

# Create, Track and Manage Your Training Projects Using M365

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ATD HOUSTON TECH CONFERENCE



Leeanne McManus

IKUW SOLUTIONS, INC. | [WWW.GETIKUW.COM](http://WWW.GETIKUW.COM) | 4/26/2022

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# Create, Track, and Manage Your Training Projects Using M365

Envision a new modern training program in which you can implement your training initiatives in an automated fashion while improving communication, collaboration, visibility, transparency, and meeting and exceeding learning program objectives. In this session, you will learn how to extend the functionality of the Microsoft 365 integrated apps to build solutions for your business challenges. You will learn how to work with apps and files you're already comfortable with, such as Excel and OneNote, and integrate these into the platform to leverage your current collateral. Additionally, you will explore new apps in the platform and discover automated and integrated solutions to have a larger reach and overall impact with less manual work.

Application on the Job:

- Learn how to improve overall communication, collaboration, visibility, and transparency, and meet learning and program objectives.
- Improve the visibility of your training program with meetings, videos, communications, feedback, data analysis and more.
- Use M365 tools to conquer your training program challenges and learn ways to improve your workflows in your organization.

The intent of this session to assist you in increasing your productivity, collaboration and communication in your workspace with your teams. This handout is being provided as a resource for you to implement the solutions provided in your own organization after the session. Keep in mind, Microsoft 365, like other SaaS products is continually being refined and the items, locations and access to the apps as demonstrated in this session may not be the same in your organization or in the future. The large majority of what is being demonstrated is based on templates provided out of the box in Microsoft 365 (Enterprise).

## Apps to Create

Using Teams, SharePoint, Outlook Calendar, Forms, Stream

## Apps to Track

Teams, Excel, SharePoint Lists, Planner, Power BI, OneNote

## Apps to Manage

Power Automate, Power Apps



## Setting the Scene

After working in Learning and Development for more than 20 years, I've found that many times LMS systems will help to keep track of some parts of the training deliverables, but not all parts. Many times, my teams have found they were utilizing multiple different systems to work, communicate (usually through email), access, monitor, track and report, to name a few of the requirements needed in this type of role. Not to mention that different team member might own or maintain different facets of the combined work and all the content is not equally accessible by team members. I always felt that a lot of time was wasted in the manual steps, not to mention the items that could get lost in the shuffle, with a lack of visibility and visual display. Most people don't have time to learn how to make beautiful dashboards with graphics and the like. But... what if the system could do much of this for you? That is just what this session is about!

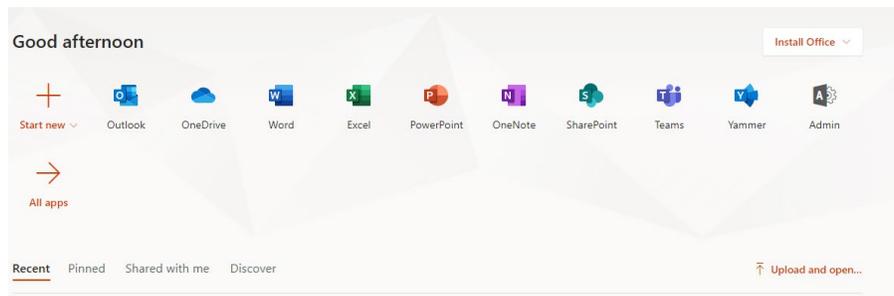
So, we're going to experience how working in one platform can allow you to automate and access the content you need, cut many of the manual steps out in a few simple clicks, and leverage other integrated tools (including third party tools) you already use within the platform.

Keep in mind, what you will see in the session is likened to a Rachel Ray show where she pulls the magic out of the oven. While I have these examples already built and automated prior to our session, this handout should assist you when you are back at the office attempting these solutions with your own work. These are only a few examples that you might undertake to improve your own workflow and those of your team. I hope you leave this session confident, adventurous and curious about the little steps you can take to improve the steps on your own projects.

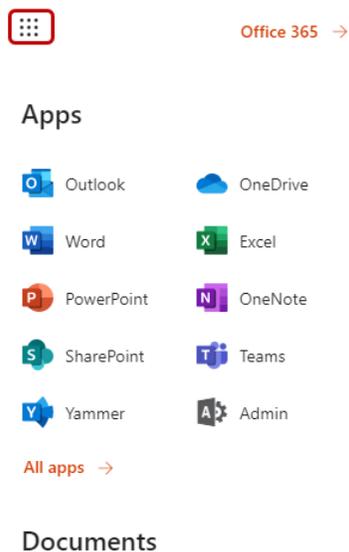


## Getting Acclimated

Office 365 is a cloud-based, integrated experience of apps and services, designed to help you do more efficiently and securely. With all these integrated apps and services, users and teams can collaborate, share, communicate and get more done. Most users are familiar with the base applications and services in Office 365, such as Office programs (Excel, Outlook, OneNote, etc.) and SharePoint (to store and share documents). There are many more applications available. Here is an example of what you will see when you access Office 365 from a browser.



You can also access your applications from Office 365, using the App Launcher in the upper left corner. This is also referred to as the Waffle.



We're going to take a special focus on these applications.



### Planner

Create plans, organize and assign tasks, share files, and get progress updates.



### SharePoint

Share and manage content, knowledge, and applications to empower teamwork.



### Forms

Create surveys, quizzes, and polls and easily see results in real time.



### PowerApps

Build mobile and web apps with the data your organization already uses.



### Power BI

Create actionable, dynamic, and engaging data dashboards you can share with others.



### Teams

The customizable, chat-based team workspace in Office 365.



### Stream

Share videos of classes, meetings, presentations, and training sessions.



### Whiteboard

Ideate and collaborate on a freeform canvas designed for pen, touch and keyboard.



### Power Automate

Create workflows between your apps, files, and data to automate time-consuming tasks.



### Sway

Create and share interactive reports, presentations, and personal stories.



### Dynamics 365

Break down the silos between your business processes and applications with Microsoft Dynamics 365.



### OneNote

Capture and organize your notes across all your devices.



### Excel

Discover and connect to data, model and analyze it, and visualize insights.



## Main Solutions in this Workshop

Here is a list of the solutions we will explore in this workshop. There may not be time to cover all of these in 60 minutes, so you can review this handout and attempt the others on your own.

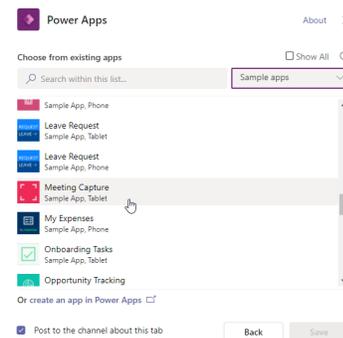
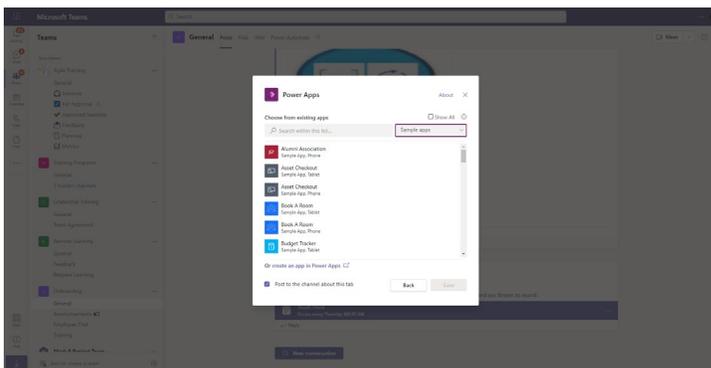
1. **The new type of Scribe!** Run effective planning meetings with one automated meeting capture tool. It's one simple click and you are ready to roll! (**Meeting Capture** template using **Power Apps** in **Teams, OneNote, Stream, Teams, Power Apps**)
2. **Let them kick it off for you!** Use a request form to populate a list, post a message to your team, populate your tasks and kick off an automation. (**Forms, Teams, Planner, Power Automate, Outlook**)
3. **Visualize it!** Track, report and display data metrics across the organization to provide visibility into your programs. (**Excel, Power BI, Teams, SharePoint Lists**)
4. **Manage your project using a nifty Milestone template.** Setup your Milestones, Status, Priority, Target Dates and Categories then begin adding new work items and you're ready to go! (**Milestones** template using **Power Apps** in **Teams**)
5. **Take the manual steps away, use an APP!** Use a mobile app to update a SharePoint List or capture immediate feedback and populate a list! (**Power Apps, SharePoint List**)

### 1. The new Type of Scribe

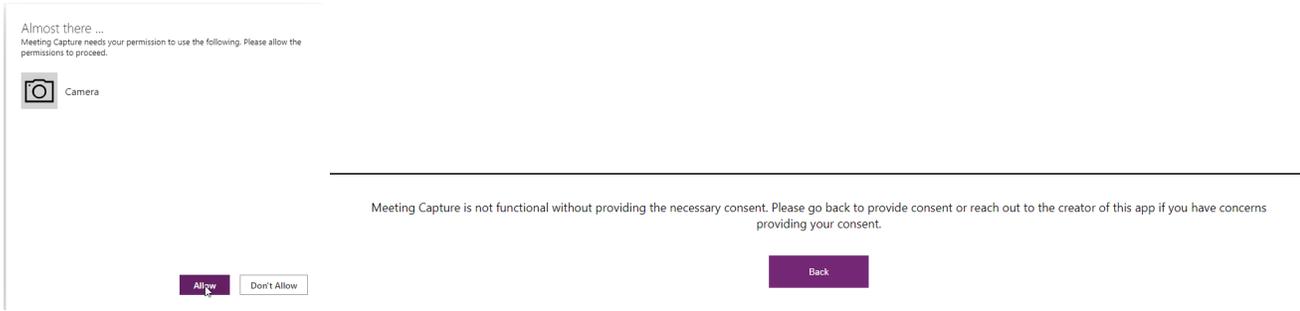
This is a highly useful template that will just need enabled by your organization's Admin or the Owner of the team (depending on how it has been setup in your organization). Once the template has been enabled, you can simply add a customized tab in your Team's Channel, select Power Apps, select Sample Apps and click on the Meeting Capture option.

This template will unite the following tools: Teams, OneNote, Planner, your pc's camera and Power Apps. Please note: You will want to have an existing Planner board and OneNote prepared prior to using this template. To make this simple, every Microsoft Team already has integration with both the Planner and OneNote applications, you just need to initiate each of these, such as creating a Planner board and creating a OneNote Section in your Team's channel. When you have finished your meeting, you will simply select these locations. Follow these steps:

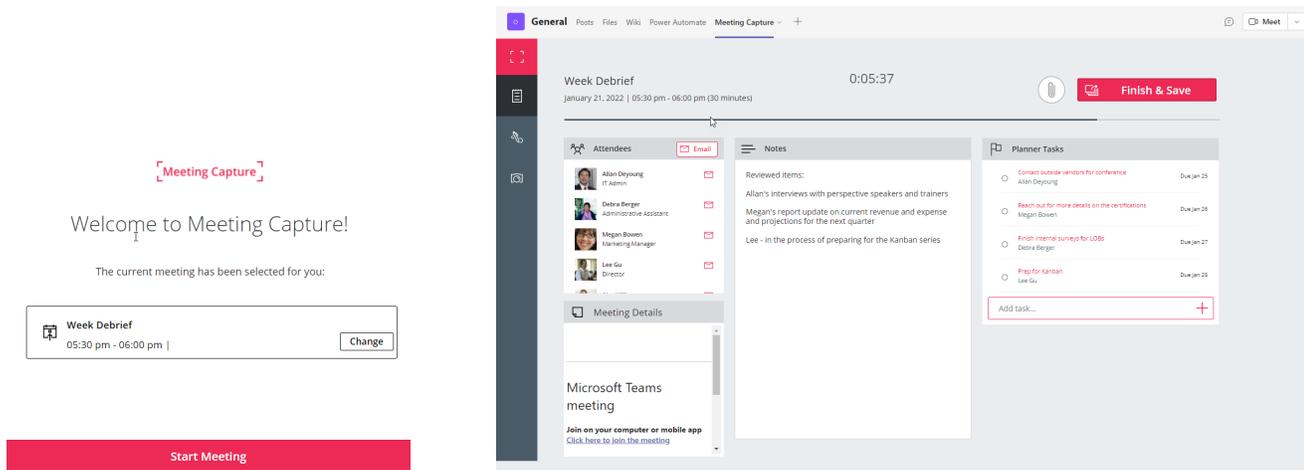
**Step 1:** in a new channel tab, select Power Apps and from the drop down, select Sample Apps, then



**Step 2:** Allow your camera to be used. Note, you will not be able to use this template (without modifications) if you do not allow your camera.



**Step 3:** You need to have a meeting on your calendar so you can choose that meeting for this meeting capture session. Begin meeting, take notes and add Action Items for your Planner board.



**Step 4:** Finish your meeting by connecting your OneNote and Planner Locations (what you had previously setup). As soon as you make these selections, the template will export this data and send an email to all participants.

# Export Week Debrief

Export

Where would you like to export to?

**OneNote**  
Export meeting summary, notes, attachments, and tasks to your OneNote.

Select Location

**Office Planner**  
Sync assigned tasks with Office Planner

Select Location

**Email**  
Email meeting summary, notes, attachments, and tasks to the attendees.

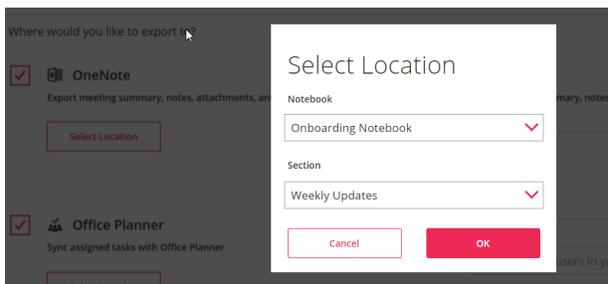
Attendees (5)

Allan Deyoung	×	Debra Berger	×
Megan Bowen	×	Lee Gu	×

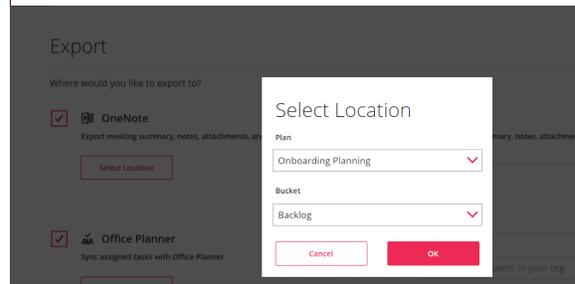
Add attendee

🔍 Search for users in your org

## OneNote Section



## Planner Board



### Step 5: Finish and Export

Are you finished taking notes?

Once you Export, your meeting summary will be shared and you will no longer have access to the edit page.

Cancel Yes, continue

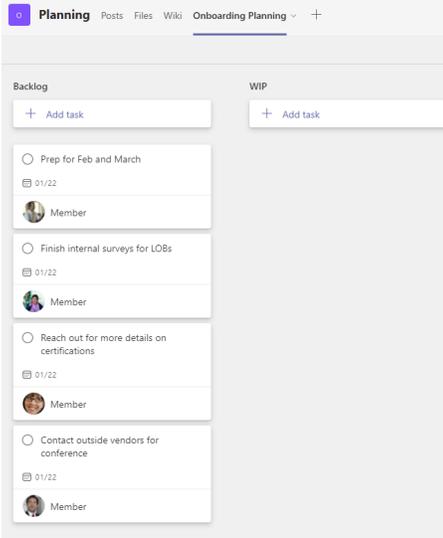
Working on export

Schedule a follow up meeting

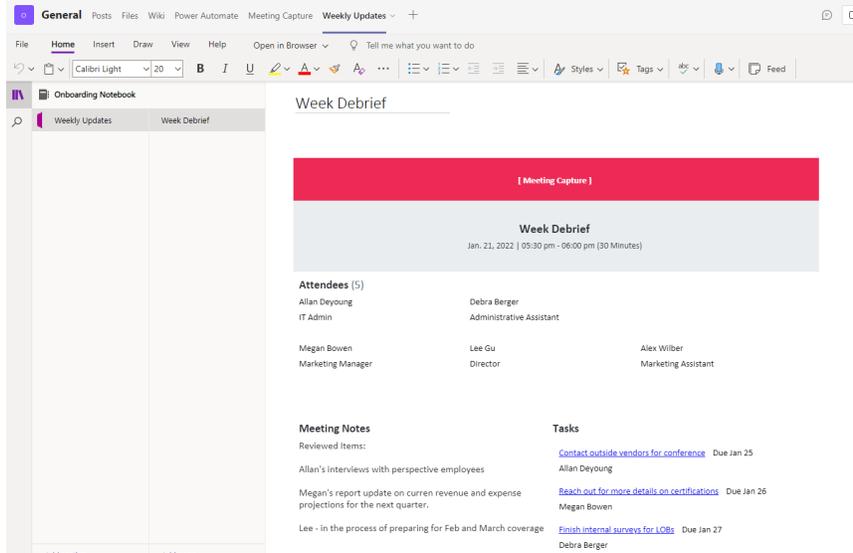
Capture another meeting →

### Step 6: Access your Planner board and your OneNote

## Planner Board



## OneNote Section



## 2. Let them kick it off for you!

We're going to setup a series of automations to make our work more efficient! We will rely on the Power Automate app to make all these connections and run the flows for the automation. There are hundreds of templates you can choose from to create your automation; this is just one example. We have a form created that we will have users complete to kick off requested trainings. As soon as this form is completed, the Power Automate will begin to populate tasks on an assigned Planner board, send a message to our team in Teams, and kick off an approval process.

**Step 1:** Create or get the link for an existing Form.

[Our Request an Agile Session Form:](#)

The image shows a 'Request an Agile Session' form. The form has a title 'Request an Agile Session' and a subtitle 'Workshop, Bootcamp, Certification, etc.'. It contains three main sections: 1. 'Your Name' with a text input field labeled 'Enter your answer'. 2. 'Your LOB' with radio button options for Finance, HR, Engineering, Marketing, Management, Administration, and Other (with a text input field). 3. 'Date of Request (today)' with a date input field labeled 'Please input date (M/d/yyyy)'. The form is displayed on a mobile device screen.

**Step 2:** Create a new flow, by selecting Templates. Search for this template. Then test the flow.

**Power Automate Template:** Create a task in Planner from Microsoft Forms and post message in Teams

Select the Form and Select Planner Board details

The screenshot shows a Power Automate flow configuration with three steps:

- When a new response is submitted:** Form Id is set to "Request an Agile Session".
- Get response details:** Form Id is "Request an Agile Session" and Response Id is "Response Id x".
- Create a task:** Plan Id is "Agile Training". Title is "Type of Agile S... x and Location or Ty... x and Agile Topics x requested by Your Name x in Your LOB x". Bucket Id is "Requested Sessions". Start Date Time is "Submission time x". Due Date Time is "The datetime the task is due (Ex. '2018-04-13T00:42:19.284Z')". Assigned User Ids is "christiec@M365x12833247.onmicrosoft.com".

Select the Team, Channel and specific message details from your Planner board

The screenshot shows the configuration for the "Post message in a chat or channel" step:

- Post as:** Flow bot
- Post in:** Channel
- Team:** Agile Training
- Channel:** Planning
- Message:** Tahoma, 12, Bold, Italic, Underline, and other formatting options. The message content is: "New Session Requested. Please see the Planner Board [Title x] for the details. This will require approval before it can be initiated. Details of the request include: Requested by: [Your Name x], LOB: [Your LOB x], Type of Agile Session: [Type of Agile Session you are requesting x], Date of Request: [Date of Request (today) x], Estimated # of session days: [Estimated number of days for the session x], Estimated # of participants with request: [Estimated number of participants in your request x], Estimated type of session: [Location or Type of session x], Estimated date needed: [Estimated Month to deliver the training x]".

Select the Create an Approval option and complete details.

The screenshot shows the configuration for the "Create an approval" step:

- Approval type:** Approve/Reject - First to respond
- Title:** Approval for [Title x] from [Your Name x]
- Assigned to:** ChristieC@M365x12833247.OnMicrosoft.com; AllanD@M365x12833247.OnMicrosoft.com;
- Details:** With approval this session will be updated to our SP List of Agile Events.
- Item link:** [MessageId x], [Message Link x]
- Item link description:** Request for an Agile Session

Below the step, there is a "Terminate" step and buttons for "+ New step" and "Save".

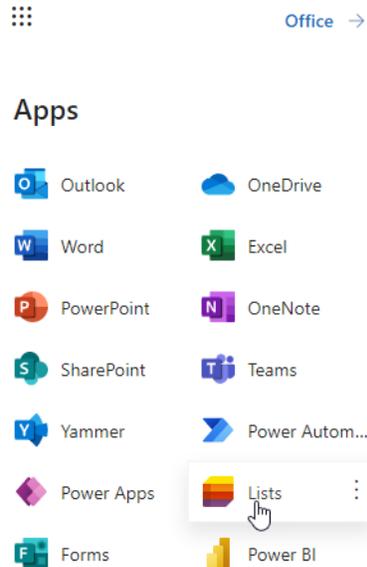
Save the automation and select Test to run. You will need to complete your form to kick this off.



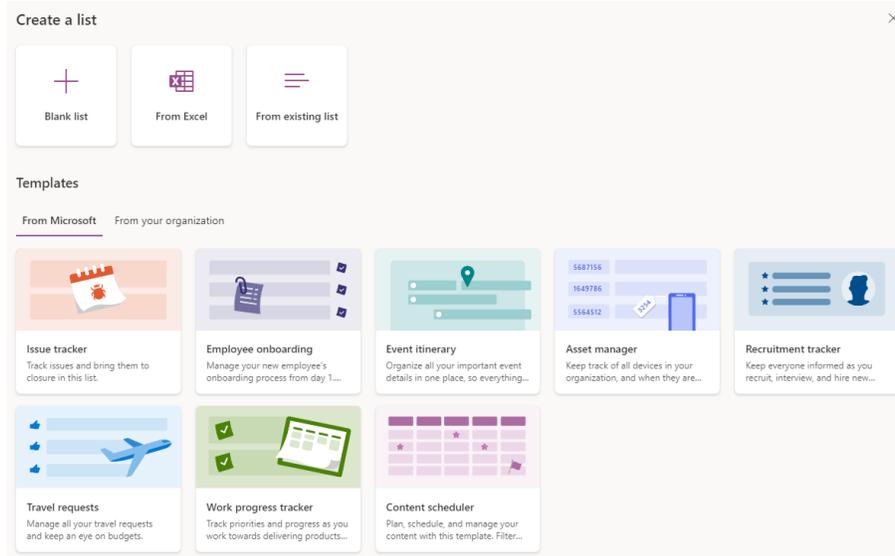
### 3. Visualize it!

Track, report and display data metrics across the organization to provide visibility into your programs. (Excel, Power BI, Teams, SharePoint Lists)

**Step 1:** Create your SharePoint list by choosing a template. We can do this from SharePoint directly or by selecting the Lists app option from our App Launcher/Waffle.

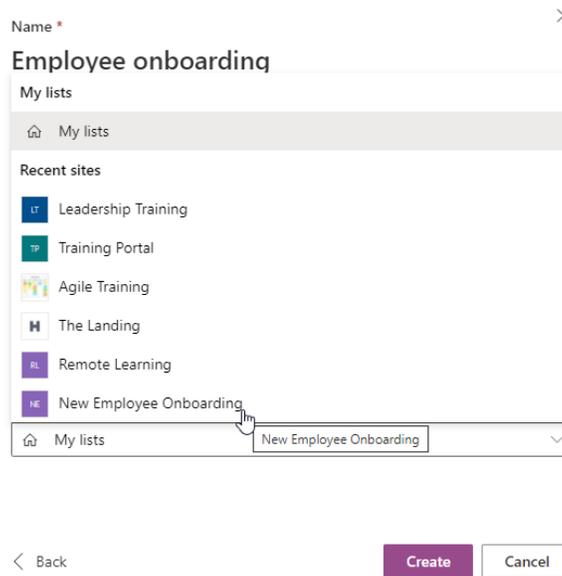


**Step 2:** Select your List by starting with a blank list, an Excel doc, an existing list or from a template. Note, you will see some list templates here and your SharePoint Admin may see even more specific templates if they are created a new modern SharePoint site for you and your team.

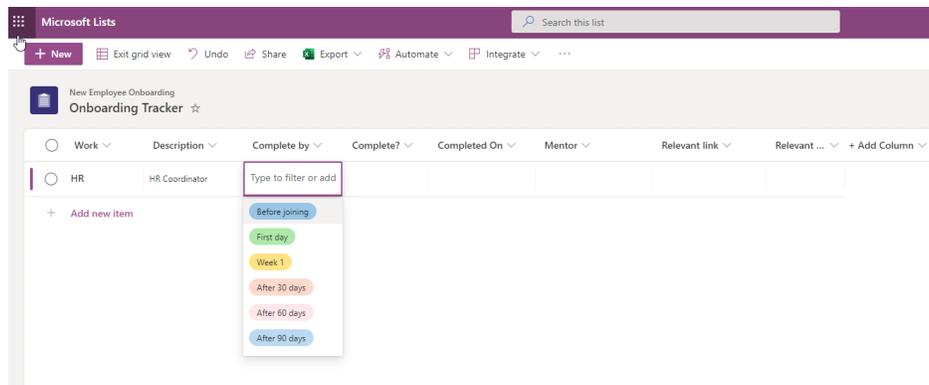


**Step 3:** Review the preview of your template and select Use template to get started. Begin by adding a name, description, icon, color and choosing the destination for this list. Take note, you

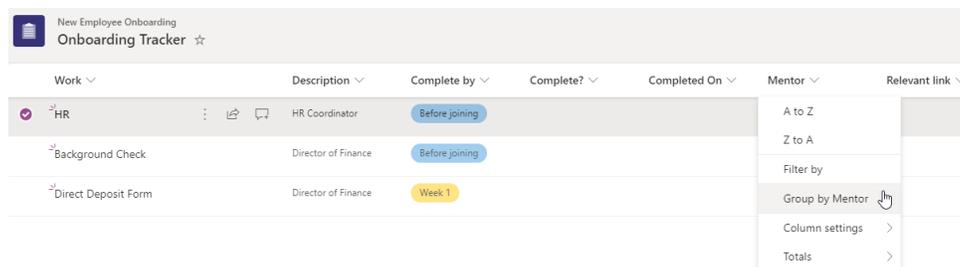
can select My Lists (where you can access this from the Lists app anytime) or you can select the team you want this to be part of and your list of options should appear for you.



**Step 4:** Begin adding data to your list, by either selecting the “New” button or the Edit in grid view option. Some of the choice option columns will appear with colored labels to make it visually more appealing. You can also populate your data in the list with content from Excel if the layout of your Excel file is consistent with the column order in SharePoint list.

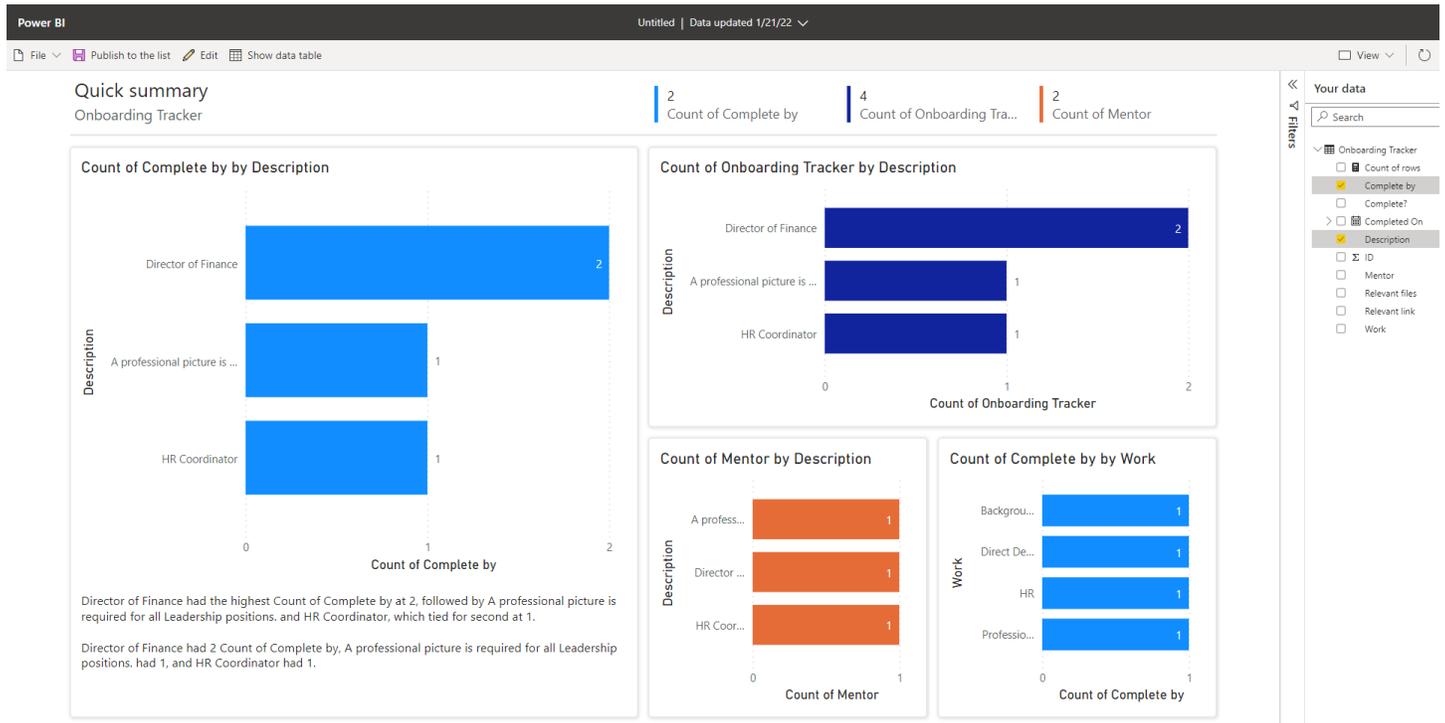


**Step 5:** As you update your information you can even modify your table using the sort, filter or grouping options.



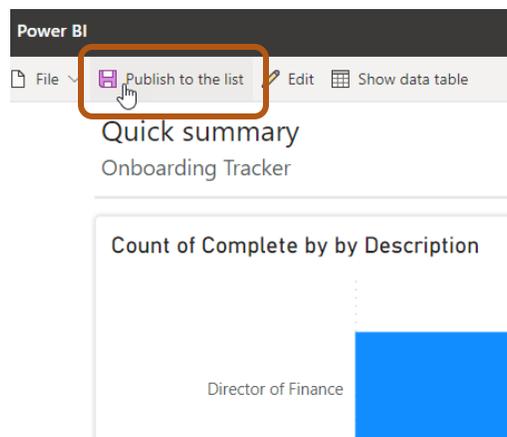
## Step 6: Extend the SharePoint List with Power BI

Extend our SharePoint List to see a built-in report using Power BI. Directly from the SharePoint list in SharePoint (cannot do this directly from the SharePoint List in Teams). Select the drop down for Integrate, select Power BI and select Visualize the list. Power BI will open, and you will see a Quick summary with details from your list.

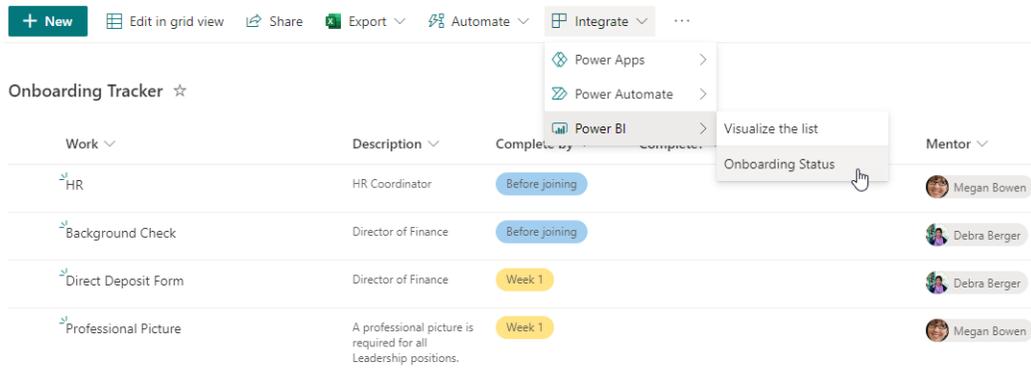


As you add more data to the SharePoint List, this Power BI visualization will also update.

**Step 7:** Select Publish to the list at the top left of the screen to sync this report with the SharePoint List. Name the report and select Publish.



**Step 8:** Navigate back to your SharePoint List in your SharePoint site. Select Integrate, Power BI and you will see your Power BI report listed. You can select this at any time to visualize your data in another way. As you update your SharePoint List, the Power BI report will dynamically update as well.



**Step 9:** Export the SharePoint List data to Excel in a simple click. Select Export and Export to Excel. The file will download as a query.iqy file. You will need to enable this file to open it in Excel. Select how you would like to look at this data in Excel (recommended to keep the suggested settings).

#### 4. Manage your project using a nifty Milestones template.

Similar to the Meeting Capture template, this Milestones template is a highly useful template that will just need enabled by your organization's Admin or the Owner of the team (depending on how it has been setup in your organization). Once the template has been enabled, you can simply add a customized tab in your Team's Channel, select Power Apps, select Sample Apps and click on the Milestones option. The good news is that once it has been added, you should be able to add Milestones to your channels moving forward.

**Step 1:** Create a new tab in your Teams channel and select Milestones (after it has been added).

Add a tab and select Milestones. If it does not show, add from Power Apps.

Select Add for the Milestones template, the select Save.

**Add a tab**

Turn your favorite apps and files into tabs at the top of the channel  
More apps

Recent

- Milestones
- Forms
- Tasks by Planner an...
- OneNote
- Power Automate
- Power Apps
- Wiki
- Website
- Viva Learning
- Stream
- Whiteboard
- Document Library
- Excel
- Lists
- PDF
- Power BI
- PowerPoint
- SharePoint
- SharePoint Pages
- Visio
- Word

More apps

- 15Five
- 360 Tours
- 365Projects
- adam.ai
- Additio
- Adobe Acrobat
- Adobe Creative...

**Milestones**  
Microsoft

Add

**About**  
More from Microsoft Corporation  
Permissions

Manage projects effectively by phasing efforts around key milestones

Stay on top of your work with efficient tracking, team status, and activity log

Plan, track, and prioritize team's work capacity across projects in a central place. See team status and work item updates to become aware of how's the work going today, and react with any needed actions. Easily manage several projects in the app to avoid switching platforms. App can be easily extended with Microsoft Power Platform to meet your org's need.

By using Milestones, you agree to the privacy policy and terms of use.

< Back

**Step 2:** You will see a sample project, System Deployment. You will update the Global Settings for your projects, by selecting the gear next to All projects.

**All projects**

Find projects

+ New project

Agile Sessions  
12 work items

**System Deployment**  
9 work items

**System Deployment**

Milestone status

0% Research - 21 Jan      0% Deployment - 28 J...

Tracking + New work item

Work item       Milestone       Status

Define Minimum Viable Prod...           

Update your Categories, Priorities and Status if you use different parameters.

**Global settings** Cancel

The details you specify here are applied to all projects.

**Category**

Category 1: Software Dev      Category 2: IT      Category 3: Business Analysts      Category 4: Business      + Add

**Priority**

Priority 1: P0      Priority 2: P1      Priority 3: P2      Priority 4: P3      Priority 5: P4      + Add

**Status**

Completion status: Done      Optional status 1: New      Optional status 2: In progress      Optional status 3: Blocked      + Add

Milestone % completion is calculated using this status.

**Step 3:** Select New Project and begin adding your Milestones.

The screenshot shows a 'New project' form with a navigation bar at the top containing 'TP', 'Planning', 'Posts', 'Files', 'Wiki', 'Planning Notes', 'Project plans', and 'Milestones'. The form has a 'Name' field with the placeholder text 'Give your project a name'. Below this are three milestone entries, each with a colored square icon, a text input field for the milestone name, and a date input field. Milestone 1 has a teal icon, 'Milestone 1' text, and '1/21/2022' date. Milestone 2 has a light blue icon, 'Milestone 2' text, and '1/28/2022' date. Milestone 3 has a light green icon, 'Milestone 3' text, and '2/4/2022' date. Each date field has a calendar icon and a trash icon. At the bottom, there is a '+ Add a milestone' button.

**Step 3:** Begin adding your work items and see the statuses change and dynamically update.

The screenshot shows the 'Agile Sessions' dashboard. On the left is a sidebar with 'All projects', 'Find projects', '+ New project', and a list of projects: 'Agile Sessions' (12 work items), 'System Deployment' (9 work items), and 'Customize'. The main area has a yellow header 'Agile Sessions' and a 'Milestone status' section with five circular progress charts. Below this is a 'Tracking' section with a table of work items.

Work Item	Milestone	Status	Priority	Assigned to	Target	Category
<input type="checkbox"/> Agile 101	Intro to Agile	In progress	P1	Megan Bowen	20 Jan	Software Dev
<input type="checkbox"/> Implementing Agile	Intro to Agile	Done	P0	Christie Cline	28 Jan	Business
<input type="checkbox"/> Agile 101	Intro to Agile	New	P2	Megan Bowen	09 Feb	Business
<input type="checkbox"/> Scrum Master Tactics	Developing SM	In progress	P1	Lee Gu	12 Feb	Software Dev
<input type="checkbox"/> Kanban Essentials	High Performan...	New	P3	Lee Gu	15 Feb	Business Analysts
<input type="checkbox"/> Agile Transformation	Intro to Agile	New	P2	Lee Gu	23 Feb	Software Dev
<input type="checkbox"/> Professional Scrum Master 1 ...	Developing SM	Blocked	P1	Megan Bowen	24 Feb	Software Dev
<input type="checkbox"/> Agile 101	Intro to Agile	New	P2	Megan Bowen	09 Mar	Business Analysts
<input type="checkbox"/> Scrum Master Tactics	Developing SM	New	P3	Ariela Vanna	15 Mar	Business Analysts

**Step 4:** Switch between Milestone Status and Team Status

**Agile Sessions**

Team status

Christie Cline 0 0 0 2  
Adele Vance 1 0 0 1  
Lee Gu 2 1 0 0  
Allan Deyoung 0 1 0 0  
Megan Bowen 2 1 1 0

Tracking + New work item

Work item	Milestone	Status	Priority	Assigned to	Target	Category
<input type="checkbox"/> Agile 101	Intro to Agile	In progress	P1	Megan Bowen	20 Jan	Software Dev
<input type="checkbox"/> Implementing Agile	Intro to Agile	Done	P0	Christie Cline	28 Jan	Business
<input type="checkbox"/> Agile 101	Intro to Agile	New	P2	Megan Bowen	09 Feb	Business
<input type="checkbox"/> Scrum Master Tactics	Developing SM	In progress	P1	Lee Gu	12 Feb	Software Dev
<input type="checkbox"/> Kanban Essentials	High Performan...	New	P3	Lee Gu	15 Feb	Business Analysts
<input type="checkbox"/> Agile Transformation	Intro to Agile	New	P2	Lee Gu	23 Feb	Software Dev
<input type="checkbox"/> Professional Scrum Master 1 ...	Developing SM	Blocked	P1	Megan Bowen	24 Feb	Software Dev
<input type="checkbox"/> Agile 101	Intro to Agile	New	P2	Megan Bowen	09 Mar	Business Analysts
<input type="checkbox"/> Scrum Master Tactics	Developing SM	New	P2	Adele Vance	15 Mar	Business Analysts

**Step 5:** Modify your view using the filter or search options.

**Filter work items**

Select milestones

- Intro to Agile
- Developing SM
- Developing PO
- High Performance Teams
- Managing Change

Clear Apply

Team status

Christie Cline 0 0 0 2  
Adele Vance 1 0 0 1  
Lee Gu 2 1 0 0  
Allan Deyoung 0 1 0 0  
Megan Bowen 2 1 1 0

Tracking + New work item

team

Work item	Milestone	Status	Priority	Assigned to	Target	Category
<input type="checkbox"/> Team Building	High Performan...	Done	P1	Adele Vance	07 Jan	Business

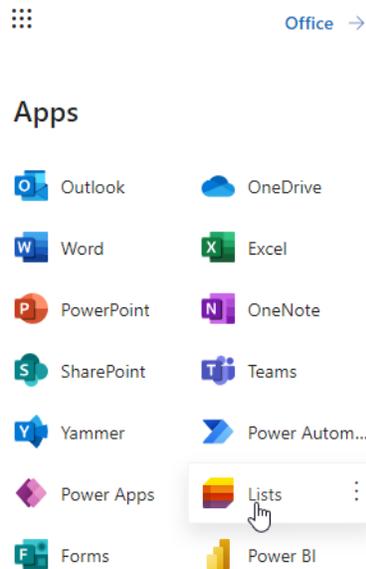
## 5. Take the manual steps away, use an APP!

Use a mobile app to update a SharePoint List or capture immediate feedback and populate a list! (Power Apps, SharePoint List)

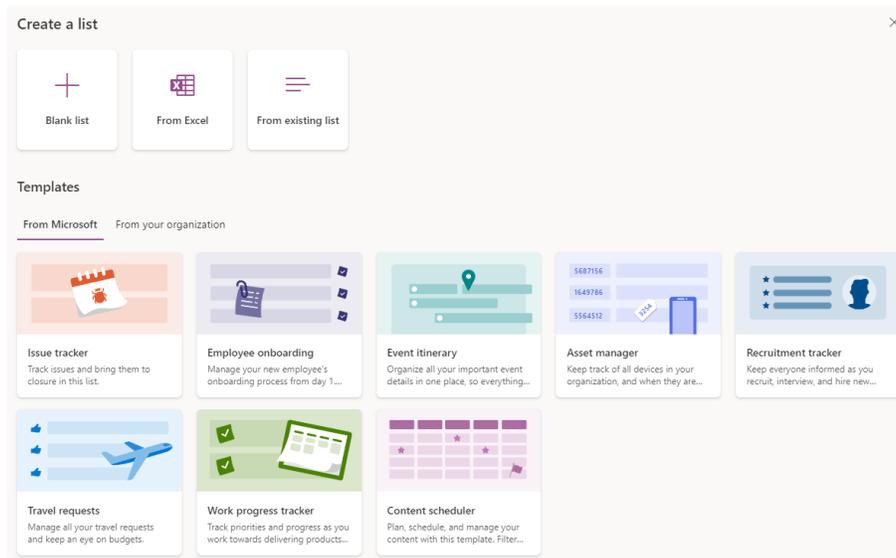
If you haven't heard, the new way to see, share and update data is not Excel, but to use a SharePoint List. Microsoft has brought these back to life in the new modern SharePoint experience and there are plenty of templates to choose from. We're going to look at our Agile Events SharePoint List. Our list tracks upcoming training sessions, including dates, session duration, speakers, session types and the location for these sessions. It is very easy to update an item in the SharePoint List by adding a new item. Now we want to make it easier for others in our organization to do this as well, so we have created an app to do this, using Power Apps. AND.... we

don't need to use any code! In fact, from our SharePoint List, the integrated tools will do this FOR US! CELEBRATE EFFICIENCY! Let's take a look.

**Step 1:** Create your SharePoint list by choosing a template. We can do this from SharePoint directly or by selecting the Lists app option from our App Launcher/Waffle.

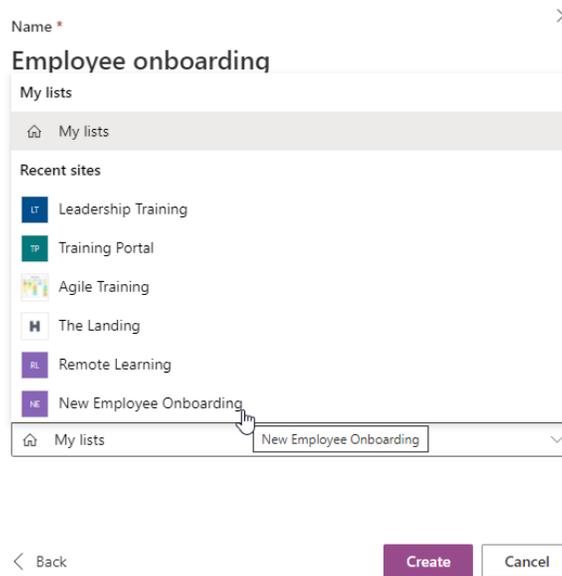


**Step 2:** Select your List by starting with a blank list, an Excel doc, an existing list or from a template. Note, you will see some list templates here and your SharePoint Admin may see even more specific templates if they are created a new modern SharePoint site for you and your team.

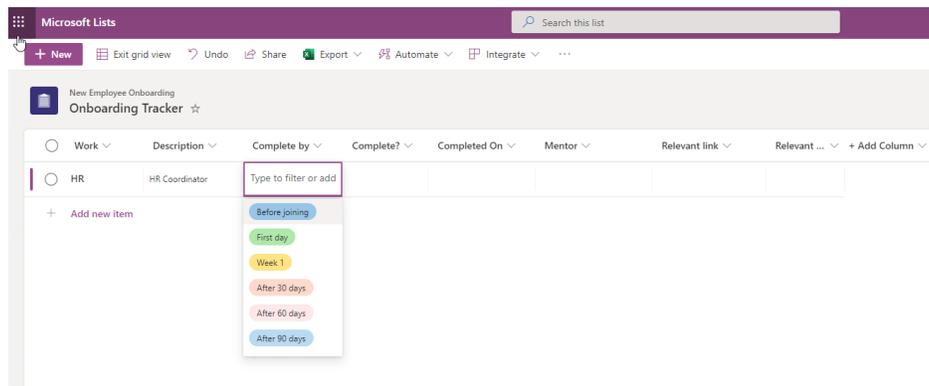


**Step 3:** Review the preview of your template and select Use template to get started. Begin by adding a name, description, icon, color and choosing the destination for this list. Take note, you

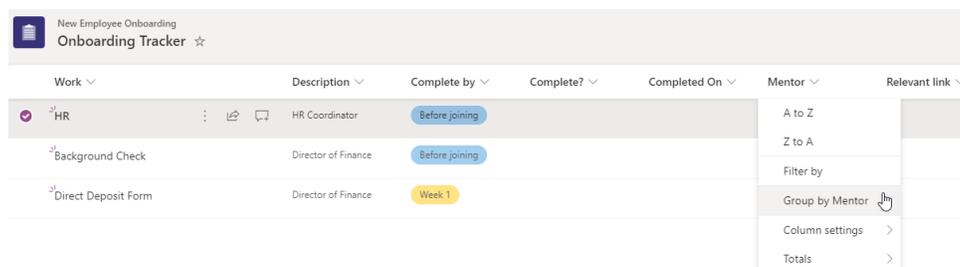
can select My Lists (where you can access this from the Lists app anytime) or you can select the team you want this to be part of and your list of options should appear for you.



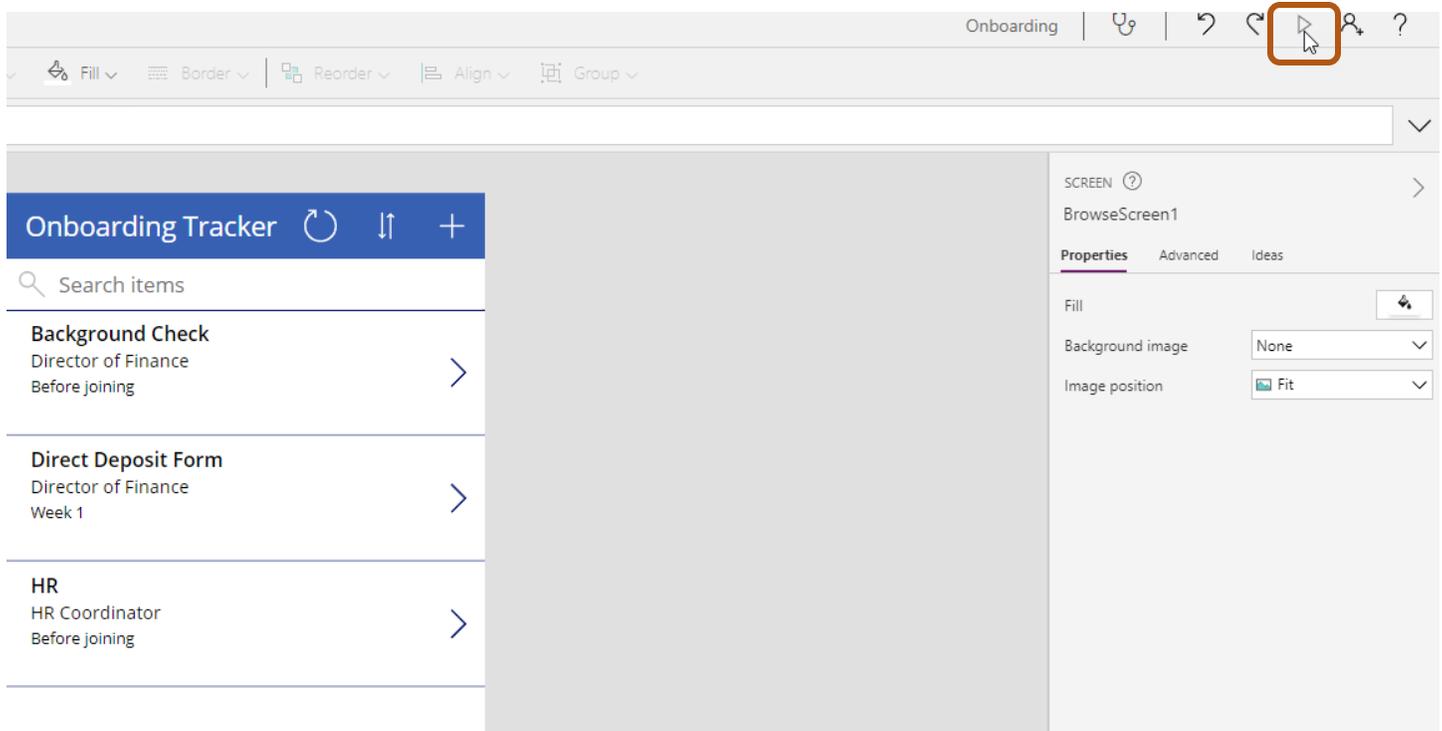
**Step 4:** Begin adding data to your list, by either selecting the “New” button or the Edit in grid view option. Some of the choice option columns will appear with colored labels to make it visually more appealing.



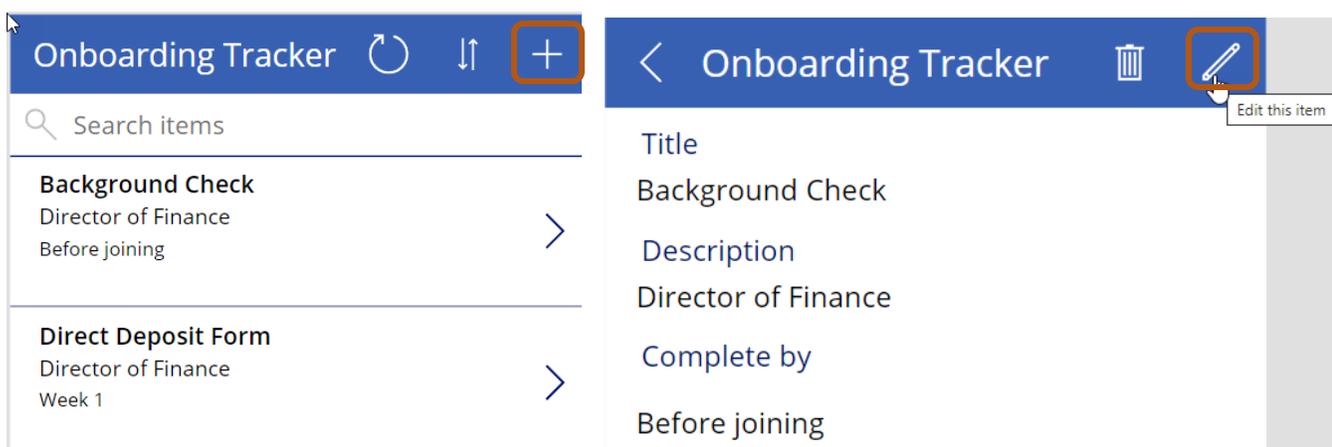
**Step 5:** As you update your information you can even modify your table using the sort, filter or grouping options.



**Step 6:** Setup the Power App to make entry by others simple. Select the Integrate drop down and select Power Apps, create an app. Name the app and select Create. Power Apps will open and preview the app for you. You can modifications here if necessary. You can also run a preview of this app using the play button in the menu. The items you see listed should match your SharePoint List.

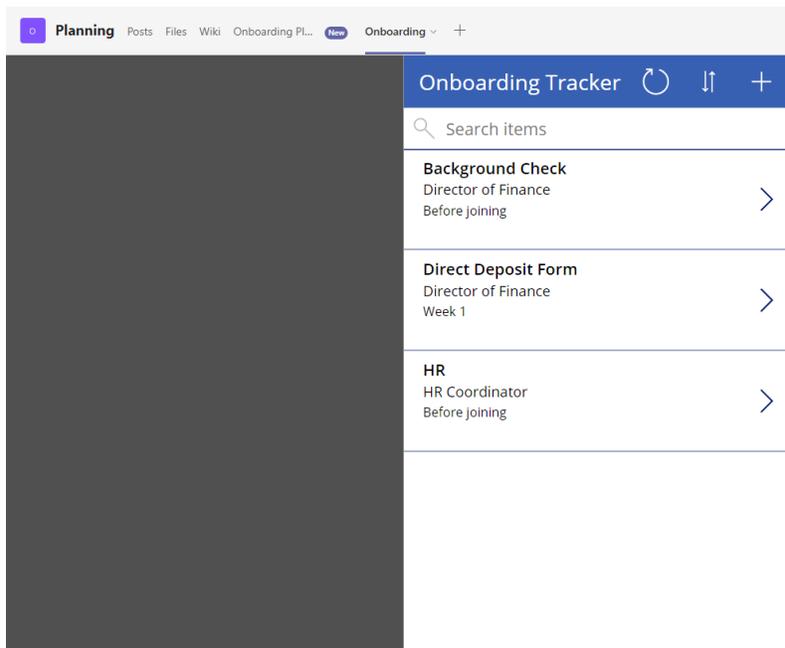


**Step 7:** Test adding a new item to this list from the app. Click on the preview button and select the plus button to add an item or select an item and click on the pen icon at the top of the app to edit an item in your list.



**Step 8:** Now make it available and easy for others to update by adding it to a Team(s) Channel(s). In your Team's Channel, add a new tab and select Power Apps. You should see My apps by

default and the app that you named and just made should appear in the list. Select this app. Any items added through this app will directly update your SharePoint List!



**Step 9:** You can also add the SharePoint List into a Team Channel as well and see updates live.

A screenshot of the 'Onboarding Tracker' app interface in a Teams channel. The app title 'Onboarding Tracker' is at the top. Below are controls for '+ New item' and 'Edit in grid view'. A table displays the list items with columns for Work, Description, Complete by, Complete?, Completed On, Mentor, and Relevant link.

Work	Description	Complete by	Complete?	Completed On	Mentor	Relevant link
HR	HR Coordinator	Before joining			Megan Bowen	
Background Check	Director of Finance	Before joining			Debra Berger	
Direct Deposit Form	Director of Finance	Week 1			Debra Berger	
Professional Picture	A professional picture is required for all Leadership positions.	Week 1			Megan Bowen	

## Other Ideas

There are likely a myriad of different ideas coming to you as you go through these solutions. I encourage you to explore where you can identify manual steps in a process that you are currently performing. Creating some of these automation features with your own work, will help you to understand how to create better streaming workflows when you're working with others as well.

Keep in mind that Teams, Power BI, Power Automate, Power Apps and other apps and services in Office 365 integrate with numerous other third-party tools as well. These are typically referred to as Connectors in the Microsoft applications. Examples can include SurveyMonkey, Jira, Adobe,

DocuSign and hundreds of other products. You can even customize a Teams channel tab with an internet tab and connect your LMS or other SaaS products. The possibilities are endless!

Thanks for participating in this session. I hope it was helpful, inspiring and fun!

## Contact Us

If you and your team would be interested in reaching out for some consulting on your projects using any of these tools, or would be interested in training, please feel free to reach out directly. I also welcome connecting on LinkedIn!

Leeanne McManus, MCT

[leeanne@ikuwsolutions.com](mailto:leeanne@ikuwsolutions.com) | [www.getikuw.com](http://www.getikuw.com)

