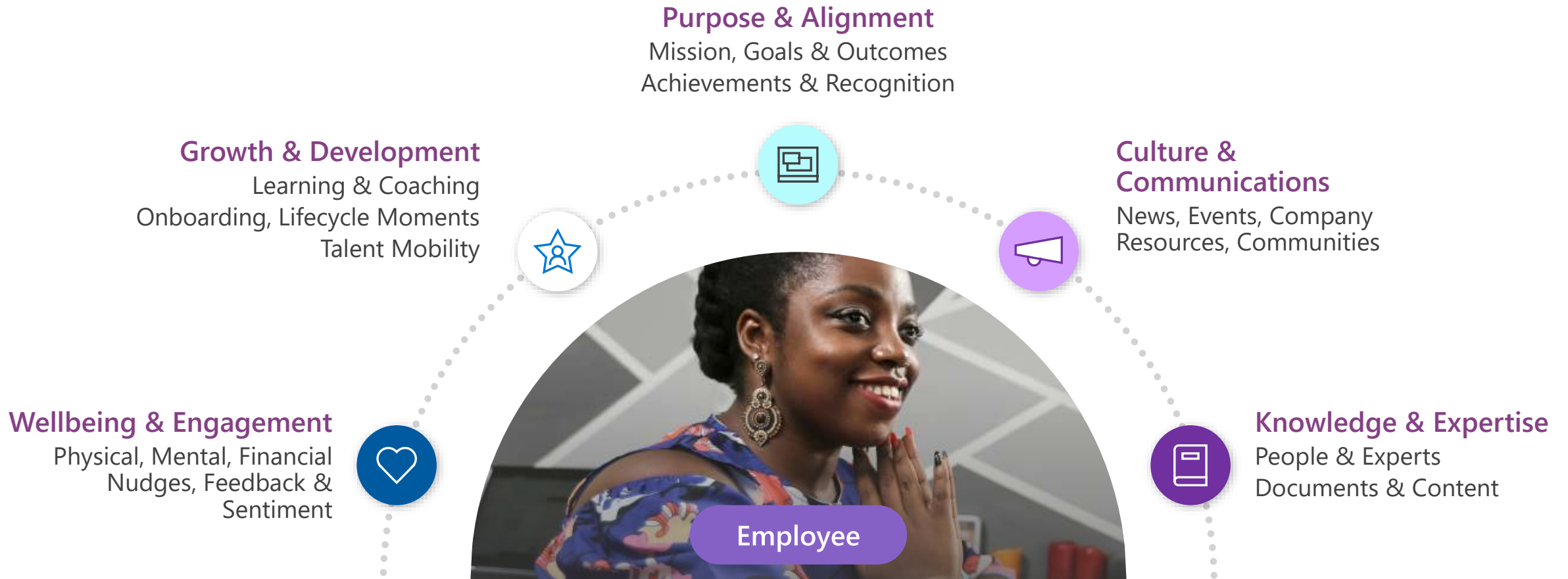
Six key elements of a great employee experience



Source: Adapted from Glint's People Success Pillars

What is an employee experience platform (EXP)

A digital platform that helps organizations create a thriving culture with engaged employees and inspiring leaders



Microsoft Viva

Microsoft Viva Connections
Culture & communications



Microsoft Viva Insights
Productivity & wellbeing



Microsoft Viva Learning
Skilling & growth



Microsoft Viva Topics
Knowledge & expertise



Ally.io
Objectives & key results



Microsoft Viva

Empower people and teams to be their best

Viva Insights

Give employees, managers and leaders data-driven insights that help everyone work smarter and thrive

Viva Topics

Organize content and expertise across systems and teams to deliver knowledge in the apps people use every day

Viva Learning

Discover, share, and engage in learning to grow personally and professionally

Viva Connections

Shape culture, foster connections, and modernize the employee experience

Microsoft Viva Insights

Balance productivity and wellbeing.



Microsoft Viva Topics

Connect to knowledge and experts.



Microsoft Viva Learning

Make learning a natural part of your day.



Microsoft Viva Connections

Stay engaged and informed.

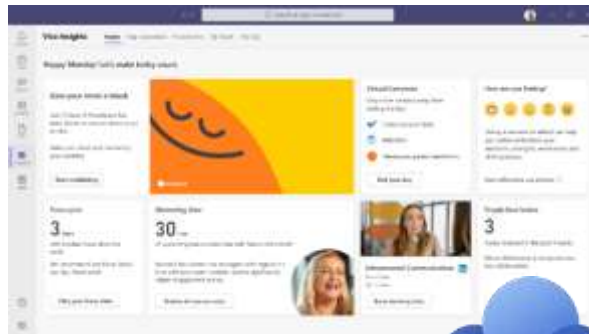


Microsoft Viva

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

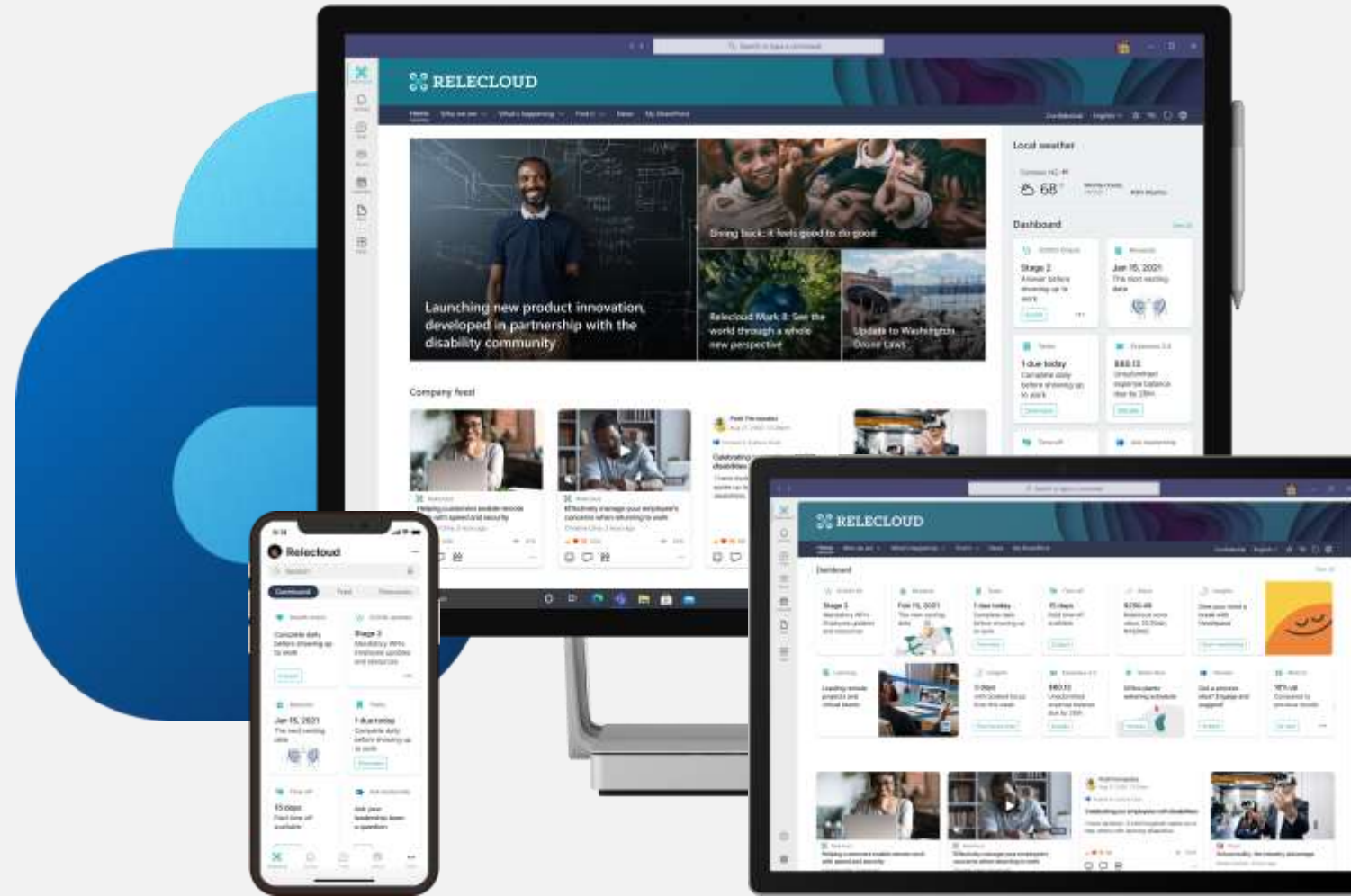
Encourage meaningful connections across the organization by enabling employees to easily discover relevant communications and communities.

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

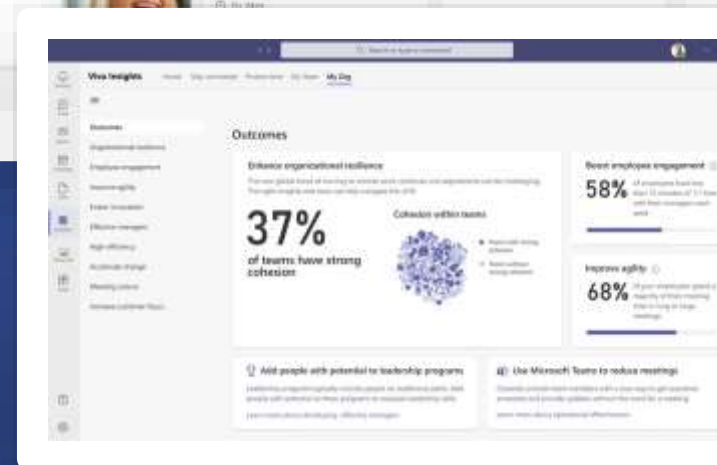
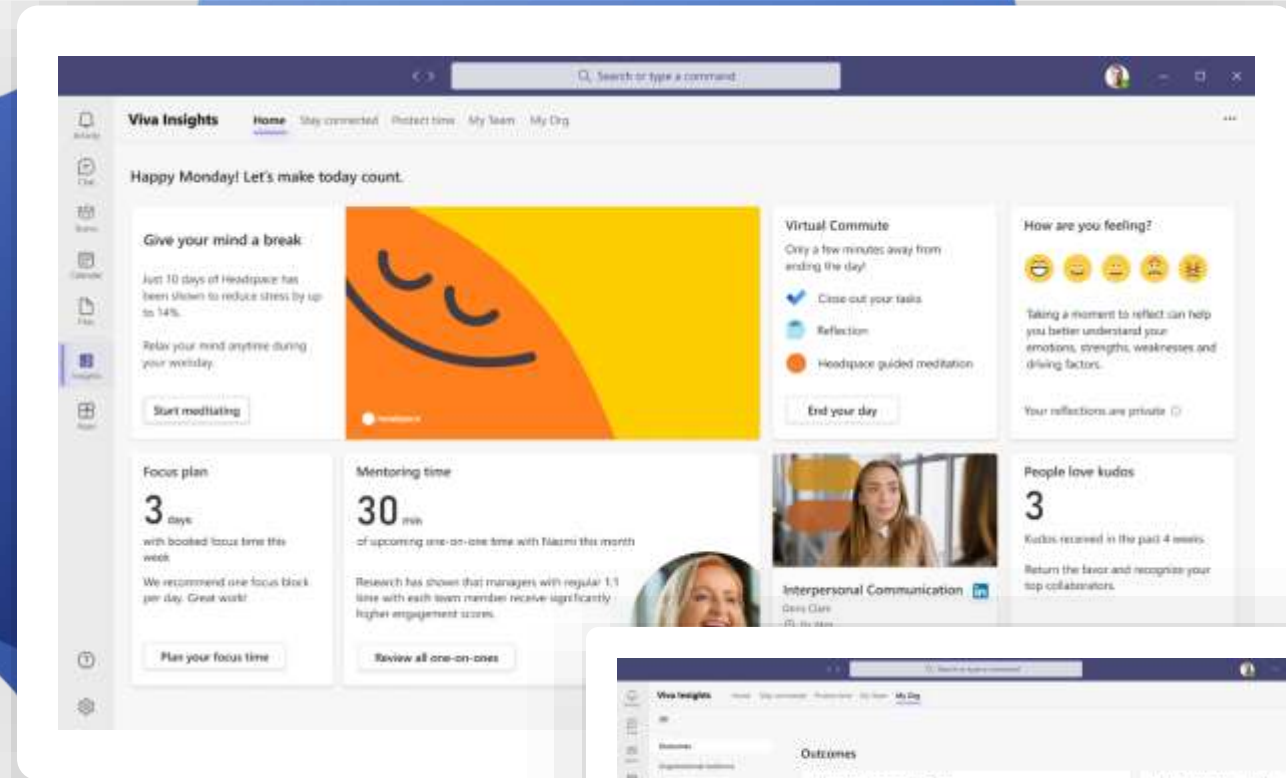
Empower individuals, teams, and orgs to achieve balance, build better work habits, and improve business outcomes with personalized insights and recommended actions.

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

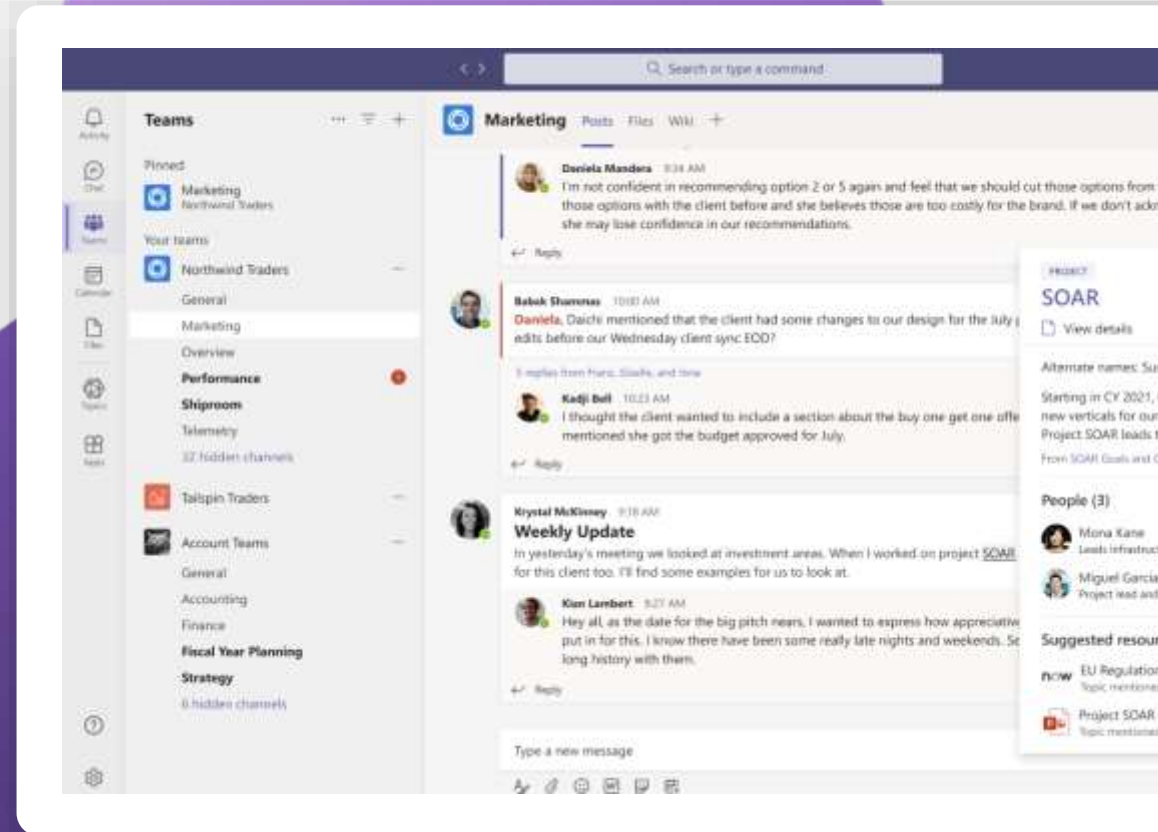
Use AI to reason over your organization's content and automatically identify, process, and organize it into easily accessible knowledge

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 growth¹

Meanwhile, employees only have 1% of their workweek to focus on learning new skills²

¹PwC CEO Survey, 2019

²Leading in Learning, Bersin by Deloitte



Viva Learning Skilling and growth

Make learning a natural part of your day

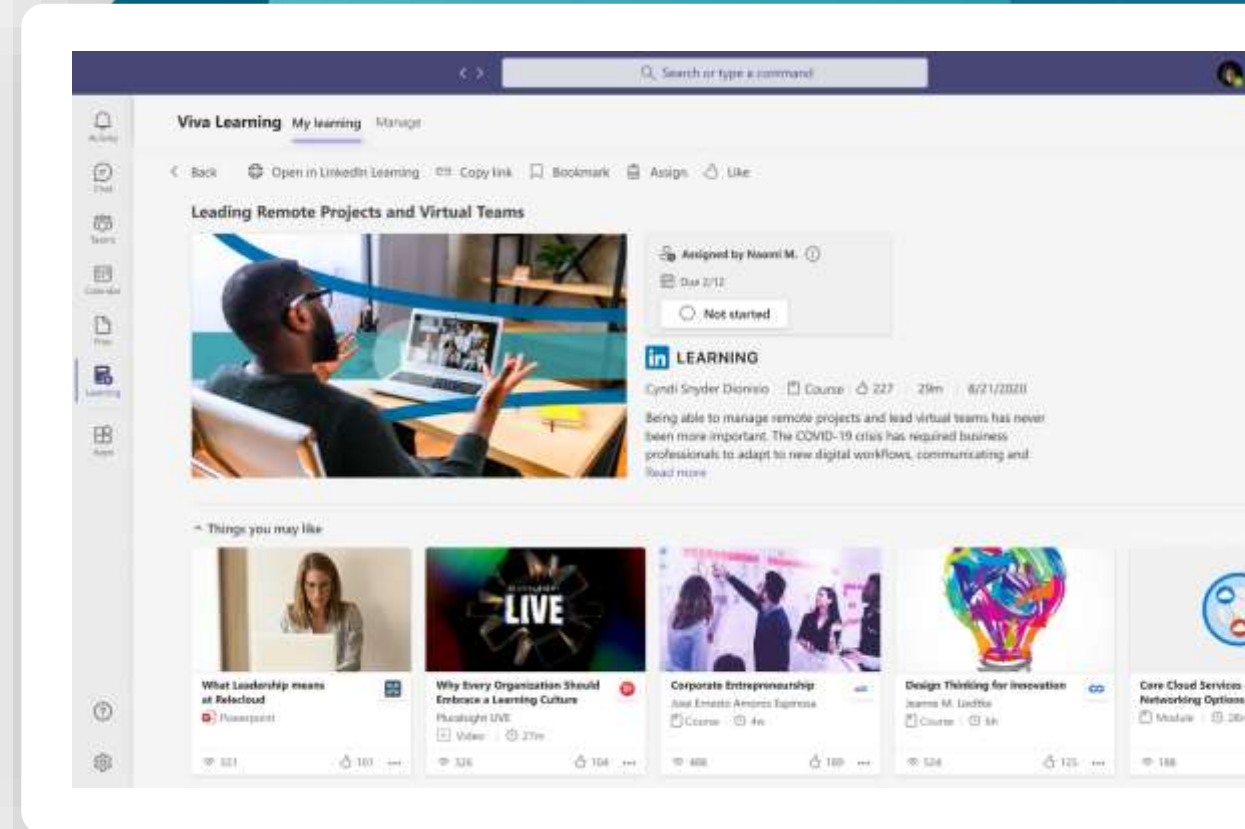
Foster a culture of learning by enabling people to easily discover, share, and engage with learning integrated into Microsoft Teams.

Make all your learning content available in one place

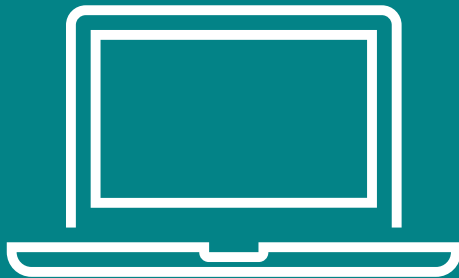
Simplify the learning experience by bringing together world class content from LinkedIn Learning, 3rd parties, Microsoft Learn, and your own content.

Drive results that matter

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



Demo



Setting up Viva Connections

Viva Topics in action

Microsoft 365 Collaboration Security

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



You can view and add members from Outlook Web / client

Add members button

Users always added as members first

Leadership
Private group · 6 members
Send email ... Follow in inbox

About **Members** Email Files

All members

Search by name or alias Add members

Name	Job Title	Role
Daniel Glenn		Owner
Nancy Reyes	CEO	Owner
Betty Hughes	VP HR	Member
Helen Price	CFO	Member
Kenneth Powell	VP Engineering	Member
Paul Foster	VP Operations	Member

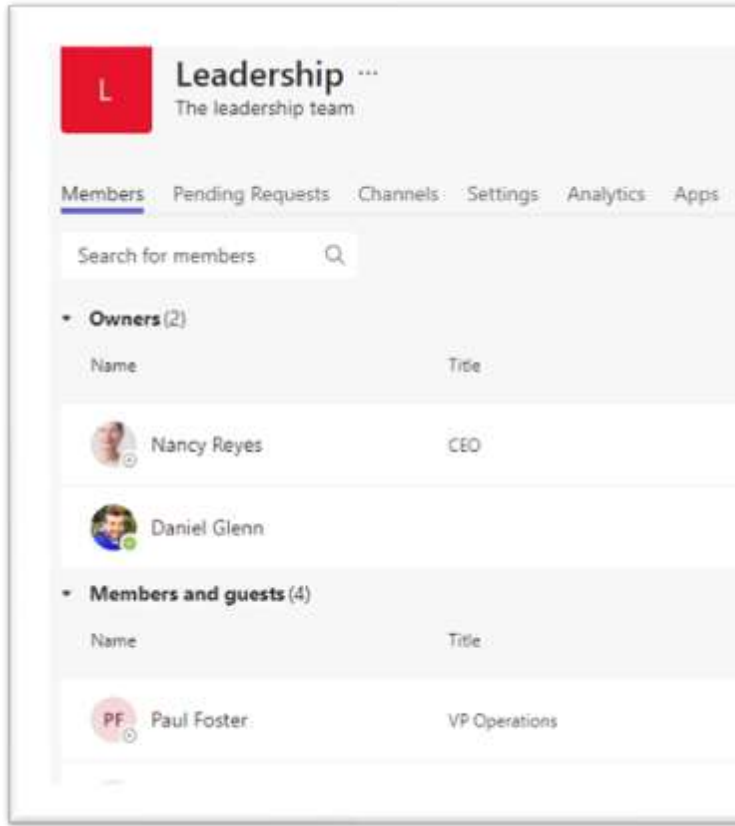
Promoting or Deleting members

You can quickly promote members to Owners from the same interface

You can also delete members from the same interface



Similar Experience Across Services



Leadership ...
The leadership team

Members Pending Requests Channels Settings Analytics Apps

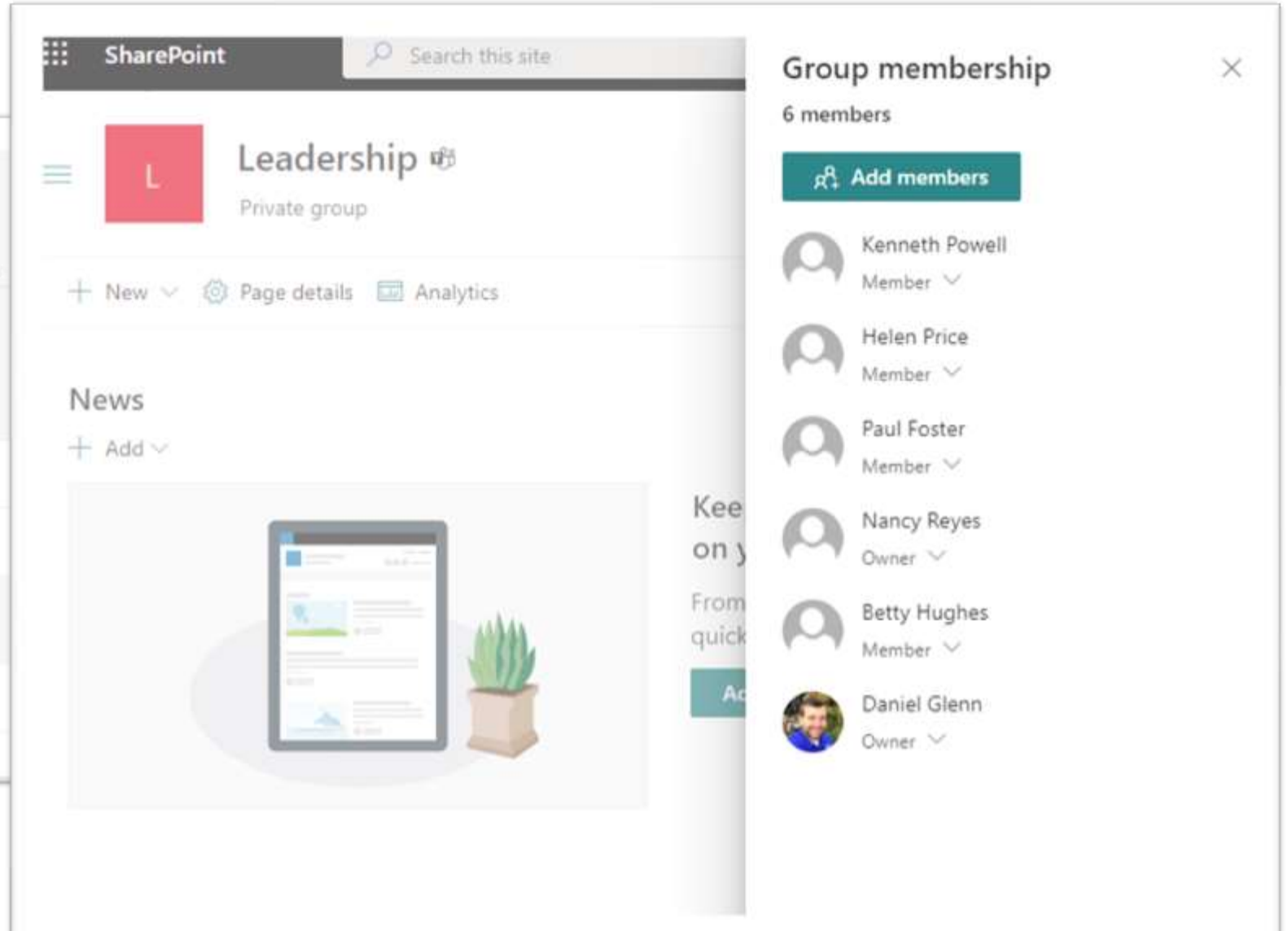
Search for members

Owners (2)

Name	Title
Nancy Reyes	CEO
Daniel Glenn	

Members and guests (4)

Name	Title
Paul Foster	VP Operations



SharePoint Search this site

Leadership Private group

+ New Page details Analytics

News
+ Add

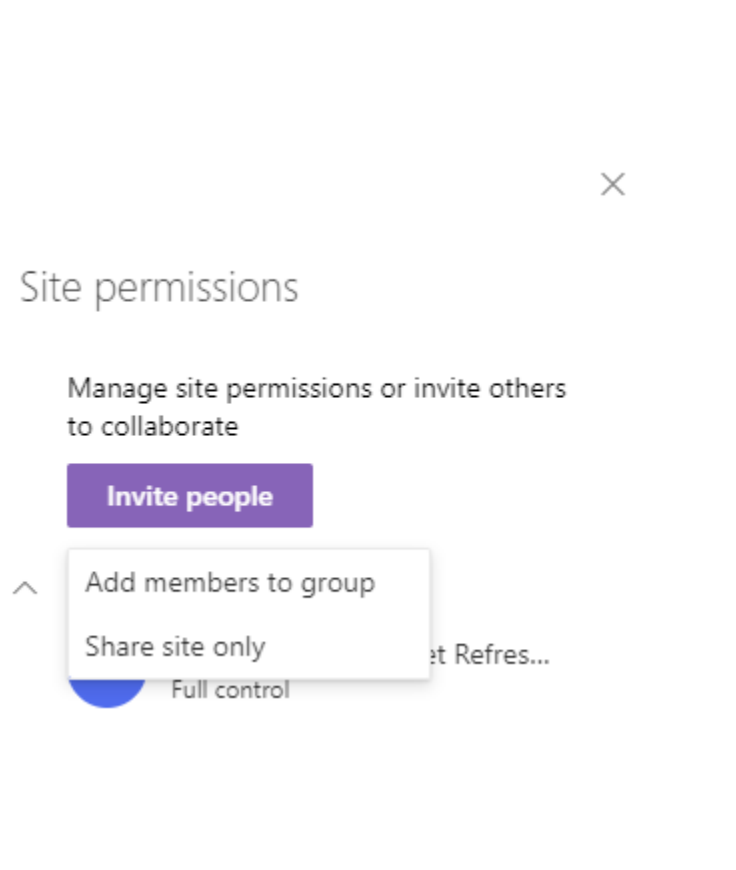
Group membership
6 members

[Add members](#)

- Kenneth Powell
Member
- Helen Price
Member
- Paul Foster
Member
- Nancy Reyes
Owner
- Betty Hughes
Member
- Daniel Glenn
Owner

Keep on y
From quick
Ad

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

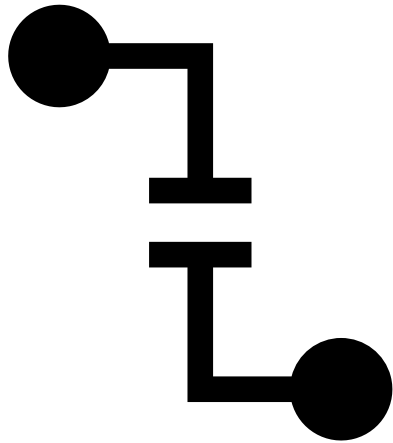
Dynamic

Members are added / removed automatically based on dynamic rules

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

Users cannot leave the group

SharePoint Permissions

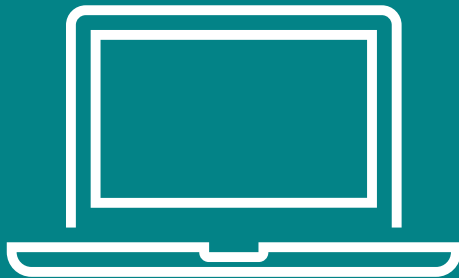


SharePoint Permissions can be very flexible

- And complicated!

You can break permissions down to the item level!

Demo



Ask anything about Collaboration Permissions!

Introduction to Power Automate

Microsoft Power Automate

Power Automate is a cloud-based service that makes it practical and simple for line-of-business users to build workflows that automate time-consuming business tasks and processes across applications and services.

Power Automate Audience



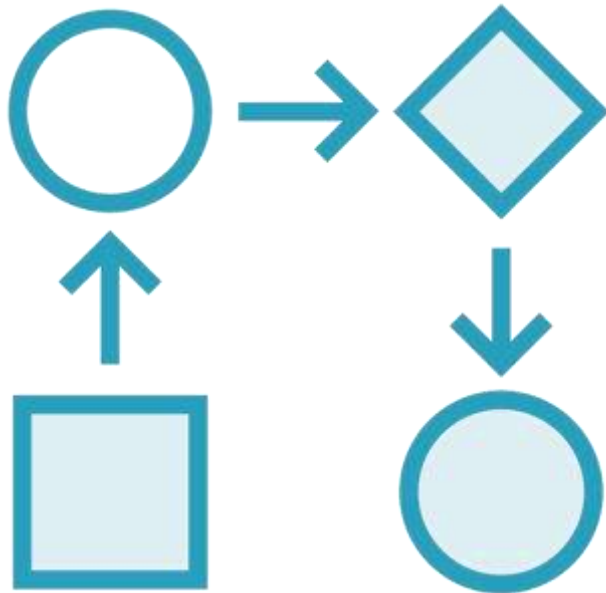
Anyone with a basic tech knowledge can automate business processes

- Line of business users
- IT Specialists

Create powerful workflows without any single line of code

- Developers can also take it to the next level

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*

Three Types of Flows

Cloud flows

Create a cloud flow when you want your automation to be triggered either automatically, instantly, or via a schedule. Those are the most popular types of flows in Power Automate

Business process flows

Business process flows provide a guide for people to get work done. They provide a streamlined user experience to help users follow a predefined process

Desktop flows

Robotic Process Automation (RPA) workflows that enable you to automate processes even in legacy applications with no APIs!

Power Automate Terms and Concepts

Power Platform Connectors



Used in all the products part of the Power Platform suite

Connectors are a bridge from your data source to your flow

Allow you to interact with data sources without any technical knowledge

Power Platform Connectors

Over 400 connectors available

Internal to Microsoft

SharePoint / OneDrive / Outlook

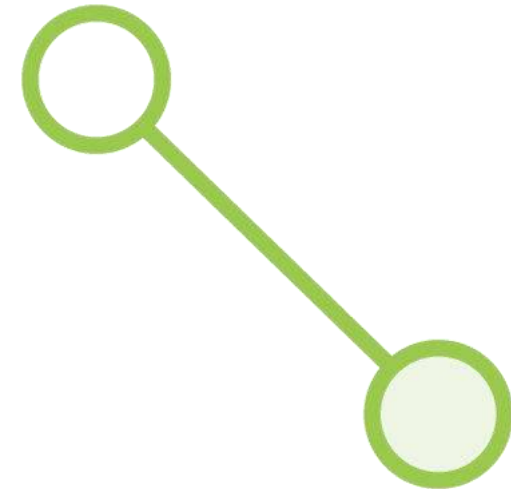
External to Microsoft

Twitter, Mailchimp, Salesforce

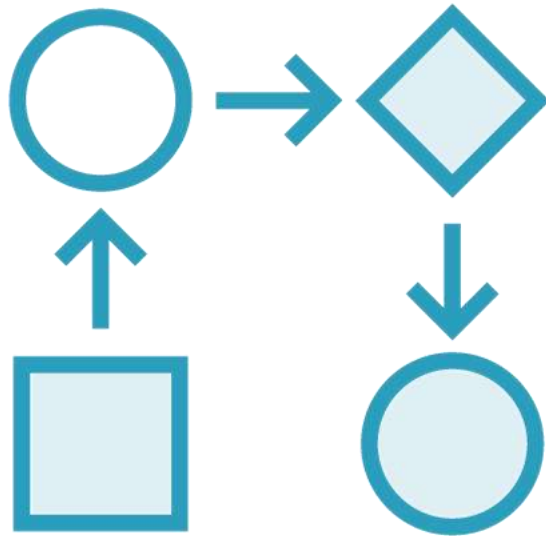
Two types of connectors from a licensing point of view

Standard

Premium



Triggers and Actions



There are two types of operations for Connectors

- Triggers & actions

Triggers only apply to Power Automate

Actions apply to both Power Apps and Power Automate

Triggers

A trigger is the event that starts a flow

Automated - event from another system

- New item added in SharePoint List

- New file added in OneDrive

- New tweet with the #Globomantics hashtag

A trigger can be time based

- Every day at 5:00 am

A trigger can also be Instant


- Triggered manually as needed




Experience in Power Automate Cloud Flows

Three ways to make a flow


Start from blank 



Automated cloud flow
Triggered by a designated event.



Instant cloud flow
Triggered manually as needed.



Scheduled cloud flow
You choose when and how often it runs.

Actions



Interaction with your data source

Sample actions

- Start an approval
- Get the user's manager
- Send an e-mail

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

Start approval when a new item is added

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

Recap



Trigger

- Event that starts the flow

Actions

- Everything your flow does

Conditions

- Allows you to do different actions depending on a value

Connectors

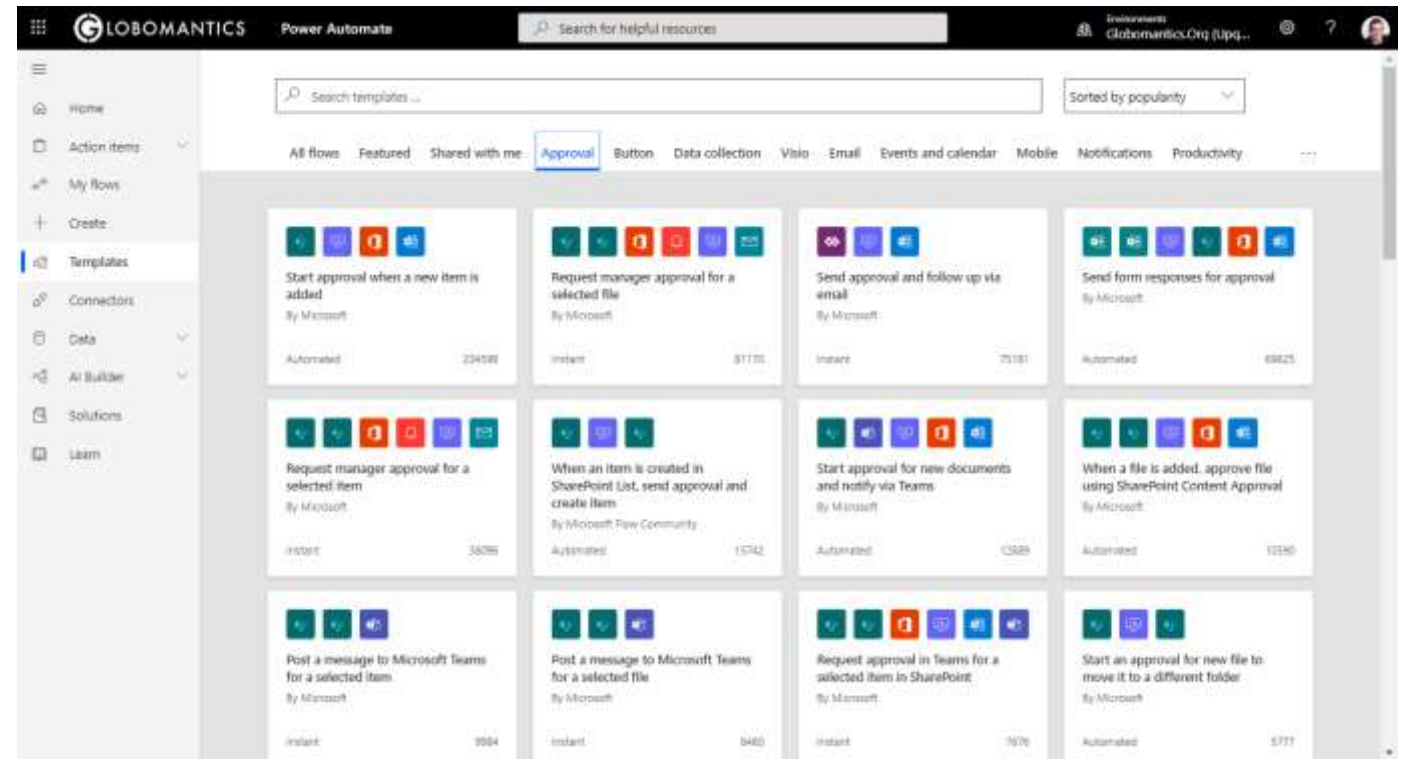
- All the services Microsoft Power Automate connects to

Templates

Hundreds of templates available

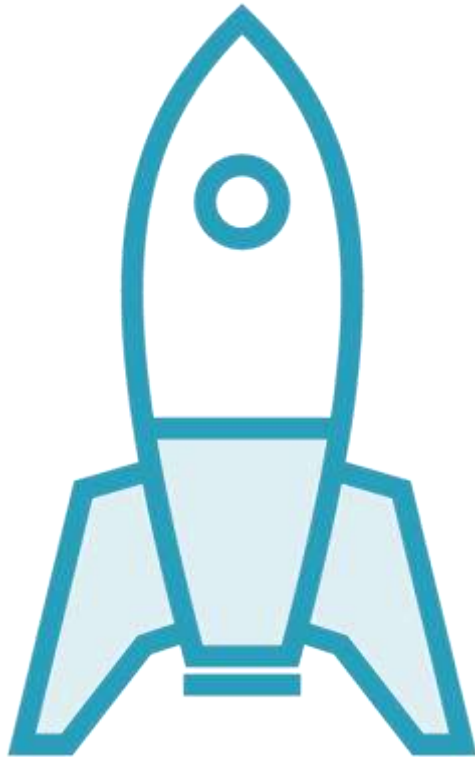
Useful as a quick start for your flows

You can customize them to fit your needs



Power Automate User Interface

Getting to Power Automate



Most flows are created from the web interface

- <https://flow.microsoft.com>
- You will be redirected depending on your Power Platform environment country
 - <https://us.flow.microsoft.com/>
 - <https://canada.flow.microsoft.com/>

There is a desktop tool for Desktop flows (RPA)

- Power Automate Desktop

Desktop flows
(RPA)

Cloud flows not
shared with
anyone

Business process
flows

Flows you have shared with
other people or
they shared with you

The screenshot shows the Power Automate interface. At the top, there is a navigation bar with the 'LOBOMANTICS' logo, 'Power Automate' text, a search bar for helpful resources, and environment information 'Environments Globomantics.Org'. Below this is a secondary bar with '+ New flow' and 'Import' options, and a search field. The main content area is divided into a left-hand navigation pane and a central workspace. The navigation pane includes 'Home', 'Action items', 'My flows' (highlighted with a red box), 'Create', 'Templates', 'Connectors', and 'Data'. The central workspace has a 'Flows' section with four tabs: 'Cloud flows' (highlighted with a red box), 'Desktop flows' (highlighted with a green box), 'Business process flows' (highlighted with a purple box), and 'Shared with me' (highlighted with a blue box). Below the tabs is a table of flows. The table has columns for 'Name', 'Modified', and 'Type'. One flow is visible: 'Start an approval in Teams when a file is added to a Sh...' with a modified date of '1 wk ago' and a type of 'Automated'. Annotations with arrows point from the text blocks above to the corresponding tabs in the interface.

Flows

Cloud flows

Desktop flows

Business process flows

Shared with me



Name

Modified

Type



Start an approval in Teams when a file is added to a Sh...

1 wk ago

Automated

Flow name and details

Connectors Used

Details [Edit](#)

Flow	Holiday Request Approval	Status	On
Description	Holiday Approval Process for the Globomantics IT Team	Created	Feb 3, 12:23 PM
Owner	Vlad Catrinescu	Modified	Dec 11, 11:09 AM
		Type	Automated
		Plan	Per-user plan

Connections [Edit](#)

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

Owners [Edit](#)

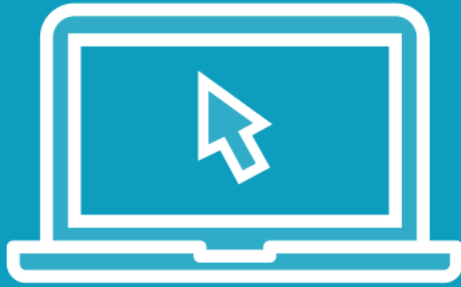
- VC Vlad Catrinescu

28-day run history [All runs](#)

Start	Durati...	Status
Oct 14, 12:04 PM (38 sec ago)	00:00:30	Succeeded

History of flow runs and durations

Demo

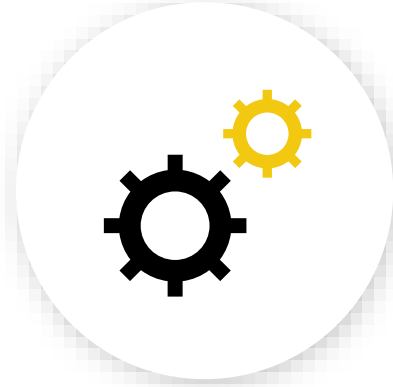


Introduction to Power BI

Business intelligence the Microsoft way



Create amazing data experiences



Scale to meet the most demanding BI requirements



Empower everyone to make confident decisions anywhere

Create amazing data experiences

Discover value in any data

- Rich integration with Excel
- Ever growing library of free data connectors like Excel, CSV, SharePoint, and Exchange

Personalize reports for your business and KPIs

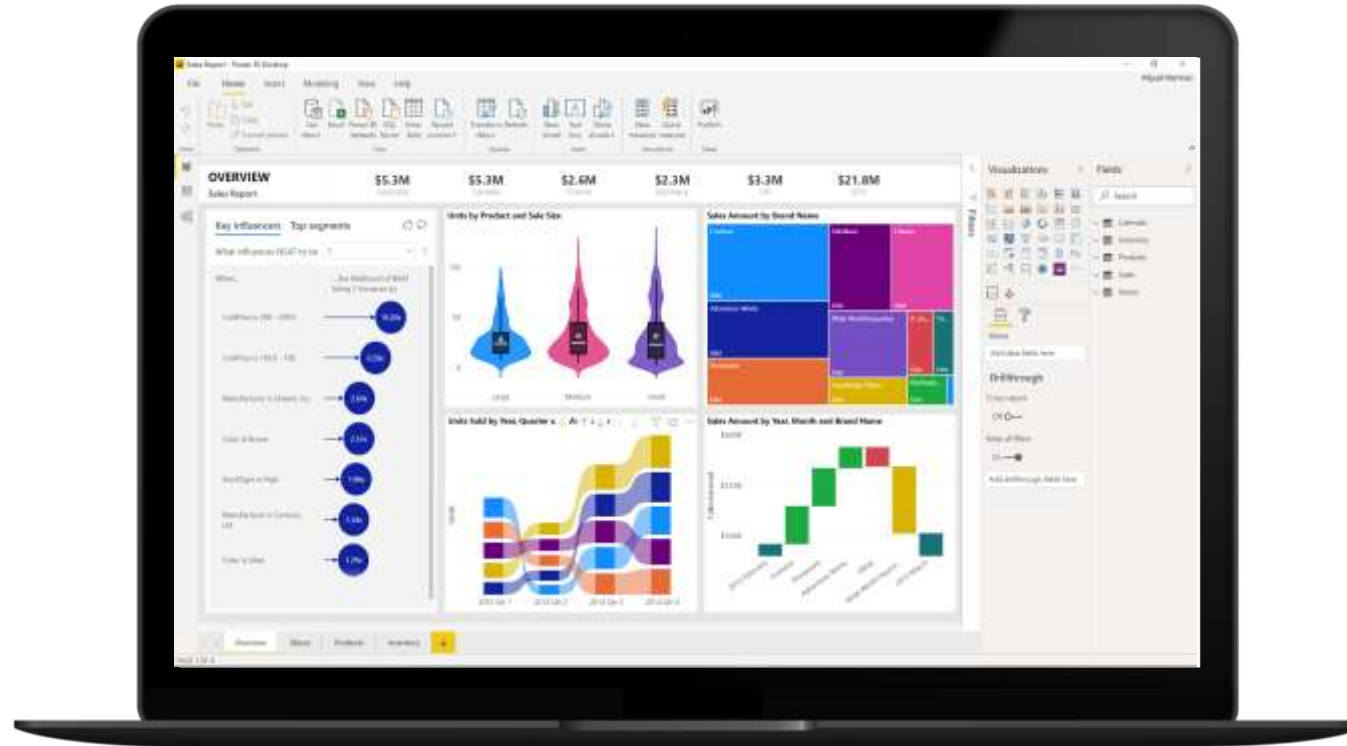
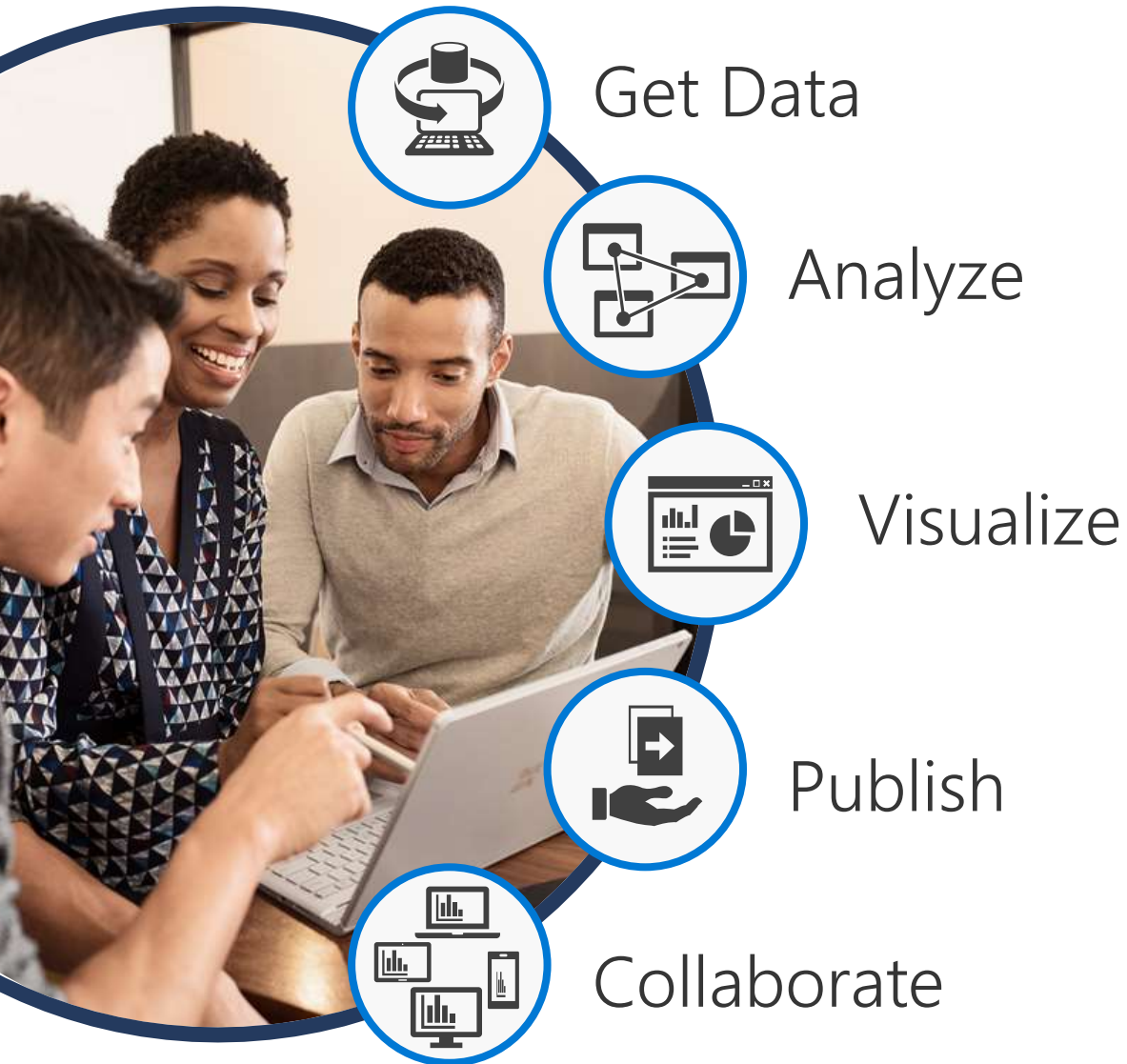
- Hundreds of visualizations and limitless branding options
- Native Visio visualizations
- Easy to install template apps

Spend less time answering business questions

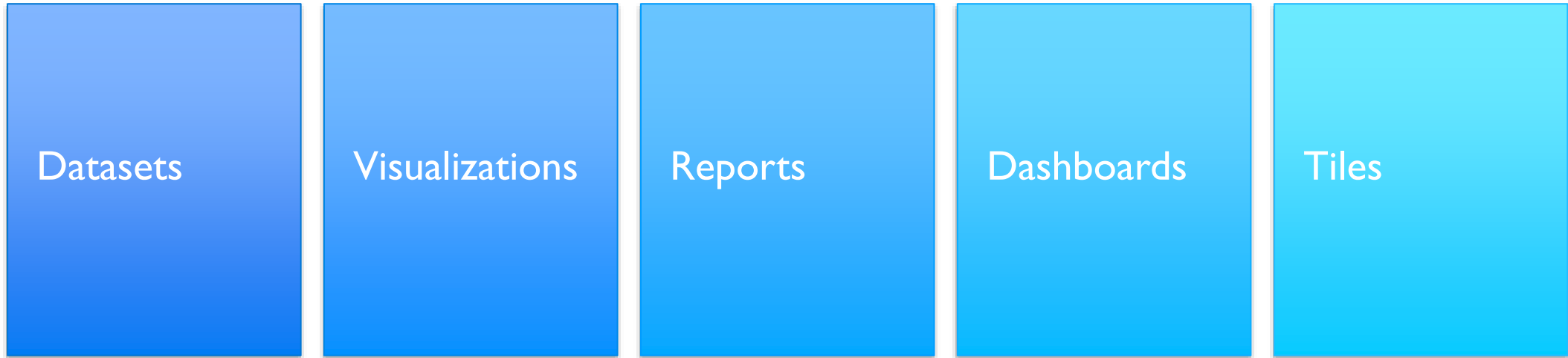
- Use everyday language to ask your data a question
- Business jargon and acronyms are easily understood
- Add and tailor dynamic, interactive narratives
- Automatically find anomalies based on personalized parameters



Microsoft Power BI



Power BI enables everyone at every level of your organization make confident decisions using up-to-the-minute analytics.



Power BI building blocks

Gain insights from your data regardless of where it lives with Power BI

Single View

Connect to all your data and get a consolidated view across your business through a single pane of glass

Any Device

Create ad-hoc analysis, live dashboards & interactive reports that are easy to consume on any device

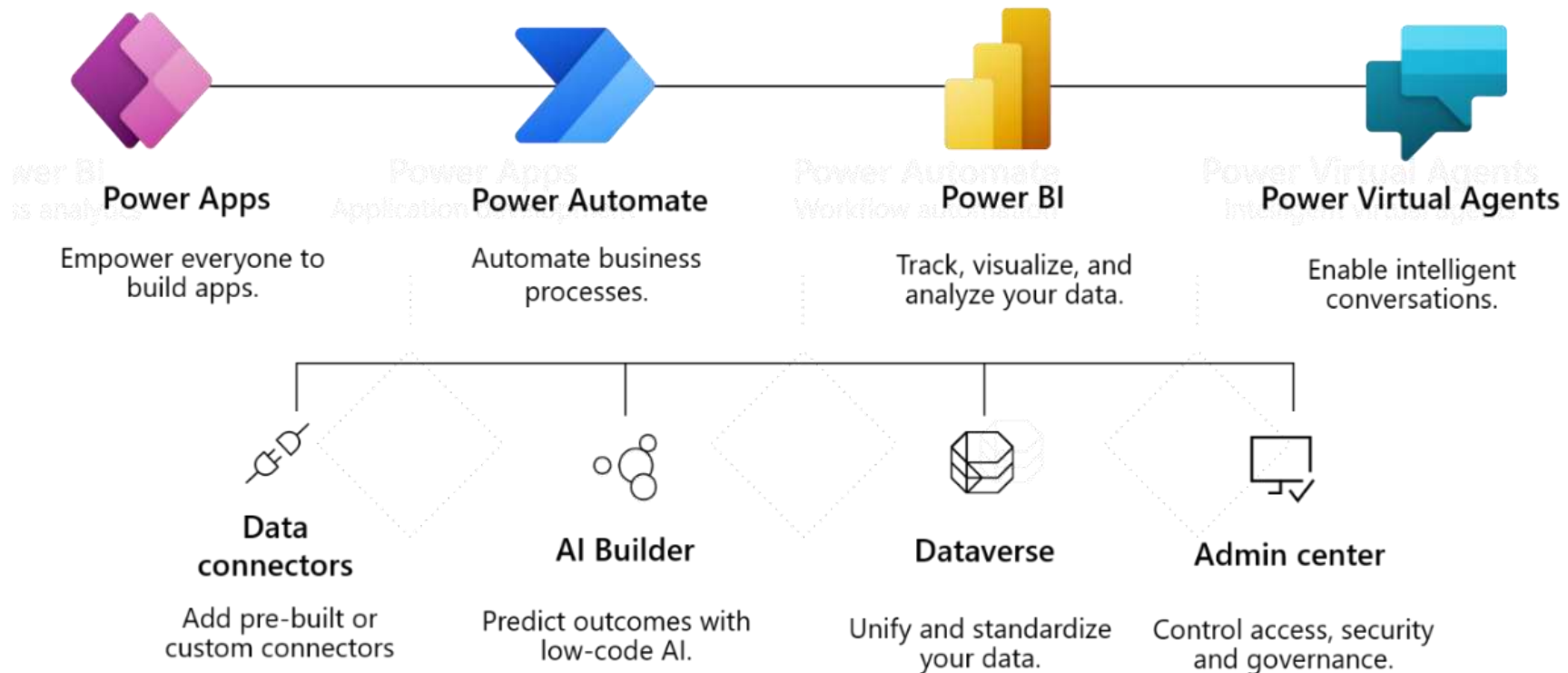
Drive Action

Build smart apps by infusing insights from your data and drive action with the power of the Power Platform

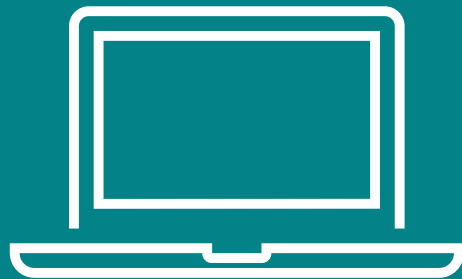


The Power Platform

The low-code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone applications



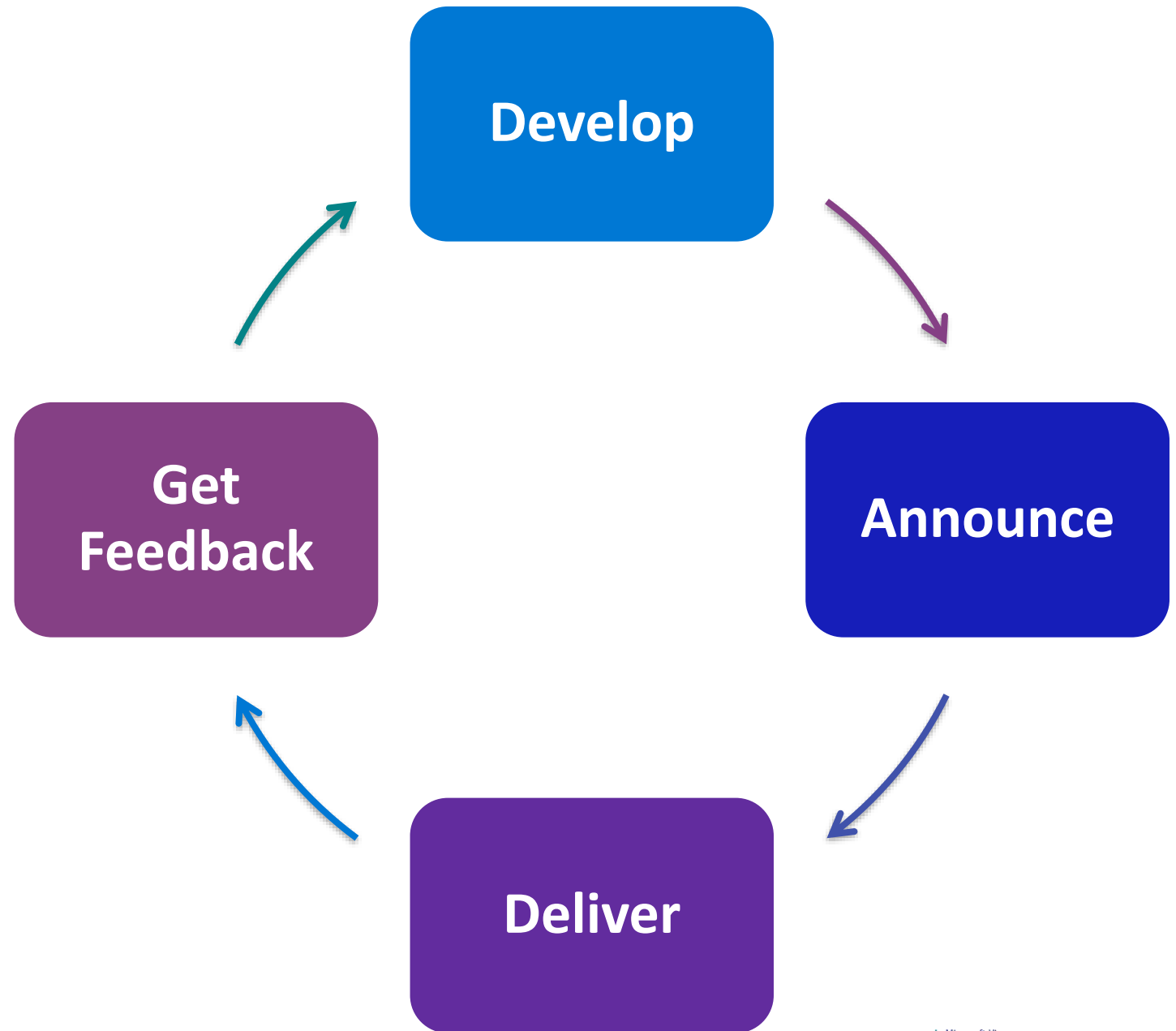
Demo



Power BI ❤️ SharePoint

Keeping Up With Change in Microsoft 365

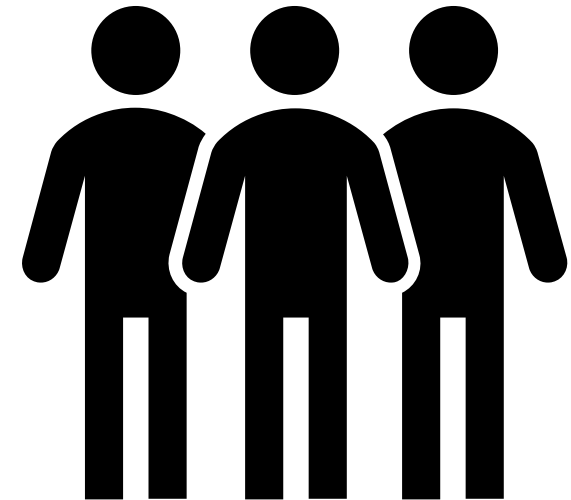
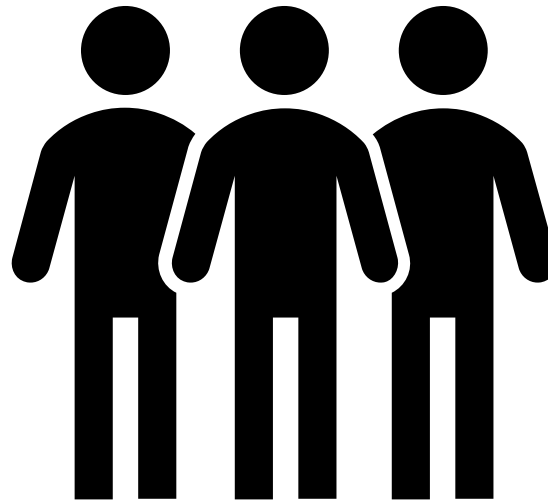
What change?



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, there are filter buttons 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
Power Platform admin center Data Export to Azure Data ...	⋮	Microsoft Power Automate in Microsof...
Power Platform performance and diagnostics monitorin...	⋮	Power Apps in Microsoft 365
Power Platform admin center cross-tenant analytics	⋮	Microsoft Power Automate in Microsof...
Removing the option to use 'Office Presentation Service'...	⋮	Microsoft 365 Apps
Search across images with Microsoft Search	★	Microsoft 365 Apps
Actionable items in Microsoft Search	★	Microsoft 365 Apps
(Updated) Release of new Yammer Desktop experience a...	⋮	Yammer



Live Show
every Monday!



Subscribe via your favorite app

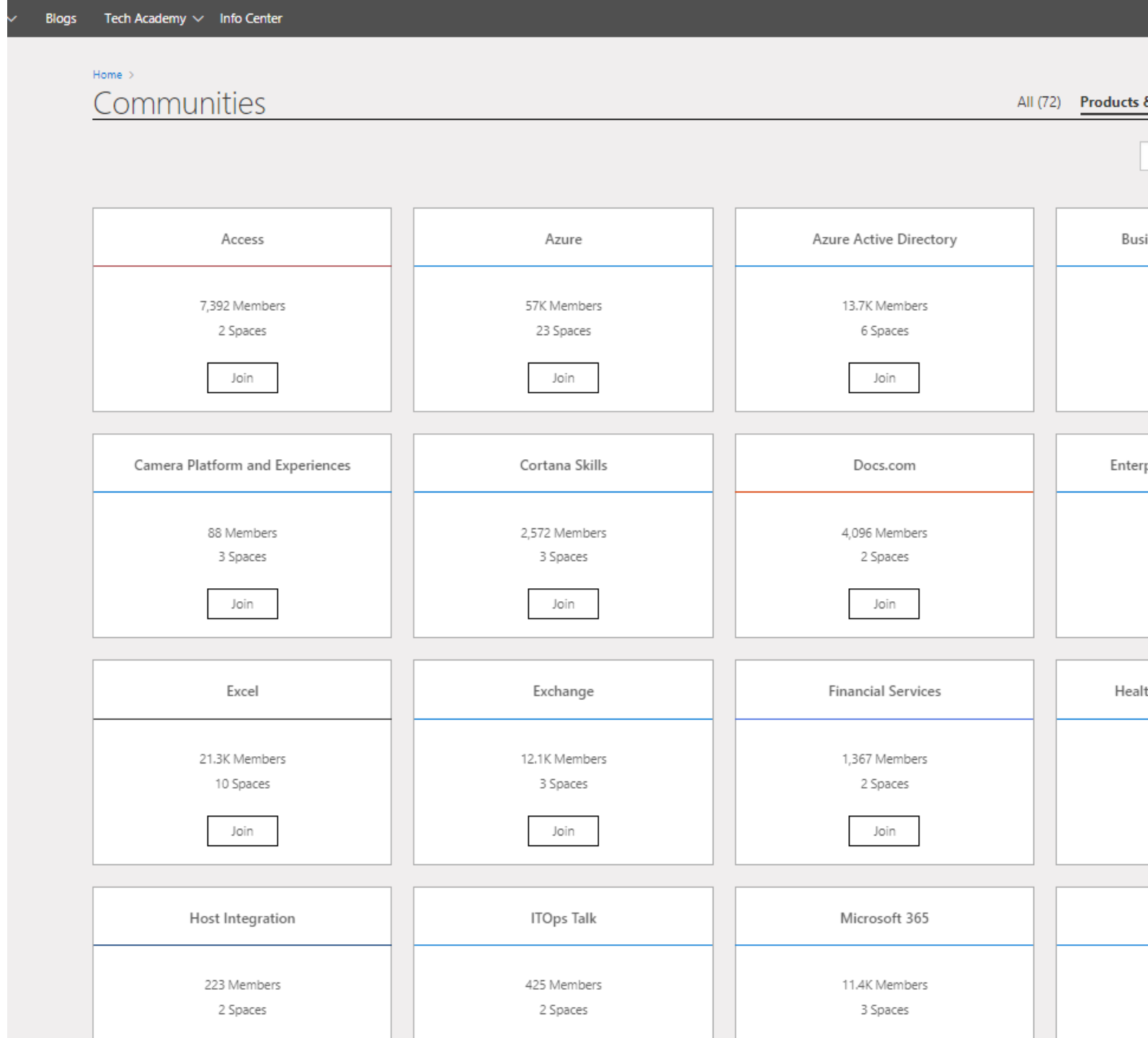
<http://MessageCenter.Show>

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

FOR INFORMATION ABOUT OUR NEXT IN
PERSON EVENT, VISIT OUR WEBSITE AT

 M365Conf.com



Microsoft 365
CONFERENCE

Microsoft Viva
Microsoft Teams
Microsoft SharePoint
Microsoft Power Platform

CO PRODUCED BY MICROSOFT AND M365 CONFERENCE



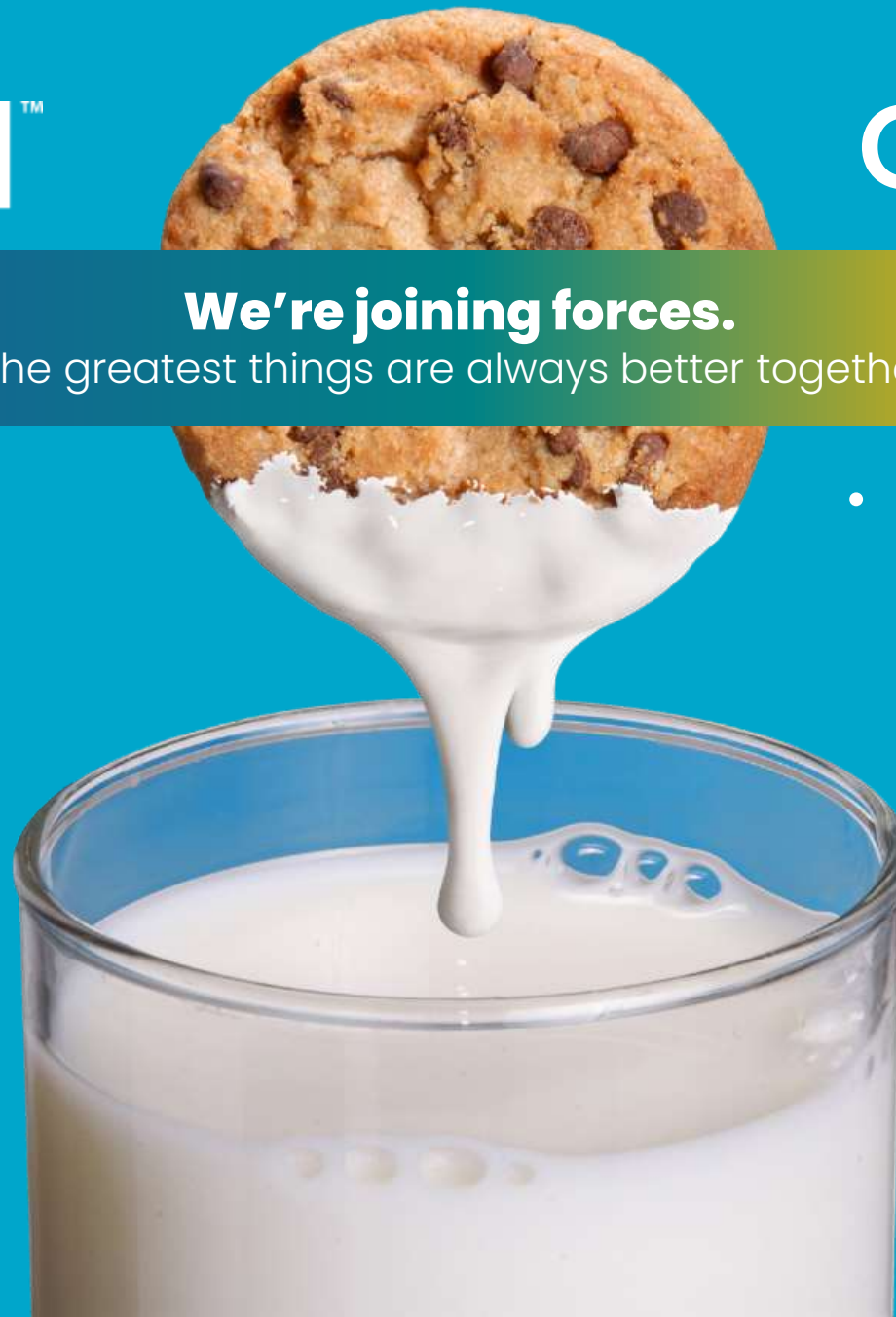


We're joining forces.

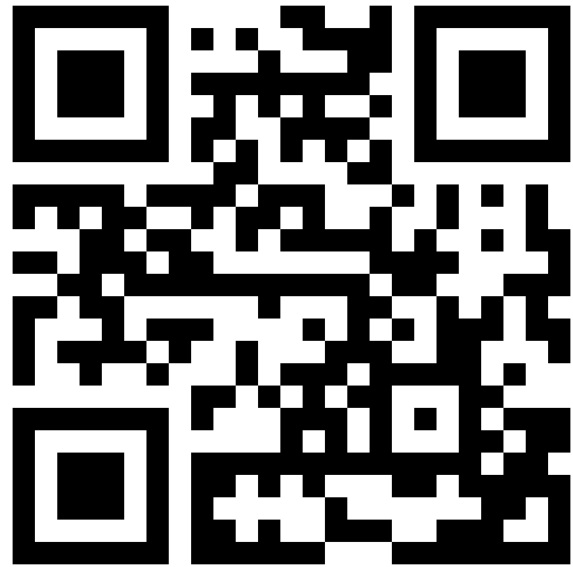
The greatest things are always better together.

- Boutique & custom collaboration & communication solutions your team will love
- Humanized digital workspaces powered by Microsoft 365, SharePoint, and Azure
- Worry-free employee experience excellence managed services programs.

- Holistic Microsoft Cloud technology partner, enabling organizations to work how they want with 3 core practices:
 - Hybrid Office helps promote employee experience and communications
 - Process Transformation alleviate the pain of time-consuming tasks using the Microsoft Power Platform
 - Secure Cloud takes the pain and risks out of identity and device management, cybersecurity and infrastructure.



Daniel Glenn



DanielGlenn.com/Hello



Slides



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