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Maximizing Business Efficiency through Collaboration and Security

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Webinar Panelists

Cat Schneider

Presenter

Power Platform Developer @ Endsight

Jason Clause

Producer

Director of Marketing @ Endsight

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Cat Schneider

Power Platform Developer

Microsoft MVP 2023 Most Valuable Professional

June 2023

- 15yrs Public Sector

  Org Development & Environmental Regulation
- Data Curious → Excel & Access
- Found SharePoint & Power Platform
- Microsoft Certified

  Microsoft Certified – Power Platform Fundamentals

  Microsoft Certified – Power Platform App Maker Associate

  Microsoft Certified – Power BI Data Analyst Associate
- Active in Community

  Community Call Presenter – M365 Platform Community – 2022

  M365 Platform Community – Power Contributor – Power Platform Samples – 2022

  Community Call Presenter – Microsoft 365 & Power Platform Community – 2023
- Innovator, Teacher, Mentor

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Agenda

- SharePoint, Teams & the Power Platform
  - Brief Product Introduction
  - Benefits & Uses
  - *Better Together*
- Questions & Answers

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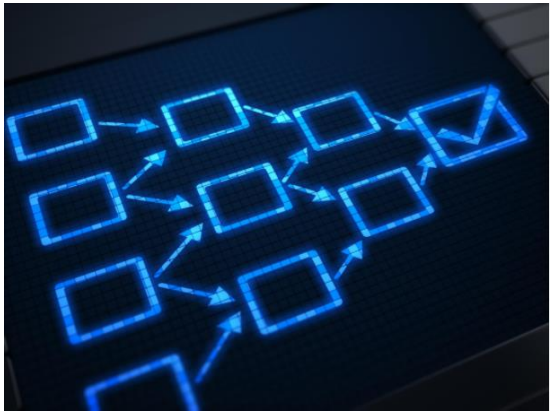
But first, is this the right webinar for you?

- Content Review, Approval and Publishing
- Expense Reporting or Contract / Proposal Approvals
- Employee or Client onboarding/offboarding
- Training and Professional Development
- Vacation requests, On-Call schedules, Events
- Inventory and Asset Management



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Microsoft Product Introduction

- SharePoint
- OneDrive
- Teams
- Power Platform
  - Power Apps
  - Power Automate
  - Power BI
  - Power Virtual Agents
  - Power Pages

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SharePoint

What it is…

- Cloud-based *Collaboration* Tool
  - Document & Content Management
  - Intranet
  - Permissions & Security
  - Automation
- Microsoft 365 Integrated
  - Excel, Word, PowerPoint

What it *definitely* is NOT…

- Simple Network Drive
- For Large Corporations Only
- One-size Fits All
- Internal Use Only
- A Database

OneDrive

What it is…

- Cloud-based *Collaboration* Tool
  - Document & Content Management
  - Intranet
  - Permissions & Security
  - Automation
- Microsoft 365 Integrated
  - Excel, Word, PowerPoint

In other words…

- aka your Personal SharePoint
- Productivity Assistant
- Integrated Microsoft Ecosystem

Teams

What it is…

- Cloud-based *Communication* Tool
  - Video Conferencing & Meetings
  - Team Collaboration
  - SharePoint Integration
  - M365 Apps Integration
  - Extend 3rd-Party Apps & Services

What it *definitely* is NOT…

- Simple Instant Messenger
- Email Replacement
- Project Management Solution
- Content Management System

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Power Platform

What it is…

- Suite of Business Tools
  - Business Intelligence
  - Automation
  - Innovation
- Microsoft 365 Integrations
  - Excel, Word, PowerPoint, etc.
- A connection to your data

What it *definitely* is NOT…

- Enterprise Systems Replacement
- For Pro-Code Developers Only
- A Standalone Product
- Complete End-to-End BI Solution

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"Better Together"

- The Building Blocks

- The Bridges spanning the Gap

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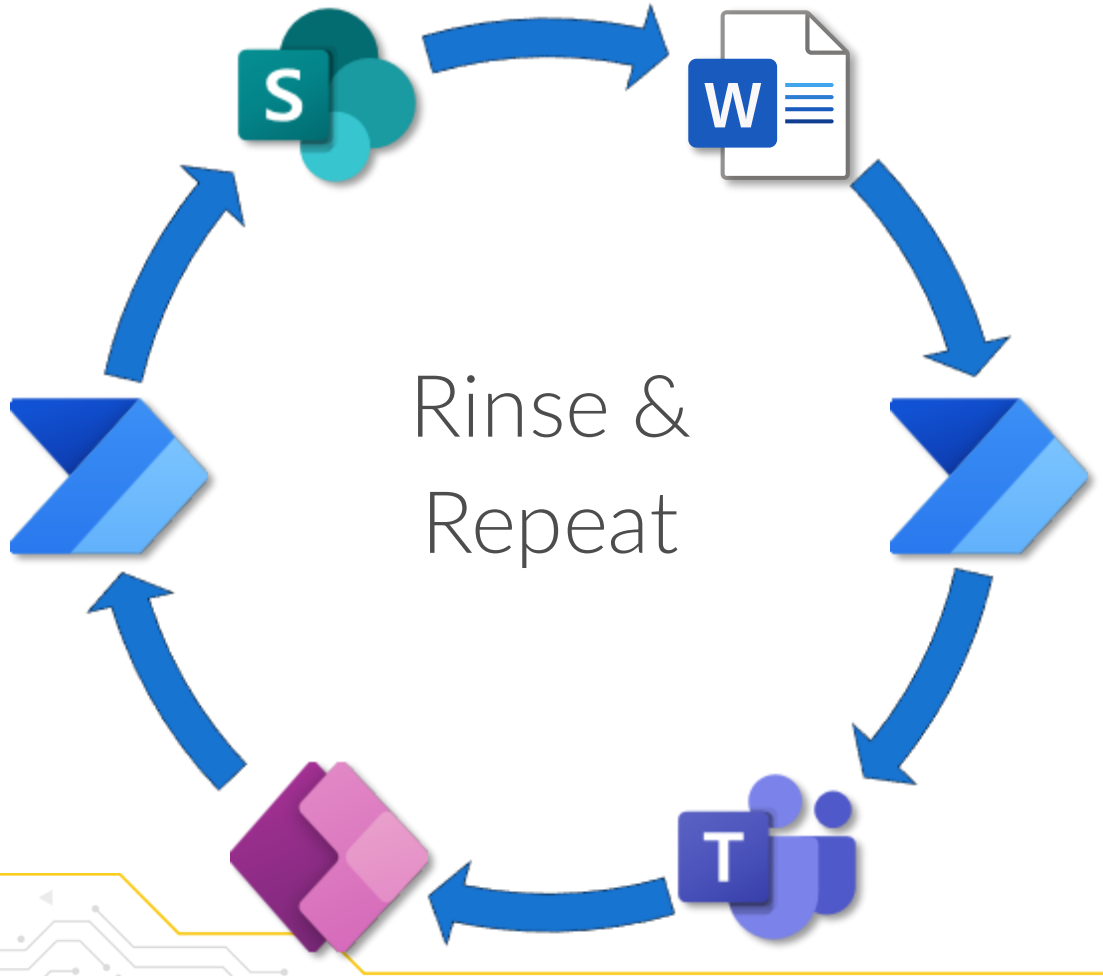
Better Together

Document Management

Approval Workflow

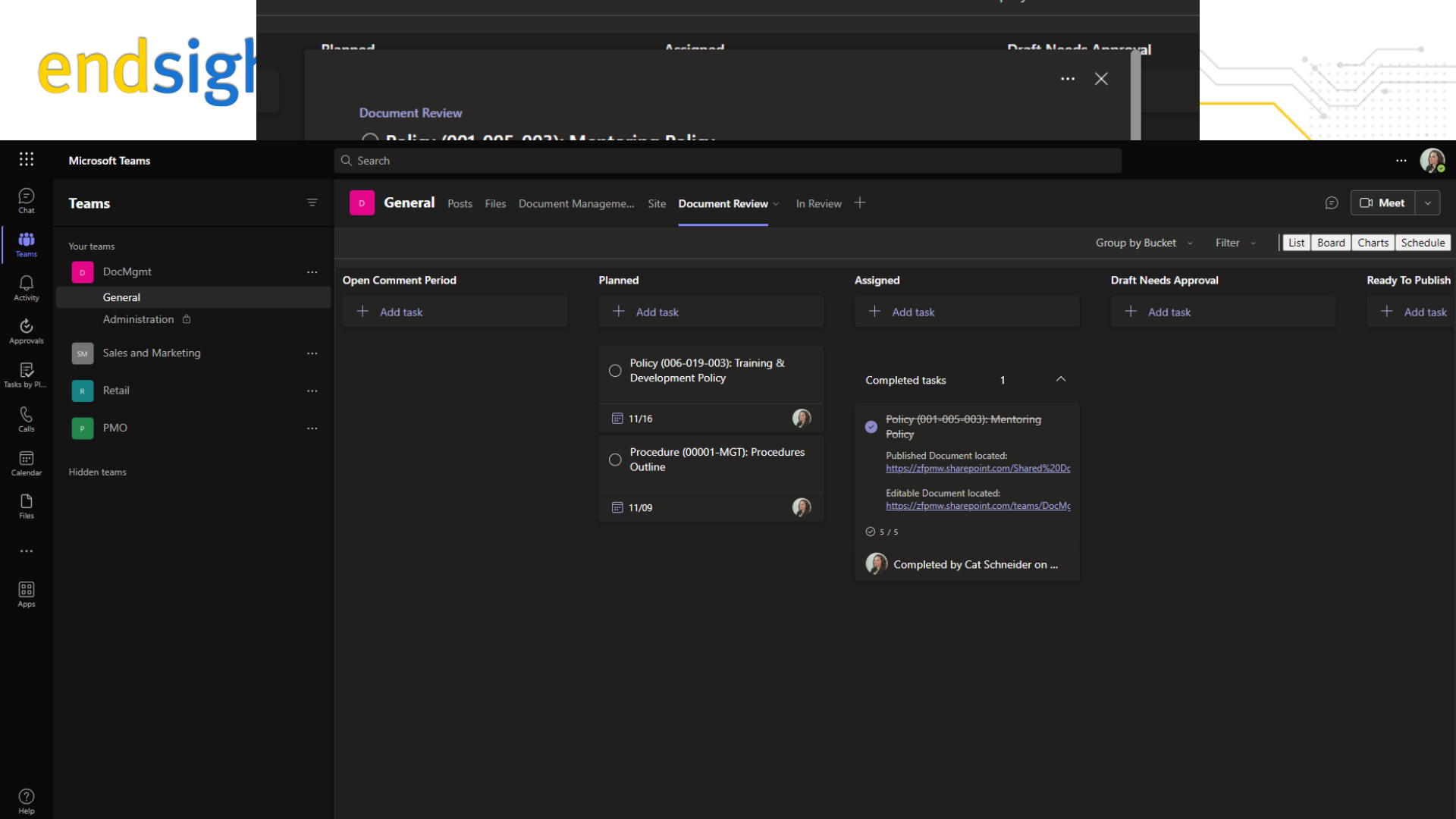


DocumentType : Procedure

Human Resources	Sales	Finance	General Counsel
00001-MGT	00001-SLS	00001-RND	00002-FIN
All Company Procedure Document Re...	Sales Training	Research Validation Procedure	Financial Audit Procedure

Content type	Department	Document	Publish Status	Draft due by	Last Published ...
Policy	Executive Management	Acceptable Use Policy	Draft needs appr...	September 7	7/1/2023
Policy	R&D	R&D Confidentiality Agreements	Published	August 10	6/20/2023
Policy	HR	Human Resources	Ready to publish	September 22	1/29/2023
Policy	HR	Mentoring Policy	Assigned	September 29	8/14/2022
Procedure	Executive Management	All Company Procedure Document Requirements	Planned	November 9	7/8/2022
Policy	HR	Training Development	Planned	November 16	7/30/2023

Logistics Procedure	Employee Exit Procedure	Customer Returns Procedure	Tax Procedure
Approval	Published	Published	Published
Effective thru 10/13/2023	Effective thru 2/8/2025	Effective thru 1/28/2024	Effective thru 6/23/2025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Planned
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Draft Needs Approval
Document Review
Microsoft Teams
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Sales and Marketing
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Filter
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Board
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Schedule
Open Comment Period
Add task
Planned
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Policy (006-019-003): Training & Development Policy
11/16
Procedure (00001-MGT): Procedures Outline
11/09
Assigned
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Policy (001-005-003): Mentoring Policy
Published Document located:
https://zfpmw.sharepoint.com/Shared%20Dc
Editable Document located:
https://zfpmw.sharepoint.com/teams/DocMc
5 / 5
Completed by Cat Schneider on ...
Draft Needs Approval
Add task
Ready To Publish
Add task

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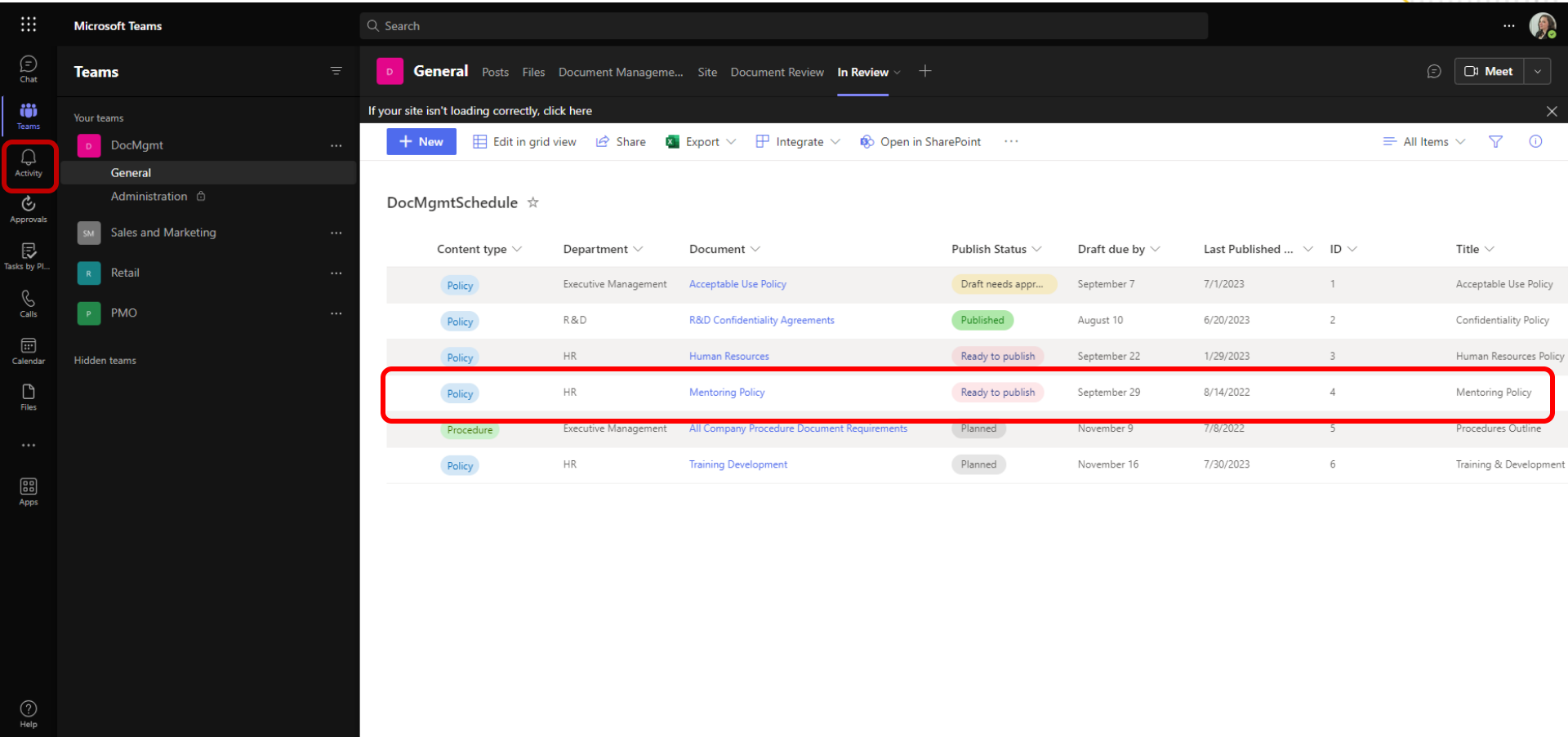
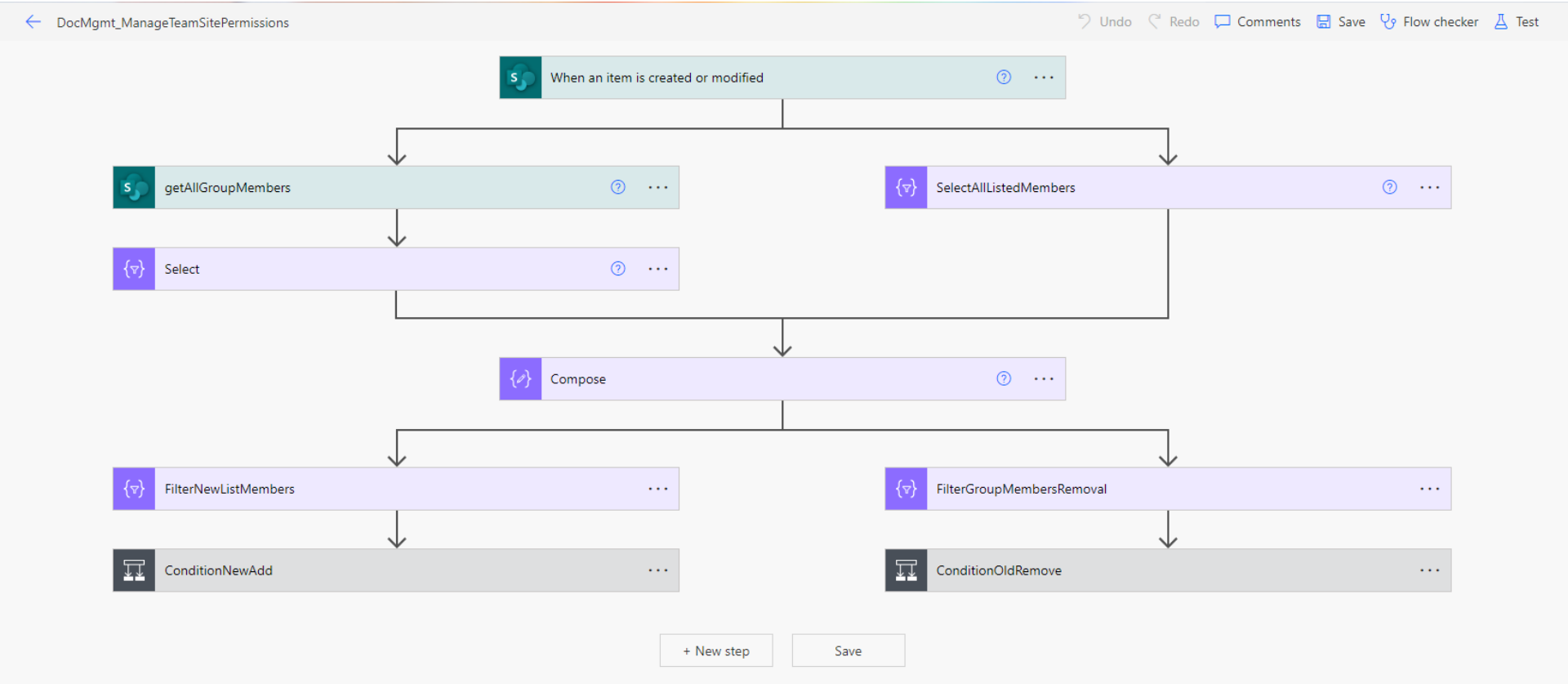


Content type	Department	Document	Publish Status	Draft due by	Last Published ...	ID	Title
Policy	Executive Management	Acceptable Use Policy	Draft needs appr...	September 7	7/1/2023	1	Acceptable Use Policy
Policy	R&D	R&D Confidentiality Agreements	Published	August 10	6/20/2023	2	Confidentiality Policy
Policy	HR	Human Resources	Ready to publish	September 22	1/29/2023	3	Human Resources Policy
Policy	HR	Mentoring Policy	Ready to publish	September 29	8/14/2022	4	Mentoring Policy
Procedure	Executive Management	All Company Procedure Document Requirements	Planned	November 9	7/8/2022	5	Procedures Outline
Policy	HR	Training Development	Planned	November 16	7/30/2023	6	Training & Development

Better Together: How'd you do that?



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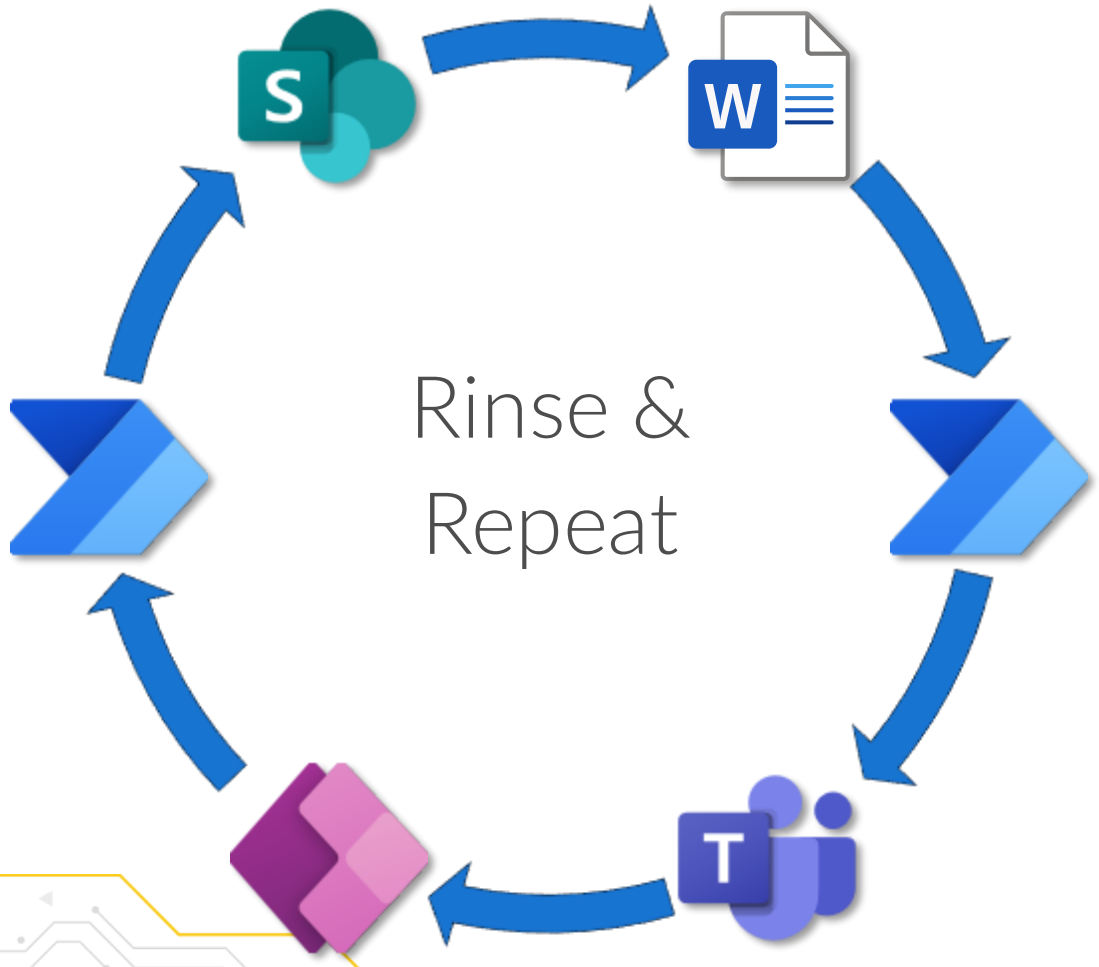
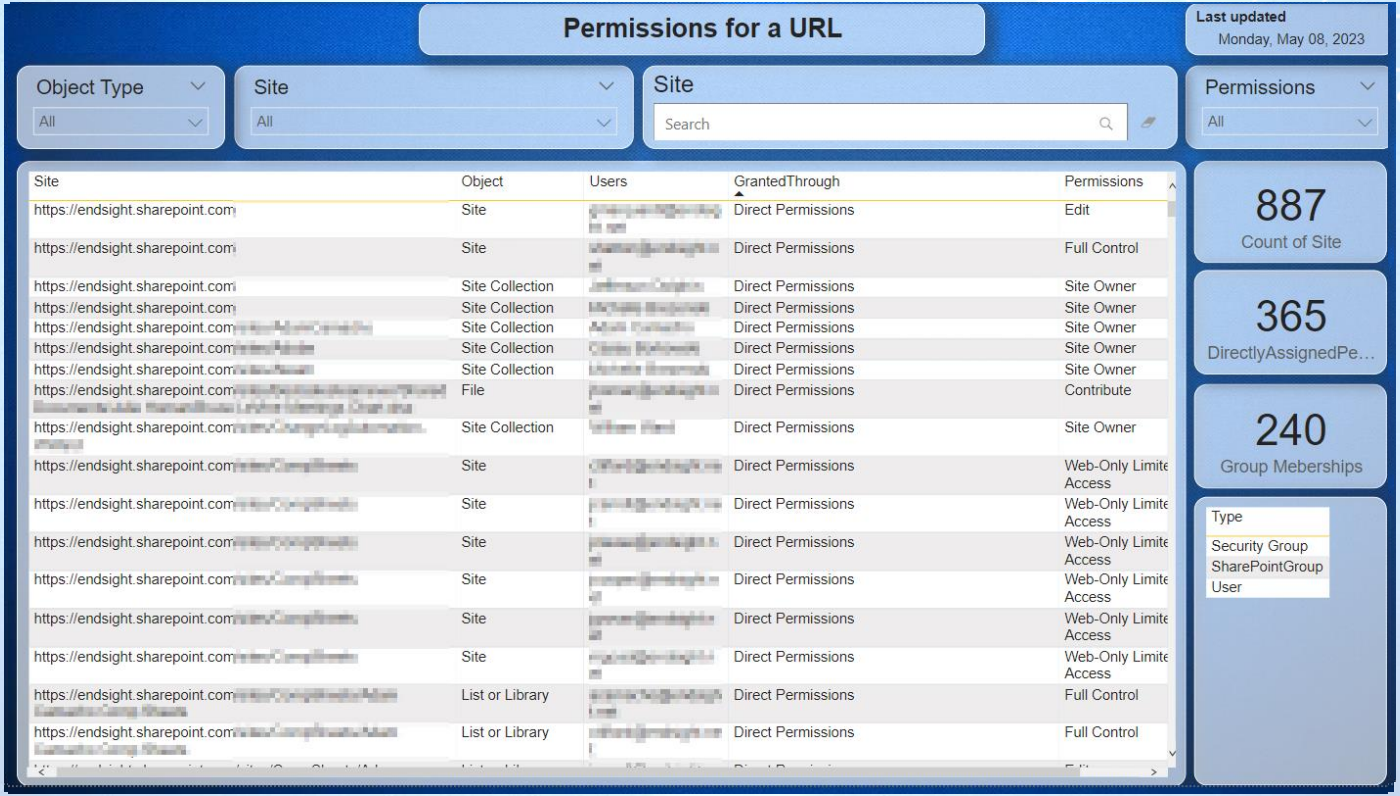
Document Management

Approval Workflow





Power BI & SharePoint Permissions

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Questions?

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Thank you!