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Office 365 for Projects and Teams

Your Guides: Tom Santos and Josh Leone

Introductions

- Meet your guides

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

Agenda

- What is Office 365?
- Office 365 and PPM
- RegoLink Flow Connector: Clarity PPM and SharePoint Integration
- Common Use Cases
- Demo
- Q&A

What is Office 365

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What is Office 365?

- An ecosystem of communication and collaboration tools.

- Mainly Web browser-based.

- Enables IT but Empowers non-technical users and power users.

- SharePoint is one of the well-known tools within Office 365. Big Ecosystem:

  - Collaboration and File Sharing

  - Communication

  - Project Management

  - Business Apps

Office 365 by the Numbers

- 1 in 5 corporate employees now use an Office 365 cloud service.

- By user count, Office 365 is the most widely used cloud solution.

- According to Bitglass, of the 81% of companies that have switched to cloud, Office 365 users make up over half.

- There were over 155 million Office 365 business users as of 2018.

- Microsoft Office has been downloaded over 1 billion times on Android devices.

- There are now 500,000 businesses using Microsoft Teams in 2019, including 91% of the Fortune 100.

Sources: Gartner; statista.org; Bitglass

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Office 365 and Clarity

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Office 365 and PPM

- Not all PPM Applications allow for:
  - Seamless integrations to existing systems
  - Have the same robustness for collaboration and communication
- Collaboration and Communication are key to PPM and Organizations:
  - Skype
  - MS Teams
  - SharePoint
  - One Drive
  - Outlook
- Today's User Community can be remote and distributed, require mobility. Work anywhere approach:
  - Office Suite
  - Sway
- PPM for all sizes
  - To-Do: Basic check list and task management
  - Planner: Robust Board like approach
  - Project Online: Full blown PPM capabilities
- Business Management
  - Automation and Application Development
  - Reporting, AI and Analytics
  - Dynamics for Business Management

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RegoLink Flow Connector

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What is it?

- Microsoft Flow based connector, certified by Microsoft. Which allows organizations:
  - Easily integrate with the Office 365 ecosystem and over 500 connectors
  - Allows you to synchronize data bi-directionally with Clarity PPM using Rego's proprietary RegoLink API
  - Integrates with Clarity's Process Engine, and can easily be automated:
    - When an instance is created in PPM or a condition is met.
    - With Office 365 interactions like:
      - creating SharePoint sites
      - Interact with SharePoint lists
      - When a communication is received or to create them (MS Teams, Outlook, Calendar)
      - Synchronize data in real time
    - Allows to validate any operation and easily take action, allowing error handling and conditions
- The RegoLink connector is a Premium connector and requires either Flow Plan 1 or Plan 2 license to use.

Common Use Cases

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Clarity New UX Conversations

When Does It Start...	When a new message is added to the New UX Conversations
What It Does...	- It publishes the message in a MS Teams Channel so the whole team is aware, even when not in Clarity

Common Use Cases

Use Case	Description
Project Site Creation	Automatically create a SharePoint site when an investment is created or meets a criteria. The flow can easily: - Sync permissions - Select a template and location of the site
MS Teams	Automatically create an MS Team or a Channel per investment, when the investment is created or meets a criteria. PPM can also read or post emails to a MS Team
SharePoint List Sync	Allows Flow to keep lists in sync either uni-directionally or bi-directionally. This means: - PPM can be updated when a list is modified, or a list items goes through an approval - A SP list can be updated when a new instance is created or updated in PPM. i.e. having a project level task list - The generated lists, will support all SP functionality
Calendar Sync	Synchronize Calendar events back and forth allowing cases like: - Update a Resource's calendar when they add Out Of Office events to Outlook - Synchronize Project Dates, Tasks with Outlook Calendar, and when modified in the calendar update PPM
Email Eaters	Easily parse emails, and update PPM accordingly. Useful to create risks, issues, or approve action items via email.

Document Management	- Fully integrate SharePoint libraries inside Clarity PPM UI, once a Project has a SharePoint Site or Microsoft Team created using our Flow Connector, a Portlet can be used to navigate files and folders inside of Clarity
	- The Portlet includes functionality to:
	  - Navigate all Document Libraries related to the Site
	  - Interact with files (View Online, Download, Delete, Upload)
	  - Navigate Folders and/or Create New Folders

Microsoft Teams – Post Message

When Does It Start…	When a Clarity Object Instance is Created or meets a criteria when modified

What It Does…	- When triggered, the Admins will be able to define:
	   - On which Team and Channel messages will be posted. For example if its Project related it can be posted to that given Channel or Team
	
	- Decide the format and content of the message, which allows you to include Clarity attributes
	- Great to use when:
	   - Not all involved users have access to Clarity
	   - Keep your team informed via Microsoft Teams
	   - Post Messages when:
	      - There is a new task or milestone
	      - When a task or milestone has been completed
	      - A Project changes status
	      - When an issue or risk is created, pending to be assigned or resolved

Clarity – Project Team Creation

When Does It Start…	When a Project is created in Clarity or it meets a criteria after being modified
What It Does…	- Sync Clarity Projects with MS Teams to extend your team's collaboration

Clarity – Project Channel Creation

When Does It Start...	When a Project is created in Clarity or it meets a criteria after being modified
What It Does...	- Have too many Projects? Having a MS Team for each might be a handful. Or Maybe your Organization has a Team per Department - This allows you to create a channel, and have it be in Sync with the Calendar

Outlook – Sync Tasks to Calendar

When Does It Start...	Scheduled, Manually Triggered or when a Task is modified

What It Does...	When fired, this Flow will allow users to:
	• Synchronize one or more Projects they have access to
	• The Project Tasks will be created as Outlook Events
	• Admins will be able to decide:
	    • Which Task types or criteria will be used i.e. Key Tasks, Milestones, etc.
	    • How the events are created
	    • Create an event for the length of the task, or use the Start or Finish Dates to track as milestones

Outlook – Sync Tasks to Calendar

Questions?

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Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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