

SSC 365Central Training Portal

History and How to

2023 June 15



Shared Services
Canada

Services partagés
Canada

Canada

Creating the SSC 365Central Training Portal

Introduction

Several departments have requested advice on how SSC created their user training portal, a SharePoint site called 365Central. In this document, we have recorded the key information.

Training Staff

SSC's requirements for a consultant to act as a Training Lead:

- Microsoft 365 expert
- Training Developer
- Executive Coach
- Focus on customizing training to meet the evolving needs of SSC
 - French and English resources

Roles and Responsibilities

The 365Central Training team's responsibilities are:

- Creating and managing schedule and calendar invites for sessions
- Creating and managing registration process (i.e., sign-up form)
- Creating and upkeeping user-facing online materials (i.e., training registration portal, additional learning resources)
- Curating, hosting and conducting training sessions for attendees
- Tracking and gathering metrics of overall program

Training Site

SSC's 365Central portal has evolved with SSC's use of Microsoft 365.

Key Learning Initiatives:

- M365 Resources Centre: Overview of the applications available at SSC and additional resources for each application
- M365 Learning Journeys: Course offerings and registration links
 - Suggested course order
 - Training sessions are 60 to 90 minutes
 - Mandatory courses

- Optional courses
- Kick-off “speed dating” event to introduce organization to each application, and to promote main training program

Sample Pages

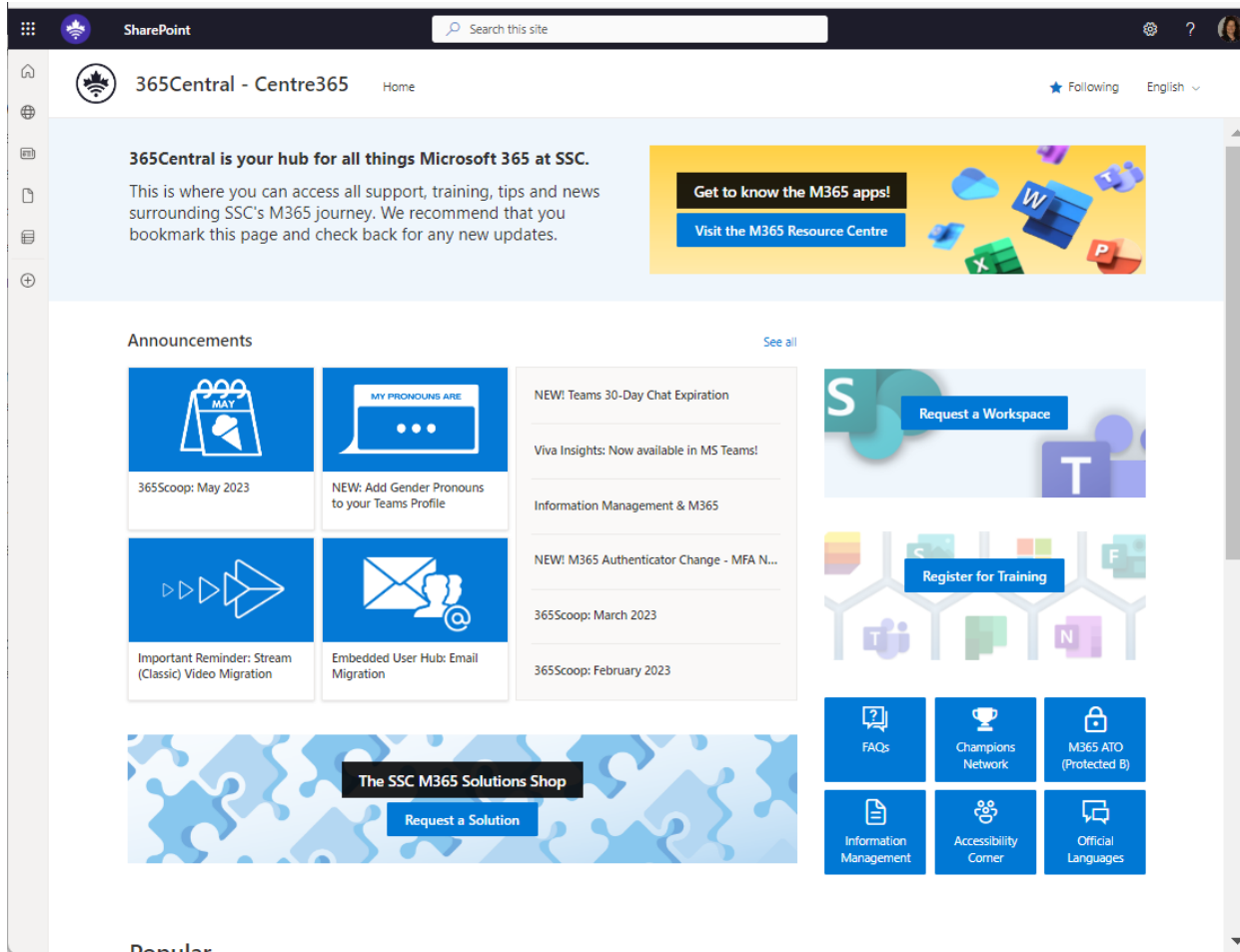


Figure 1 - 365Central Main Page with Announcements

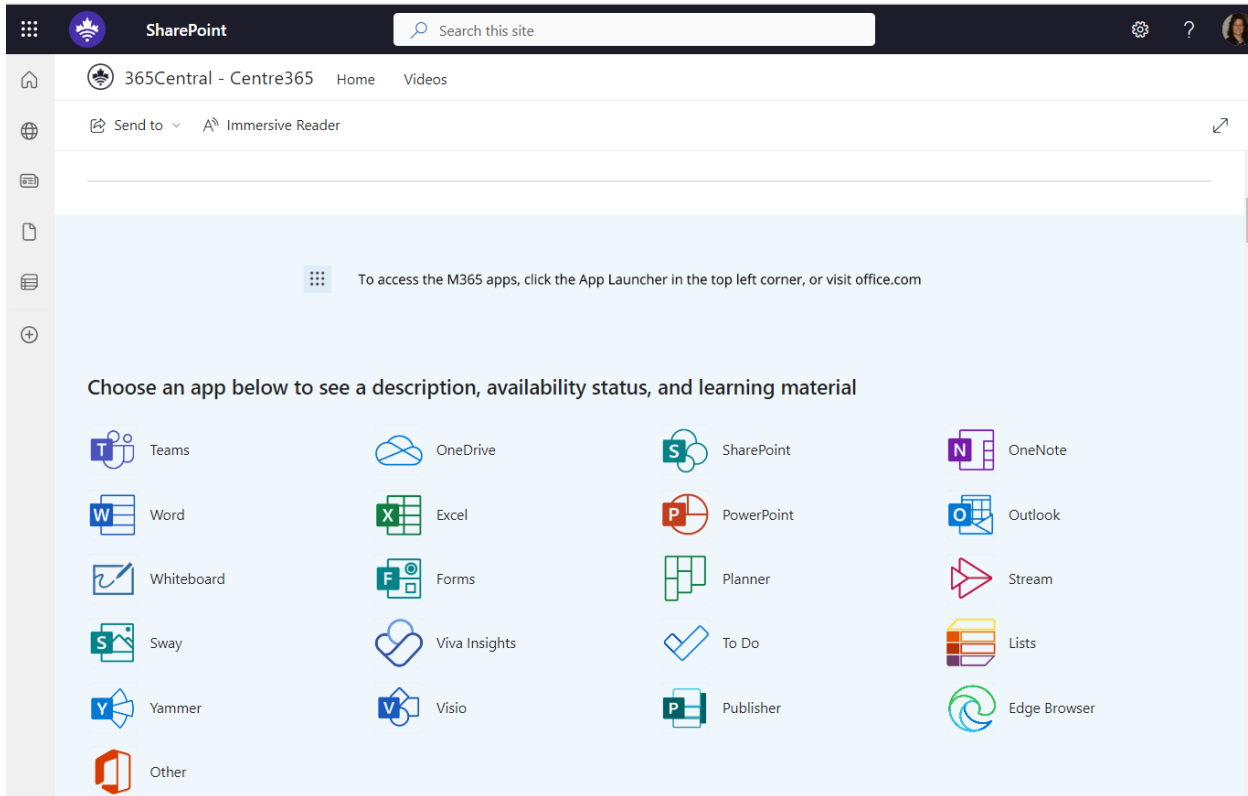


Figure 2 - 365Central Applications page

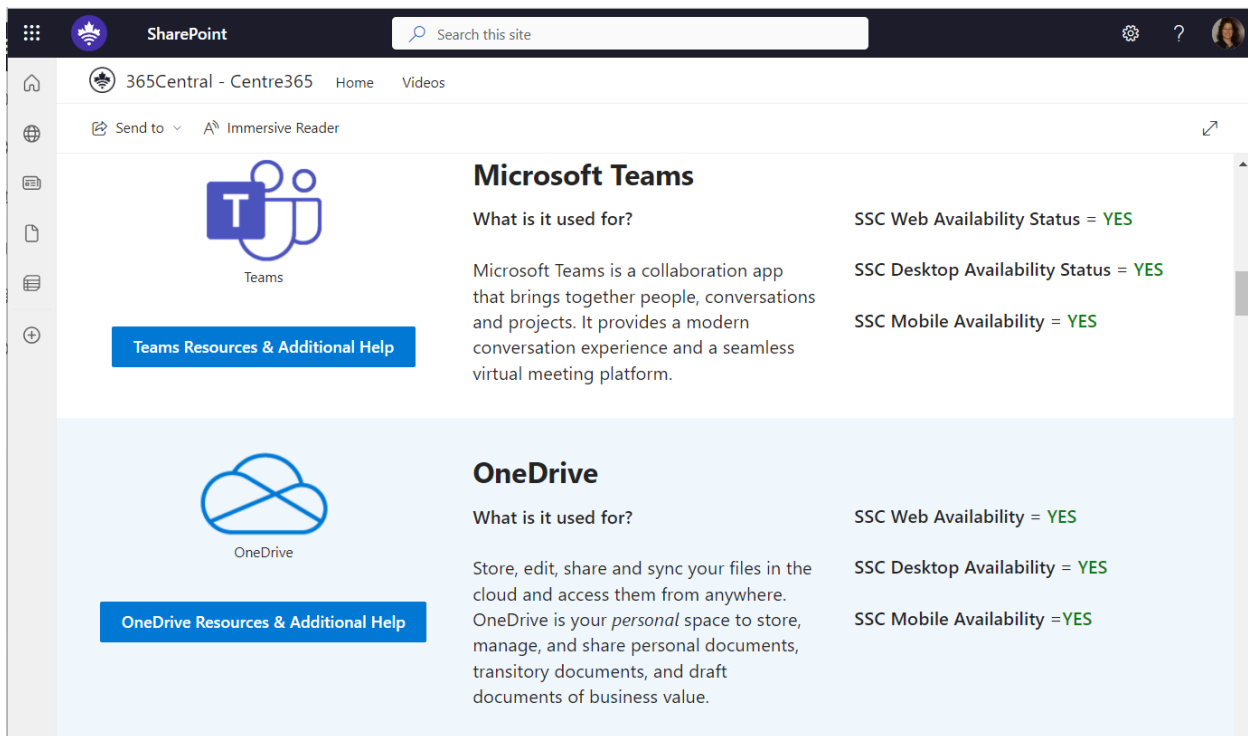


Figure 3 - 365Central Application details


SharePoint Search this site

365Central - Centre365 Home Following English

Send to Immersive Reader

365Training: Learning Journeys

We built SSC's M365 Learning Journeys to help guide employees through a recommended training plan. Following the journey outline will help you build a solid foundation for the M365 apps and how they contribute to SSC's "New Ways of Working".



SSC's "New Ways of Working" with M365

How does it work?

In order to successfully complete the M365 Learning Journey, please register for all **5 core courses**, and at least **2 electives**. (See courses below). **Note:** For those who do not wish to follow the recommended Learning Journey outline, these courses can be taken as standalone sessions, in whichever order you prefer.

What if I've taken a course already?

The courses you've previously attended will count towards your Learning Journey credits. For a complete listing of all the M365 courses you've attended, please visit: [My M365 Course History](#)

- Step 1: Core Courses
- Step 2: Elective Courses
- Mandatory Owner Training

Figure 4 - 365Central Training

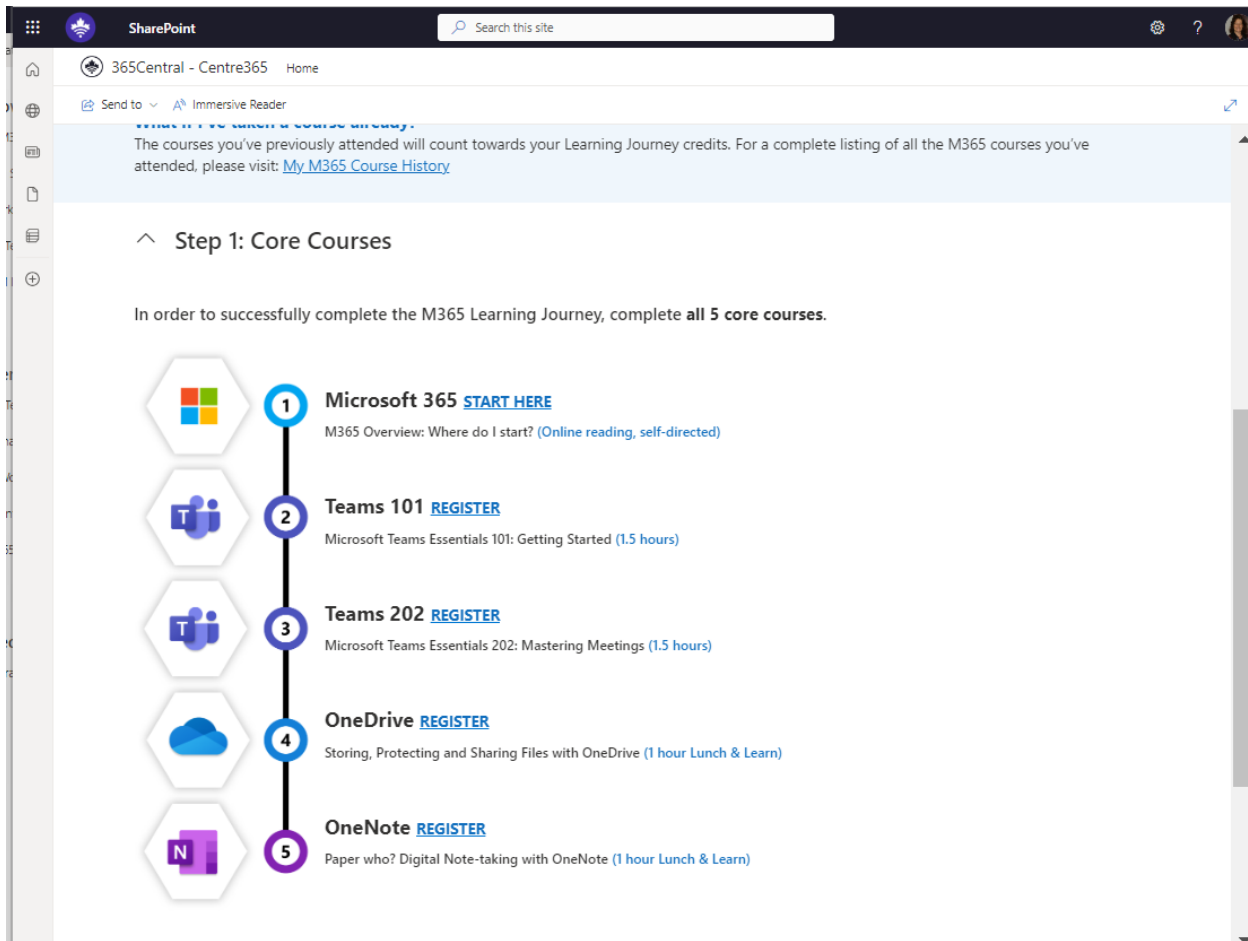


Figure 5 - 365Central Training - Core Courses

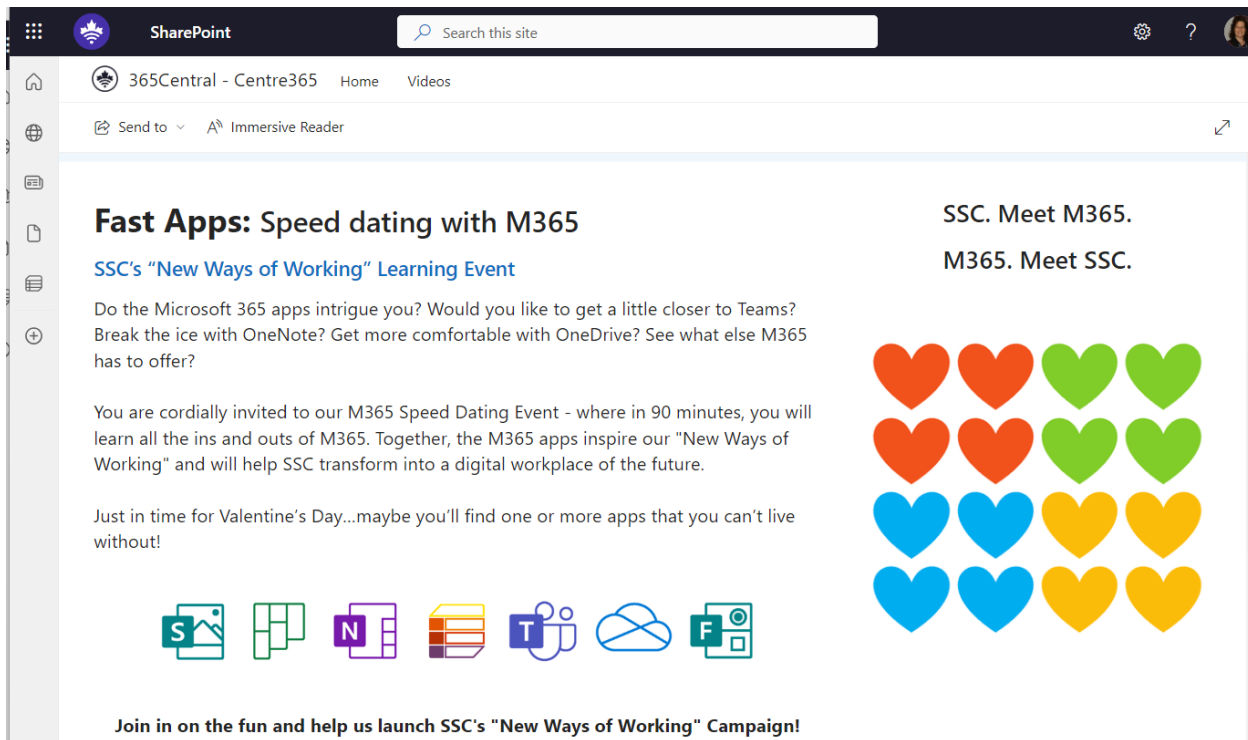


Figure 6 - 365Central Speed dating with M365

SharePoint Search this site

365Central - Centre365 Home Following English

Send to Immersive Reader


SSC's "New Ways of Working" with M365

What is the "New Ways of Working" campaign?

We released the M365 platform department-wide at incredible speed, in order to provide employees the tools they needed to work remotely. Now, let's make sure we are all moving in the same direction as an organization — leaving no employee behind. To ensure SSC is making the most of all M365 has to offer, we've built a learning campaign that will shift how we work together and guide us towards the future of work.


We've broken it down into 4 main objectives

The following objectives are meant to encourage adoption of the M365 tools at SSC. We are reframing all our adoption and training activities to focus on the following:




Connect and Communicate

Keeping in touch with your team in a way that makes sense. Reducing emails, focusing on channel discussions, making proper use of chats, and connecting virtually with your team.




Effective Meetings

Making the most of our Teams meetings. Ensuring full accessibility, utilizing the built-in features, customizing meeting settings, and mastering the tracking and organization at your meetings.



Working Smarter with Documents

Improving the processes for collaborating on files, and making you work more efficiently. Introducing co-authoring, cloud storage and sharing, built-in file versioning, easy accessibility checks, and more!



Work from Anywhere

Accessing your files, conversations and content from any SSC device, any time. M365 is all about the cloud, and it just keeps getting better as we roll out the mobile applications!

We built SSC's M365 Learning Journeys to help guide employees through a recommended training plan. Following the journey

Figure 7 - 365Central "New Ways of Working" with M365

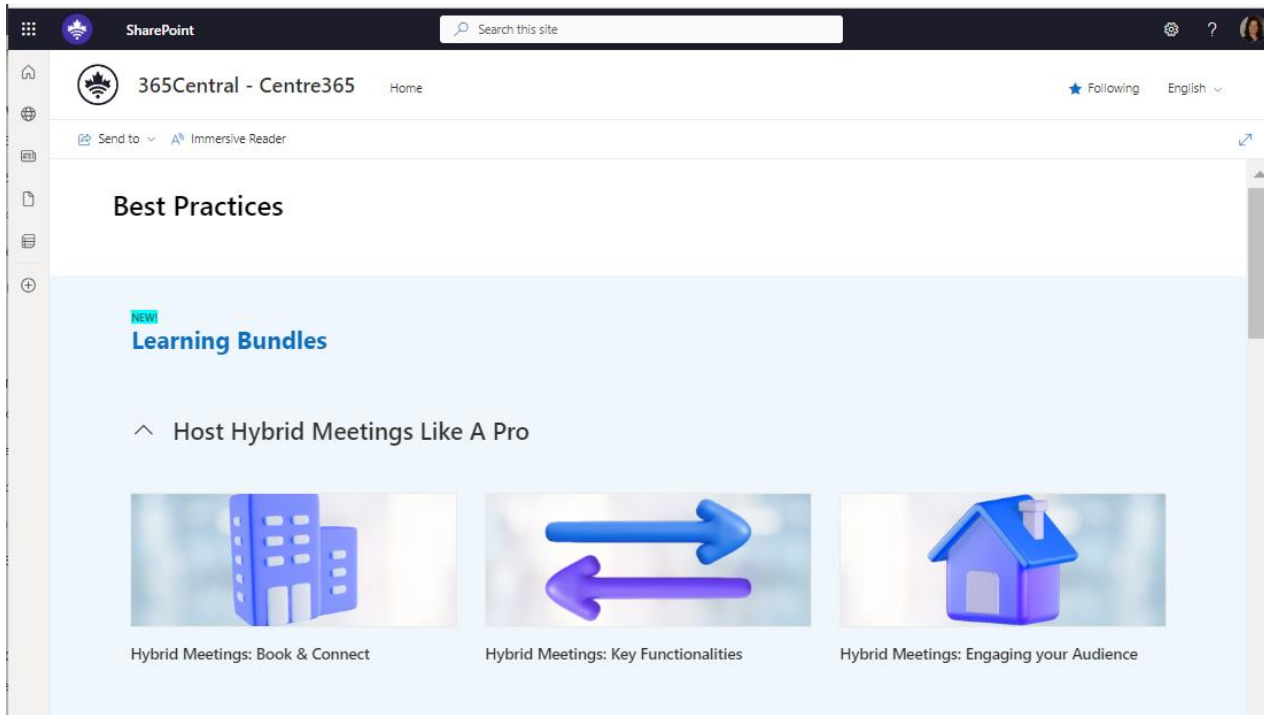


Figure 8 - 365Central Best Practices

Office 365 training

Departmental Learning & Development team offers all-day+, application-specific training. Third party vendors provide the training.

M365 Learning Path Course Outlines

MS Teams Essentials

1. Introduction to MS Teams Desktop App
2. Setting up your profile, preferences, status and notifications
3. Searching MS Teams with just a few letters or a word
4. MS Teams / Shortcuts
5. Filtering Activities and Feed
6. Ad hoc 1 to 1 Chat Messages
 - a. Creating a Chat
 - b. Saving a Chat
 - c. Adding people to a Chat (Group Chat)
 - d. Naming a Chat
 - e. Leaving a Chat
 - f. Sharing in a Chat
 - g. Audio Call
 - h. Video Call
 - i. Send Praise
 - j. Priority Chats
 - k. Sending GIFs, Stickers and Emojis
7. Bookmarking messages
8. Pinning a Chat
9. Pinning a Message
10. Working Collaboratively in a Chat
11. Calendar in Teams
12. < and > options in Teams
13. Adding Apps to Teams
14. Files App
15. Pinning a Channel you are working in
16. Hiding Teams
17. Muting Chats
18. Hiding Chats
19. Delete a Chat

- 20. Working Synchronously in a Team
- 21. Focused Group Discussions in a Teams' Channel Post
- 22. @ Mentions
- 23. Translation in MS Teams Chats and Posts
- 24. MS Teams Help

MS Teams - Mastering Meetings

- 1. MS Teams Best Practices
- 2. Scheduling Meetings in MS Outlook and MS Teams
- 3. Meeting Options before and during the meeting
 - a. Co-organizer
 - b. Interpreters
 - c. Presenter
 - d. Microphone On/Off
 - e. Video On/Off
- 4. Creating Breakout Rooms
- 5. Creating Polls
- 6. Adding a Notebook Tab for meeting notes
- 7. Creating bilingual Meeting Invites
- 8. Join with ID
- 9. In the Teams Meeting
 - a. Pinning vs. Spotighting
 - b. Managing the Attendees
 - c. Screen Sharing Options
 - i. Whiteboard
 - ii. Screen
 - iii. PowerPoint Live
- 10. Giving Control to a meeting attendee
- 11. Interactive PowerPoint Presentations
- 12. Chats in Meetings
- 13. Changing the Video View
 - a. Gallery View
 - b. Large Gallery

- c. Together Mode
- 14. Adding Speaker Coach to help you during the meeting
 - a. Talking too fast
 - b. Talking too slow
 - c. Speaking over someone
 - d. Being Inclusive
 - e. Filler Words
- 15. Meeting Etiquette
 - a. Raise Your Hand
 - b. Questions in the Chat
 - c. Unmute Mic
 - d. Turn Camera On
- 16. Meeting Recordings and Transcriptions
- 17. Video Effects (formerly meeting background)
- 18. Audio failing use Call Me
- 19. Leaving vs Ending a Meeting
- 20. Where does the Recording Go
 - a. Who owns the recording
- 21. Attendance analytics
- 22. Mute All or Disable Mics
- 23. Disable or enable cameras
- 24. Webinars
 - a. Setting them up
 - b. Who's registers
 - c. Who's canceled
 - d. Meeting Options
- 25. Mastering Meetings User Guides in 365Central

MS OneDrive

- 1. MS OneDrive Hub Overview
- 2. Navigation Menu
 - a. Home
 - b. My files

- c. Shared
 - d. Favorites
 - e. Recycle Bin
- 3. OneDrive Best Practices
- 4. Syncing folders if not syncing
- 5. Organizing OneDrive using Folders
- 6. Sharing Files for Edit or View Rights
 - a. Different Types of Groups for granting permissions
 - b. Using Copy Link to send to others
- 7. Shared Folders vs Shared Files
- 8. Using Sort and Filter to easily find files
- 9. Searching your OneDrive
- 10. Recycle bin and 2nd Stage Recycle Bin
- 11. How to find files that are shared with you
- 12. How to find files you shared with others
- 13. Removing Shared Permissions
- 14. Seeing who has viewed files and when
- 15. Accessing OneDrive from your Device
 - a. Sharing
 - b. Save to Device
 - c. Free up Space
- 16. Accessing OneDrive from MS Teams App
- 17. Meeting Recording Expirations in OneDrive
- 18. MS OneDrive Help

MS OneNote

- 1. MS OneNote Online Hub Overview
 - a. Searching from the Hub
 - b. Accessing Notebooks (Recent, Favorites, My notebook, Shared with me and Discover)
 - c. List View or Tiles View
- 2. Create a Notebook from the Hub
- 3. Write anywhere, any place and any time with MS OneNote
- 4. Organize Notebooks by sections, and section groups

5. How to work with quick notes
6. Searching your OneNote Notebooks
7. Using Tags to easily find and organize important information in your Notebook
8. Versioning Control
9. Sharing your Notebook with others
10. Find Edits, authors and hide authors
11. Page Templates
12. Customizing Tags in the Desktop Version of OneNote
13. Adding a Notebook to your Teams Channel
14. Creating a Notebook in a Teams Channel
15. Converting Wiki Pages in a Teams Channel to MS OneNote
16. Packing your OneNote for another team or member if leaving the organization
17. Desktop version of OneNote vs online version
18. Creating a weekly agenda for meetings
 - a. Taking Meeting Notes
 - b. Sharing Page with Meeting Members
19. Deleting a Notebook
20. OneNote Recycle Bin
21. Getting OneNote Help

MS Outlook - Take Control of Your Inbox

1. Managing Folders
2. Creating Rules, Quick Steps and Alert Wizard
3. Using the Outlook Panes
4. Changing Message Options
5. Setting Advanced Message Options
6. Configuring Categories
7. Tame your inbox with the Four D's
8. Manage Calendars and Time Zones
9. Managing a Shared Mailbox
10. Tracking Responses for meetings set up in Outlook
11. Creating Search Folders
12. MS Outlook Online

- a. To Do App
- b. Plan My Day

MS Teams - Team Owner Training

1. Team Owner Roles and Responsibilities
 - a. Adding Members
 - b. Members and Owners
 - c. Transferring Members to Owners and Vice Vera
 - d. Creating Channels
 - e. Creating Tabs
 - f. Adding Apps
2. MS Teams Channel Analytics
3. Removing members from a team
4. Adding external users to a team
5. Adding and Managing files in a team's channel
6. Creating an announcement and adding to every channel at the same time
7. Pinning Messages in Posts
8. Using Tags
9. Adding a Logo to your team
10. SharePoint underneath MS Teams
11. Creating Standard, Private or Shared Channels
12. MS Teams Help Section
 - a. Topics
 - b. Training
 - c. What's New

MS SharePoint for Standalone Sites

1. Difference between a Team Site and a Standalone Site
2. Roles and Responsibilities
3. SharePoint Hub Overview
4. Accessing SharePoint Site
5. Site Contents Overview
6. Site Settings Overview

7. Site Permissions
 - a. Creating Groups
 - b. Creating Permissions
 - c. Editing Group Permissions
8. Document Library Permissions Best Practices
9. File Permissions Best Practices
10. Setting up Document Libraries and Lists
11. Adding a Site Template
12. Adding Lists
13. Site Information
14. Changing the Colours and the Themes of a Site
15. Language Settings
 - a. English Sites must have a French Site
 - b. French Sites must have an English Site
 - c. Translating Pages
16. Inclusivity
 - a. Accessible SP Site and Pages
17. Navigating with the Top Link Bar
 - a. Cascading or Drop Down
18. Site Analytics
19. SharePoint Help

Modern SharePoint Pages

1. Creating Site Pages
2. Using Sections
3. Using Web Parts
 - a. Hero
 - b. Timer
 - c. Forms
 - d. Lists
 - e. Text
 - f. Image
4. French and English Pages

- a. Translation
5. Making a page a home page
6. Draft Pages vs. Publishing a page
7. Unpublishing a Page
8. Inclusivity
9. Organizing Pages
10. Deleting Pages
11. SharePoint Web Part Help

MS Lists

1. Overview of MS Lists Hub
2. Searching for Lists from the Hub
3. Lists View
 - a. Favorites
 - b. Recent Lists (shared with you or Lists you accessed recently)
 - c. My Lists (Lists you created)
4. Create a blank List from the Lists Hub
5. Create a List from an existing list
6. Create a List from Excel
7. Create a List from a CSV
8. Create a List from MS Templates
9. Filtering and Grouping a List
10. Creating views for your List
11. Editing a List
12. Applying different layouts to your List
13. Sharing Lists
14. Creating a List for a Team
15. Exporting a List
16. Deleting a List
17. Creating or Editing List Columns
18. Editing in the Grid View
19. Getting Help for MS Lists

MS Forms

1. Overview of MS Forms Hub
2. Using the Search in the Forms Hub
3. Navigating the Hub Views
 - a. Recent, Favorites and Shared with me
 - b. My groups view
4. The All My Forms Hub
5. Creating a New Form
6. Creating a New Quiz
7. Adding different types of questions to a form
8. Creating Sections in a Form
9. Adding branching to questions
10. Styling your Form with themes or colours
 - a. Adding your own theme
11. Preview and test the Form
 - a. Mobile and Device View
12. Collecting Responses
 - a. Anyone can respond (external and internal users)
 - b. Only People in my organization
 - c. Specific people in my organization
13. Send invites to Form
 - a. Send Link
 - b. Email Form
 - c. QR Code
 - d. Add to Web Page
14. Present
 - a. Show Form in meeting and have users use QR code or link to immediately access Form
15. 3-dot menu
 - a. Collaborate or Duplicate Form
 - b. Add other languages to Form (does not translate Form)
 - c. Print Form
 - d. Settings
 - i. Who can fill out the Form

- ii. Options for responses
 - iii. Response Receipts
- e. Notifications for Forms
- f. Viewing Responses
- g. Editing Form
- h. Sharing Summary Link for responses
- i. Exporting Form responses
- j. Help for MS Forms

MS Planner

1. Overview of the MS Planner Hub
 - a. Navigation Pane on the left
 - b. Dashboard
 - c. Pinned, Recent, Recommended and AI View
 - d. Using Assigned to me to only focus on what you have been assigned
2. Creating a plan with an existing group (groups are any team you belong to)
3. Creating Buckets to organize your plan
4. Adding tasks to your plan
5. Assigning tasks to other team members or yourself
6. Filtering and Grouping Tasks
7. Viewing Options for Planner
 - a. Grid/Lists View
 - b. Board View
 - c. Charts View
 - d. Schedule View
8. Members Menu (who has access to this plan)
9. 3-Dot Menu
 - a. Conversations in Planner
 - b. Files attached to a Plan
 - c. Copy a Plan
 - d. Export a Plan to Excel
 - e. Copy Link to Plan
 - f. Plan Settings

- i. Renaming Plan
 - ii. Adding a Template to Plan (Online availability only)
 - iii. Adding Plan to your personal Outlook
 - iv. Notifications
 - v. Delete Plan (only creators can do this)
- 10. Adding a Plan to a Teams Channel Tab
- 11. Create a new Plan in a Team
- 12. The Help Section for MS Planner

MS Visio Online

- 1. Visio Hub Overview
- 2. Visio Views
 - a. All
 - b. Recently Opened
 - c. Shared
 - d. Favorites
- 3. Show where Visio files are saved (OneDrive)
- 4. Creating Visio Drawings
 - a. Using Templates
 - i. Basic Diagram
 - ii. Flowchart
 - iii. Process Template
 - iv. Communication Template
 - b. From Scratch
- 5. Reviewing Shapes and the Shape Sheet
- 6. Creating your own Shape Sheet
 - a. Adding shapes to the Shape Sheet
- 7. Sharing Visio Drawings
- 8. Commenting and Collaborating with Visio Drawings
- 9. Uploading Visio Diagrams to Visio Online Hub
- 10. Adding Visio to a MS Teams Channel
- 11. Getting Help for MS Visio

Power Automate

1. Power Automate Hub Overview
2. Navigation Pane
 - a. Home
 - b. Approvals
 - c. My flows
 - d. Create
 - e. Templates
3. Exploring Learning for every level
4. Creating a Flow from Scratch
 - a. Triggers
 - b. Actions
 - c. Conditions
5. Creating a Flow from a Template using Connectors
 - a. MS Forms Connector
 - b. MS Lists Connector
 - c. MS Teams Connector
 - d. MS Outlook Connector
6. Adding Conditions to a Flow
 - a. If Yes do this
 - b. If No do this
7. Saving your Flow
8. Testing Your Flow
9. Editing your Flow
10. Sharing your Flow
11. Monitoring the Flows
12. Getting Help for MS Power Automate

MS Whiteboard

1. Overview of MS Whiteboard App
2. Desktop vs Online Whiteboard
3. Creating a new Whiteboard

4. Getting familiar with the toolbars
 - a. Ink Menu
 - b. Insert Menu
 - c. Create Menu (Notes, Text, Shapes, Reactions, Images, Templates, Documents and Links)
5. Using the Ruler in MS Whiteboard
6. Using Comments in MS Whiteboard
7. Using the Settings in MS Whiteboard
 - a. Export your Whiteboard
 - b. Export Whiteboard as a PDF
 - c. Adding Collaborative Cursors (see people collaborating in Whiteboard)
 - d. Show Note Authors
8. Share your Whiteboard with others
9. Present your Whiteboard in a meeting
10. Post your Whiteboard in a Teams Channel
11. Create a new Whiteboard in MS Teams

MS Sway

1. Overview of MS Sway Hub
2. Creating a Story in MS Sway
3. Adding Images to your Sway
4. Adding Cards to your Sway
5. Changing the layout and style in your Sway
6. Playing your Sway
7. Sway and Accessibility
8. Sharing Sway with others
9. Create a Sway Story using MS Word or PowerPoint

Statement of Work

This is a sample of SSC's M365 User Adoption Development and Training Statement of Work.

Create Pilot Training for M365 or SharePoint Pages for:

- Collaboration and the New Ways of Working (NWOW)
- Why M365?
- The End User Experience
- What M365 Apps are available on the web for collaboration and working efficiently
- What M365 Apps are available on the desktop for collaboration and working more efficiently
- New Features in the Desktop Apps (Teams, OneDrive, Outlook, Word, PowerPoint, and Excel)
- Develop Pilot Plan
- Create Awareness

Develop an intranet user portal with User Adoption Strategies and Guides (French and English)

- The user portal will be the one stop site for all GOC ORGANIZATION members to access information for end users that are specifically targeting GOC ORGANIZATION's Change Management and User Adoption strategies.
 - When to use what app when
 - User Guides for each M365 Application
 - Availability of the apps (desktop, mobile and online/cloud)
 - Security and Privacy information regarding the app for which users are seeking information and guidelines.
 - This is a great opportunity to ensure that the support desk can focus on other tasks and direct users to these pages for information.
 - Develop a Champions Network for end user adoption and mentoring.
 - Giving champions previews of upcoming features, best practices and tips for them to spread the word to their groups and team members.
 - Create a Champions Team
 - Each channel would represent an app or a group of apps, where focused group discussions can be placed in the correct channel.
 - Champions would now answer other champions with their questions and assist with findings we may not be aware of that messaging needs to be communicated.

- Create a Learning Journey
 - Apps that will help users collaborate, be more productive and work more efficiently.
 - These can be broken into categories of where to start such as Core Courses and Elective Courses
- Create FAQs for the M365 Apps.

Develop Weekly M365 Training for User Adoption (French and English)

- Develop a series of Lunch and Learns for the Learning Journeys
 - MS OneDrive
 - MS OneNote
 - MS Planner
 - MS Lists
 - MS Forms (for unclassified data only)
 - MS Sway (if released, product not fully accessible; for unclassified data only)
- Develop a series of courses for Core and Elective Courses
 - Mandatory MS Team Owner
 - Mandatory SharePoint Site Owner
 - MS Teams Essentials
 - MS Teams Meetings
 - Outlook
 - Visio
 - Viva Insights
 - Whiteboard
 - Power Automate (if released)
- Analytics
 - Provide Weekly analytics of training sessions.
 - Attendance
 - Create a Power BI Report for easy access of numbers for attendance.
- Consultant on hand for customized group training to help teams work more collaboratively and productively in the apps together.
- Assist teams with better ways of working, providing customized documentation for their teams in the apps they are working with on their projects or other items.
- Be available for Executives to provide VIP Training, User Adoption strategies and more.

- Log all chats for help requests from GOC ORGANIZATION team members that ask for assistance regarding the apps they took courses on.
 - Report for GOC ORGANIZATION to view how many chats per month for user adoption.

The consultant would need to have an extensive background in User Adoption. The consultant would not only be an experienced M365 Trainer, but also have hands-on experience in all applications that are in the M365 Suite. The consultant would have to be empathetic, knowledgeable on inclusivity, have an accessible understanding of all apps and provide direction to GOC ORGANIZATION with MS updates and suggestions for better user adoption and areas that can be frustrating and overwhelming for the End User. The consultant would be able to create use cases and suggestions for training and user adoption, create on-the-fly events that would create engagement from the organization to excite end users to embrace M365.

The consultant should provide other organizations where their strategies have been successful.

Table of Figures

- Figure 1 - 365Central Main Page with Announcements3
- Figure 2 - 365Central Applications page4
- Figure 3 - 365Central Application details4
- Figure 4 - 365Central Training5
- Figure 5 - 365Central Training - Core Courses6
- Figure 6 - 365Central Speed dating with M3656
- Figure 7 - 365Central "New Ways of Working" with M3657
- Figure 8 - 365Central Best Practices8