



Download all my presentations
and video recordings

<http://bit.ly/AsifConference>

Are you thinking about the following?

How do I make sense of all that's included in Office 365?

Does our team even need all the Office 365 applications?

It would be great if I could learn from others' experiences...

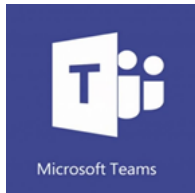
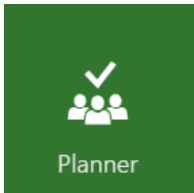
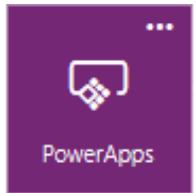
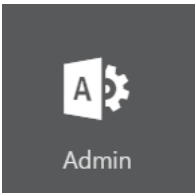
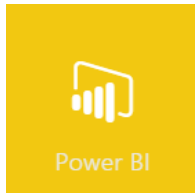
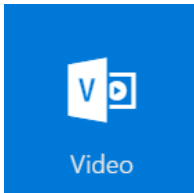
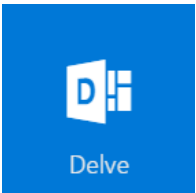
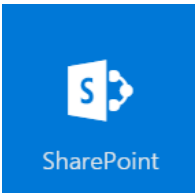
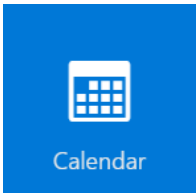
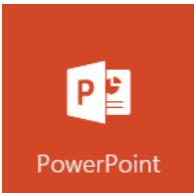
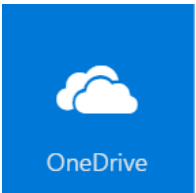
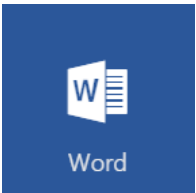
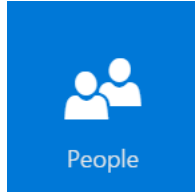
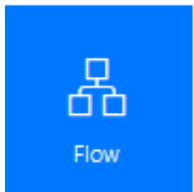
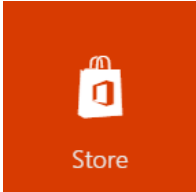
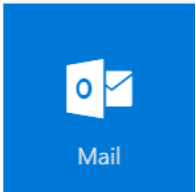
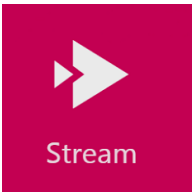
If Yes, Great! This session is for You!





Good afternoon, Asif

Search online documents 



Office

Stream

To-Do

Outlook

Mail

OneNote

Sway

Tasks

Store

Excel

Flow

People

Collaboration

Word

OneDrive

PowerPoint

Calendar

SharePoint

Delve

Video

Power BI

Video Portal

Admin

PowerApps

Security & Compliance

Groups

Yammer

Forms

Planner

Microsoft Teams

Workflows and Forms

Asif Rehmani

Microsoft MVP

VisualSP

Should we be using All Office 365 applications?

Download my presentations at:

<http://bit.ly/AsifConference>

@asifrehmani

About me - Asif Rehmani



Trainer
Founder and CEO
VisualSP
Chicago, USA

Conference Speaker

Ignite
ESPC
SPTechCon
SP Fest
SPC
Dev Intersection
And many more...

SharePoint MVP



Since 2007

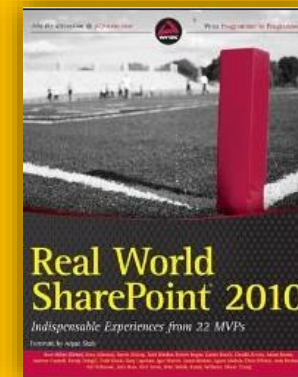
Trainer & Consultant



Contact:

@asifrehmani
asif@visualsp.com
www.VisualSP.com

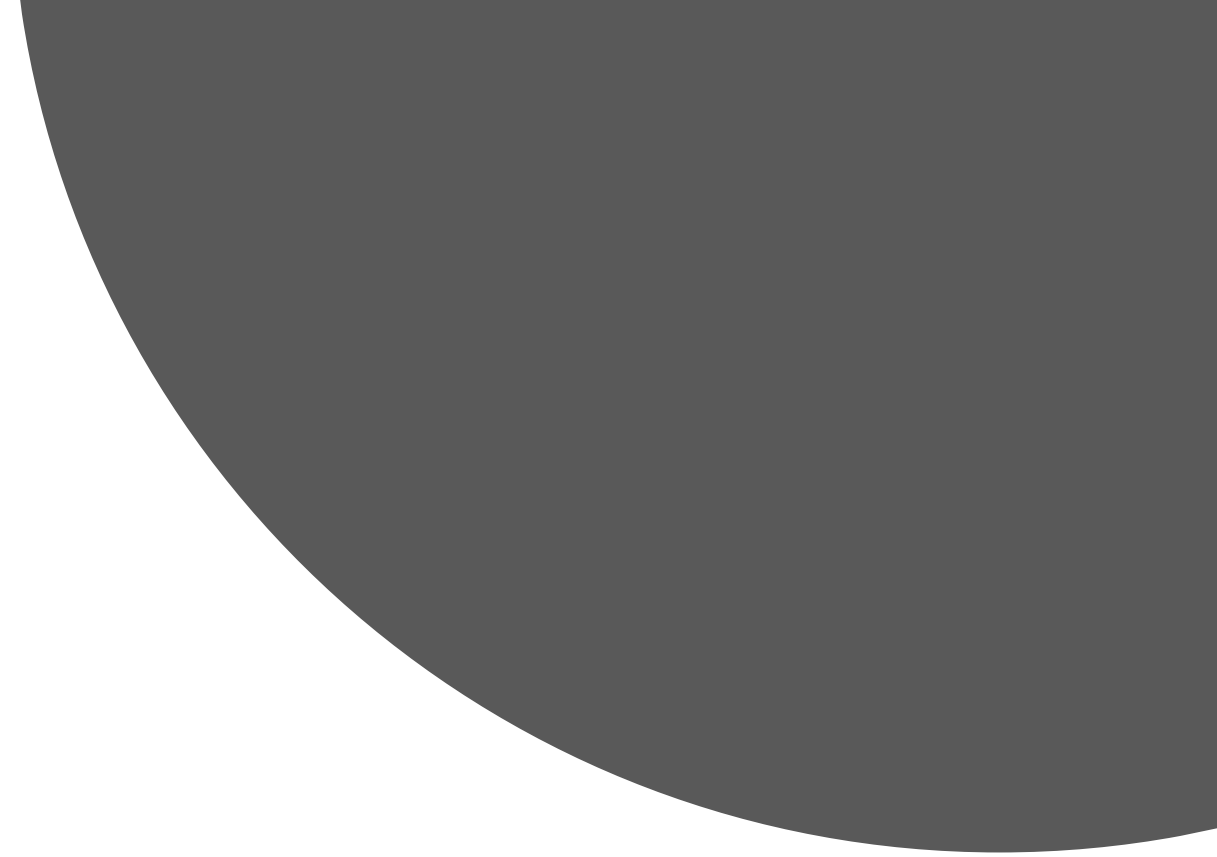
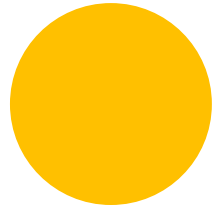
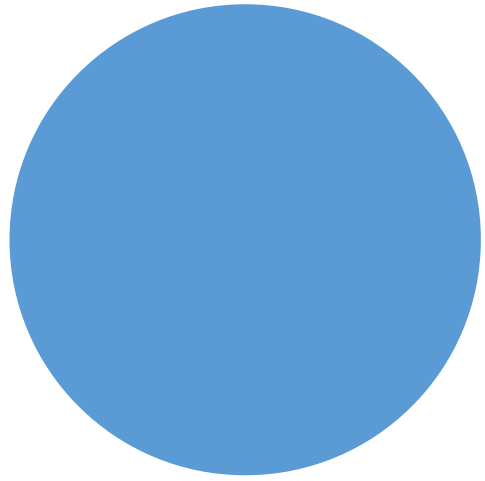
Author



VisualSP – In-context training for Office 365 users


The screenshot displays the OneDrive web interface for a user named Megan Bowen. The interface includes a top navigation bar with the Contoso Electronics logo, the OneDrive label, a search bar, and icons for notifications, settings, help, and the user profile. A left sidebar contains navigation options: Files (selected), Recent, Shared, Discover, Saved for later, and Recycle bin. Below these are shared libraries: Campaigns - Events, Operations, News @ Contoso, Sales and Marketing, and Communication site, along with a link to create a shared library. At the bottom of the sidebar are links to get OneDrive apps and return to classic OneDrive. The main area shows a list of files and folders with columns for icons, names, dates, owners, sizes, and sharing status. The files are sorted by date in descending order. A 'Document.docx' file is highlighted, showing additional icons for sharing, bookmarking, and a menu. A 'Need Help?' button is visible in the bottom right corner.

+ New		↑ Upload		↻ Sync		Sort	
	BrokenPipe.jpg	August 3, 2019	Megan Bowen	5.21 KB	x Shared		
	Business Card.pdf	August 2, 2019	Megan Bowen	846 KB	Private		
	CE Annual Report.docx	August 2, 2019	Megan Bowen	36.6 KB	Private		
	CE Drone - Mark IV.glb	August 2, 2019	Megan Bowen	2.18 MB	Private		
	Contoso Patent Template.docx	August 2, 2019	Megan Bowen	83.6 KB	Private		
	Contoso Purchasing Data - Q1 KJ co...	August 2, 2019	Megan Bowen	21.5 KB	Private		
	Contoso Purchasing Permissions - Q...	August 2, 2019	Megan Bowen	24.7 KB	Private		
	Contoso Purchasing Permissions.docx	August 3, 2019	Megan Bowen	28.8 KB	x Shared		
	CR-227 Product Overview.docx	August 2, 2019	Megan Bowen	1.62 MB	Private		
	Création du contoso Mark 8.pptx	August 2, 2019	Megan Bowen	827 KB	Private		
	Document.docx	January 7	Megan Bowen	399 KB	Private		
	Employee Health Accounts - Q3.xlsx	August 2, 2019	Megan Bowen	21.5 KB	x Shared		
	Employee Travel - Q3.xlsx	August 2, 2019	Megan Bowen	20.7 KB			



VisualSP for Microsoft Learning Pathways

<http://bit.ly/VSP4LP>



Should we be using All
Office 365 applications?

Story about a company and their Office 365 journey

Use cases for various Office 365 applications (much of it demonstrated in a Live environment!)

Lessons learned from other companies' successes and failures

Agenda

Company Profile



Name:

Contoso corporation



Business:

Change Management Consulting



Employee count:

150

Requirements



COMMUNICATIONS:
EMAIL & CHAT



DOCUMENT TYPES: WORD
PROCESSING,
SPREADSHEETS



**DOCUMENT
MANAGEMENT:** STORAGE,
EASY ACCESS, SHARING



**INTERNAL COMPANY
WEBSITE** FOR COMPANY
WIDE COMMUNICATIONS



CONSULTING TRACKER
APPLICATION



PROJECT TASKS TRACKING
APPLICATION

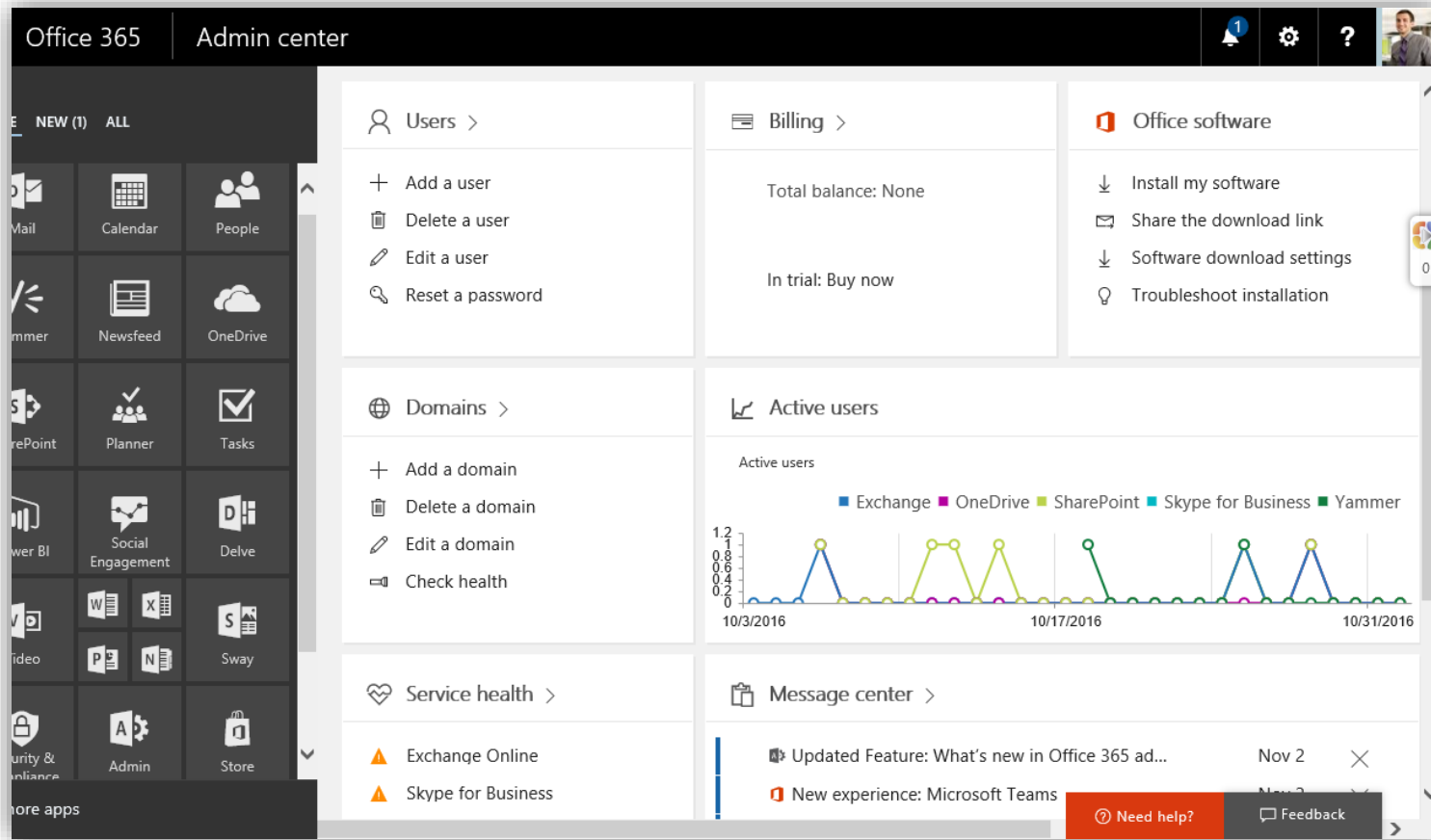
Decided on Office 365

Office 365 E1 for \$8/user/month

*no desktop MS Office apps



Deployment
journey begins...



Admin Center
used to manage the tenant

- Manage billing
- Setup users
- Attach our domain
- Track usage by our users
- Activate/deactivate services like Analytics, Teams

Security and Compliance Center

Default protections already setup

Examples:

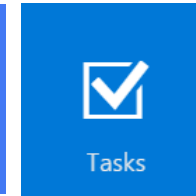
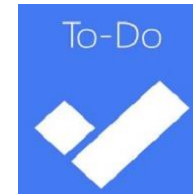
- Auditing data being accessed by your users
- Notification when someone gets added as a tenant admin
- When sensitive information like credit card info leaves the organization domain, admin gets notified



Onwards to user focused apps...

To-Do replaced Outlook Tasks

As of Nov 2019, To-Do has replaced Outlook Tasks.



Personal Task Management with *To-Do*



The screenshot displays the Microsoft To-Do application interface. On the left is a sidebar with a user profile for Sandra Smith and a list of categories: My Day, To-Do (selected), Groceries, Work, Movies to Watch, Family, Travel, and a New List button. The main panel shows the 'To-Do' list with a red header featuring a city skyline. It contains a list of tasks, some of which are crossed out and marked with green checkmarks: 'Pick Anna up from piano practice', 'Finish website design for new clients', and 'Take car to be serviced at the garage'. Below these are two uncompleted tasks: 'Finish design for new website' and 'Buy flowers for grandparents'. A 'New To-do' button is at the bottom of the list. A 'My Day' overlay is positioned on the right, showing a blue header with a mountain landscape and the date 'Wed 22 February'. It lists tasks for the day: 'Finalize presentation Work' (completed), 'Book flights to Seattle Travel' (completed), 'Finish design for new website Work' (uncompleted), and 'Get flowers for nana Family' (uncompleted). An 'Add a to-do' button is at the bottom of the overlay.

Sandra Smith

- My Day
- To-Do**
- Groceries
- Work
- Movies to Watch
- Family
- Travel
- New List

To-Do

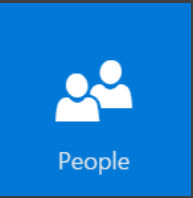
- ☒ ~~Pick Anna up from piano practice~~
- ☒ ~~Finish website design for new clients~~
- ☒ ~~Take car to be serviced at the garage~~
- ☐ Finish design for new website
- ☐ Buy flowers for grandparents
- + New To-do

My Day

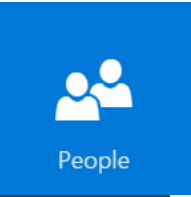
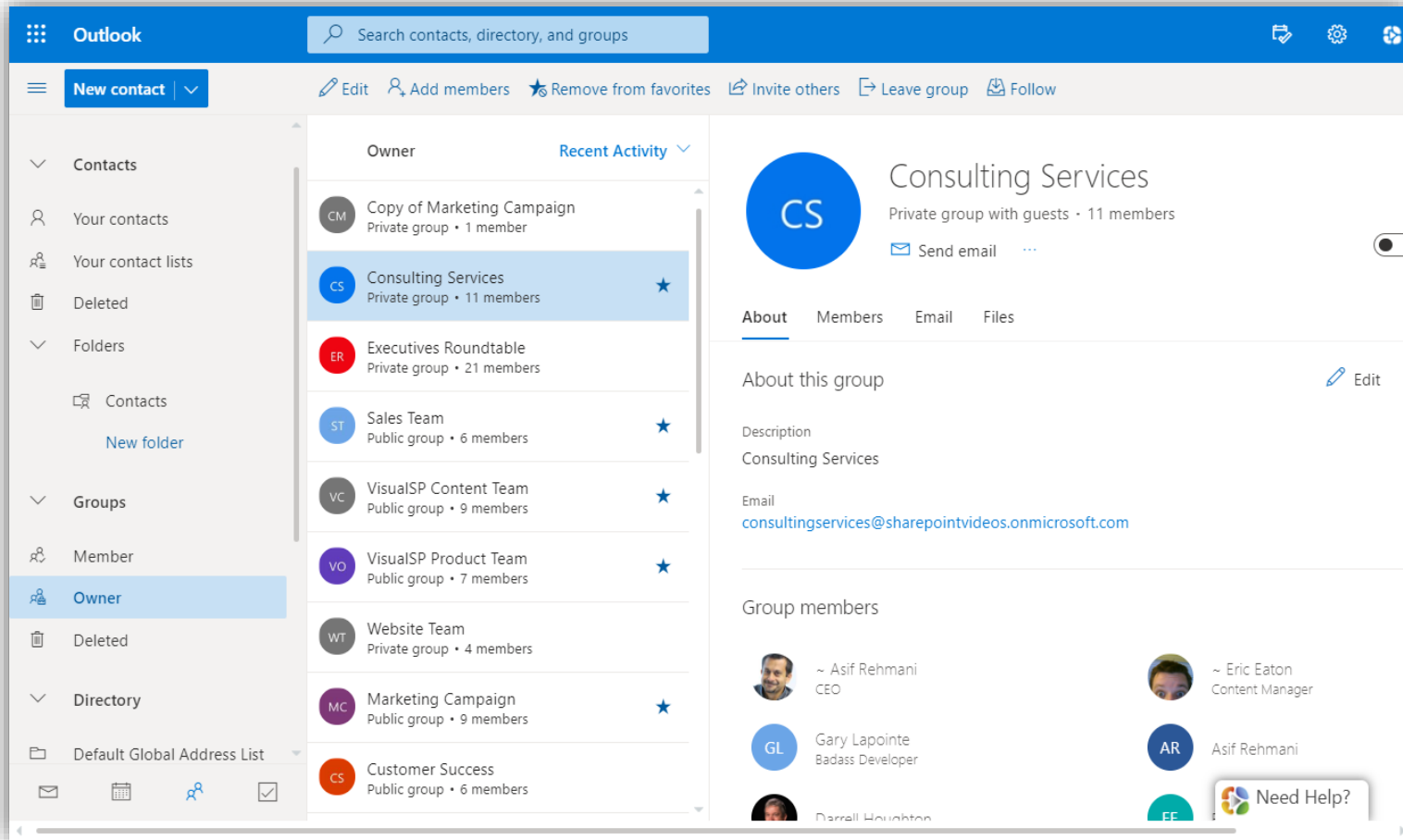
Wed 22 February

- ☒ Finalize presentation Work
- ☒ Book flights to Seattle Travel
- ☐ Finish design for new website Work
- ☐ Get flowers for nana Family

+ Add a to-do



What does the
People app do
anyway...?



- A people centric view
- Manage group memberships
- Discover and connect with co-workers

People



PowerPoint



Word



Excel

Transitioning to Microsoft Office Online
Apps

Should we be using Sway as a presentation tool?

PowerPoint or Sway?

Sway

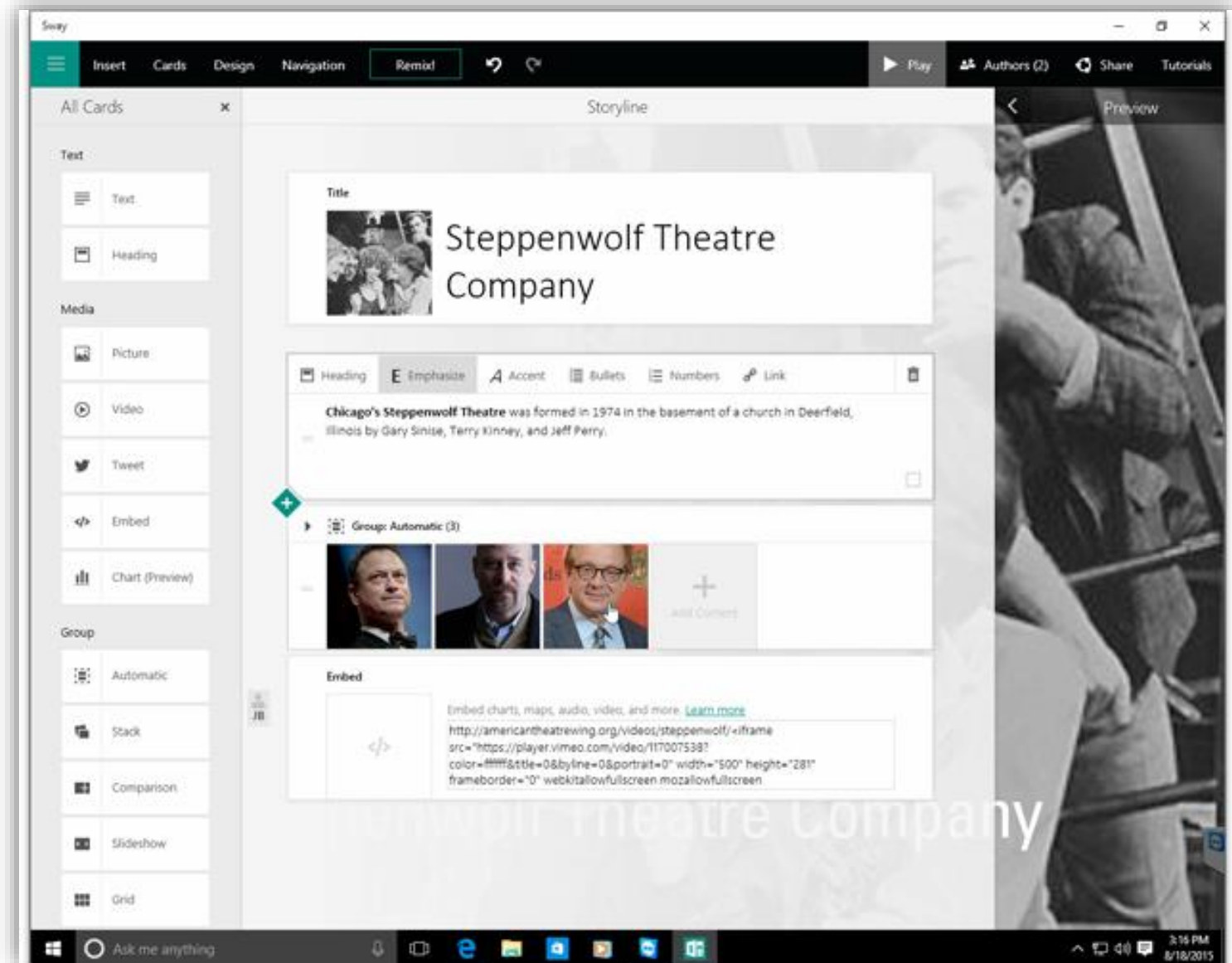


Pros:

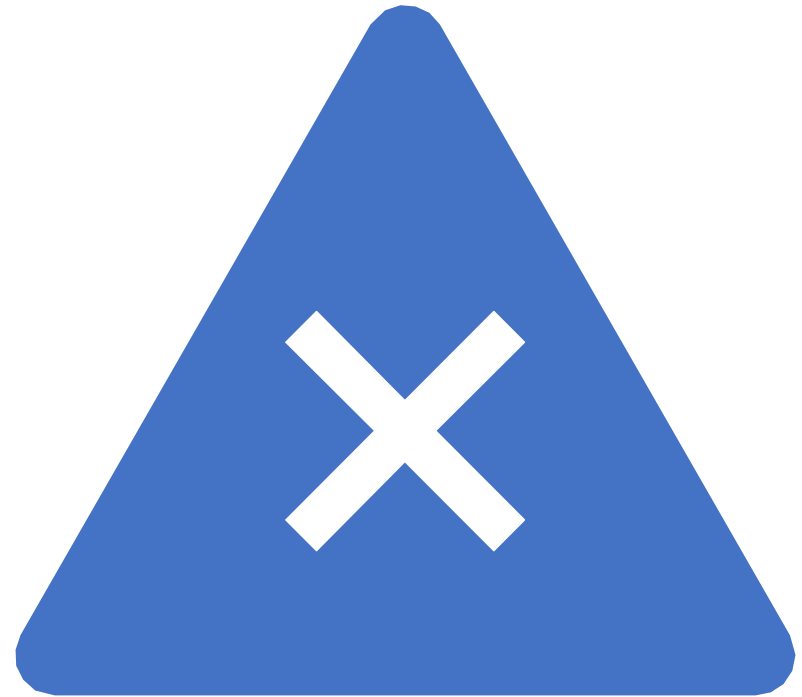
- Quick to create presentations
- Easy to share with others
- Like a quick web page

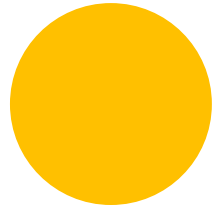
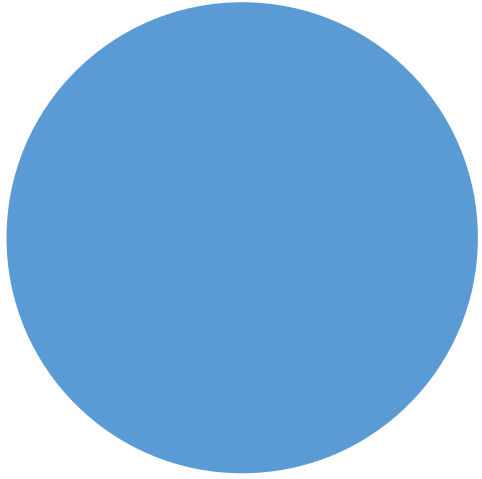
Cons:

- Another application to learn
- PowerPoint is still the industry standard and evolving as well



Chose to not
use Sway





Users need to manage
their own business
documents |


Personal file management using OneDrive




OneDrive

The screenshot displays the OneDrive web interface. The top navigation bar includes the OneDrive logo, a search bar, a 'Need Help?' link, and icons for notifications, settings, and a user profile (labeled 'FC'). The left sidebar shows navigation options: 'Full Control' (selected), 'Files', 'Recent', 'Shared', 'Saved for later', and 'Recycle bin'. Below these are 'Shared libraries' with a list of sites including 'VisualSP - Context sen...', 'VisualSP -- Context-se...', 'Site Owner Training', 'Modern Team Site', 'Classic Team Site', 'Modern Team Site 2', 'Modern Site Test - Do...', and 'Classic Site Test - Don't...'. The main content area, titled 'Files', shows a table of files and folders.

Name	Modified	Modified By	File Size	Sharing
Expense reimbursement	14 minutes ago	Full Control	1 item	Private
Attachments	April 10, 2018	Full Control	1 item	Private
Notebooks	April 10, 2018	Full Control	2 items	Shared
CTV Building.docx	11 minutes ago	Full Control	15.9 KB	Private
Financial data.xlsx	13 minutes ago	Full Control	82.0 KB	Private
File Naming Recommendations.pdf	15 minutes ago	Full Control	465 KB	Private
Employee Status Report.docx	15 minutes ago	Full Control	24.5 KB	Private
Employee Award Certificate.pptx	15 minutes ago	Full Control	430 KB	Private
employee data sheet doc	15 minutes ago	Full Control	28.5 KB	Private



Employees are
already pretty
comfortable with
Dropbox



What's in it for
them to move to
OneDrive??

Challenge: how do you get users to switch to OneDrive?

- Empathized with the users
- Admin became a Dropbox user herself
- Made a list of pros and cons of why employees should switch from Dropbox to OneDrive
- Demonstrated the pros of switching in company town hall meeting

Examples:

- Native support for automatically saving documents in OneDrive as you work on them
- Easier to share documents with colleagues using OneDrive
- Easily promote documents from OneDrive to SharePoint Document Library to share with others



Requirement: Workspace needed for teams to collaborate

- Task management
- Chat
- Online meetings
- Team calendars
- Easy note taking



Yammer



Team



Email



Calendar



SharePoint



Notebook



Stream



Dynamics CRM



Power BI



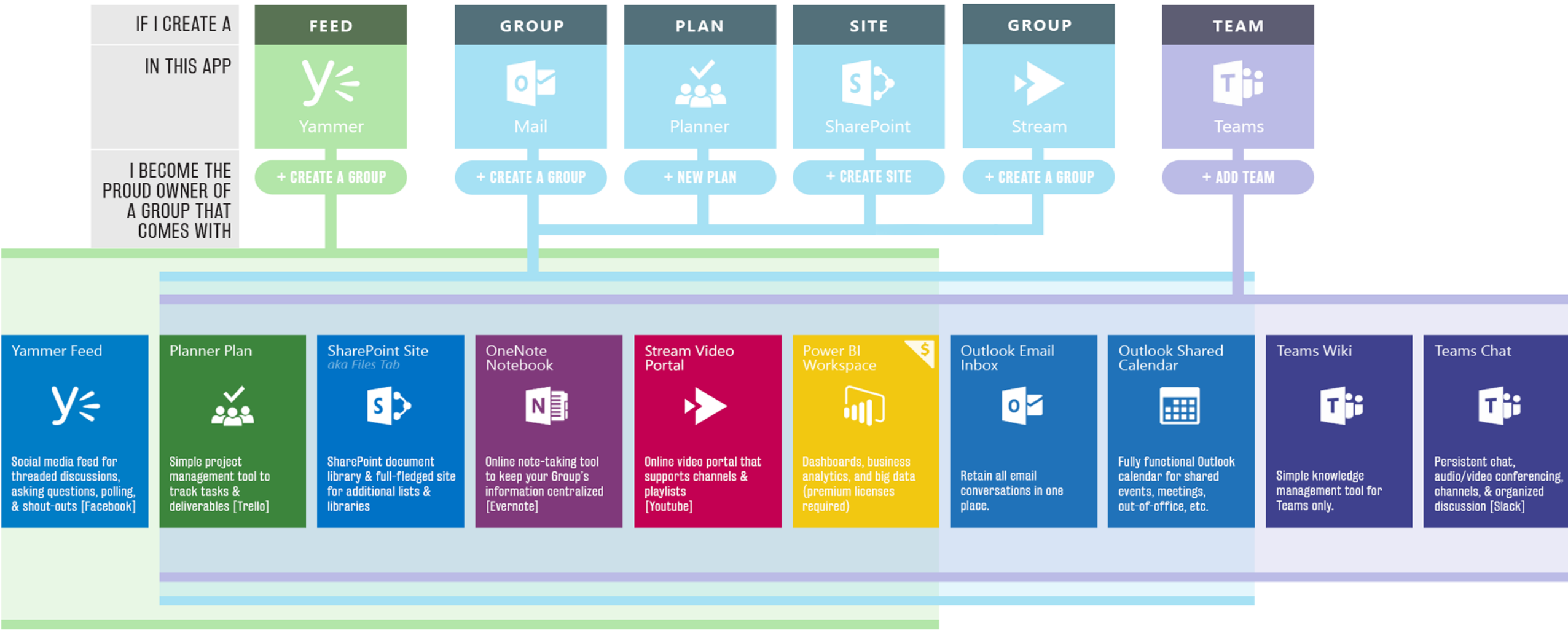
Planner

Office 365 Groups

Underlying foundation for all work

Permanent and
Temporary
Groups

Office 365 Groups



Chose to use
Microsoft Teams to
create Office 365
Groups as needed

Microsoft Teams



Chat based workspace



Organized by teams in the company



Channels exist within teams to discuss specific topics



Video chat capability



Connectors to connect to other services



Private chats and small group chats



Ability to send emails directly into Teams.



Attachments go into the associated SharePoint site document library

Microsoft Teams



Activity

Chat ⁴

Teams

Meetings

Files

Feedback

Search

Favorites

GTM vTeam

General

Analytics

Compete Info

PR planning

Social media

Web site

3 more channels

Project Redstone

General

Engineering

Legal

Prototype Feedback

Security

More

Want an even faster, more collaborative experience? Download the desktop app. [Download](#)

GTM vTeam > General

Conversations Files OneNote +

Andrew Spiziri 11:16 AM

IMPORTANT!

Need a substitute speaker for press briefing

Folks, we have a press briefing for APAC tonight and I need someone to cover the Q&A for me. Any takers? Dinner's on me.

Suphatra Rufo 11:20 AM

Andrew, I can cover.

Reply

Kady Dundas 11:15 AM

Moble user research Feb. 2017 - summary.xlsx

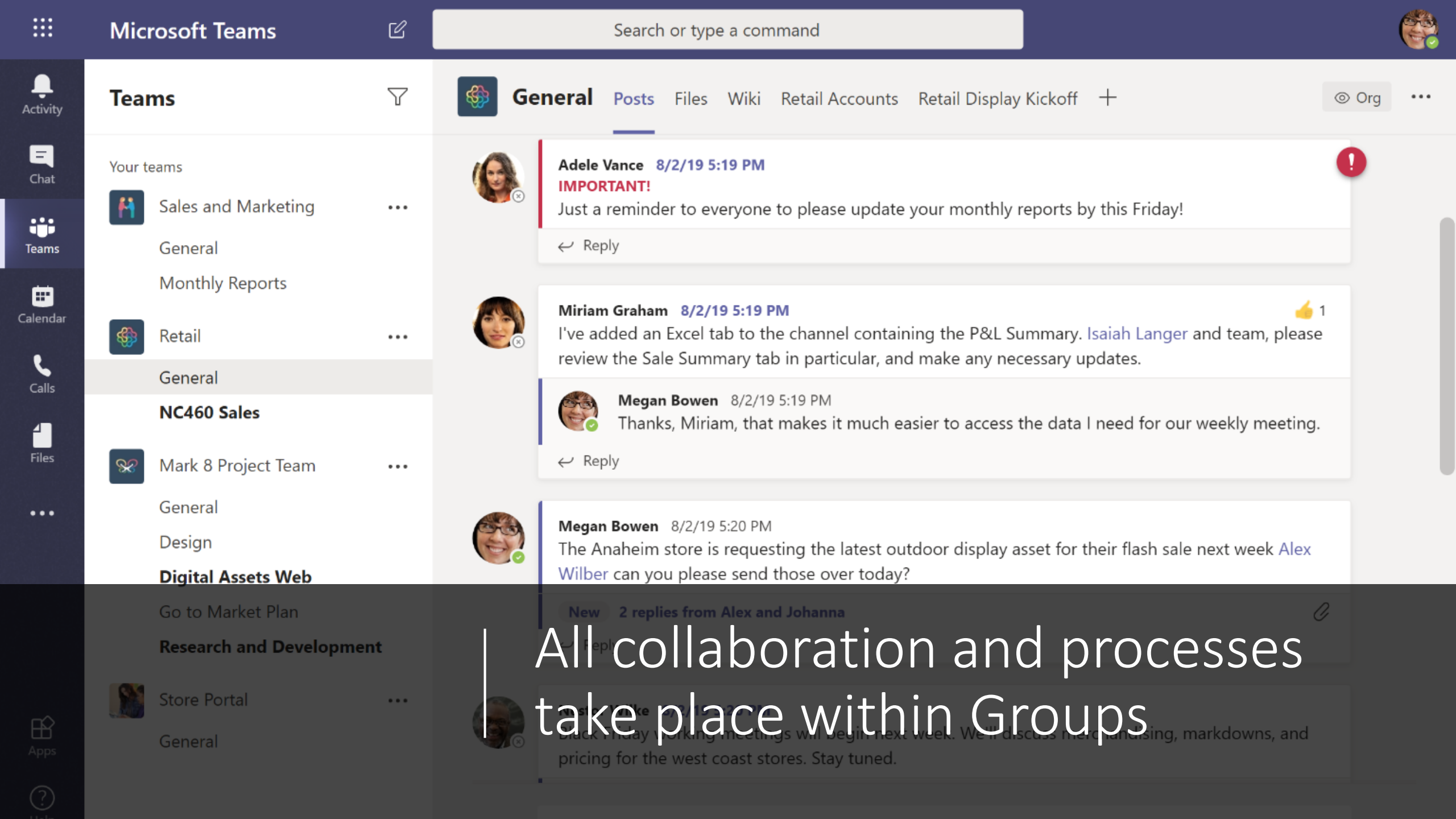
check it out @GTM vTeam - the latest on mobile users

Andrew Spiziri 11:20 AM

Kady, this is great. How about we pin it as a tab?

Reply

Start a new conversation



Teams

Your teams

Sales and Marketing

...

General

Monthly Reports

Retail

...

General

NC460 Sales

Mark 8 Project Team

...

General

Design

Digital Assets Web

Go to Market Plan

Research and Development

Store Portal

...

General



General

Posts

Files

Wiki

Retail Accounts

Retail Display Kickoff



Org



Adele Vance 8/2/19 5:19 PM

IMPORTANT!

Just a reminder to everyone to please update your monthly reports by this Friday!

← Reply



Miriam Graham 8/2/19 5:19 PM

I've added an Excel tab to the channel containing the P&L Summary. [Isaiah Langer](#) and team, please review the Sale Summary tab in particular, and make any necessary updates.



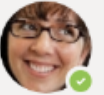
1



Megan Bowen 8/2/19 5:19 PM

Thanks, Miriam, that makes it much easier to access the data I need for our weekly meeting.

← Reply



Megan Bowen 8/2/19 5:20 PM

The Anaheim store is requesting the latest outdoor display asset for their flash sale next week [Alex Wilber](#) can you please send those over today?

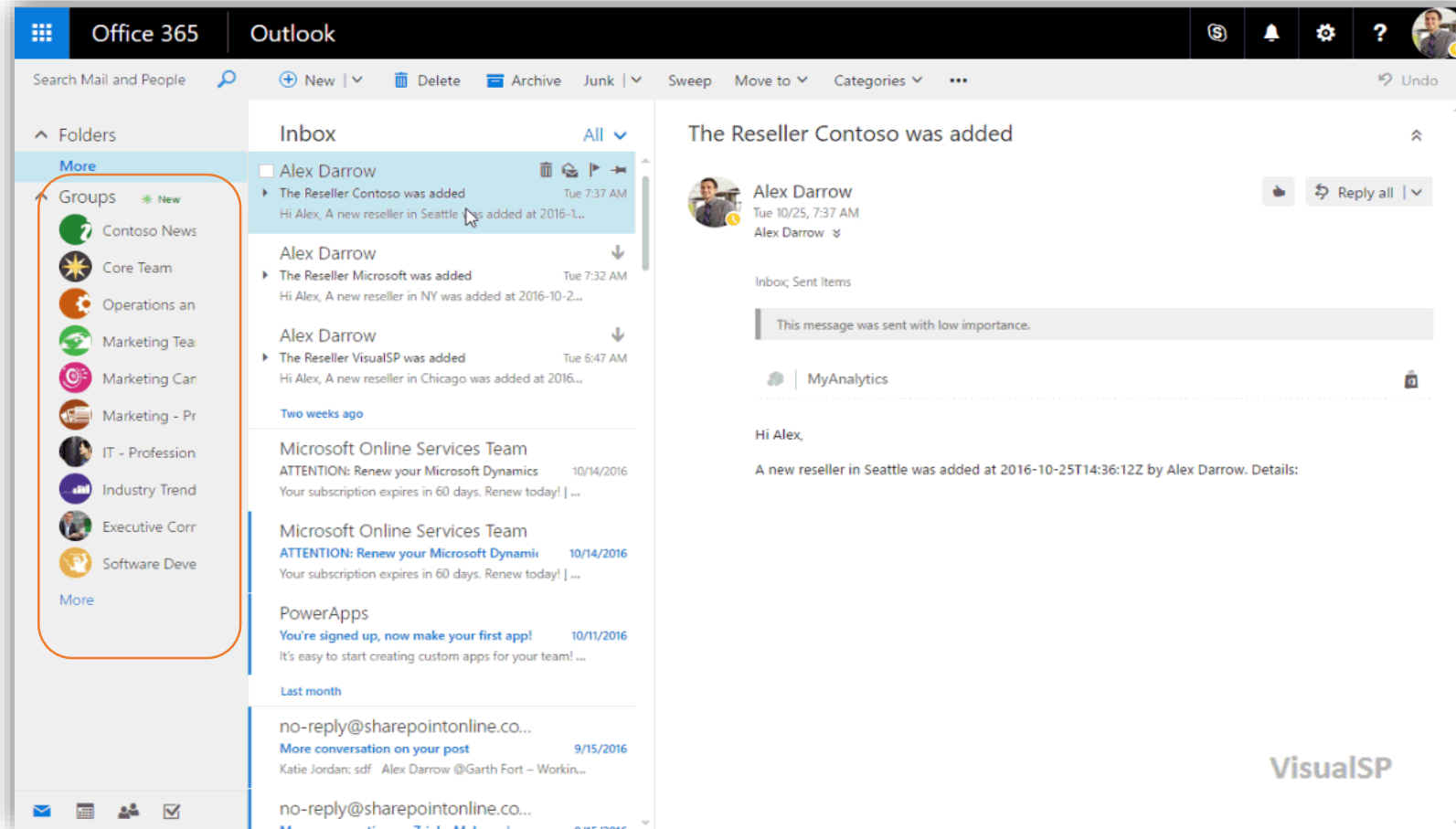
New 2 replies from Alex and Johanna



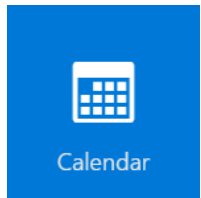
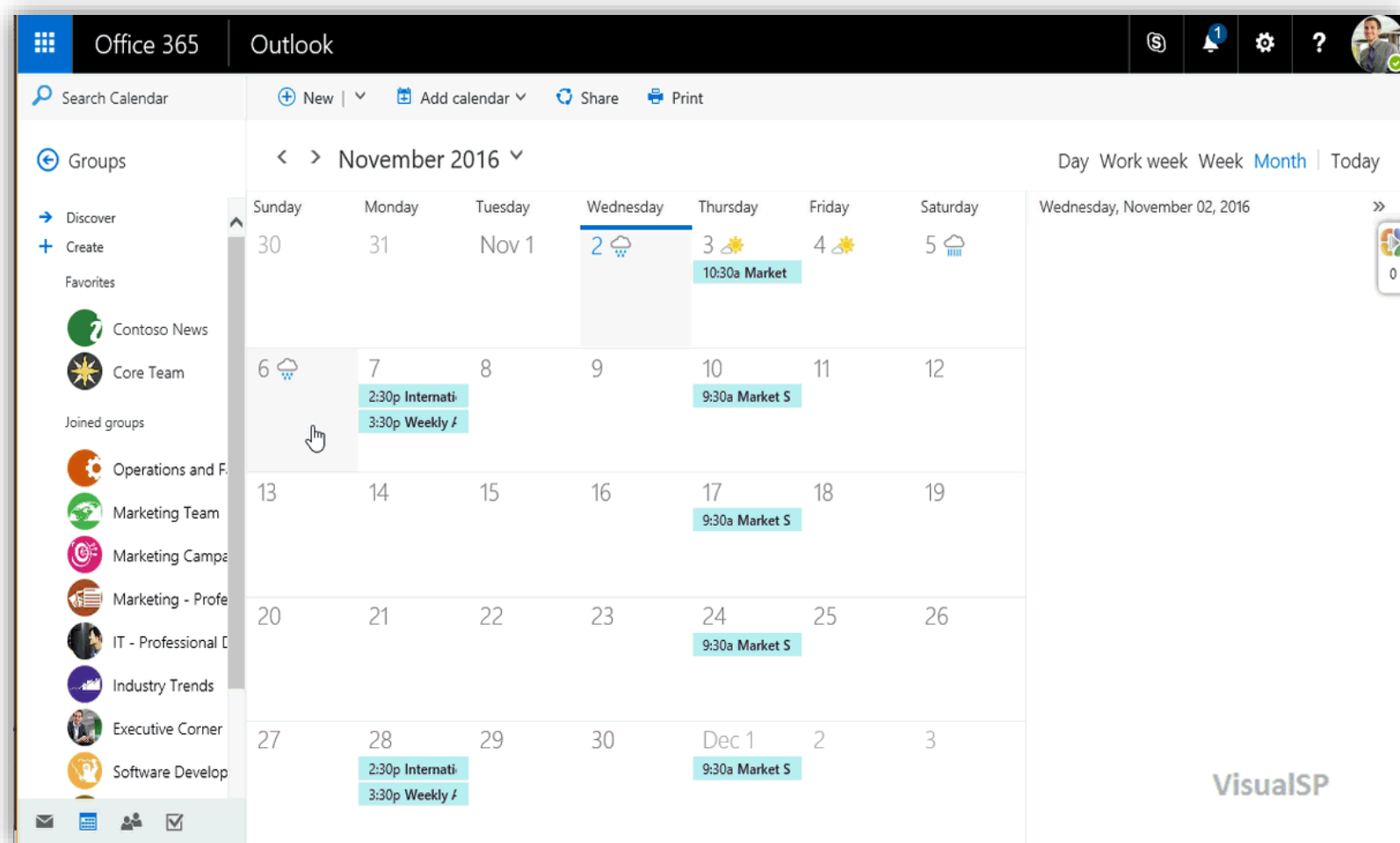
Black Friday

Black Friday working meetings will begin next week. We'll discuss merchandising, markdowns, and pricing for the west coast stores. Stay tuned.

All collaboration and processes take place within Groups

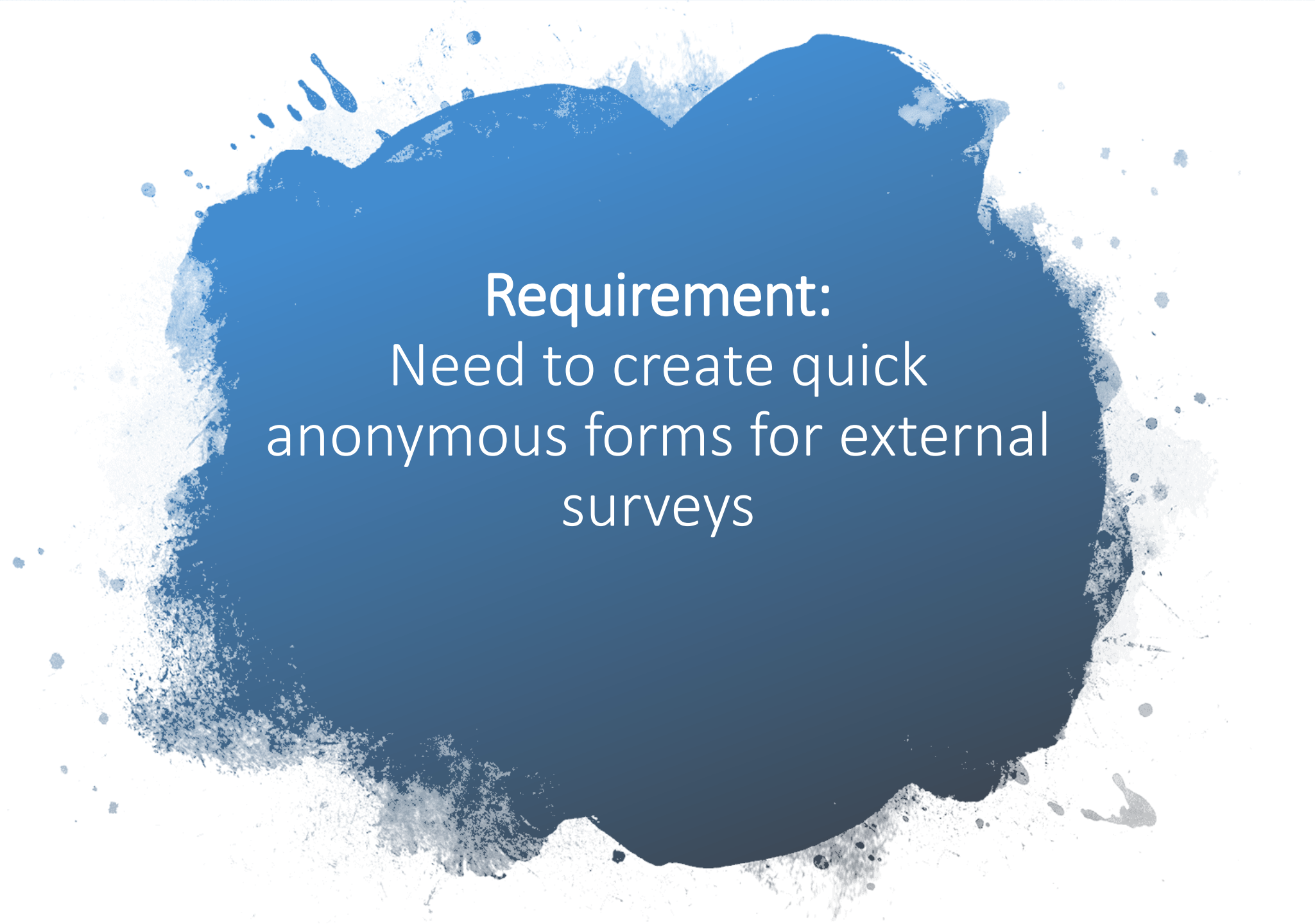


Easy access to Groups from Outlook



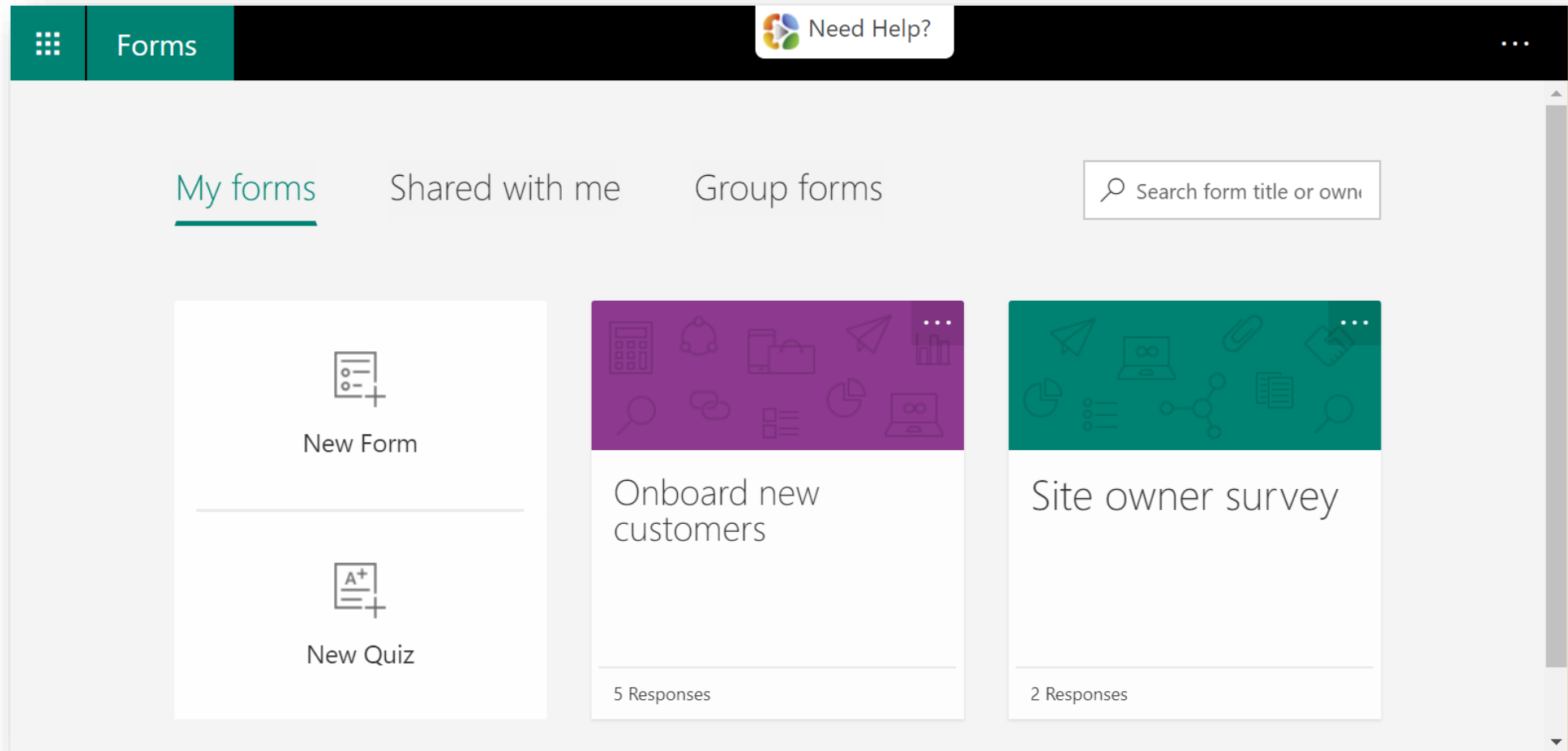
Group Calendars

Overlapping calendars to keep things in check



Requirement:
Need to create quick
anonymous forms for external
surveys

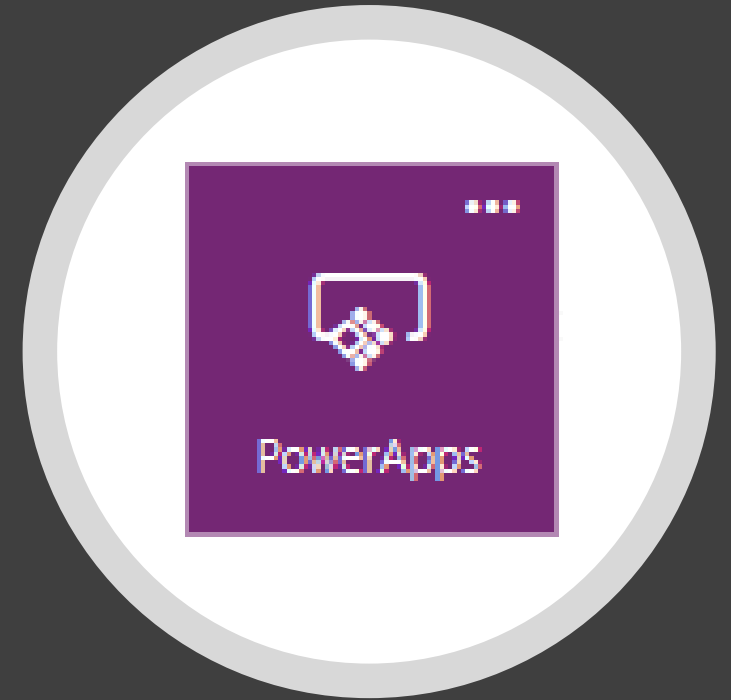
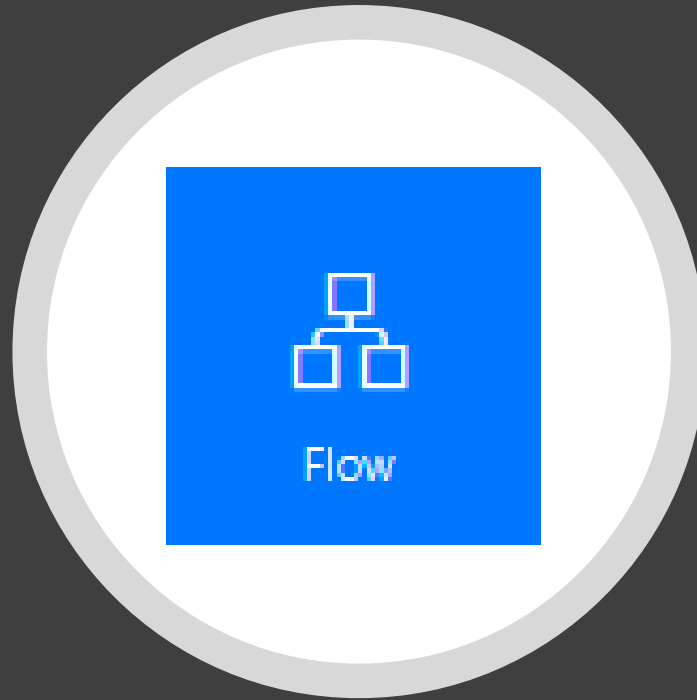
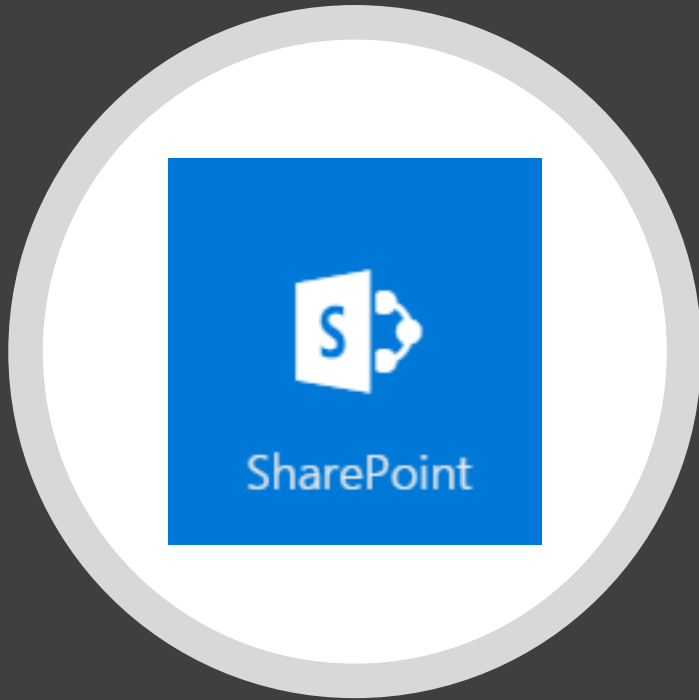
Microsoft Forms



Requirement:
Consulting team needs an
easy way to track 1-on-1
consulting engagements



Chose to create application using
SharePoint lists, PowerApps and
PowerAutomate (formerly Flow)



Automated business processes

Consulting services tracking



SharePoint list

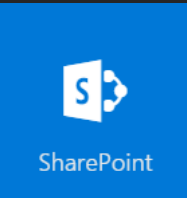
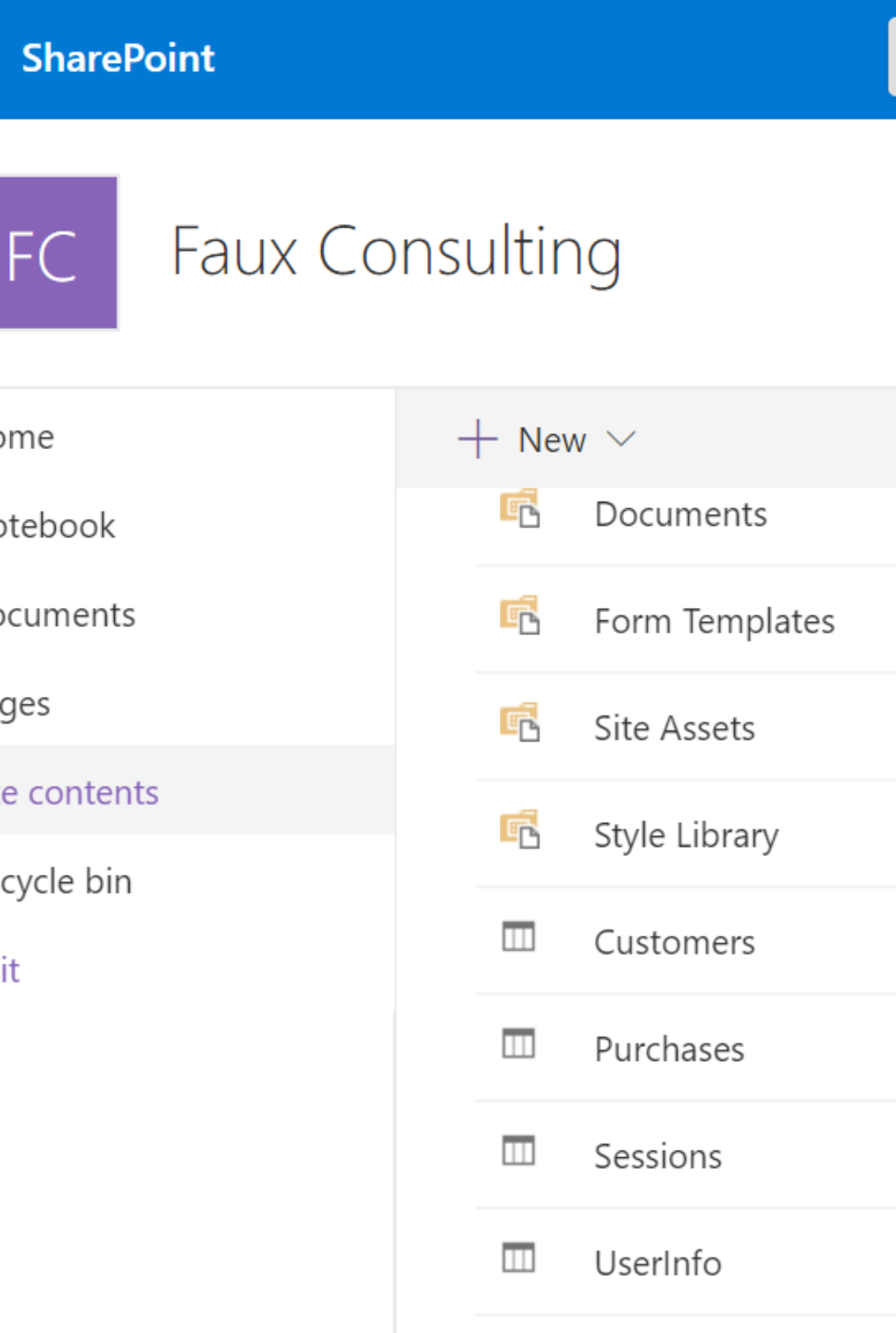
Clients, Hours billed

PowerApps

Customized Forms and Views

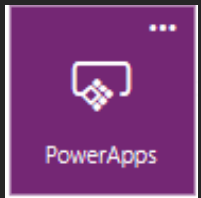
Flow

Approval process



Consulting SharePoint lists

PowerApps



VisualSP Consulting Services Tracker

[Refresh](#)[Billing view](#)

12 hours available

Old Republic

Obi-Wan Kenobi

yourmyonlyhope@jedicounci



Hours purchased this year: 20

[Add a purchase](#)

12/20/2018 - 1:1 Consulting 2 indiv - 2 hours purchased for \$500 - 1

4/1/2019 - 1:1 Consulting 10 block - 10 hours purchased for \$2500 - -0.5

**Phone Booth Time
Machines, Inc**

Bill S. Preston, Esquire

bill@wildstallions.com



Hours used this year: 8

[Add a session](#)

8/15/2019 - 1 hours from 20190618 - -- - 102+20 | Eric Eaton |
Checkpoint meeting

Preston High School

Napoleon Dynamite

ivoteforpedro@liger.com



Santa Poco PD

Ned Nederlander

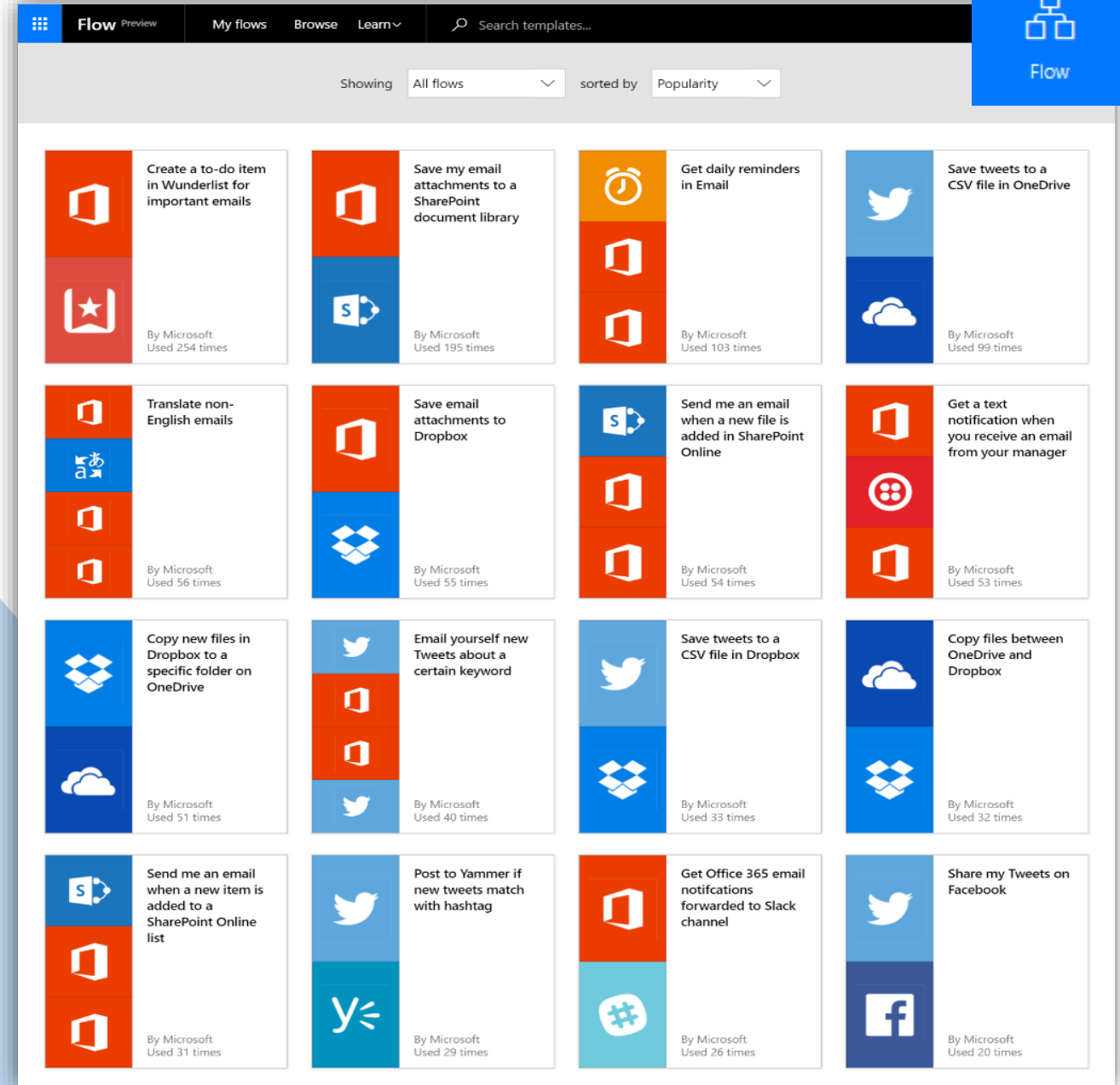
littleneddy@threeamigos.co



7/31/2019 - 1 hours from 20181210 - PLA - 114.75+22.5 | Eric Eaton
| Weekly call



PowerAutomate (Flow)





What about Yammer?

Do we need it? Why...?



Yammer



Yammer

The screenshot displays the Yammer web interface. At the top, a navigation bar includes the Office 365 logo, the Yammer logo, and user profile icons. The left sidebar shows a list of groups under 'CONTOSO DEMO GROUPS', with 'Sales' currently selected. The main content area is the 'Sales' group page, featuring a blue header with tabs for 'NEW CONVERSATIONS', 'ALL CONVERSATIONS' (which is active), 'FILES', and 'NOTES'. Below the header, there's a section for group actions: 'Update', 'Poll', 'Praise', and 'Announcement'. A text input field prompts users to 'Share something with this group...'. The conversation feed shows two posts. The first post is by Alex Darrow, dated September 14 at 9:34am, mentioning Garth Fort and his work on a Q4 Strategy document. It has options to 'LIKE', 'REPLY', and 'SHARE'. Below it is a 'Write a reply' input field. The second post is by Katie Jordan, dated September 14 at 9:33am, discussing customer traction and mentioning '#salesofferings'. It also has 'UNLIKE', 'REPLY', and 'SHARE' options. At the bottom of the feed, it shows that 'You and Molly Dempsey like this' and a hashtag '#Salesofferings'. On the right side, there's a 'MEMBERS (11)' section with profile pictures of group members and a 'SEARCH' section with a list of online members, including Katie Jordan (Auditor), Pavel Banksy (VP Sales), Garth Fort (Web Marketing Mana...), Janet Schorr (Product Marketing Ma...), Zrinka Makovac (VP Marketing), and Molly Dempsey (Product Manager).

Yammer



Enterprise Social. Works great for mid to large size companies – usually > 500 people



Discover connections and people you don't know through the organization.



Yammer conversations are like forums



Many large companies are using Yammer successfully and loving it!



Definitely overlaps with Teams

A large, irregular red ink splatter or blotch serves as the background for the text. The splatter is centered and has a textured, painterly appearance with various shades of red and some darker spots. The text is white and positioned in the center of the splatter.

Teams vs Yammer

What's the difference...?

Teams or Yammer ??

Small teams (under 100 ppl)

- Teams only
- Connecting with people you know

Medium to Large teams

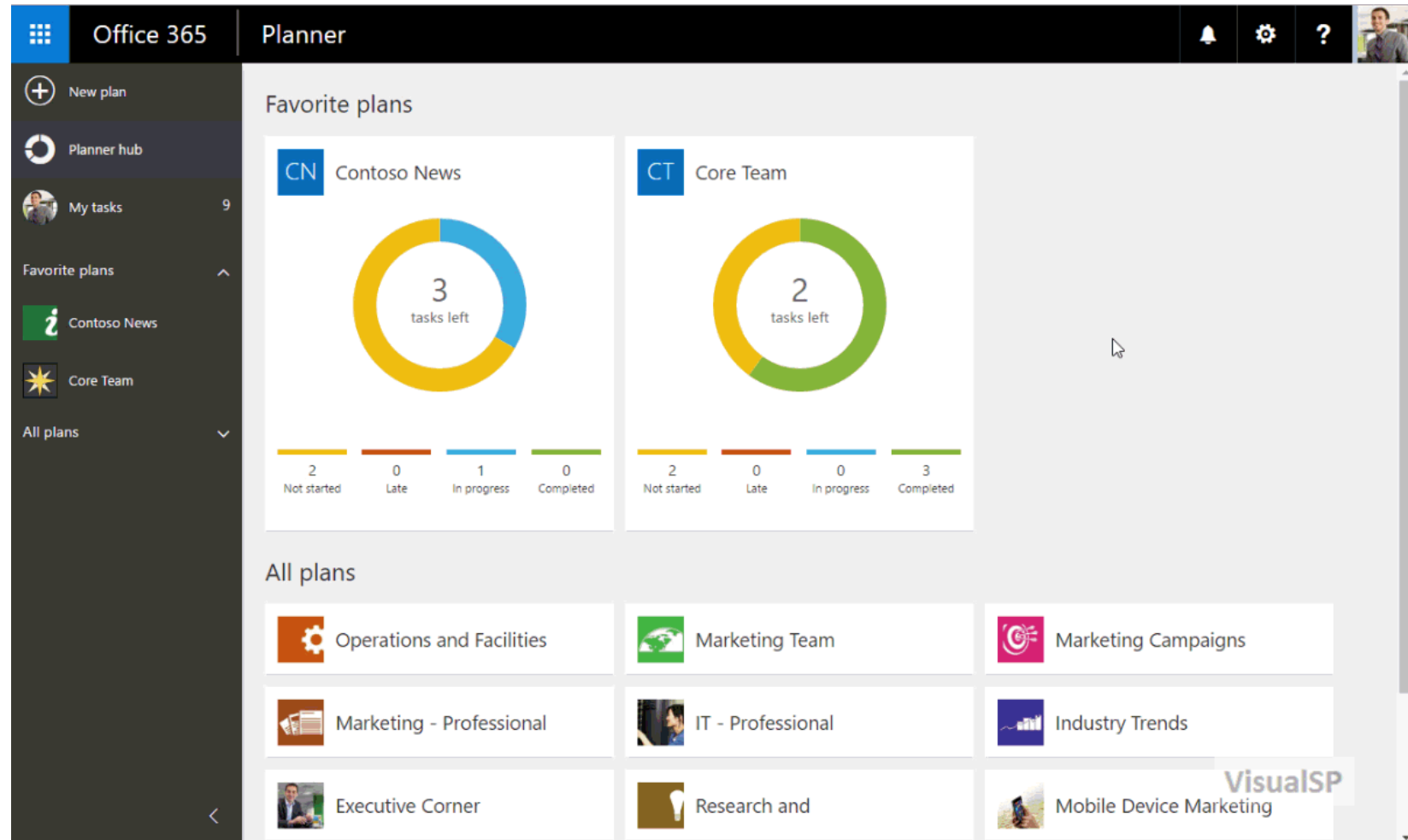
- Teams and Yammer
- Discovering people who you don't necessarily know

Caution: avoid redundancy. Use both only if there is a good business use case for it

Requirement:
Need *simple* task
management tool for
our team

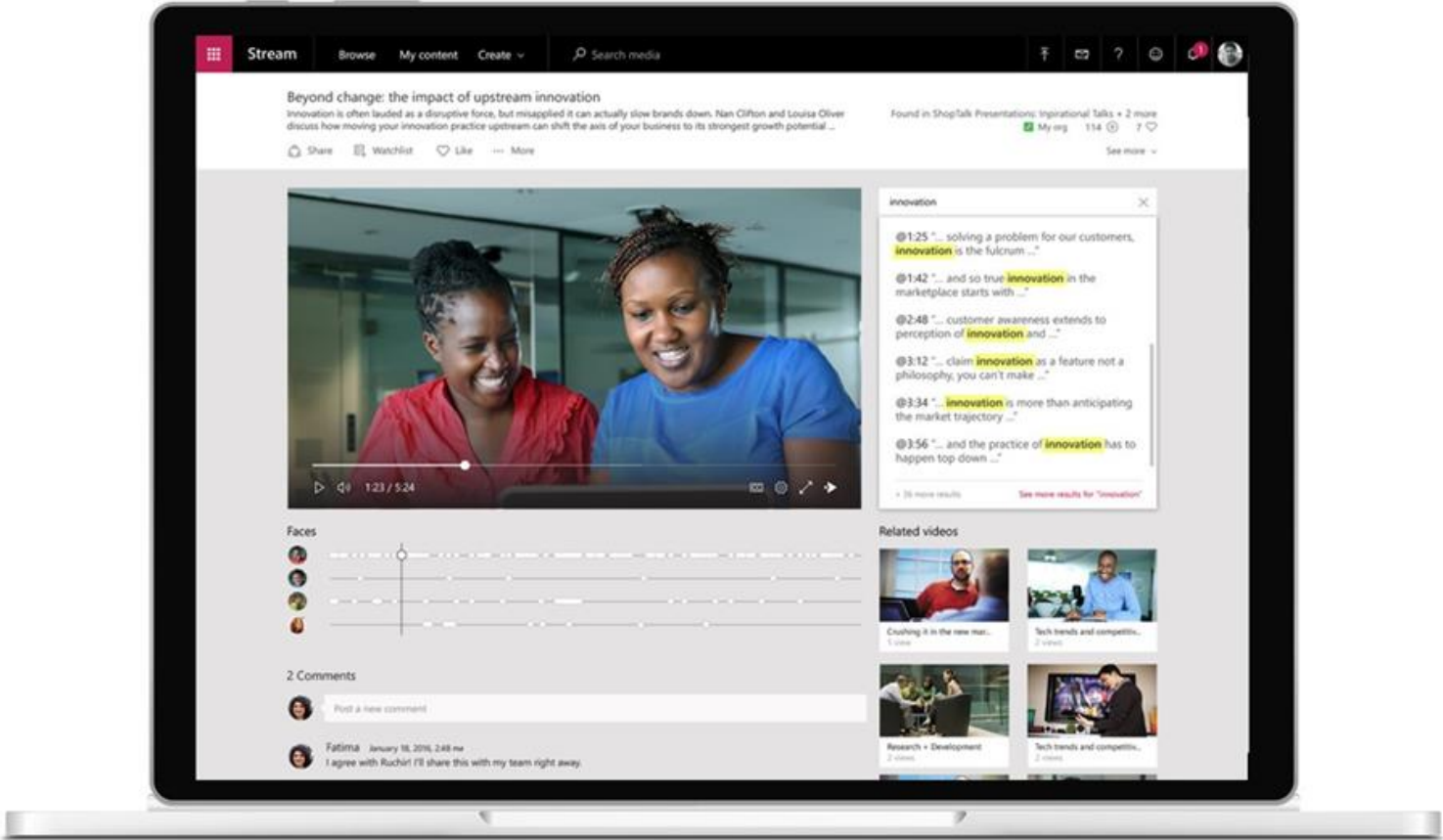
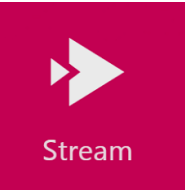
Team task management

- Planner hub to see all your boards
- Kanban approach to working on tasks



Requirement:

Need a place to store our video demos,
meetings, etc.



Auto
Transcription

Face detection

Search &
Discovery

Stream – evolution of Video



The Challenge with
info overload is
Context
not Content

Delve and Discovery view help with that

Delve



Delve

Office 365

Delve

HOME

NEW

ALL

Mail

Calendar

People

Yammer

Newsfeed

OneDrive

SharePoint

Planner

CRM

Tasks

Power BI

Social Engagement

Delve

Delve

Video

Word

Excel

PowerPoint

Outlook

Sway

Security & Compliance

Admin

Get more apps

ar documents

Robin Counts

Modified • September 14

Product List

Under Budget, High Costs Under H2Q2 (Especially in R&D Engineering) but Expected through Q3. Recommended Budget in H2Q3.

Word

Product List

Robin Counts's OneDrive

Robin Counts

Modified • September 14

XT1000 Marketing Campaign

Document Center

1

Robin Counts

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Contoso Pricing Guidelines Version 1.0

Document Center

Robin Counts

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1000 Marketing Analysis

counts's OneDrive

Robin Counts

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ZT1000 Administrator Guide

Document Center

Janet Schorr

Modified • September 14

New Product Pricing

Janet Schorr's OneDrive

Janet Schorr

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Q2 and Q3 Monthly Sales and Marketing Expenditures

PowerPoint

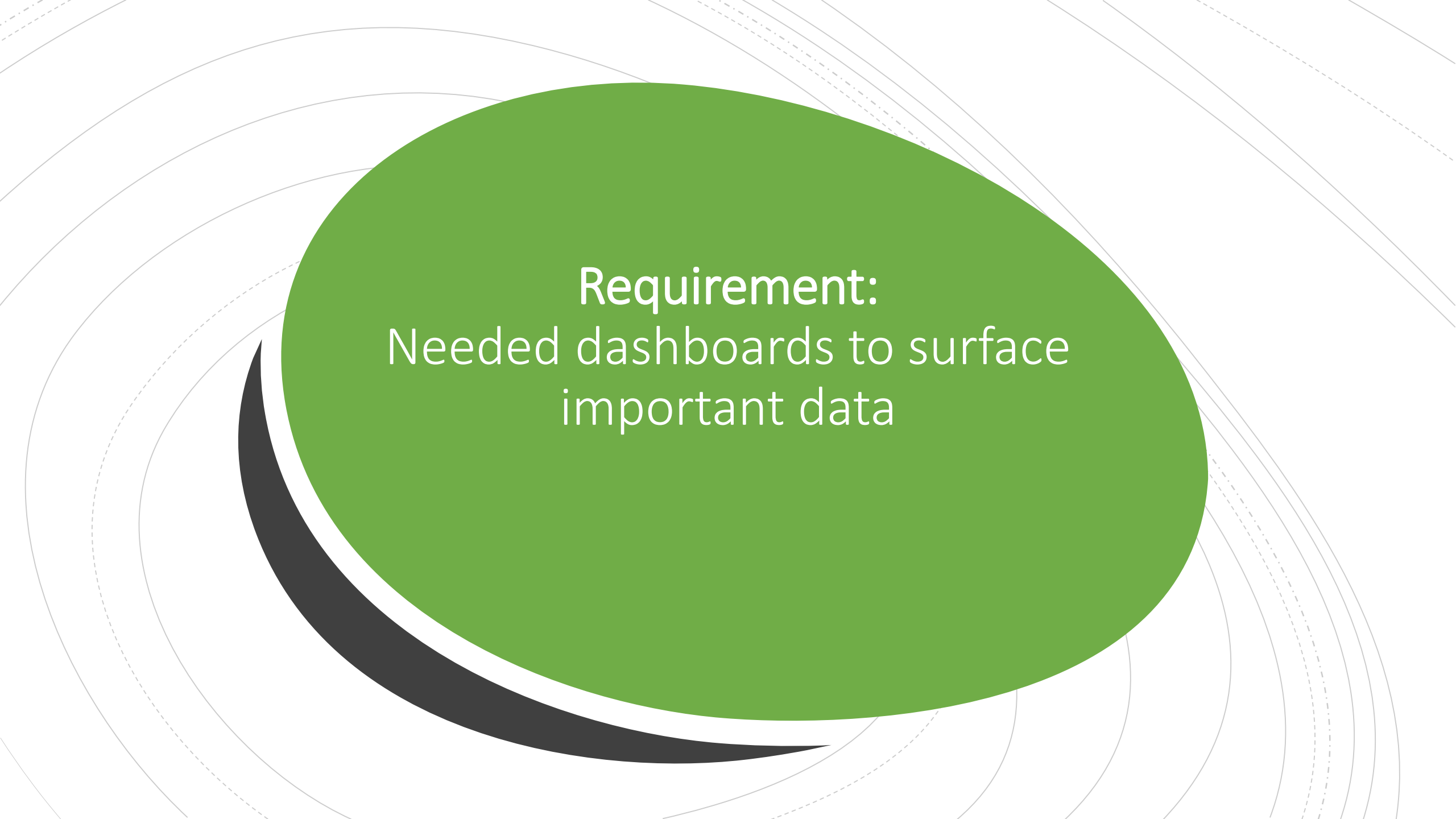
New Products: QT9002, ZT6006

VisualSP

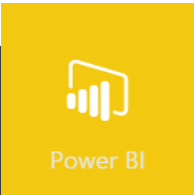
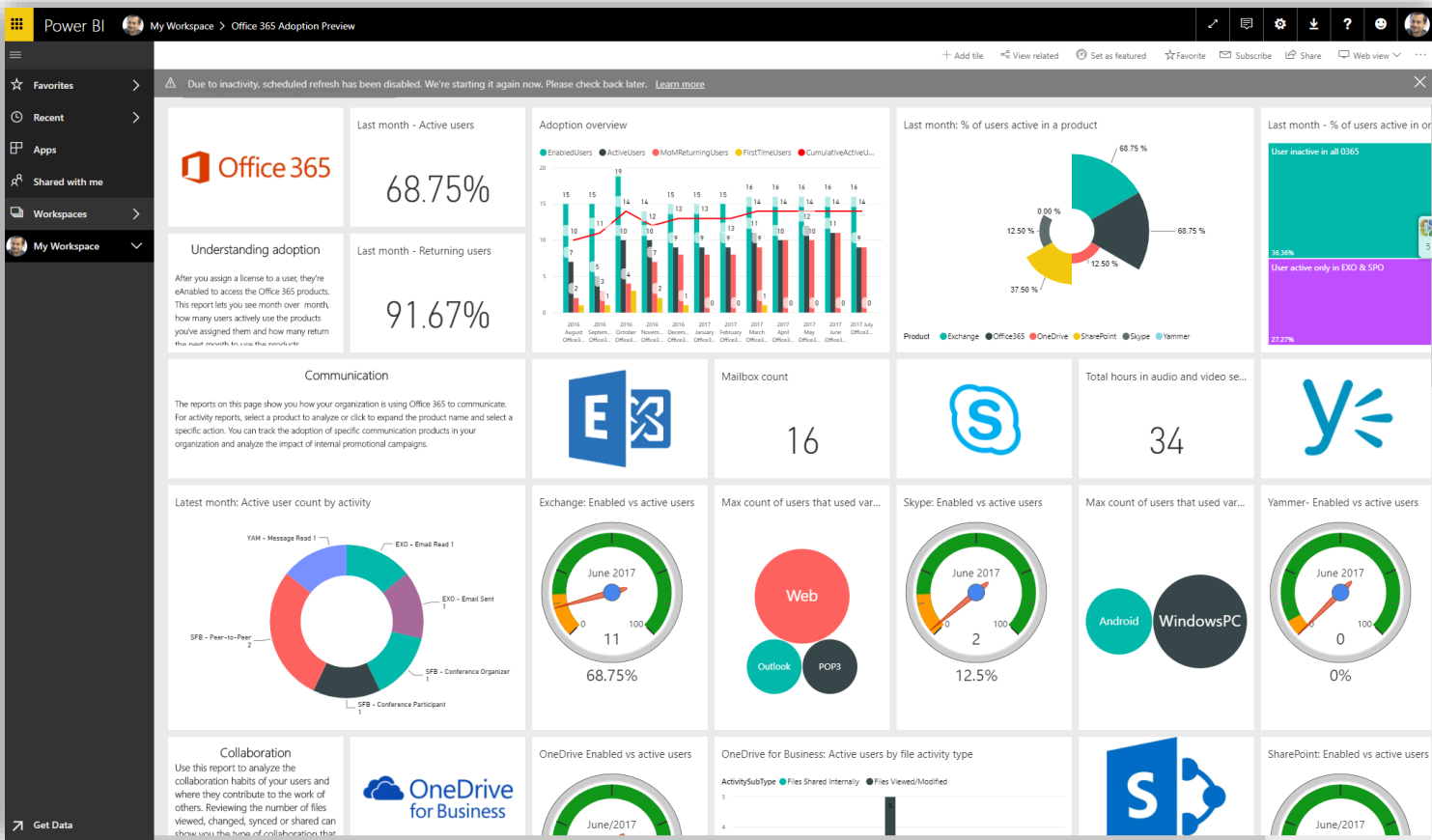
Janet Schorr's OneDrive

https://mfs194690-my.sharepoint.com/_layouts/15/me.aspx?origin=shell

Employees needed to be
educated as to why they were
seeing other people's content

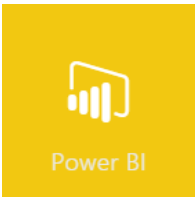
The background features a series of concentric circles in light gray, some solid and some dashed, creating a ripple effect. A large, solid green oval is positioned in the center, containing the text. A thick, dark gray curved line sweeps across the lower-left portion of the green oval.

Requirement:
Needed dashboards to surface
important data



Office 365 Adoption dashboard



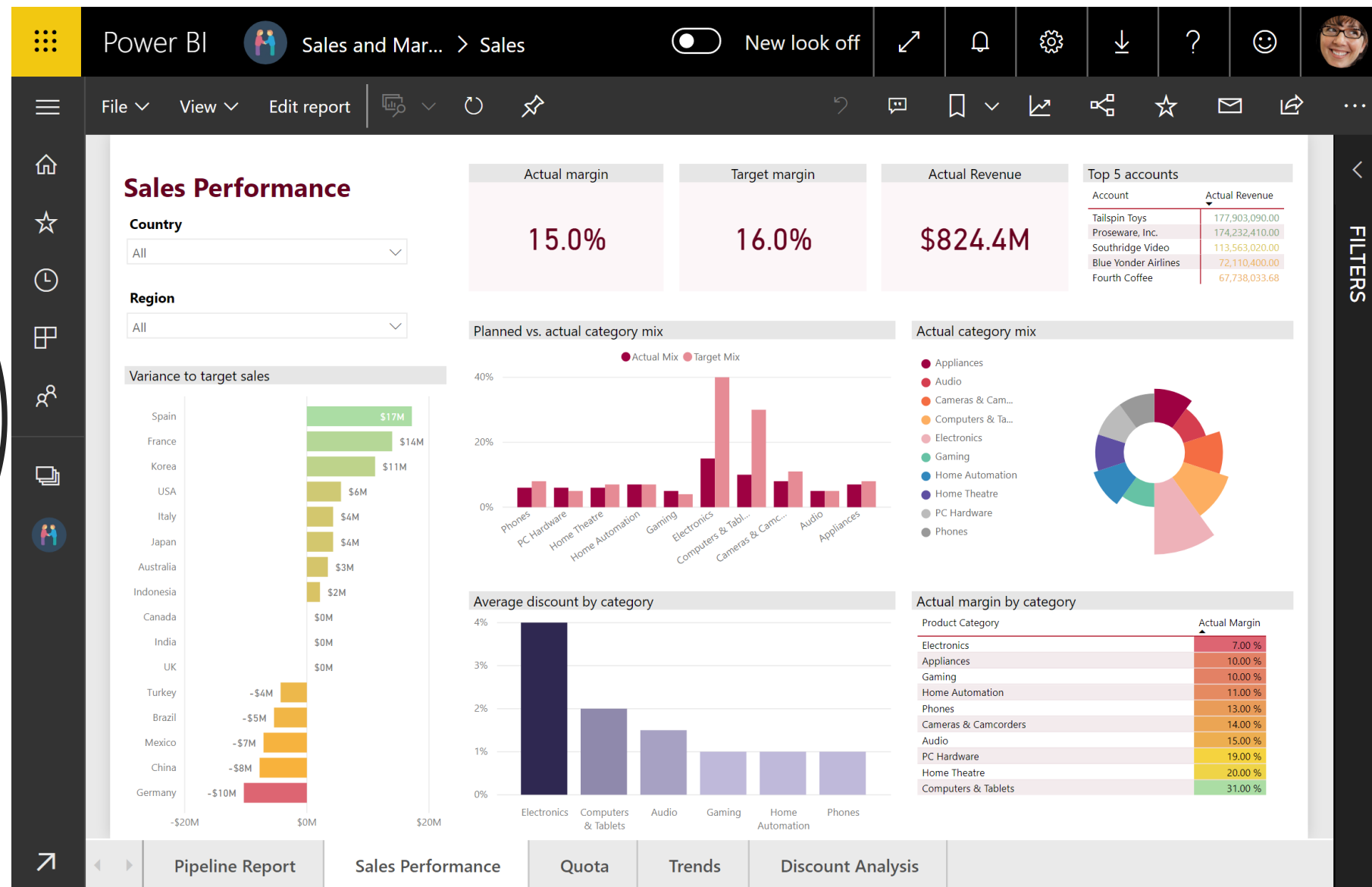


Application statistics

Power BI



Sales dashboard



Use *only* what's needed

Eliminate redundant systems

Make sure a need exists before
using a new process/system

Summary

The background features a series of concentric circles in light gray, some solid and some dashed, creating a ripple effect. A large, solid green oval is centered on the page, containing the main text. A dark gray, curved shape, resembling a stylized 'C' or a swoosh, is positioned to the left of the green oval.

Are you the
SharePoint Gal / Guy?

If yes, I have a gift for you!



Come collect your badge of honor



VisualSP – In-context training for Office 365 users

The screenshot displays the OneDrive web interface for a user named Megan Bowen. The interface includes a top navigation bar with the 'Contoso Electronics' logo, 'OneDrive' text, a search bar, and icons for notifications, settings, help, and the user's profile. A left sidebar shows navigation options: 'Files', 'Recent', 'Shared', 'Discover', 'Saved for later', 'Recycle bin', and 'Shared libraries'. The 'Shared libraries' section lists several libraries: 'Campaigns - Events', 'Operations', 'News @ Contoso', 'Sales and Marketing', and 'Communication site'. The main area shows a list of files and folders. The files are sorted by date, with the most recent at the top. The file 'Document.docx' is highlighted, showing its details: it was created on January 7, is 399 KB, and is private. The interface also includes a 'Need Help?' button in the bottom right corner.

Contoso Electronics OneDrive Search

Megan Bowen

+ New Upload Sync Sort

Icon	File Name	Date	Owner	Size	Share Status
	BrokenPipe.jpg	August 3, 2019	Megan Bowen	5.21 KB	Shared
	Business Card.pdf	August 2, 2019	Megan Bowen	846 KB	Private
	CE Annual Report.docx	August 2, 2019	Megan Bowen	36.6 KB	Private
	CE Drone - Mark IV.glb	August 2, 2019	Megan Bowen	2.18 MB	Private
	Contoso Patent Template.docx	August 2, 2019	Megan Bowen	83.6 KB	Private
	Contoso Purchasing Data - Q1 KJ co...	August 2, 2019	Megan Bowen	21.5 KB	Private
	Contoso Purchasing Permissions - Q...	August 2, 2019	Megan Bowen	24.7 KB	Private
	Contoso Purchasing Permissions.docx	August 3, 2019	Megan Bowen	28.8 KB	Shared
	CR-227 Product Overview.docx	August 2, 2019	Megan Bowen	1.62 MB	Private
	Création du contoso Mark 8.pptx	August 2, 2019	Megan Bowen	827 KB	Private
	Document.docx	January 7	Megan Bowen	399 KB	Private
	Employee Health Accounts - Q3.xlsx	August 2, 2019	Megan Bowen	21.5 KB	Shared
	Employee Travel - Q3.xlsx	August 2, 2019	Megan Bowen	20.7 KB	

Get the OneDrive apps
Return to classic OneDrive

Need Help?

Next Steps

Download my presentations:

<http://bit.ly/AsifConference>

Get started free with *VisualSP for Microsoft Learning Pathways* training:

<http://bit.ly/VSP4LP>

Come pick up your SharePoint badge of honor and my business card

Reach out to me to talk about your scenarios:

asif@visualsp.com