Learning Objectives

After attending this presentation, you will …
- Be aware of all the Office 365 apps that are available
- Realize the role that the apps can play in your organization
- Be prepared to determine what subscription plans are best suited to your individual team members

Presentation Outline

- Office 365 Introduction
- Core of Office 365
- Lightning Round App Review
- Subscription Plans
OFFICE 365 INTRODUCTION

Office 365 Ecosystem

Key Strategic Benefits of Office 365

- Fosters internal & external collaboration / communication
- Controlled document sharing and distribution
- Complete document life cycle version history
- Outsource file server infrastructure
- Outsource data backup, data security & disaster recovery
- Scalable
Microsoft Office 365 Apps

- There are over 30 Office 365 apps
- Depends on your subscription plan
- Constantly changing
  - This scares users
  - Microsoft needs to limit this
- 30+ apps intimidates & confuses users
- Microsoft create the Teams app to bring it all together … HUGE help!!

What is Teams?

- A fairly new collaboration app (2016)
- Chat-based workspace
- The idea is to bring together people, conversations and content in a central place
- Built “on-top” of other Office 365 apps
  - SharePoint, Groups, OneDrive, OneNote, Skype, Exchange group mailbox, Office, Planner, Forms, Stream & more
- Meant to be a central “hub” for teamwork
  - Makes it much easier for users to interact with Office 365 apps
The Core Communication, Collaboration and Knowledge Sharing Apps

Teams

Outlook  Office Online  OneDrive
Forms  Planner  OneNote
Power BI  Office  SharePoint

Teams – Things to Know

Creating a Team creates a Group, SharePoint site, OneNote & Plan
Teams are broken down by Channels
Each Team creates a General Channel
Creating a Channel creates a Folder in the SP Document Library
You can provide Guest Access for external users

Public vs Private Teams

- Public Teams
  - Anyone in the organization can join
- Private Teams
  - Grant access to users
- Channel Access
  - Currently, no Channel security
  - If a user has access to a Team they have access to ALL Channels in the Team
Ways to Access Teams – Desktop App

Menu
Personal Chat
Team
Channel
Public Conversations

Team Design Process
- List groups that work together
- Identify a group to pilot Teams
- Inventory how these users work today
- Develop Team site (KISS)
- Conduct pilot and onboarding

List Groups That Work Together
- Departments
- Projects
- Functional areas
- Products and services
- Customer support
- Events
- Corporate strategy
- Operations
- Teams of people that work closely together
Create a Team

Team is Created

“New” Channel
SharePoint on Office 365

Folder in Documents Library for Every Channel

Setup Document Libraries
Add Tabs to Channels

Tabs are unique per Channel

Links to favorite files, apps & services

Conversations

“Persistent” chat between team members in the Channel

Reply to conversation

Start a new conversation

Use @ symbol to “tag” someone

Conversation @ Mentions

Using @ symbol anywhere in a conversation to tag someone or team

@ mentions appear in side panel

Must select member(s) to add them to conversation
Viewing “Known” File Format

View or Edit
Continue conversation

Start Conversation From Files

Click to view file
Click on Start conversation
Type message
Appears in the Conversation tab

Team Communications & Collaboration

Anytime there is activity on one of your conversations
Anytime someone sends you a chat
You can have Chats appear in notifications
Anytime you are mentioned in a conversation
Taskbar icon “badge”
Chat – New Chat

Chat is a private conversation with an individual

New Chat icon

Type person’s name

You can chat with multiple people

Type message

Chat – New Chat

Chat

Notification will appear in Task Panel

Chat

Conversation

Search Teams

Use “top box” to type search term

Searches Chat, Teams, Conversations, files, etc.

Chat

Conversation

Search Teams
Using Filters with Search

Select filter icon to get advanced filter options

Why So Much Time on Teams?

Where O365 users begin their day
Access all the apps the Team uses
Enhances other apps
Reduced email clutter
Improves communication & collaboration

OFFICE 365 APPLICATIONS
LIGHTNING ROUND REVIEW
Lightning Round Process

- There are over **30 Office 365 apps**
- We will spend a minute or 2 on most
- Each app will have a direct link to detailed information on Microsoft’s support site
- The goal is for you to understand how each app can be used
- Office 365 is more than Outlook, Excel, Word & PowerPoint

List of Office 365 Apps

- **Admin**
- **Business (Bookings, Invoicing, MileIQ)**
- **Delve**
- **Dynamics 365**
- **Flow**
- **Forms**
- **Kaizala**
- **MyAnalytics**
- **Office Online**
- **OneDrive for Business**
- **OneNote**
- **Outlook**
- **Planner**
- **PowerApps**
- **Power BI**
- **Security & Compliance**
- **SharePoint**
- **Stream (Video)**
- **Teams (StaffHub now Shifts)**
- **Skype for Business** (Teams)
- **To-Do**
- ** Yammer**

= Core applications to focus on initial deployment

Admin App

- App for administering Office 365 across your organization
- Manage users and groups
- Track and manage Office 365 subscriptions & billings
- Initiate and track support tickets
- Monitor the “health” of all of your Office 365 services
- Admin centers for individual Office 365 apps
Office 365 Admin App

Business Apps

- Bookings – schedule & manage appointments
- Invoicing – create invoices & online payments
- MileIQ – mileage tracking & reporting
- Others have come & gone

Bookings
Invoicing

MileIQ

Delve

- Employee profile page with contact info
- Rudimentary organization chart
- Content discovery tool
- Search for documents across Office 365
- Recently used Office 365 documents page
- See what other people are working on
- Each person's experience with Delve is unique
Dynamics 365

- Redesigned cloud-based version of the popular Dynamics on premise applications
- Financial, ERP and CRM, field service applications and more
- Premium pricing
- Initial rollout in 2017

Delve – Employee Profile Page

Delve – Document Page
Dynamics 365 Financials

Flow

- Build automated workflows with Office 365 apps
- Pre-built workflow templates for common tasks
- Setup alerts / notifications
- Collect data
- Approve workflows

Flow

Build automated workflows with Office 365 apps
Pre-built workflow templates for common tasks
Setup alerts / notifications
Collect data
Approve workflows
Forms

Create forms to gather feedback or get sign-ups
Simple survey, poll & quiz tool
Shared internally or externally
Results can be displayed as text, charts or Excel
Not a replacement for InfoPath

Kaizala

Phone-number based chat app
Mobile-based app
Communicate with people inside and outside your organization
Share text, documents, photos, and videos
Customizable built-in apps such as poll, survey, job, training and more.
Kaizala

- Announcements
- Let’s Move
- Photos with Location
- Quick Polls
- Surveys

Displays on your personal MyAnalytics Dashboard

Included in Office 365 Enterprise E5

MyAnalytics

- Summarizes how you spend your time at work
- Suggests ways to work smarter
- Set goals and monitor progress
- Displays on your personal MyAnalytics Dashboard
- Included in Office 365 Enterprise E5
The Office Online Apps

- A special online version of Office Apps
- Excel, Word, PowerPoint and OneNote
- Run these apps in browser - device independent
- Facilitates simultaneous editing
- Share files via the cloud
- Automatically saves file as you work

Excel Online

Word Online
PowerPoint Online

OneDrive for Business
- Cloud based file storage
- 1 Terabyte per user
- Share files internally & externally
- Eliminate email file attachments
- Synchronize with local PC
- Maintain file version history

OneDrive for Business
**OneNote**

- An application for recording and managing notes, correspondence and more.
- Desktop, cloud and mobile app.
- Local and cloud-based notebook storage.
- Internal and external shared access.
- Integration with the Office applications.
- Supports a multitude of content types.

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**The Outlook Apps**

- Mail / Calendar / People / Tasks
- Cloud based individual apps
- Exchange Online
- Synchronize to Outlook desktop
- Synchronize to any mobile device
Tasks App

Planner

A simple project management and task app

Not as simple as Outlook Tasks or as complex as MS Project

Plan based on Groups or Teams

Each plan contains Task “Cards”

Cards are organized into Buckets which can be prioritized

Each Plan has a OneNote Notebook
PowerApps

- Build Office 365 apps without writing code
- Connect to Office 365 data sources
- Pre-built app templates
- Push apps to the web or mobile devices
- Examples: budget tracker, cost estimator, asset checkout, etc.

Power BI

- Suite of business analytics tools
- Connect to internal & external databases
- Power BI Desktop creates visual data analysis reports
- Power BI Mobile lets you access visual dashboards of your analytics
- Third party database connection services
SharePoint

- Cloud based file sharing, communications and collaboration platform
- Collection of customized websites (internal)
- Access permissions granted at site level
- Multitude of site apps and content types
  - Document libraries / Customized lists
  - Announcements / Discussion board
  - Site mailbox / calendar / contacts
- A development platform

SharePoint

SharePoint

Stream (Video)

- Replaces Office 365 Video
- Used to store, share and play videos INTERNALLY
- Record executive presentations, meetings, training, etc.
- Video files are organized by “channels”
- Access controls are set at the channel level
- Audio transcriptions and face detection
Create web-centric reports, stories, presentations, newsletters, etc.

- Sway's design engine controls the layout.
- Share your presentation on-line.
- Content optimized for viewing device.
- Create from scratch or existing PPT, PDF, or DOC file.

Sway Example

Rainier 2014
Teams

- Team collaboration app
- Central point of communications and collaboration
- “Persistent” chat feature
- Integration with other Office 365 apps
- Teams broken down into Channels
- Shifts replaces StaffHub

Skype for Business

- Instant messenger and online meeting application
- Desktop and cloud apps
- Integrated with Office apps
- Schedule meetings in Outlook
- Integrated HD video and audio
- Transfer files in IM and meetings
Skype for Business

To-Do

Manage, prioritize, and complete the most important things
- Concept is to provide focus on what's most important
- Intelligent Suggestions feature to recommend the most important tasks
- Finds tasks in email and appointments
- Create checklists
- Integrates with Outlook tasks

To-Do

To-Do
Yammer

- Internal social media app for knowledge sharing and communications
- Discuss ideas, share updates, and crowdsource answers from coworkers
- Document collaboration
- Allows for external collaboration
- Mobile app allows conversation access on the go
- Conversations are public within the organization

OFFICE 365 SUBSCRIPTION PLANS
Office 365 Subscription Plans

- There are over a dozen different plan options.
- You can have a different subscription plan for everyone.
- Most plans offer two months free with annual commitment.
- Most of the popular plans are $5 to $35 per user, per month.
- Subscriptions can be canceled at anytime, annual plans may incur a cancellation fee.
- You can switch plans at anytime.

Learning Objectives Summary

You should now …
- Be aware of all the Office 365 apps that are available.
- Realize the role that the apps can play in your organization.
- Be prepared to determine what subscription plans are best suited to your individual team members.

Questions?
Our Mission:
“Simplifying Technology to Help CPA’s Succeed”

Service Offerings:
Strategic Technology Advisors
Office 365 Deployment Specialists
Data Analytics Projects
KPI Dashboard Development

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