

Delve

Deep Dive Demo Guide

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# Before You Begin

## Hardware and Software Requirements

* Browser: Internet Explorer 11 or greater
* Client machine: Any that will support Internet Explorer 11 or greater

**Note**: the demo has not been tested on other browsers.

## Office 365 Account Credentials and Demo Home Page

This demo is run in a Web App on an Office 365 tenant. It is assumed that you have been assigned an Office 365 demo tenant in advance. The tenant name (for example, OneNoteDemo563) will be shown as <tenant> in this document. The demo hero is Katie Jordan.

* Office 365 tenant: https://<tenant>.sharepoint.com/sites/contoso
* User alias: [katiej@<tenant>.onmicrosoft.com](mailto:katiej@%3ctenant%3e.onmicrosoft.com)
* Password: pass@word1
* Demo home page URL: https://<tenant>.sharepoint.com/\_layouts/15/me.aspx

**Important note**: there may be a lag of several days after provisioning a demo tenant before realistic user behavior will be simulated by machine learning.

# Delve Demo

## Length

Approximately 30 minutes

## Intended Audience

Information Worker, Power Users, Business Decision Makers and IT Professionals

## Goals

The goal of this demo is to demonstrate how Delve can reimagine search and discovery through a visually engaging, fast, and intuitive views of their work, relevant content, and people in their network.

## Pre-demo Steps

1. Log into the demo tenant with **Katie Jordan** credentials (see the **Before you Begin** section above).
2. In the Office 365 suite navigation, click **Delve** (you may need to click the ellipsis (…) in order to see the Delve link.
   1. Alternatively, navigate to the Delve home page at https://<tenant>.sharepoint.com/\_layouts/15/me.aspx.
3. If you see the Welcome to Delve screen, click **Let’s go**.
4. Test **Shared with me** view:

This feature is scheduled to go live 10/23/2014.

* 1. In the left navigation, click **Shared with me**.
  2. Note whether content appears. If not, you should skip the relevant section in the demo.

1. Warm up the Web Apps:
   1. Click one of the content cards containing an Office document.
   2. If the Office 365 login screen appears, enter credentials **katiej@<tenant>.onmicrosoft.com**, **pass@word1**.
   3. Close the tab and return to the Delve home page.
2. Log into the tenant’s Yammer account with Katie Jordan credentials:
   1. In the Office 365 suite navigation, right-click **Yammer** and then click **Open in new tab**.
   2. Make sure you are on the login page for the tenant:

[https://www.yammer.com/<tenant>.onmicrosoft.com/](https://www.yammer.com/%3ctenant%3e.onmicrosoft.com/)

* 1. Log in using the Katie Jordan credentials [katiej@<tenant>.onmicrosoft.com](mailto:katiej@%3ctenant%3e.onmicrosoft.com), pass@word1.

1. Keep the Yammer tab open and return to the Delve Home page.
2. If you wish to hide Internet Explorer during your introduction, minimize the browser.

# Introduction

| **Speaker Script** | **Steps** |
| --- | --- |
| **Introducing Delve and Office Graph**  Welcome to Delve. Delve is a new way to search and discover content across O365 based on personalized insights. The idea behind Delve is to tailor and surface the most relevant content for you at any given time from your network. What’s considered relevant is based on you, who you work with, and what topics your colleagues are working on. This helps you stay better connected and informed on topics that matter most to you. In addition, the new experience provides an engaging and natural way to search for content across any source from within a single view. With Delve, you can easily discover content that is relevant to you, no matter where it came from: SharePoint libraries, OneDrive, or (if synced via OneDrive, local folders). |  |
| Delve is built on technology called **Office Graph**. Office Graph represents a collection of analyzed signals via machine learning, also called insights. These new insights are derived from each users’ behavior, their relationships to content, topics, and one another. Content and signals are captured from Exchange Online, SharePoint Online, and Yammer. Delve is the first experience powered by Office Graph.  You no longer need to know details about specific documents in order to find them quickly. For example, you do not need specific keywords, titles, or URLs to find what you need. Office Graph automatically discovers and sorts items with a high probability to be of interest, are liked by, or have had significant touches by members of your network or working group.  Office Graph automatically updates when content is changed, so users stay current and always view or edit the most recent versions.  Office Graph and Delve obey security settings that cover relationships between content and people in your organization. Delve does not change any permissions and will only show you content that’s stored in a location that you already have access to. You won’t see confidential information that you don’t have permissions to see. Other people won’t see any of your content either, unless they already have access to it. | 1. Introduce Office Graph.      1. Discuss how Office Graph can discover content without having to know details about your documents. 2. Discuss how Office Graph updates whenever someone interacts with content. 3. Discuss how Office Graph respects your privacy by obeying security settings and relationships. |

# Pillar 1: Stay in the know

## Main Points:

* Delve helps you stay up to date by making information more discoverable, actionable and relevant.
* Discover new information tailored to you from your network.
* Stay connected on topics that you and your colleagues are working on.

| **Speaker Script** | **Steps** |
| --- | --- |
| It’s the start of a new work day, and Web Marketing Manager Katie Jordan has just arrived at the office. To catch up quickly on several high-priority projects, she logs into Delve and starts browsing his home view.  **Views**  Views in Delve represent more natural ways of interacting with content than traditional search queries, or browsing document libraries and emails. For example, from his Delve Home view, Katie can quickly see items to which he himself contributed (“My work”), or items that have been shared with him (“Shared with me”).  **Content Cards**  Katie immediately sees the latest updates on her team’s content. The view is presented on “content cards”, each of which shows a document preview, as well as important metadata such as title, type of document, who modified it, number of views, and social network stats such as likes and comments.  Katie does not need to know in advance where all of these documents are stored. Delve gathers content from multiple sources, including Office 365, email (future), users’ OneDrive for Business, SharePoint Online, and Yammer (future). This saves Katie a lot of time and effort previously spent searching and browsing. | 1. If not already open to the Delve home page, in the Office 365 suite navigation, click **Delve** (you may need to click the ellipsis (…) in order to see the Delve link. 2. Explore the main Delve home page.      1. Show one or more of the **different views** that are available of the content. When done, return to the Home view.    1. Home (starting view)    2. My work    3. Shared with me   C:\Users\RudyJ\AppData\Local\Temp\SNAGHTML10c3330e.PNG   1. Point out content cards, document previews, and the metadata they display.   **Note**: Your view may not match the screen shot; show any of the document cards you wish.     * 1. Author, e.g. **Alex Darrow**   2. File type, e.g. **Word**   3. File location, e.g. **Document Center**   4. Buttons for sharing  1. Scroll down and show the variety of locations represented by the cards, including central document center, team sites, and libraries. |
| **Stay up to date**  In her Home view, she sees a document recently contributed by a co-worker.  Delve presented the document because it had a high probability of being of interest to Katie, based on her previous interactions with similar content and activity within her network of peers and associates. | 1. Point to any Office document recently contributed by someone other than Katie Jordan. |
| **Doc Preview**  When Katie clicks the content card, a web (Office Online) version of the document opens in a new tab. She can review the document in detail, but can also copy, save, edit and even share this information with her team.  When Katie opens or edits the document, adds tags, comments on Yammer, or add a “like”, this activity would all go back to Office Graph. The document’s metadata would immediately be updated, and the views others would see would automatically update as well.  Katie can join or start a Yammer conversation concerning the document directly from the web app view. | 1. In the content card, click the title of the document. 2. Browse through the document in the Web App. 3. Point to the options for editing, copying, and sharing the document. 4. Close the tab and return to Katie’s home view. |

# Pillar 2: Find what you need

## Main Points:

* Find the right results from any source and take action.
* Get to the content that is most meaningful for the task at hand.

| **Speaker Script** | **Steps** |
| --- | --- |
| **My work**  Katie’s manager just asked her for some Contoso financial information from several years ago that appeared in an annual report.  Katie remembers working on the financials, but not where the source document is located, its exact title, or how best to search for it.  By simply clicking **My work**, Delve rearranges the content cards to highlight documents she worked on.  Katie can then search for documents relating to the keyword **financial**.  From the previews, Katie can find the document she needs very quickly. | 1. From the home page, in the left navigation, click My work. 2. In the search box, start typing financial and point to one of the search results that dates back a year or two. 3. Note to Presenter: Because of the dynamic nature of Office Graph, a specific document is not specified in this script; you should see a number of search results. 4. Click the **X** in the search box to clear it. 5. Click the **Home** **icon** to return to the home view. |
| **Shared with me**  **Note to presenter:** If you did not see Shared with me content during pre-demo setup, skip these steps.  In addition to finding documents he recently worked on, Katie can quickly find documents that were shared with her in OneDrive for Business or in SharePoint Online sites. | 1. In the left navigation, click **Shared with me**. 2. Explore the content. 3. Return to the home page. |
| **Deep search**  Besides staying up on recently contributed content, Delve can help find any content quickly, regardless of author, file type, or source location. As long as Katie has permission to view the documents, Delve can discover and present them quickly.  While working on this year’s XT1000 marketing plan, Katie receives an urgent request from her manager Zrinka Makovac for some marketing data for a potential **Denver expansion**. Specifically, she needs information on the **demographic income profiles** of that market.  Katie scans her Home view, but doesn’t see any recently active or trending documents relating to that subject. Fortunately, a quick search will turn up what she needs. Since Delve taps into all content and topics across his network, inbox, social feeds, shared sites, etc., an initial search on **Denver** returns a number of hits.  None of the top results fit what Katie is looking for. But adding just one more term (**income**) to the search, she quickly finds the document she was looking for.  Katie notices the file has been shared from Alex Darrow’s personal OneDrive. She clicks the link and goes directly to that shared folder to see what other content Alex has shared.  Katie can post a Yammer message that mentions the Denver file and provides a link.  Delve helped Katie fulfill her manager’s request in just a few minutes. | 1. In the search documents and people field, type **Denver**. 2. View the results.   C:\Users\RudyJ\AppData\Local\Temp\SNAGHTML10def4f4.PNG   1. Add the term **income** to the search query. 2. Show the content card for the **Income Data Denver** document.   C:\Users\RudyJ\AppData\Local\Temp\SNAGHTML10e403e0.PNG   1. In the content card for **Income Data Denver**, at the bottom of the card, click **Alex Darrow’s OneDrive**.      1. Click the ellipsis next to **Income Data Denver** and then click **POST**.      1. **Optional**: Compose and post a Yammer message and add Zrinka Makovac to “People to notify”. If you do not wish to post a message at this time, close the window, close the OneDrive tab, and clear the search page.   C:\Users\rudyd\AppData\Local\Temp\SNAGHTML5de084c4.PNG   1. Return to the Delve home page. |

# Pillar 3: Discover new connections

## Main Points:

* Delve maintains a dynamic view of the top individuals you are working with most.
* You can easily get to a person’s view in Delve, view their relevant content, and interact with them directly.
* You can go directly to a person’s My Site from Delve and view more detailed content and profile information.

| **Speaker Script** | **Steps** |
| --- | --- |
| **The People group**  Delve helps you connect and engage with people you need in your daily work. In doing so, you learn more about your colleagues, their activities, and their content.  Of course, as your role, workload, and projects change, so does the group of people you interact with most. Delve automatically adapts to the reality of that change.  The people listed in Katie’s home page are not there by chance. By sensing who she has recently interacted with most, Delve is able to show the five people that are most likely to be in Katie’s “inner circle” of colleagues at the present time.  As Katie works on different projects with different people, individuals will drop off the “top 5” view to be replaced with those who are currently most active.  Katie can click on a person’s picture and go directly to their view in Delve.  The content now displayed is centered on the person’s recent work and activities.  She can quickly initiate a conversation or email message.  The content cards also contain links to the locations from which they originate, including SharePoint document libraries, team sites, and personal OneDrive libraries. Links to the OneDrive libraries are shown as **<Author Name>’s OneDrive**.  **Optional**: View someone’s OneDrive library and personal profile  Katie clicks **<Author Name>’s OneDrive** in one of the content cards to see the content in the shared OneDrive.  Once in the person’s shared OneDrive, Katie can view additional information about them in their public profile. | 1. Point out the individuals in the People area. Note that the names may change over time as Katie works on different projects with different teams and individuals.      1. Click the top photo in the list of Katie’s colleagues. 2. Point out the picture, title, and links for communicating with the colleague (Lync and e-mail).   **Note**: you may use another person as the colleague.     1. Scroll down and notice the different content source locations on the cards. 2. Point out author’s names as links to their shared OneDrive libraries. 3. If you will not be showing **OneDrive**, skip to the section **Search for an expert**.   **Optional**: View someone’s OneDrive library and personal profile   1. In a content card that displays it, click the **<Author Name>’s OneDrive** link (for example, **Alex Darrow’s OneDrive**). 2. View the person’s **Shared with Everyone** documents on OneDrive (Your view may differ depending on the person you selected in the previous step).      1. In the left navigation, click **About <Author Name>**. 2. At the right of the page, click **More Information**. 3. Point out the rich information shown on the person’s My Site.    1. Documents we have in common    2. People in common    3. Contact information    4. Profile (About…) 4. Close the tab and return to Katie’s Delve page. 5. Click **Home**. |
| **Search for an expert**  Katie is about to embark on a new project and needs some expert help on **project budgeting**. In the past, she would consult with Dorena in Finance VP Tony Krijnen’s group on this subject. Unfortunately, this person has been promoted to another division and will be unavailable.  To find another expert in this area, Katie searches for the topic “project budgeting”.  She sees content from her previous contact Dorena, but also finds a project budgeting document by **Kari Furse**. This might be a good lead.  Katie clicks Kari’s name at the top of the content card. This takes her directly to a view centered on her recent documents and activities.  Kari has a number of documents that she contributed to.  Scanning her content, Katie decides that Kari would be a good lead for help. She will send Kari a meeting invite and start a conversation. | 1. Return to the Delve home page. 2. In the search box, enter **project budgeting** and press ENTER. 3. Show the search results and point out the **Proseware Project Budget Overview** document by Kari Furse.   C:\Users\RudyJ\AppData\Local\Temp\SNAGHTML10f9eb0d.PNG   1. At the top of the content card, click **Kari Furse**. 2. Show her content. 3. In the left navigation, click **Home**. |
| **Broader connections**  Katie has a new VP of Sales and Marketing, **Bonnie Kearney**. To “stay in the know”, Katie wants to see what Bonnie is doing to set the Sales and Marketing agenda for this year. She believes Bonnie may have shared content broadly throughout the organization.  Bonnie is not in Katie’s immediate peer group, but Katie can still find Bonnie’s shared content very quickly.  Among Bonnie’s recent contributions is a deck entitled **Europe Holiday Campaign Status**. Katie is very interested in that, so she will take a look later, and perhaps download a copy for her own use.  <End of Demo> | 1. In the search box, type **bonnie**. 2. Under People, click **Bonnie Kearney**.   C:\Users\RudyJ\AppData\Local\Temp\SNAGHTML1d5a4988.PNG   1. Note the content modified by Bonnie or ~~trending around her~~. 2. Point out the **Europe Holiday Campaign Status** deck.   C:\Users\RudyD\AppData\Local\Temp\SNAGHTML4940dbaf.PNG |

# Reset Instructions

1. If you posted a Yammer message during the demo, go to the Yammer network and delete it.