



# Viva Technical Essentials

Karl Kocar



# Partner University: Viva Technical Essentials

 <p>Microsoft Viva Connections technical essentials</p> <p>Explore the destination for news, conversations, apps, and more.</p> <p>2022-05-05</p>	 <p>Microsoft Viva Insights technical essentials</p> <p>Create a culture in which people and business can thrive.</p> <p>2022-05-05</p>	 <p>Microsoft Viva Learning technical essentials</p> <p>Bring learning courses from multiple content providers to you.</p> <p>2022-05-05</p>	 <p>Microsoft Viva Topics technical essentials</p> <p>Set up content and expertise automatically, and put knowledge to work.</p> <p>2022-05-05</p>
 <p>Microsoft Viva Goals technical essentials</p> <p>Discover a goal alignment solution that connects teams and priorities.</p> <p>2022-06-15</p>	 <p>Customizing all Microsoft Viva apps in Microsoft Teams</p> <p>Learn how admins can configure Viva modules in Teams.</p> <p>2022-05-02</p>	 <p>Microsoft Viva Employee Experience: Technical assessment</p> <p>Take the assessment by first signing in to Partner University.</p> <p>2022-05-02</p>	 <p>FAQ for Partner University</p> <p>Review the FAQ for Partner University.</p> <p>2021-10-05</p>

[Microsoft Viva Employee Experience: Technical learning path](#)  
[Microsoft Viva Employee Experience: Technical assessment](#)

<https://github.com/karlkocar/VivaTechEssentials>

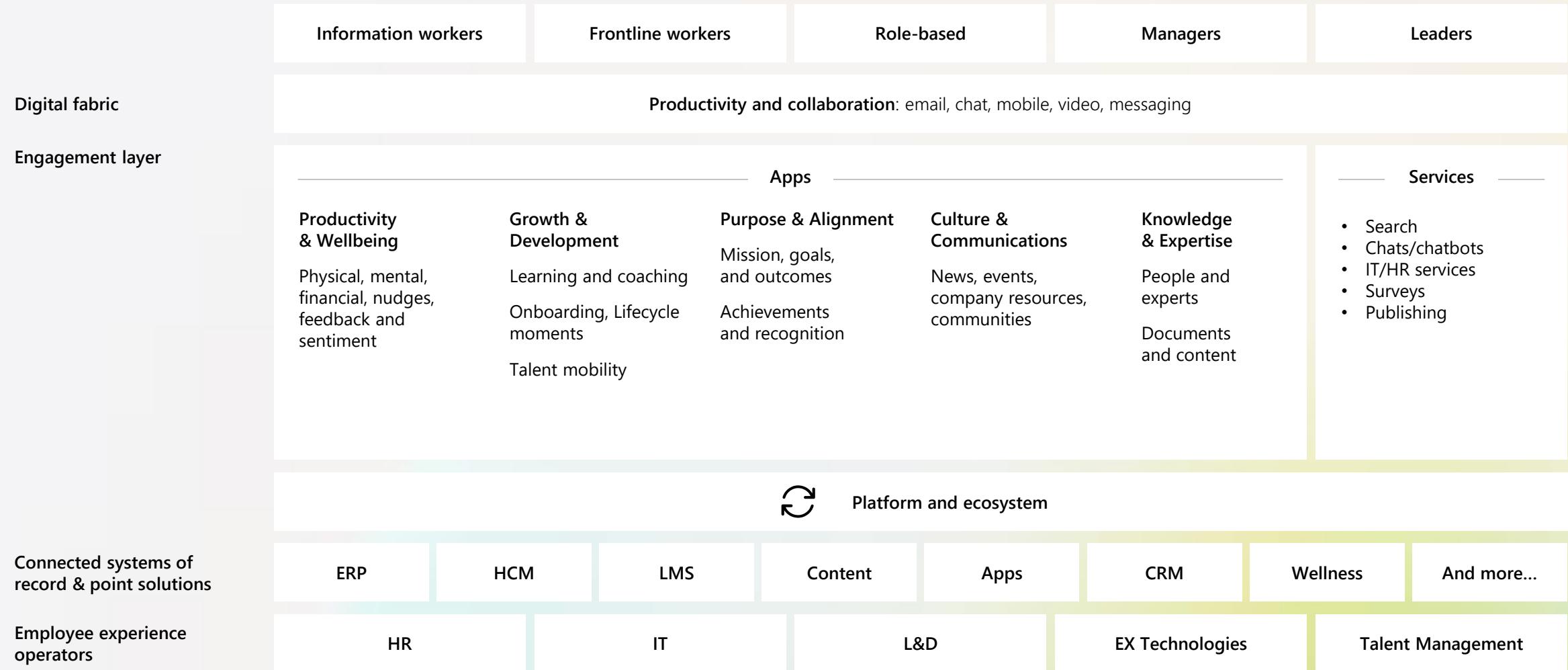
# What is an employee experience platform (EXP)?

A digital platform that helps organizations create a thriving culture with engaged employees and inspiring leaders



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# Microsoft Viva

The integrated employee experience platform that empowers people and teams to be their best



Viva Connections | All apps in one place

All employees

Role-based experiences

## Connection

Keep everyone informed, included, and inspired



Viva Engage



Viva Amplify\*

## Insight

Improve productivity and wellbeing with actionable insights



Viva Insights



Viva Pulse\*

## Purpose

Align people's work to team and organization goals



Viva Goals

## Growth

Help employee learn, grow, and succeed



Viva Topics



Viva Learning



Viva Sales<sup>+</sup>

## Microsoft 365

### Platform and admin services

Briefing email, people, answers, admin experience, common navigation

### Privacy and security

Granular feature access controls, inherited permissions for 3P, differential privacy for insights

### Integrations to HCM, CRM, LMS, wellness, and more

Workday, Qualtrics, SAP SuccessFactors, LinkedIn, Headspace, and more



YAMMER

VIVA ENGAGE

# Yammer is evolving to Microsoft Viva Engage

[Blog home](#) / Microsoft Viva

A photograph showing three people in a professional setting. Two women and one man are seated around a round wooden table, engaged in a discussion. They are all dressed in business attire. The background shows a large window with a cityscape view.

News Microsoft Viva Enterprise · 6 min read

## Yammer is evolving to Microsoft Viva Engage with new experiences rolling out today

By [Seth Patton](#), General Manager, Microsoft 365

February 13, 2023

Microsoft 365

Microsoft Teams

Outlook

[more ▾](#)

Hybrid work in an uncertain economic climate is causing many leaders to rethink how to scale meaningful connections among their distributed teams. More than half (51 percent) of employees surveyed for our Work Trend Index say relationships outside their immediate work group have weakened.<sup>1</sup> At the leadership level, building social capital is crucial to the success of workplace culture. In fact, 68 percent of business decision-makers view cohesion and social connections within teams as a moderate to strong challenge due to the shift to hybrid work.

[Yammer is evolving to Microsoft Viva Engage | Microsoft 365 Blog](#)



# Viva Engage Features

## Microsoft 365

Available to customers at no additional charge

### Build communities

#### Apps

Viva Engage app in Teams  
Viva Engage app in Outlook  
Yammer app (web/mobile)

#### Communities

Public, private  
Create posts including Q&A  
Video, images, files & links  
Reactions and nested replies  
Announcements, notifications  
Post on behalf of

### Connect & contribute

#### Storyline

Posts  
Stories (coming soon)  
Storylines page & feeds  
Following  
Posts in Viva Connections  
Notifications: Teams, Outlook  
People recommendations

### Communicate with employees

#### Community-based comms

All Company  
Restricted & official  
Define channels & audiences  
Delegation (Post-on-behalf)  
Pin and feature post  
Announcements in Viva home  
Announcement notifications  
Post and community insights

#### Events

Company-wide virtual events  
Q&A in Teams meetings

### Share knowledge, answers and ideas

#### Knowledge communities

Q&A posts

#### Topics

Add topics to conversations  
Topic following & feeds

### Manage with confidence

#### Integrations

Files in SharePoint & OneDrive

#### Security, privacy, compliance

Keyword monitoring  
Report conversation  
eDiscovery, Data Retention  
Communications Compliance\*

#### Manage guests

Azure B2B guests

#### Administration

Admin role

## Viva Engage Premium

Available to Viva Premium Suite customers starting Q1 2023

#### Enhanced storyline features

Customizable cover photo  
Storylines digest Outlook  
Storylines catch-up Teams

#### Storyline communications

Post on behalf of  
Featured posts & stories  
Storyline post insights

#### Leadership engagement

Leadership corner  
Leader identification  
Personal & audience analytics

#### Features for communicators

Communications role

#### Events & campaigns

Ask-me-anything events  
Social #campaign pages

#### Viva Topics integrations

Conversations in Topics  
Topic cards in conversations

#### Answers in Microsoft Viva

Answers in Microsoft Viva  
Enterprise-wide, open Q&A  
Route questions to experts

# Viva Engage: Storyline & Stories



Viva Engage: Storylines & Stories

#MicrosoftEmployee #MSPartnerUK

# Agenda

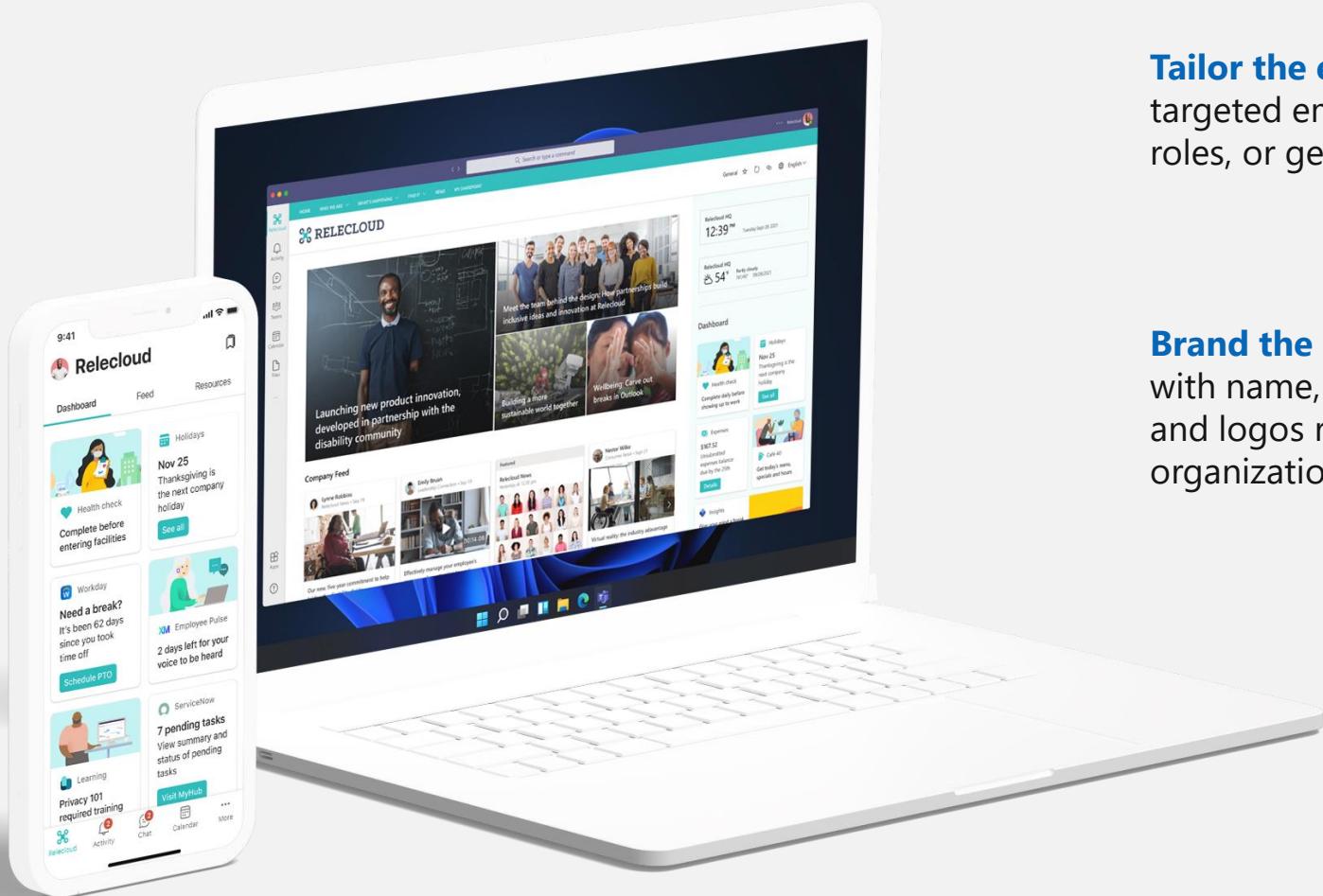
## Connections

- Set up and launch
- Introduction to the SharePoint App Bar
- Apply audience targeting to cards
- Plan build and launch a homesite
- Build your first SharePoint Adaptive Card Extension
- Choose settings for the Mobile App
- Connections Feed
- Boost SharePoint news from organisation news sites



SHAPE CULTURE, FOSTER CONNECTIONS

# Modernize your employee experience



**One place** to connect with news, conversations and resources from across the organization

**Tailor the experience** to targeted employee groups, roles, or geos

**Brand the experience** with name, icon, colors and logos reflecting your organization's identity

**Personalized experience** that delivers relevant content, information and resources, powered by Ai and Microsoft Graph

**Create custom components** that enrich the experience with powerful frameworks

**Leverage your investments** in SharePoint, Engage, Teams, Stream, and Microsoft 365 security, compliance and identity

**Integrate your investments** in partner solutions from leaders including Workday and ServiceNow



# Meeting Customers where they are at with Viva Connections

## Bring Home site to Teams

The screenshots illustrate how a company's internal communication platform (The Landing) can be embedded directly into Microsoft Teams. This integration allows users to access company news, events, and other resources from within their messaging app, streamlining their workflow.

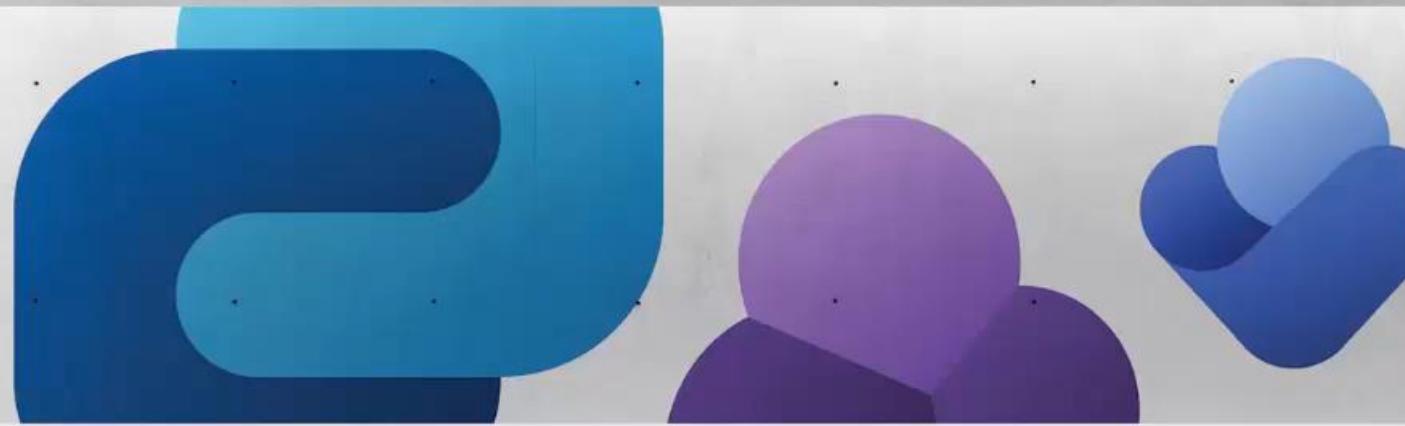
## The Best of both

This configuration represents the "Best of both" approach. It combines the familiar look of a company's internal website with the mobile-friendly, personalized experience of the Microsoft Viva app. This dual-layered approach ensures that users can engage with company information on their desktop and receive tailored notifications and reminders via mobile.

## Viva Only

The "Viva Only" configuration represents a shift towards a more focused and modular approach to company communication. By consolidating all features into the Microsoft Viva suite, it aims to provide a more cohesive and personalized user experience. This approach is particularly effective for mobile users who may not have access to a desktop browser or prefer a more streamlined interface.

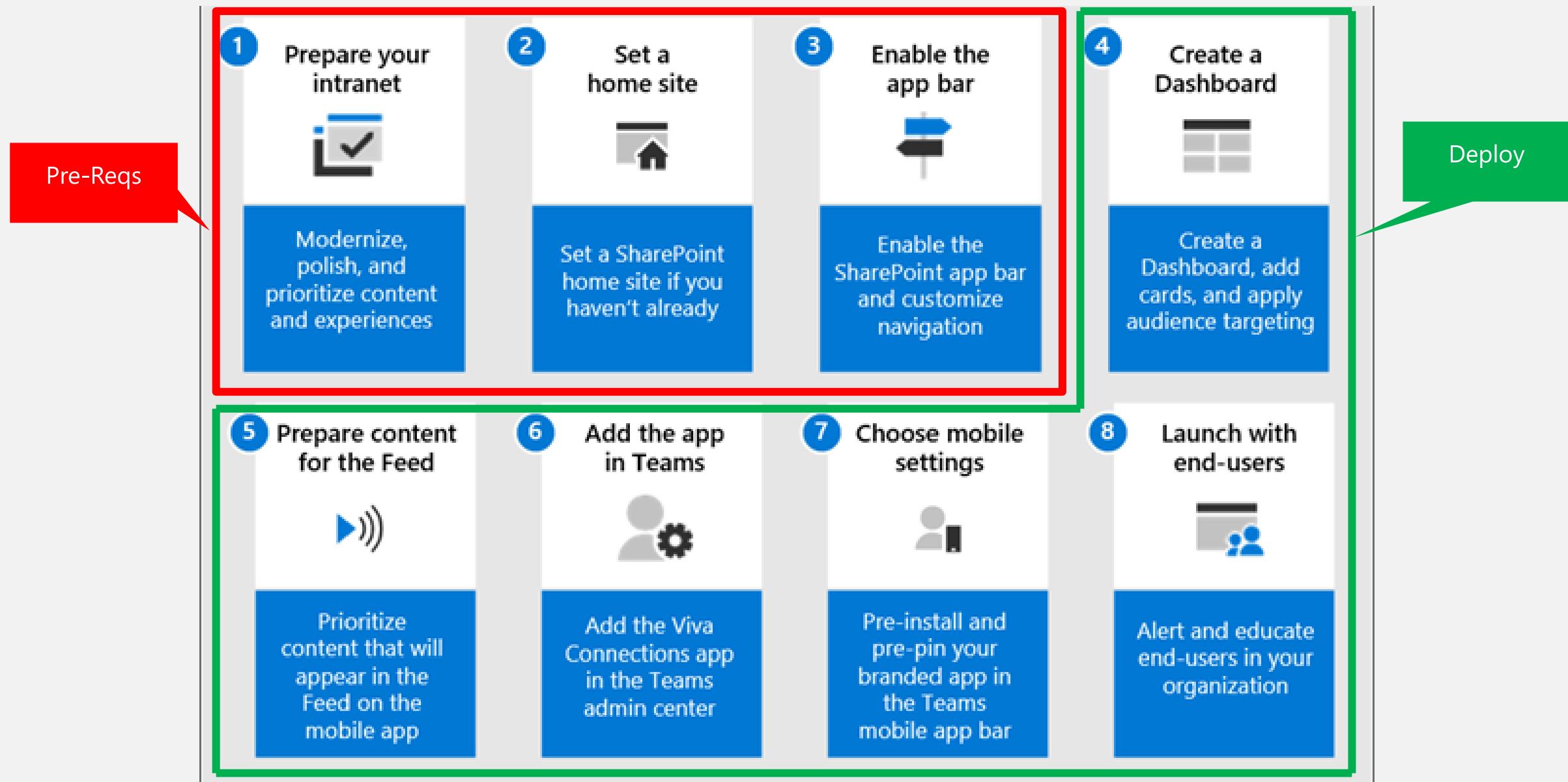
# New Viva Home Experience



Viva Connections:  
Switching the Home Experience

#MicrosoftEmployee #MSPartnerUK

# Set up Viva Connections



# Set a Home Site

## Select

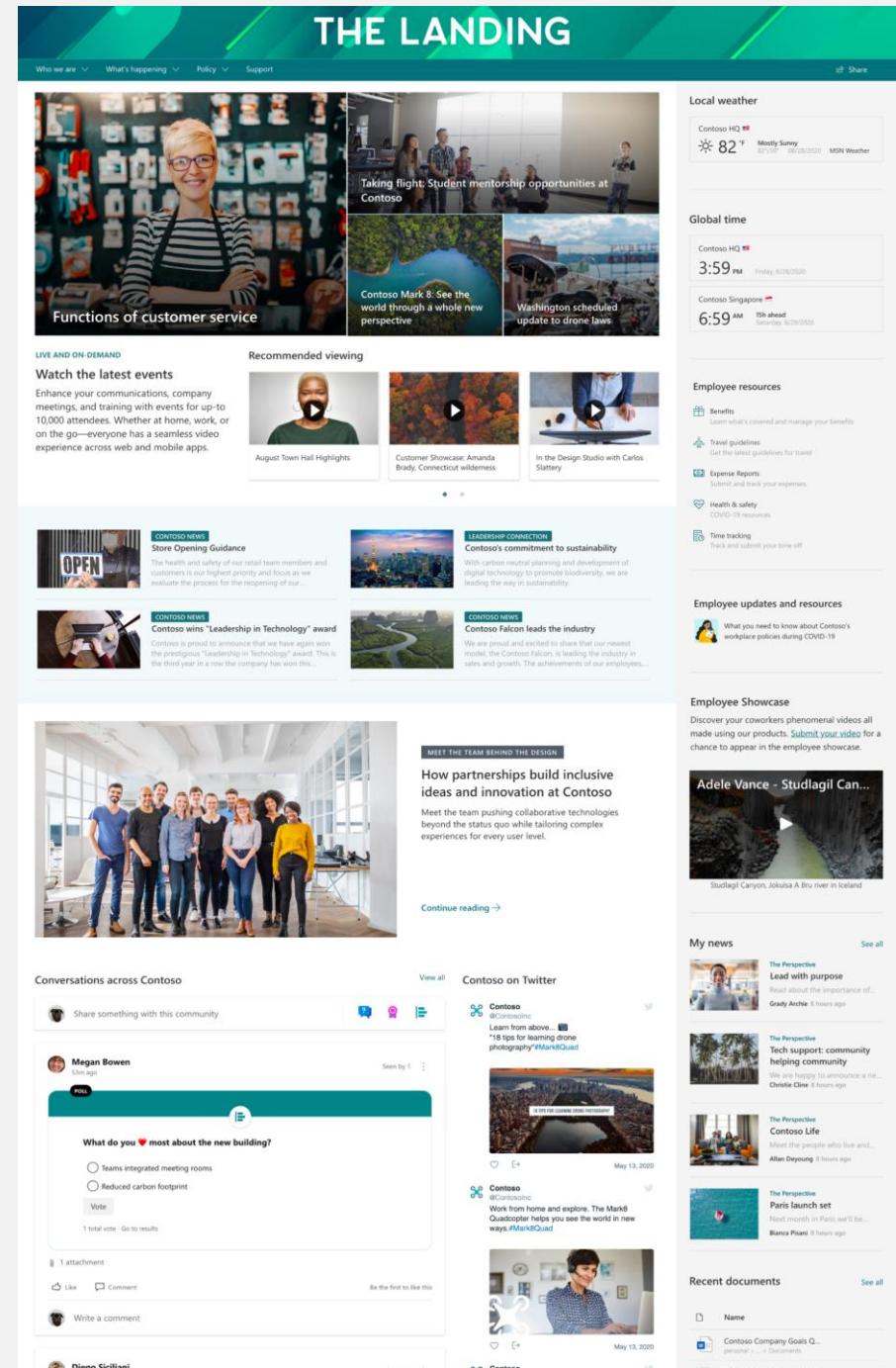
A modern home site is the top landing page for all users in your modern intranet. When you deploy Viva Connections, your SharePoint home site will become the intranet landing experience inside of Microsoft Teams.

## Get started

1. If your organization does not already have a home site, [learn more about how to plan a home site](#).
  2. Then, [set the home site](#) in the SharePoint admin center.
  3. Make sure you [share the home site](#) with everybody in your organization.
- A SharePoint home site is required to set up Viva Connections.
  - Home sites are generally high-traffic sites that should be [optimized for performance](#)

## Permissions

SharePoint admin (or higher) can create a home site.

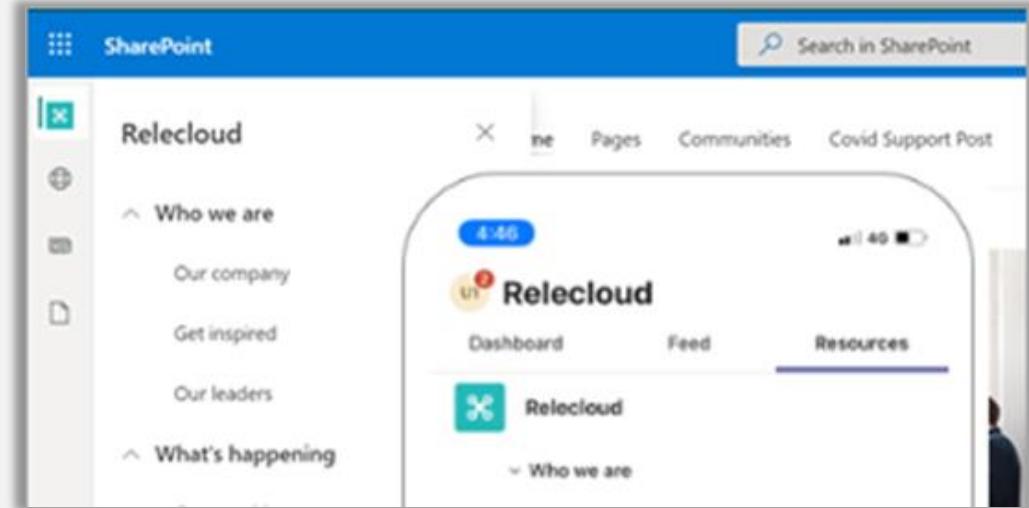


The screenshot displays the SharePoint 'THE LANDING' page, which serves as the top-level intranet site. It features a header with navigation links for 'Who we are', 'What's happening', 'Policy', and 'Support'. Below the header, there's a large image of a woman smiling in front of a wall of photos, with the text 'Functions of customer service'. To the right of this main image are several smaller cards: 'Taking flight: Student mentorship opportunities at Contoso', 'Contoso Mark 8: See the world through a whole new perspective', and 'Washington scheduled update to drone laws'. The page also includes a 'LIVE AND ON-DEMAND' section for 'Watch the latest events', a 'Recommended viewing' section with video thumbnails for 'August Town Hall Highlights', 'Customer Showcase: Amanda Brady, Connecticut wilderness', and 'In the Design Studio with Carlos Slattery', and a 'Conversations across Contoso' section where users can share their thoughts on various topics.

# Enable Global Navigation & App Bar

## Navigation and the SharePoint app bar

The Resources tab of the mobile app automatically uses the global navigation links that you set up in your [SharePoint app bar](#). This provides users with a familiar navigation structure and allows them to open sites, pages, news, and more — right from their mobile device.



## Notes

Global navigation is the only app bar tab that can be customized.

When global navigation is disabled or not configured, the home icon links to the SharePoint start page.

Specific SharePoint app bar tabs cannot be disabled.

The SharePoint app bar cannot be disabled on specific sites.

The SharePoint app bar may impact current page customizations specifically those that appear on the left side.

Personalized content in the SharePoint app bar is enabled by Microsoft Graph.

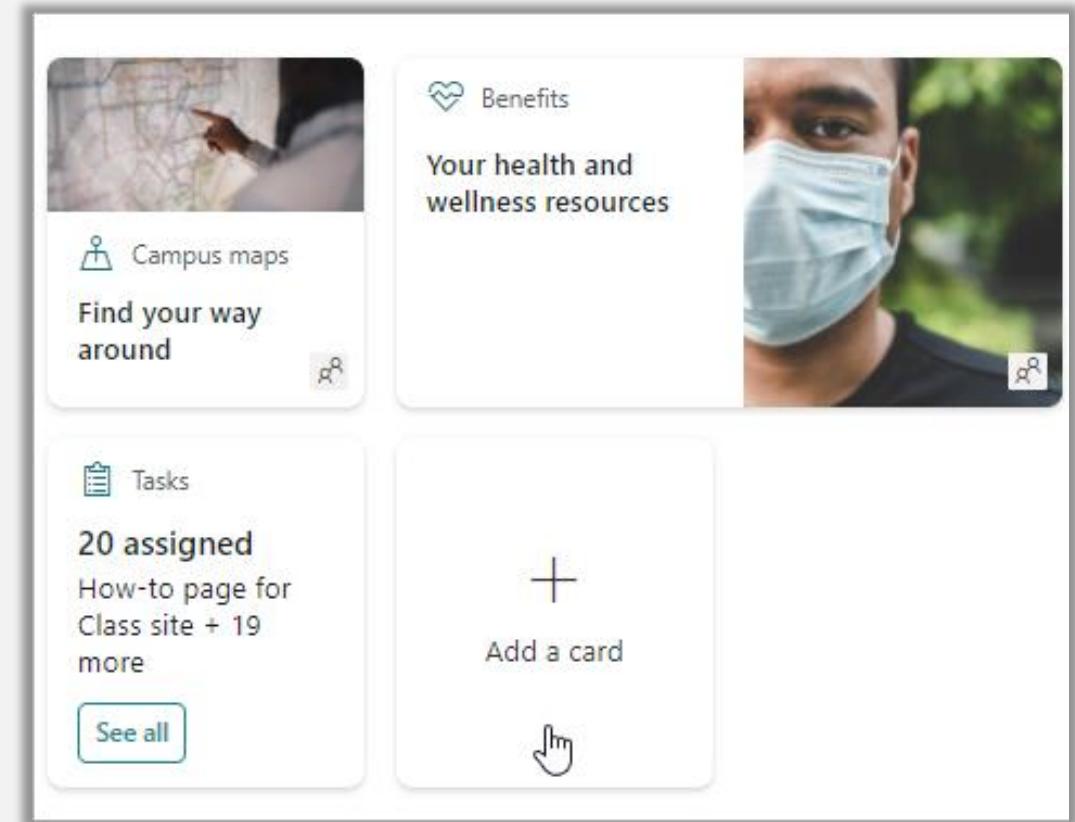
The SharePoint app bar will not display in SharePoint for external or guest users outside of your organization.

# Create a dashboard

The dashboard brings it all together – it provides a personalized landing experience and is designed to be the central destination where everyone can discover organization resources and complete tasks. You can even apply audience targeting to dashboard cards to give your users an experience tailored to them. [🔗](#)

The dashboard is made up of cards that can be linked to SharePoint pages, existing Teams apps, third-party apps, and other custom solutions.

To develop your own custom cards using Adaptive cards, see [Adaptive Cards Overview - Adaptive Cards | Microsoft Docs](#)



## Note

The ability to create a dashboard is available only on your home experience site

# Dashboard Leverages Existing Investments

Configurable to company brand

Adaptive Cards + SharePoint & Teams Apps

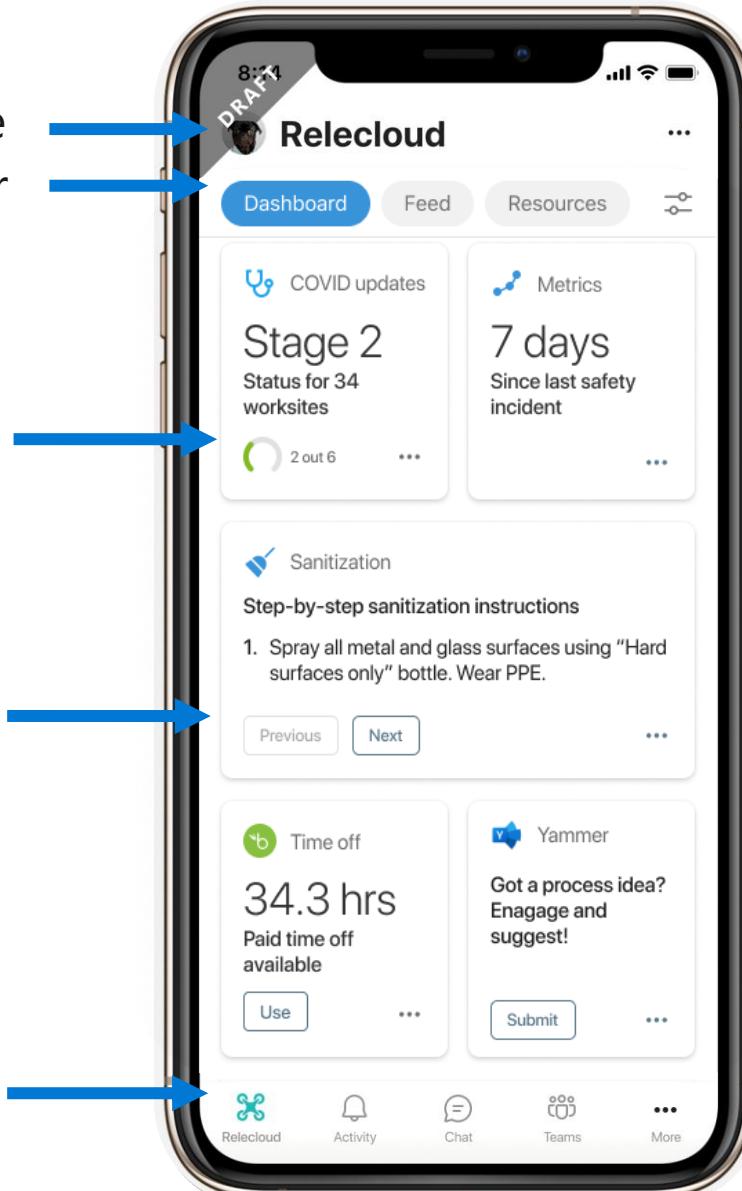
Custom Card capabilities  
with Adaptive development

Company Name  
Nav bar

Medium Adaptive Card

Large Adaptive Card

Company Logo



# Adaptive Card Extensions (ACEs)

- New SharePoint Framework (SPFx) component type
- Works both on the Viva Connections Dashboard as well as SPO's modern pages
- Used by developers to build Cards and Quickview experiences
- ACEs can link to SharePoint, Web, and Teams Apps
- Introduces a clear separation between UX and business logic:
  - UX is **constrained**: no full control of the DOM
- Uses Adaptive Card framework components

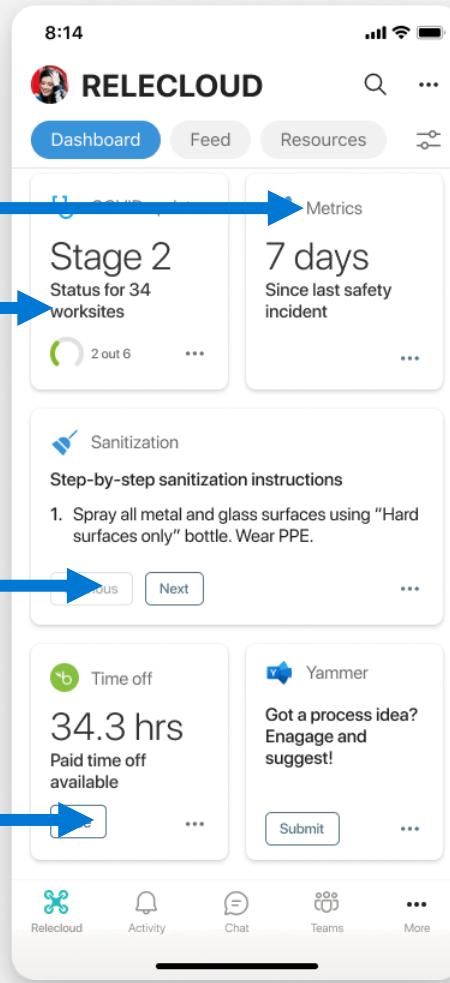
# Platform for Customized Cards

1. Dynamic Title & Icon

2. Dynamic Desc

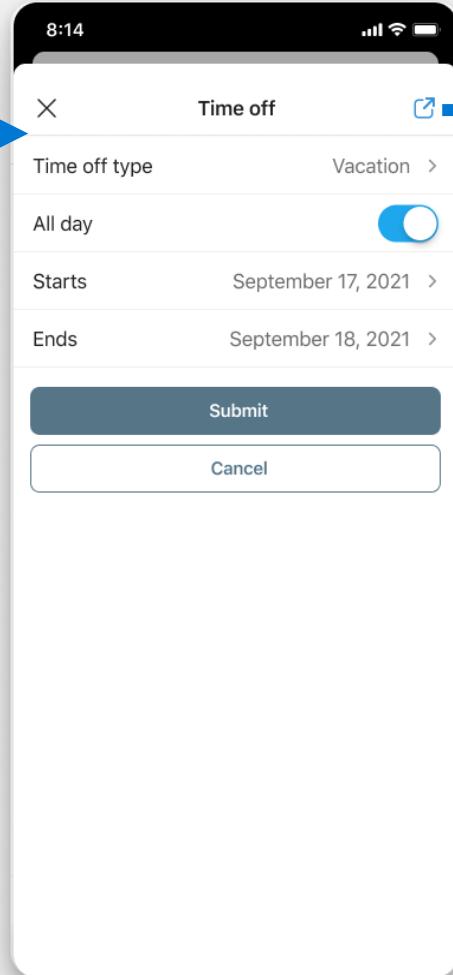
3. Multiple Buttons

4. Dynamic Button



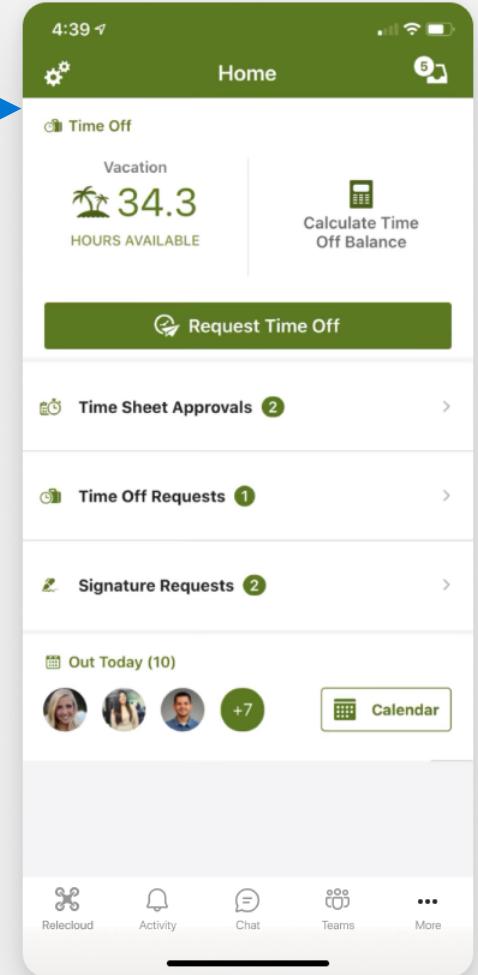
L1 Card

5. Custom L2s



L2 Quickview

6. Link to App



L3 App

# Audiences

## Targeting

With audience targeting, you can promote cards to specific groups of people. This is useful when you want to present information that is especially relevant to a particular group of people. For example, you can target cards to a specific department.

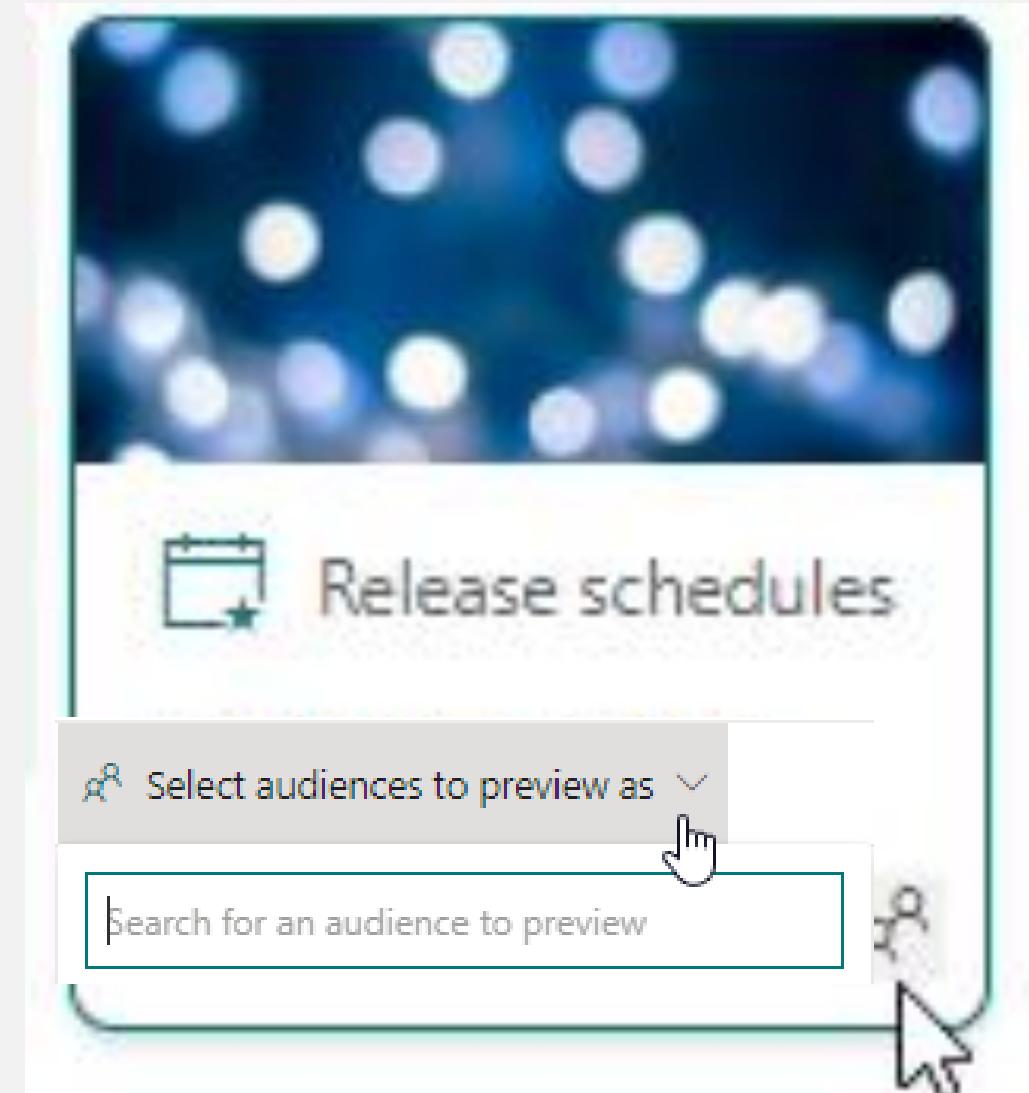
When a card is successfully targeted to an audience, you'll see a people icon in the lower left corner of the card.

When you've targeted a card, you can see how different audiences will see your dashboard depending on the audience they are part of, and how it will look on mobile and desktop.

### Note

If you've selected an audience group that you recently created or changed, it may take some time to see targeting applied for that group.

Azure Active Directory groups (including security groups, Microsoft 365 groups, and AAD dynamic groups) are supported.



# Anatomy of an ACE | Quickview flexibility

Start with <https://adaptivecards.io/samples/>

**Flight itinerary**

Passengers  
Sarah Hum  
Jeremy Goldberg  
Evan Litvak

2 Stops  
Tue, May 30, 2017 12:25 PM

San Francisco Amsterdam  
**SFO** **AMS**

Non-Stop  
Fri, Jun 2, 2017 1:55 PM

Amsterdam San Francisco  
**AMS** **SFO**

Total \$4,032.54

**Expense report**

**EXPENSE APPROVAL** PENDING

Trip to UAE ER-13052 EXPORT AS PDF

Submitted By Matt Hidinger matt@contoso.com

Duration 2019-06-19 - 2019-06-21

Submitted On 2019-04-14

Reimbursable Amount \$400.00

Awaiting approval from Thomas thomas@contoso.com

Submitted to David david@contoso.com

DATE	CATEGORY	AMOUNT
06-19	Air Travel Expense	\$300.00
06-19	Auto Mobile Expense	\$100.00
06-21	Excess Baggage Cost	\$50.38

Total Expense Amount \$450.38  
Non-reimbursable Amount (-) \$50.38  
Advance Amount (-) 0.00  
Amount to be Reimbursed \$400.00

**Stock update**

Microsoft Corporation Nasdaq Global Select: MSFT

Fri, May 3, 2019 1:00 PM

128.90

▲ 2.69 USD (2.13%)

	Open	High	Low
	127.42	129.43	127.25

**Input form**

Phone

Comments

Quantity

Due Date

Start time

**Input.ChoiceSet**  
What color do you want? (compact)  
 Red

What color do you want? (expanded)  
 Red  
 Green  
 Blue

What color do you want? (multiselect)  
 Red  
 Green  
 Blue

**Input.Toggle**  
 I accept the terms and conditions (True/False)

**Agenda**

A Redmond 8a - 12:30p 1hr

B Bellevue 12:30p - 3p 1hr

C Seattle 8p

Contoso Campaign Status Meeting Conf Room Braverm-2/9050

Contoso Brand Guidelines shared by Susan Metters about 45 minutes

Alaska Airlines AS1021 flight to Chicago Seattle Tacoma International Airport (17801 International Blvd, Seattle, WA, United States)



# SPFX ACE



# Feed content and targeting experience



**SharePoint news**

Boosted News



**Yammer conversations**

Featured Posts



**Feed web part**

Existing home site



**Viva Connections**

Microsoft Teams

The screenshot shows the Microsoft 365 Home page. On the left, there's a vertical navigation bar with icons for Activity, Chat, Teams, Calendar, Files, Insights, Learning, and Apps. The 'Activity' icon is highlighted with a blue box. The main content area features a banner for 'RELECLOUD' with a smiling man in front of a chalkboard. Below the banner, there's a section titled 'Launching new product innovation, developed in partnership with the disability community'. To the right of this are three smaller cards: 'Meet the team behind the design: How partnerships build inclusive ideas and innovation at Relecloud', 'Building a more sustainable world together', and 'Wellbeing: Carve out breaks in Outlook'. At the bottom, there's a 'Company Feed' section with four news cards: 'Boosted' by Lynne Robbins, 'Expansion of benefits with Relecloud's new health plan' by Emily Bruan, and 'Featured' news from Relecloud News. The right side of the screen includes a weather forecast for Relecloud HQ (54°) and a dashboard with various status updates like Holidays, Health check, Expenses, and Insights.

[Boost SharePoint news from organization news sites - Microsoft Support](#)  
[Feature a conversation in new Yammer - Microsoft Support](#)



# How is the Viva Connections feed curated?

## Where does content in the Viva Connections Feed come from?

Feed content primarily comes from **SharePoint news** and **Yammer posts**

- SharePoint news posts and “boosted” SharePoint news from authorised organisational news sites
- SharePoint news and videos from sites you follow and are a member of
- SharePoint news that has audience targeting applied
- Videos on SharePoint or OneDrive that are shared with your entire organization
- Yammer posts, featured posts, and announcements in All Company
- Yammer posts, featured posts and announcements in communities that you are a member of

### Bottom line:

**As a consumer of the feed:** you should be a member/follow of SharePoint sites and Yammer communities

**As a publisher to the feed:** you should post news and announcements to SharePoint sites and Yammer communities.

The screenshot shows the Viva Connections interface with the 'Feed' tab selected. A news item by 'MSW' (3 hours ago) is displayed, featuring a photo of a person in a video call. The headline reads: "Microsoft Teams uses AI and machine learning to filter out noise and improve calls". Below the headline, there is a summary: "A new set of capabilities are built into Teams' underlying architecture, powered by AI and ML, including echo ... See more venturebeat.com". At the bottom, there are navigation icons for Viva Connections, Activity, Chat, Teams, Calendar, and More.

# How is the Feed Ranked?

... today.

We're experimenting and rapidly iterating on the logic used.

**Chronology**  
Content is sorted into 3 buckets

0-4 Days

**Promotion**  
Boost & Featured is surfaced highly in each bucket.

5-8 Days

**Source Priority**  
“Top Down” messaging is ranked slightly higher than organic content from people around you.

9-30 Days

**Engagement**  
Ensure dynamic mix of content types within each bucket.

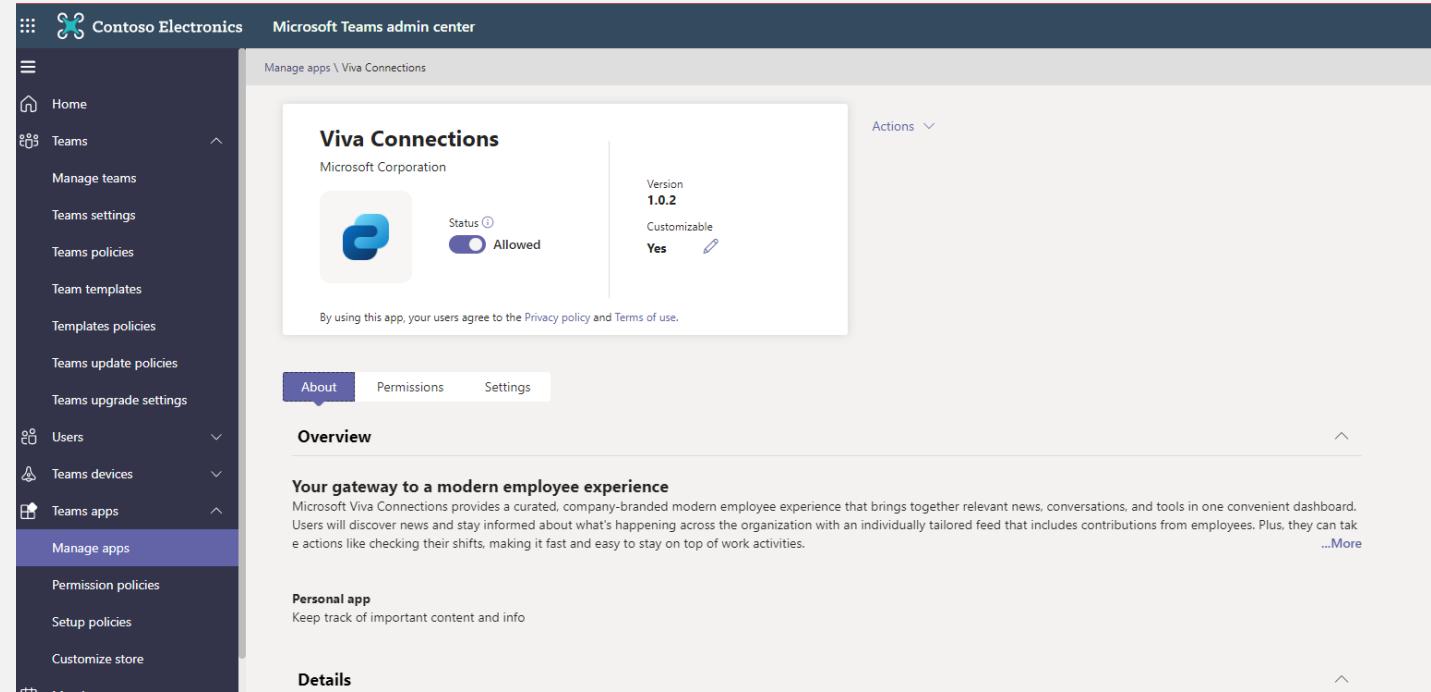


# Add App in Teams Admin Center

App setup

## Viva Connections Teams Admin

1. Log in to the Microsoft Teams admin center
2. Select **Teams Apps** and then **Manage Apps**
3. Search for "Viva Connections", and select the **Viva Connections app**



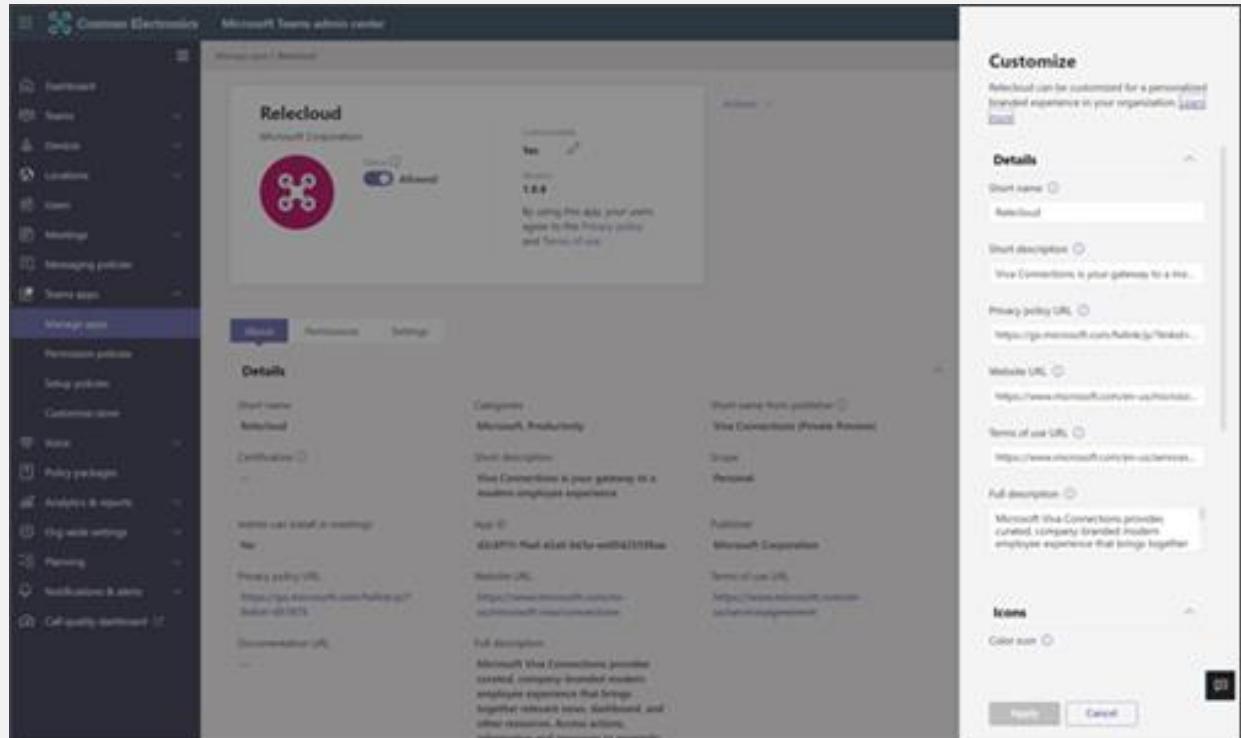
The screenshot shows the Microsoft Teams Admin Center interface. On the left, there is a dark sidebar with various navigation options. The 'Teams apps' section is expanded, and 'Manage apps' is selected, highlighted with a purple background. In the main content area, a card for the 'Viva Connections' app is displayed. The card includes the app's name, developer (Microsoft Corporation), version (1.0.2), status (Allowed), and customizability (Yes). Below the card, there are tabs for 'About', 'Permissions', and 'Settings', with 'About' currently selected. Under the 'Overview' section, there is a heading 'Your gateway to a modern employee experience' followed by a detailed description of the app's features. At the bottom of the card, there are sections for 'Personal app' and 'Details'.

## Important

- The Viva Connections app is blocked by default.

# Customize the App

1. Select **Actions** in the top-right area and then select **Customize**
2. From the **Customize** panel, update the attributes under details.
3. The **Short name** will be the display name of the Viva Connections app in your tenant. In this example, it is "Relecloud".
4. Next, select **Icon** at the bottom of the **Customize** panel.
5. Upload a full color icon 192x192px and also upload a transparent outline icon 32x32px. Optionally, select an accent color that will be applied on card elements in the app on Teams mobile.
6. Select **Apply** when you are done.



## Important

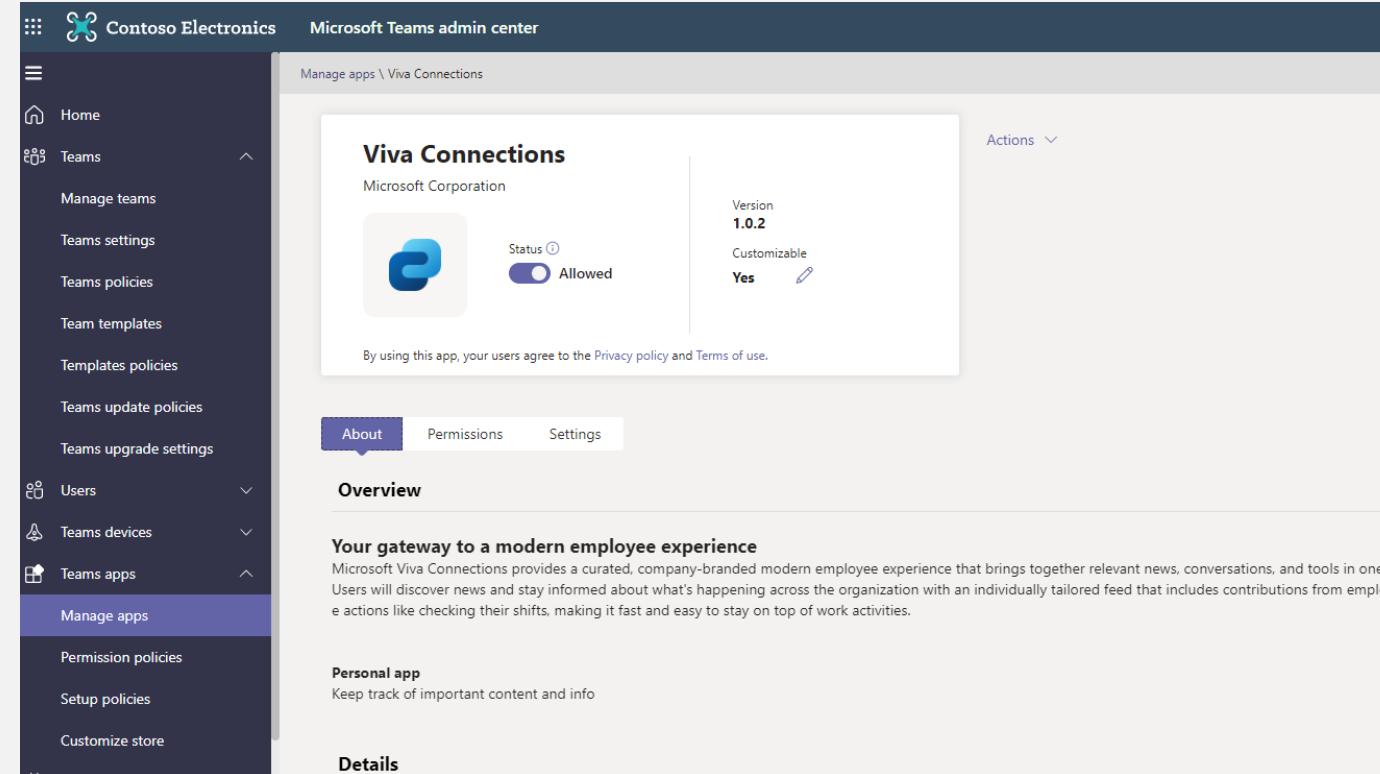
- We recommend renaming to one word so it displays better in the Teams App Icon (left rail)

# Make the App Available

1. Return to the Teams admin center and select **Teams apps** then **Manage apps** and search for the Viva Connections app using the name you selected as the **Short name** when you first customized the Viva Connections app.
2. Change the app from the default **Blocked by Publisher** state to the **Allowed** state.

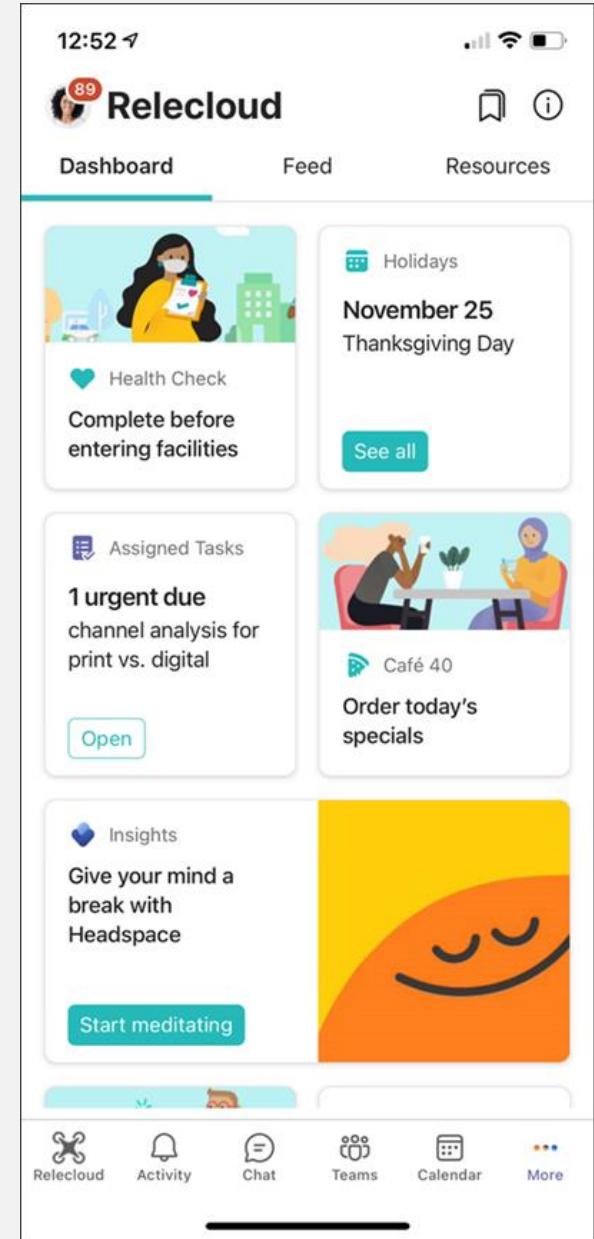
## Important

- This will allow end users to find the app in Teams Store



# Choose mobile settings

1. If you have pre-pinned the app for your users with Teams app set-up policies, then the app will automatically appear in users' Teams mobile client apps on iOS and Android.
2. If you have not pinned the app via policy, then users will first need to search for and install Viva Connections from the Teams desktop application. [Learn more about Viva Connections mobile settings.](#)



# Agenda

## Learning

- Overview
- Manage Content Sources
- Add content providers
- Configure SAP SuccessFactors as a content source
- Add Learning Management Systems
- Use SharePoint Integration and content sources
- Manage learning content sources
- Manage Learning in Bing, Office and SharePoint
- Set up in the Microsoft Teams admin centre
- View reports in the Microsoft 365 admin centre



# Bring learning into the flow of work



Foster a culture of learning and growth



Make learning social



Encourage coaching and mentorship

The image illustrates the integration of learning within the Microsoft Teams ecosystem. On the left, a desktop screenshot of Microsoft Teams shows the 'SOAR Learning' channel, which contains six items. These items include 'Leading Remote Projects and Virtual Teams' by Cyndi Snyder Dionisio (a Microsoft Course), 'Understanding and Applying Leadership Styles' by Stephen Haunts (a Microsoft Video), 'Leading Diverse Teams Organizations' by Linedred Greer (a Microsoft Course), 'Organize your Team's Tasks in Microsoft Planner' by Scott Allen (a Microsoft Module), 'Inclusive: Inclusive Communication' by Kat Larsson (a Microsoft Powerpoint), and 'Communicating with Charisma' by Vanessa Van Edwards (a Microsoft Course). On the right, a mobile screenshot of the Microsoft Viva Learning app shows a conversation between Laurence Gilbertson and another user. The conversation includes messages like 'Excited for you!', 'Thanks Laurence!', 'I'm sure you'll do great!', 'Yeah', 'Thank you!', and 'Here's hoping, I'm nervous but I have been practicing all week, so fingers crossed!!!'. Below the conversation, there is a feed of course cards from the 'SOAR Learning' channel, including 'Organize your Team's Tasks in Microsoft Planner' and 'Inclusive: Inclusive Communication'.

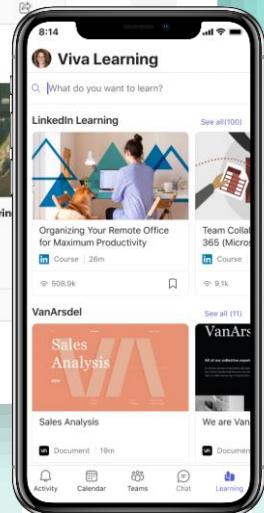
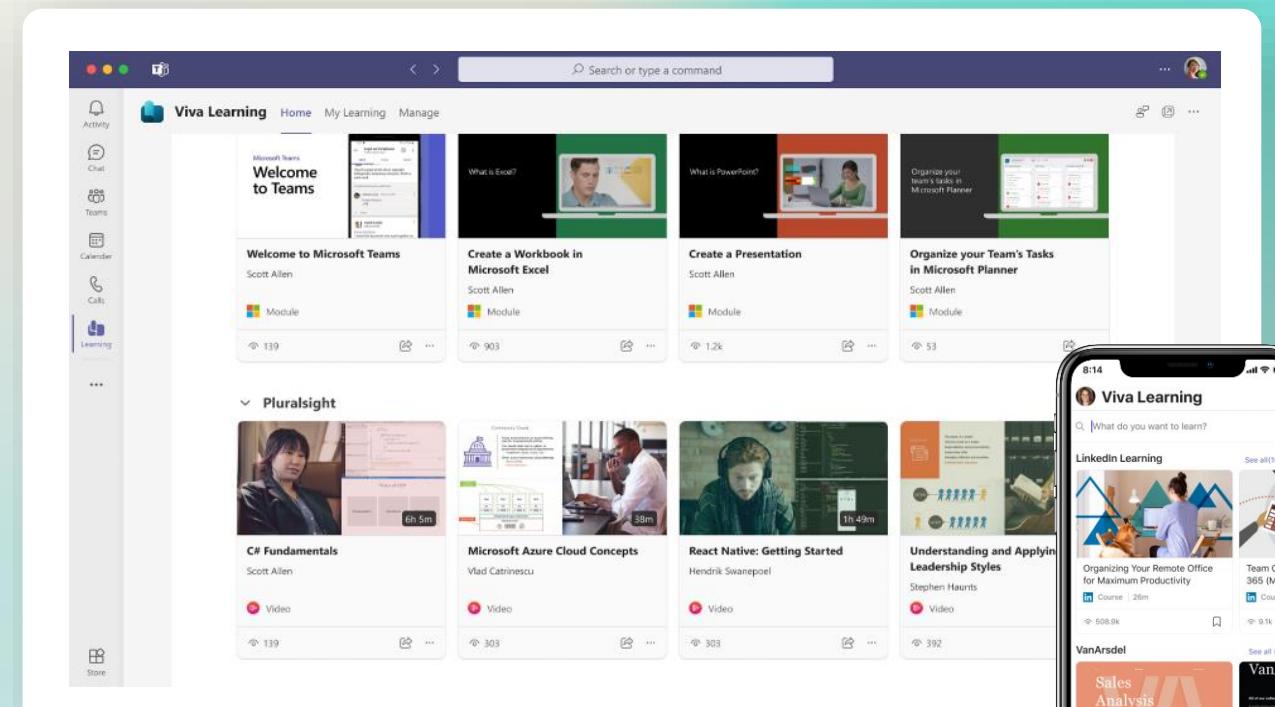
# Simplify learning

Aggregate learning from across your organization

Discover content from connected learning providers and LMS's

View assignments and records from connected LMS's

Integrate custom SharePoint content, including external URLs and SCORM content



# Viva Learning

## Learning in the Flow of Work

Bring learning to the tools and platforms where users already spend their time

## Simplified Learning

Aggregate learning content and tools from different sources in one central hub

## Personalized and Relevant

Find the right content and develop new capabilities with personalized recommendations and search

Platform layer

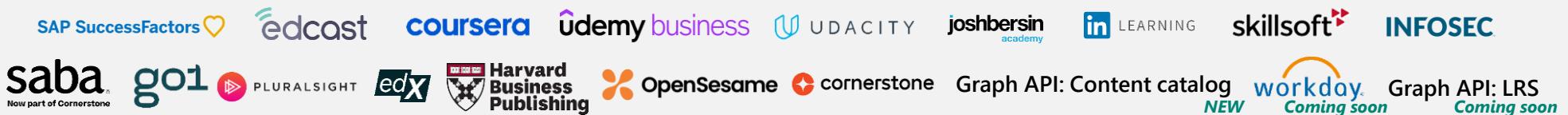
Aggregation layer

Data layer

## Teams + Microsoft 365

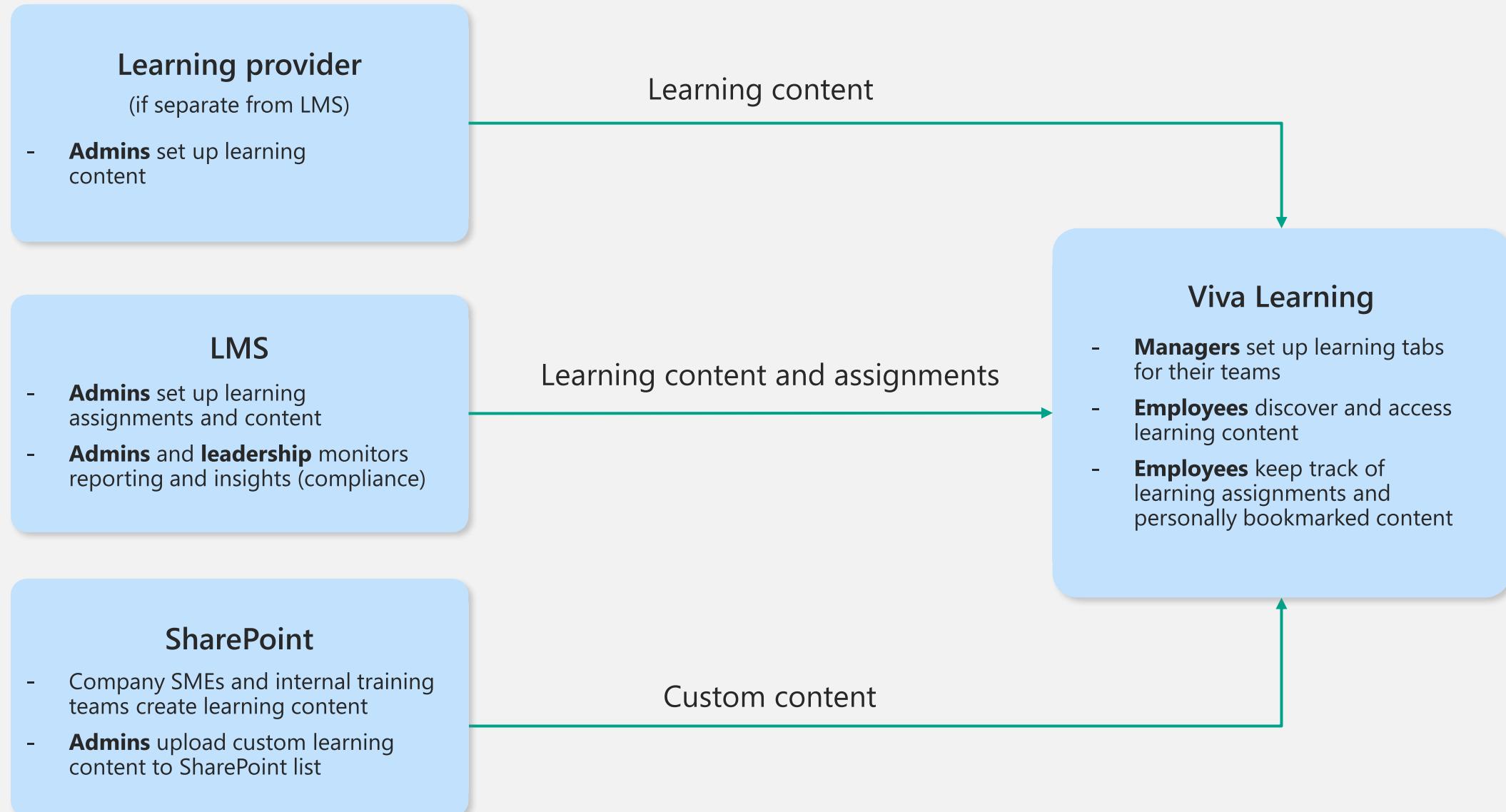


## API enabled partner integrations



## Microsoft Graph

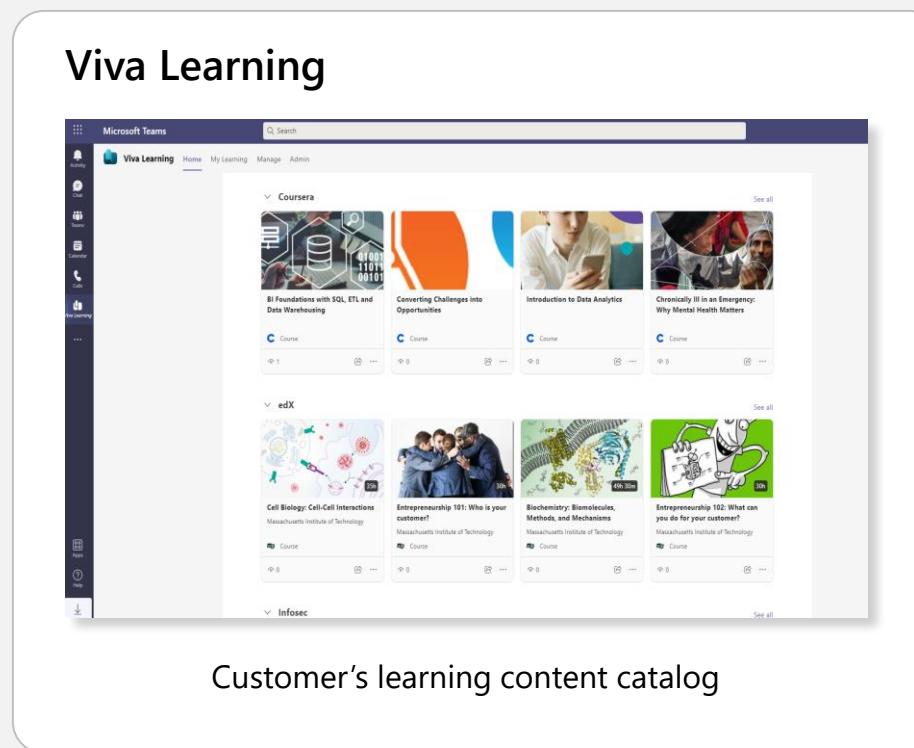
# Streamlining the learning ecosystem



# Understand Learning sources integration- Diagram

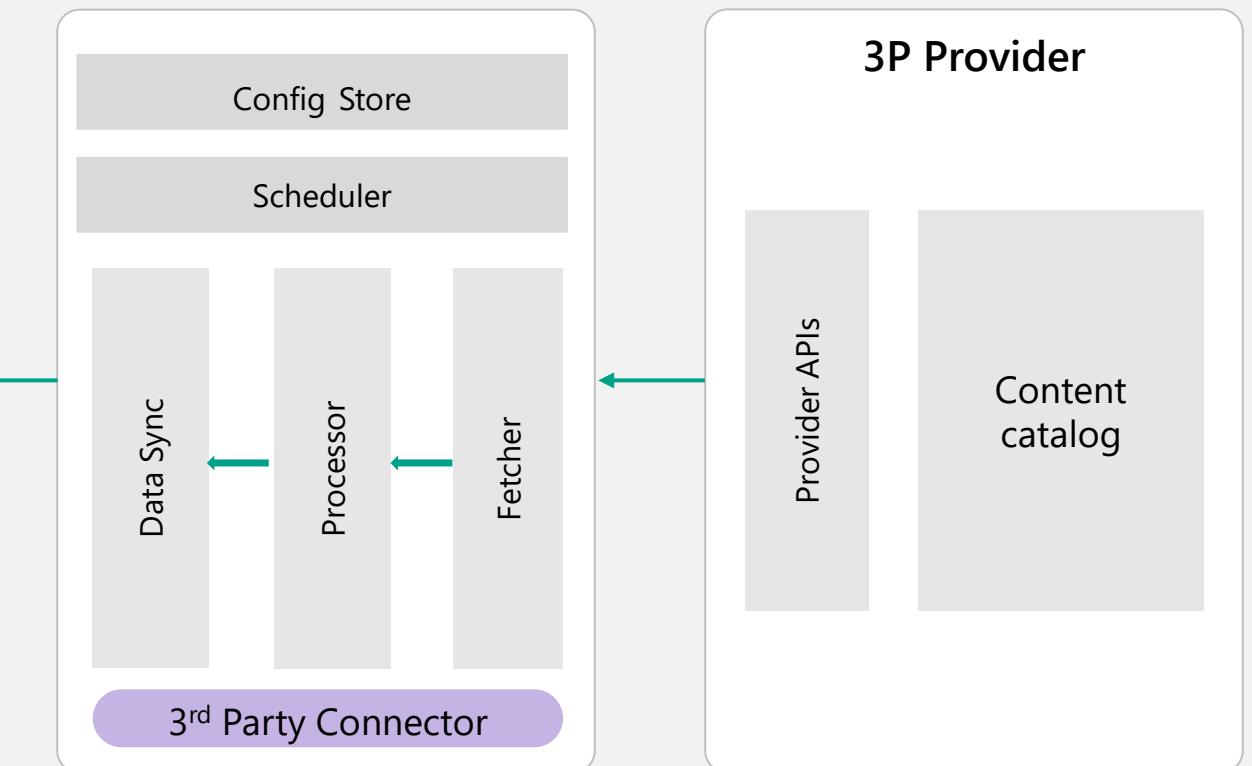
## Learning provider content

It can take 24 to 48 hours for Viva Learning users to see content for the sources you enabled in the admin portal.



Content metadata fields pulled from content provider and used in Home and Learning tabs. Eg. Provider Name, Provider Logo URL, Title, Thumbnail URL etc.

**Use cases:**  
**Content Catalog Sync** – Users can discover the content from their learning provider within Viva Learning.

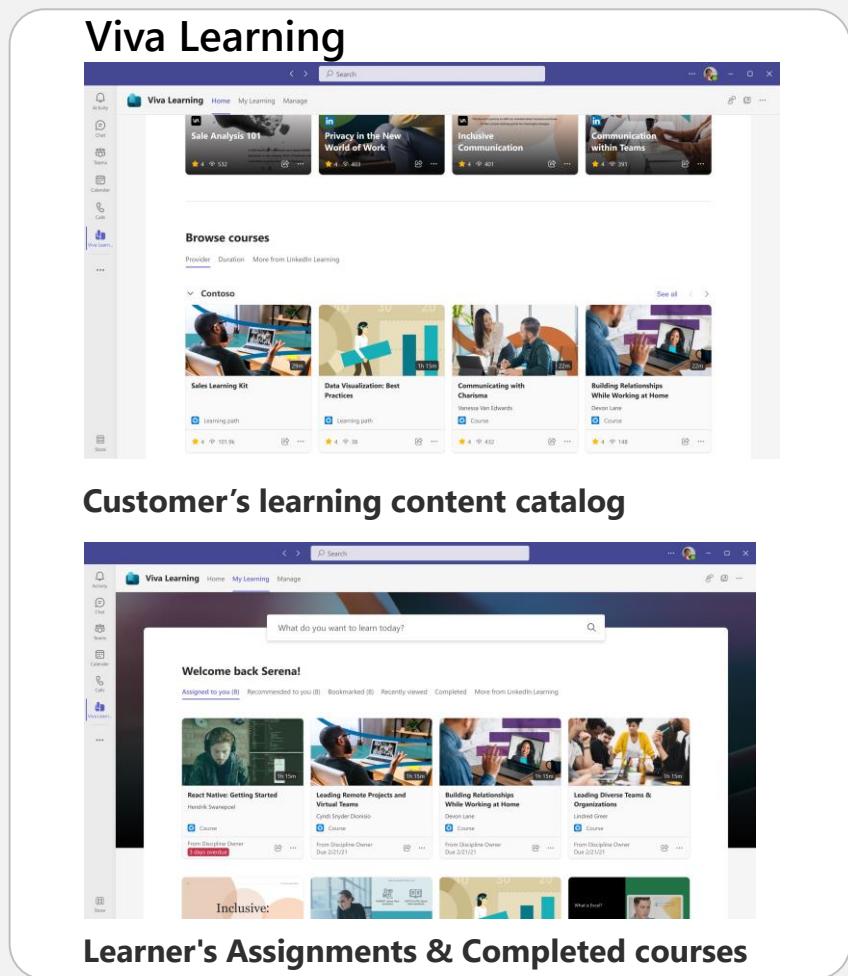


Scheduler triggers once every 24 hours to refresh the data and pull any changes

# Understand Learning sources integration - Diagram

## LMS Learning content and assignments

Content metadata fields pulled from content provider and used in Home and Learning tabs. Eg. Provider Name, Provider Logo URL, Title, Thumbnail URL etc.

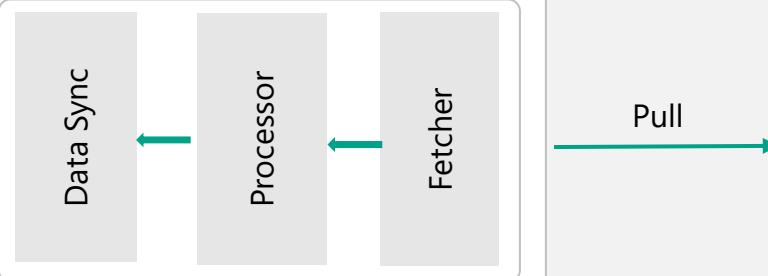


Assignment and Completion Status metadata extracted from LMS  
Refer to the documentation to review required and recommended fields.

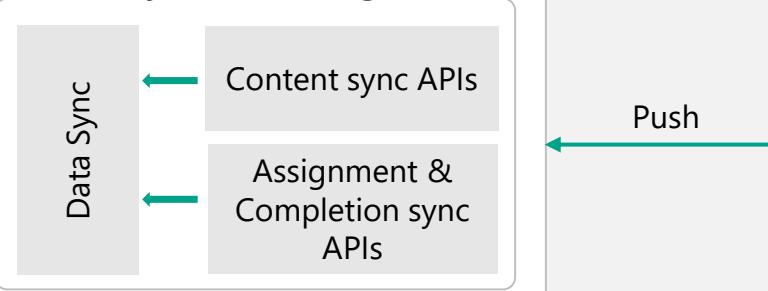
## Use cases

- Content Catalog Sync** – Users can discover the content from their LMS within Viva Learning.
- Learner Record Sync** – Users can discover their Assigned & Completed courses from LMS within Viva Learning.

## Out of Box Integrations

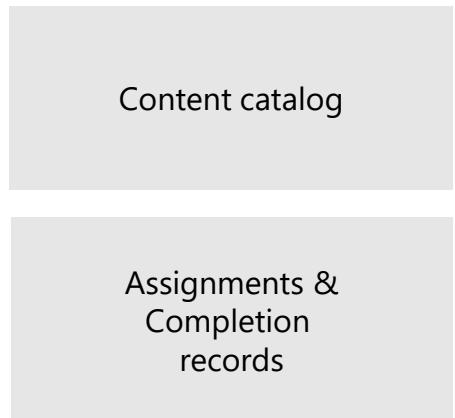


## Employee learning API



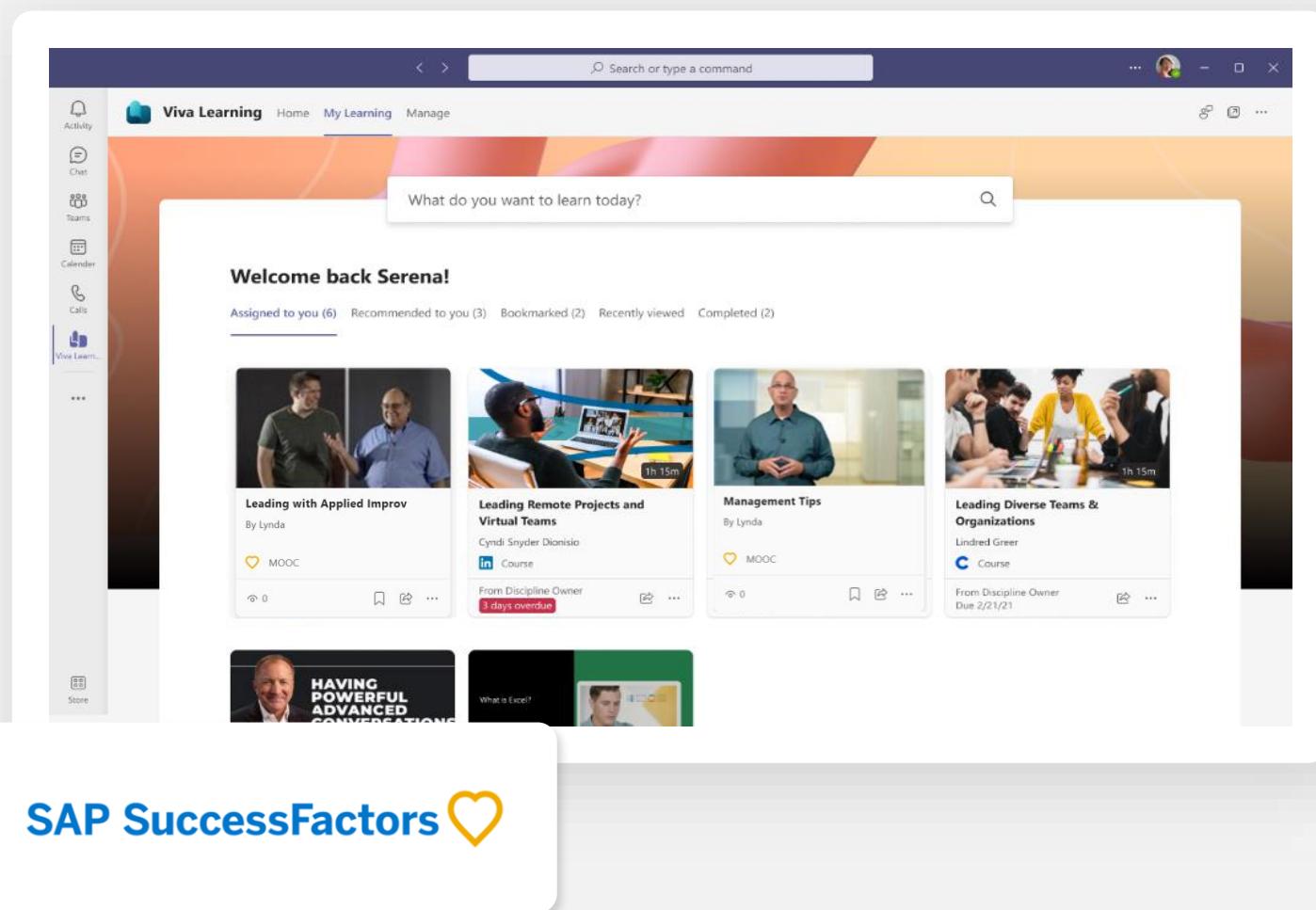
3<sup>rd</sup> Party Connectors

## LMS/3P sources



# Viva Learning + SAP SuccessFactors

## Learning management system integration



The screenshot shows the Microsoft Viva Learning interface. On the left, there's a vertical sidebar with icons for Activity, Chat, Teams, Calendar, Calls, and Viva Learning. The main area has a search bar at the top with the placeholder "What do you want to learn today?". Below it, a "Welcome back Serena!" message is displayed. A list of learning items is shown, including:

- Leading with Applied Improv (By Lynda, MOOC, 0 views)
- Leading Remote Projects and Virtual Teams (Cyndi Snyder Dionisio, Course, 3 days overdue, 0 views)
- Management Tips (By Lynda, MOOC, 0 views)
- Leading Diverse Teams & Organizations (Lindred Greer, Course, Due 2/21/21, 0 views)

At the bottom, there are two small video thumbnail cards: "HAVING POWERFUL ADVANCED CONVERSATIONS" and "What is Excel?".

**SAP SuccessFactors** 

Access learning assignments and content from SAP SuccessFactors in Viva Learning

- Discover, share, and access content from SAP SuccessFactors Learning in Viva Learning
- View learning assignments from SAP SuccessFactors Learning in the Viva Learning My Learning view
- Teams notifications for new assignments and upcoming due dates
- **New:** SSO, In-App Playback, Learning Path Inheritance, Permissions Inheritance

[Configure SAP SuccessFactors as a content source for Microsoft Viva Learning | Microsoft Learn](#)

Search

Microsoft 

Viva Learning Home My Learning Manage

Activity Chat Calls Teams Calendar Files Community Viva Insights Viva Connect Viva Learn...

2

Featured

## Communicating with Charisma

Vanessa Van Edwards

What do you want to learn about? 

Welcome back Karl!

Your progress

- 03 Assigned to you  
3 upcoming due date
- 01 Bookmarked  
From 10,000+ courses
- 05 Recommended to you  
From your peers

Get started with a quick course

See all

**Micros** Overview of CHLOE the chatbot

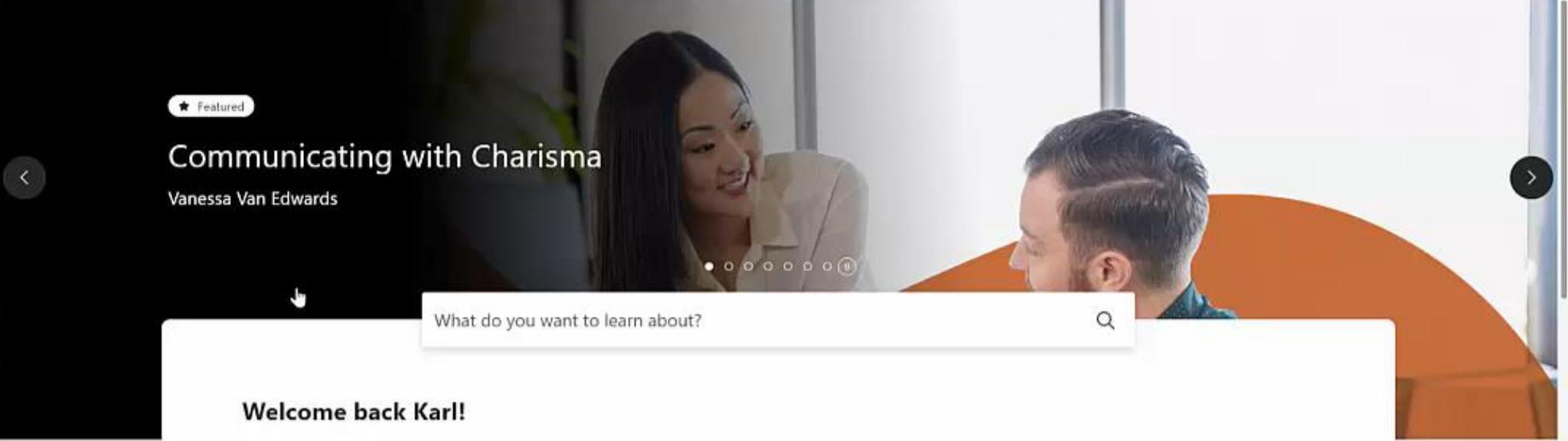
**Micros** Success Factors Administration - Assign...

**Micros** A Look at the One TrIP Platform (OTP)

Trending in Microsoft

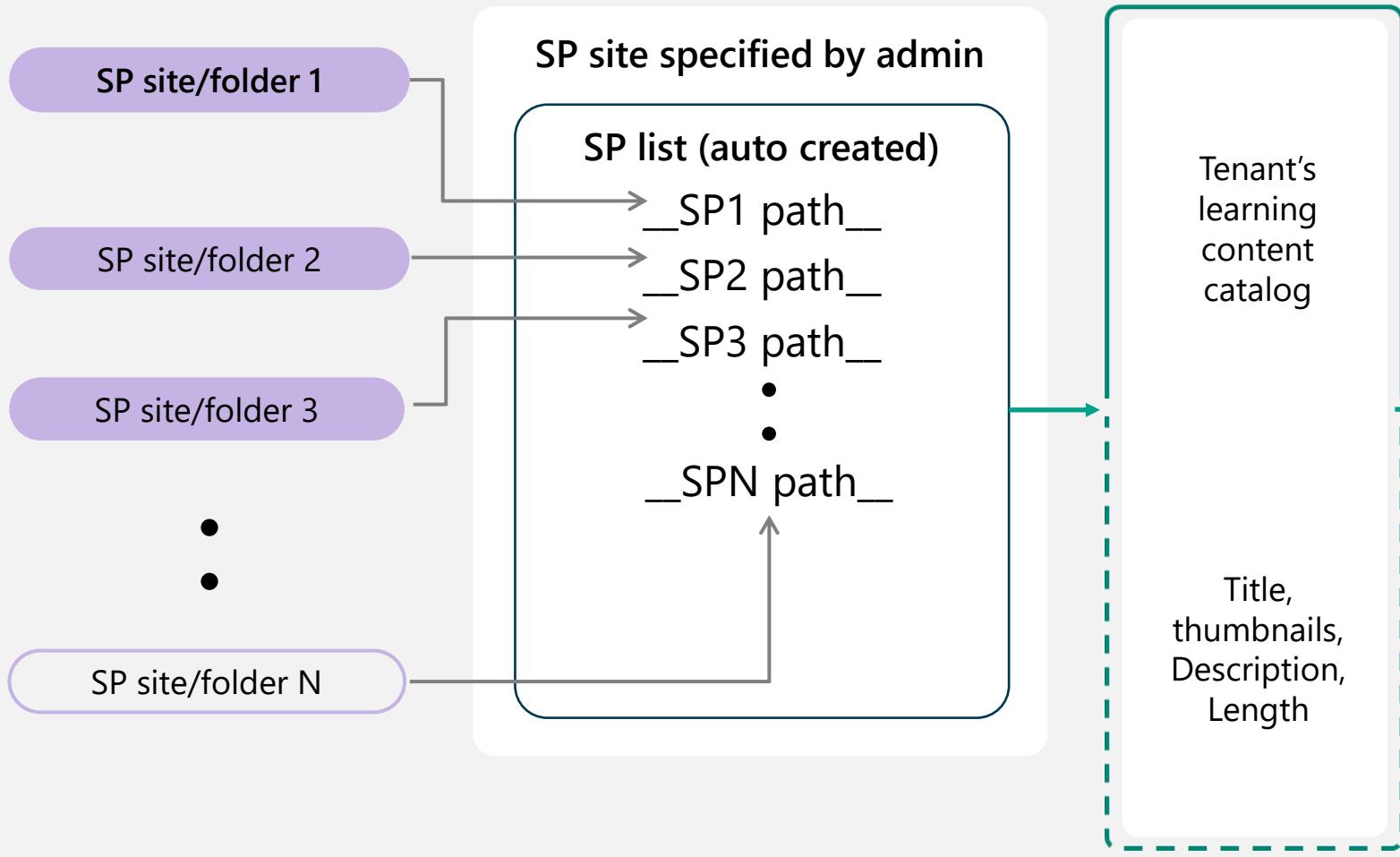
See all

? Help



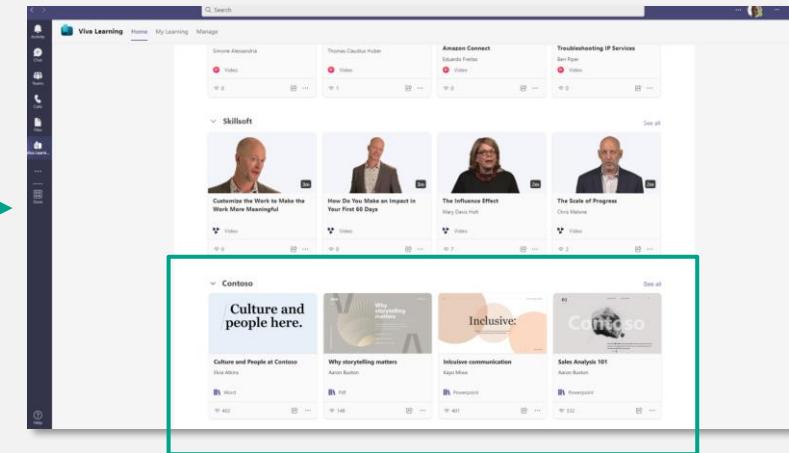
# Understand Learning sources integration- Diagram

Custom Learning content in SharePoint



## Use cases:

**Content sync** – users can discover and resources from their company's internal SharePoint.



## SP objects supported:

- Word, PPT, Excel, PDF
- Audio (.m4a)
- Video (.mov, .mp4, .avi)
- Link (internal or external)

# SharePoint integration: Metadata tagging

Customize metadata for SharePoint content so it can be discoverable, searchable, and filterable in Viva Learning.

## Metadata fields:

- Description
- Thumbnail
- Content duration
- Author
- Skill tag

The screenshot illustrates the integration of SharePoint content into Microsoft Viva Learning. On the left, a SharePoint document library titled 'LearningTest' displays a list of files, including 'azureYoutube.url', 'CE Annual Report.docx', 'Cost and Pricing Analysis - Western Region...', 'New In-Store Customer Service Counters.p...', and 'Recordings Overview.mp4'. The 'SkillTags' column is highlighted, showing tags like 'Business development', 'Negotiation', 'Creativity', 'Accessibility', 'Negotiation', 'Shivam Garg', and 'PowerPoint'. On the right, the Microsoft Viva Learning interface shows a course titled 'Organizing Your Remote Office for Maximum Productivity' by Paula Rizzo. A search bar at the top right shows the query 'collaboration'. Below the course, a progress summary indicates 'All caught up!' with '0 courses assign', '05 Bookmarked From 10,000+ co...', and a reminder to 'Pin to sidebar'.

# SPO Learning Content



# Learning admin roles



## Knowledge Administrator

Full access to all knowledge, learning and intelligent features settings in admin center

Manage learning sources in Viva Learning

Assigns knowledge and learning program manager roles

## M365 Administrator

General admin and management features across Microsoft

Teams Administration

### Role assignments

Azure AD   Intune

Assign Azure AD built-in roles to users who need access to other admin centers and resources in Azure Active Directory, such as users, groups, and apps that use Microsoft Graph API.

[Learn more about roles in Microsoft 365](#)

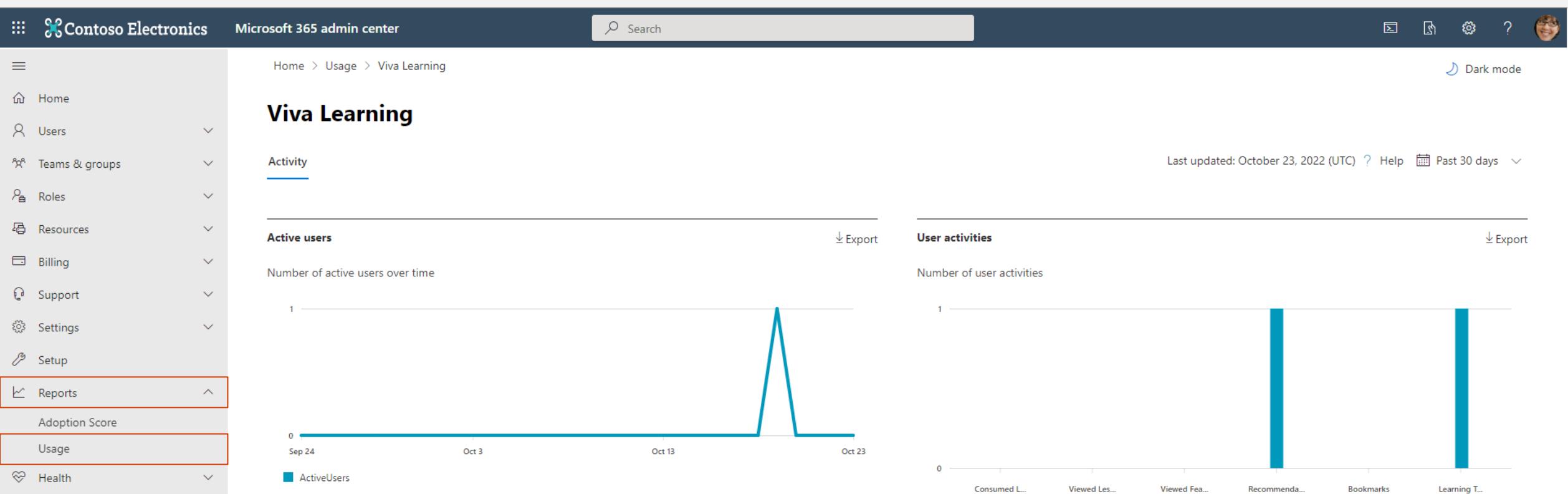
[Add to favorites](#) [Assign admins](#) [Run As](#) [Compare roles](#)

1 selected [X](#) [Filter](#)  [Choose columns](#)

<input checked="" type="checkbox"/>	Name ↑	<input checked="" type="checkbox"/>	Description	Category	<a href="#">Choose columns</a>
<input checked="" type="checkbox"/>	<b>Knowledge Administrator</b>	<input checked="" type="checkbox"/>	Can configure the knowledge network and content understanding.	Collaboration	

[Show suggested roles](#)

# M365 Admin Reporting: Viva

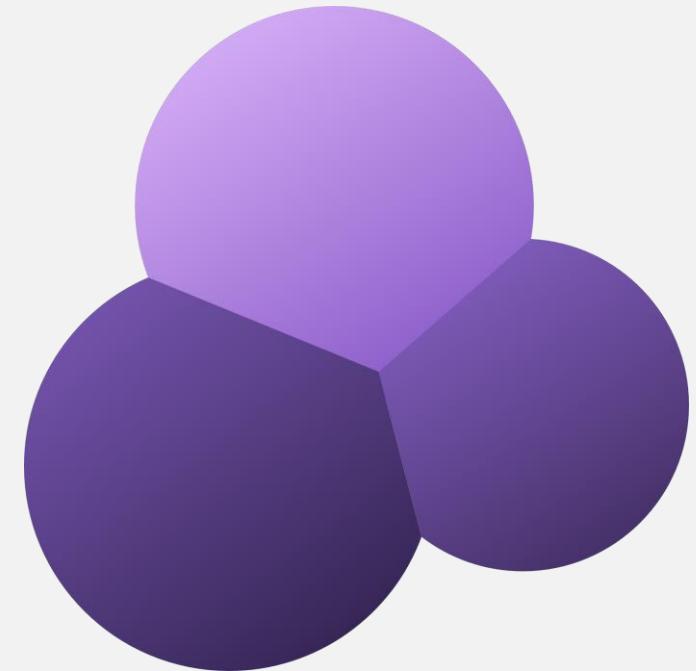


- **Active users** – Shows you the number of active users over time. For example, you can use it to find the number of active users in your organization on a specific day over the past 30 days.
- **User activities** – Shows you the number of user activities over all platforms. For example, you can use it to find how many users in your organization bookmarked a course in the last 30 days.

# Agenda

## Topics

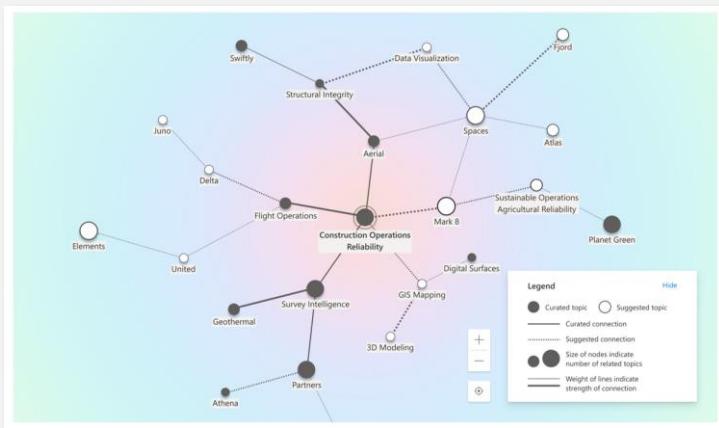
- Overview
- Set up Viva Topics
- Use Microsoft Viva Topics to create a Topic Centre and assign licenses
- Establish Security and privacy setting
- See how security and privacy works in Topics
- Manage Topics life cycle stages
- Manage content through the Topics life cycle
- Prepare your environment for Topics
- Integrate Topics with various Microsoft 365 apps
- Access analytics for Viva Topics



# Overview

## Knowledge identification

Viva Topics applies advanced AI to **identify knowledge and expertise** in Microsoft Graph and organize them into related **topics**.



## Knowledge curation

Viva Topics creates **topic pages** that experts can refine. Viva will automatically update these topics.

## Knowledge discovery

Topic cards find you in the apps you use every day and you can discover topics in your **topic center** or with Microsoft Search.

# Knowledge curation

- AI creates the **first draft** of a **Topic page**
- Subject matter experts **curate** and **refine** topic pages, and AI learns from their input
- AI **automatically updates** the topic and related resources as it discovers new information

## Knowledge & Insights

Alternate names: K&I

Knowledge & Insights  
Updated by Scott Adams, March 9

### Suggested people

 Rebecka Isaksson Contributed to 5 resources	 Rachael Taylor (Ally Incorpora... Contributed to resources	 Chris McNulty Contributed to resources	 Irem Bilgin Contributed to resources
 Krizia Ceccobao Contributed to resources	 Dan Holme Contributed to resources	 Amy Geiger Contributed to resources	 Julian Fang Contributed to resources

[See more](#)

### Suggested files and pages

 Name	Modified	Modified by	Activity	View count
 Knowledge & Insights - pitch v2 sites > KnowledgeInsights > _layouts > 15	February 2	Joerg Petter	Topic mentioned 2 times	1k+ views
 K&I Envisioning module - Knowledge discovery - v3 sites > KnowledgeInsights > _layouts > 15	February 4	Rebecka Isaksson	Topic mentioned once in this file	14 views
 K&I Envisioning module - Workplace insights - v3 sites > KnowledgeInsights > _layouts > 15	February 4	Rebecka Isaksson	Topic mentioned once in this file	19 views
 K&I Envisioning module - Content services - v2 sites > KnowledgeInsights > _layouts > 15	February 4	Rebecka Isaksson	Topic mentioned once in this file	156 views
 K&I Envisioning module - Content services - v3 sites > KnowledgeInsights > _layouts > 15	February 4	Rebecka Isaksson	Topic mentioned once in this file	7 views

### Related sites

# AI elements

The screenshot shows a document page with several AI-generated sections:

- SUGGESTED TOPIC**: SOAR
- Alternate name: Sustainable Operations and Reliability**
- Starting in CY 2020, Contoso Electronics will focus on new verticals for our commercial drones. The SOAR project leads the way in su...**
- Suggested people (8)**
  - Miguel Garcia (Program Manager)
  - Annie Lindqvist (Software Engineer)
- Suggested resources (10+)**
  - Project SOAR Customer Presentation (by Miguel Garcia, modified on Mon at 3:15pm, Topic mentioned 10 times)
  - Project SOAR Overview (by Annie Lindqvist, modified on Tues at 2:15pm, Topic mentioned 8 times)
- Related topics (7)**
  - Plant Blue
  - Drone flight
  - Flight op...

- Content sensitive topic mention detection

- Topic identification and conflation

- Acronym + alternate name extraction

- Definition extraction

- Related people

- Related documents

- Topic relatedness

# Prepare for Viva Topics

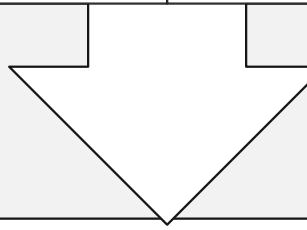
**Migrate and prepare content** for knowledge generation

Migrate content into  
SPO

Modernize classic to  
modern\*

Have plenty of content  
and activity

Plan permissions!



Secure Content and Identify Knowledge Managers and Topics

\*Modernizing sites allows topics to be displayed. But it shouldn't be a blocker. Topics can also be extracted from classic sites.

# Security, compliance, and privacy

- Microsoft 365 [security settings](#) (site permissions) and [Topics admin settings](#) determine what users can see in topics
- Users only see what they already have access to, but [access differs](#) depending on how the topic got generated (automatically vs. manually)

Topic item	User access
Topic name	<ul style="list-style-type: none"><li>• Users can see the topic name of all topics in the topic center</li><li>• Some topics won't be visible if users don't have permissions to the source content</li></ul>
Topic description	<ul style="list-style-type: none"><li>• AI-generated descriptions are visible only to users who have permissions to the source content</li><li>• Manually entered or edited descriptions are visible to all</li></ul>
People	<ul style="list-style-type: none"><li>• Pinned people are visible to all users</li><li>• Suggested people are only visible to users with source content permissions</li></ul>
Files / Pages / Sites	<ul style="list-style-type: none"><li>• Only visible to users who have permissions to the source content</li></ul>

# Security Trimmed Files

Suggested topic  
**Humongous Insurance**

Alternate name: HI  
From You, October 26

Humongous Insurance is an emerging consumer insurance firm that now has a strong growth potential thanks to a new round of investment capital.  
Source [Humongous Insurance Supply Contract 1064.docx](#)

**Pinned people**

Patti Fernandez  
President

**Suggested people**

Miriam Graham  
Contributed to resources

Nestor Wilke  
Contributed to resources

Lee Gu  
Contributed to resources

**Pinned files and pages**

Name	Language	Modified	Modified by	Pinned by	View count
<a href="#">Humongous Close Date</a> HumongousInsuranceMerger > Shared Documents	English	about an hour ago	Megan Bowen	Megan Bowen	
<a href="#">Humongous Takeover Financials</a> HumongousInsuranceMerger > Shared Documents	English	3 hours ago	Megan Bowen	Megan Bowen	
<a href="#">Humongous Purchase Review</a> HumongousInsuranceMerger > Shared Documents	English	3 hours ago	Megan Bowen	Megan Bowen	

**Suggested files and pages**

Name	Language	Modified	Modified by	Activity	View count
<a href="#">Project Management Overview Humongous Insurance</a> operations > ... > Project Management > Humongous Insurance	English	January 14	Nestor Wilke	Topic mentioned once in this file	
<a href="#">Notes on Humongous Insurance</a> Contoso > Shared Documents > Projects > Humongous Insurance	English	February 16	Lee Gu	Topic mentioned 2 times	
<a href="#">Contoso Humongous Insurance SOW 1151</a> operations > Shared Documents > Teams > Humongous Insurance	English	February 25	Miriam Graham	Topic mentioned once in this file	
<a href="#">Humongous Insurance Supply Contract 1063</a> operations > Shared Documents > Teams > Humongous Insurance	English	July 26, 2021	Nestor Wilke	Topic mentioned 2 times	
<a href="#">Survey feedback on Humongous Insurance</a>					

Suggested topic  
**Humongous Insurance**

Alternate name: HI  
From Megan Bowen, October 26

Humongous Insurance is an emerging consumer insurance firm that now has a strong growth potential thanks to a new round of investment capital.  
Source [Humongous Insurance Supply Contract 1064.docx](#)

**Pinned people**

Patti Fernandez  
President

**Suggested people**

Miriam Graham  
Contributed to resources

Nestor Wilke  
Contributed to resources

Lee Gu  
Contributed to resources

**Suggested files and pages**

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<a href="#">Project Management Overview Humongous Insurance</a> operations > ... > Project Management > Humongous Insurance	English	January 14	Nestor Wilke	Topic mentioned once in this file	
<a href="#">Notes on Humongous Insurance</a> Contoso > Shared Documents > Projects > Humongous Insurance	English	February 16	Lee Gu	Topic mentioned 2 times	
<a href="#">Contoso Humongous Insurance SOW 1151</a> operations > Shared Documents > Teams > Humongous Insurance	English	February 25	Miriam Graham	Topic mentioned once in this file	
<a href="#">Humongous Insurance Supply Contract 1063</a> operations > Shared Documents > Teams > Humongous Insurance	English	July 26, 2021	Nestor Wilke	Topic mentioned 2 times	
<a href="#">Survey feedback on Humongous Insurance</a>					

**-----Security Trimmed-----**

# Restricted Site Permissions

The screenshot shows a SharePoint document library interface. The top navigation bar includes the site logo 'Contoso Electronics', the word 'SharePoint', and a search bar labeled 'Search this library'. The left sidebar lists site navigation options: Home, Conversations, Documents (which is selected and highlighted in blue), Shared with us, Notebook, Pages, Site contents, and Recycle bin. The main content area is titled 'Humungous Insurance Merger' and displays a 'Documents' list. The list includes four items: 'Humongous Close Date.pptx', 'Humongous Purchase Review.docx', 'Humongous Restructure.pptx', and 'Humongous Takeover Financials.xlsx'. Each item has columns for Name, Modified, and Modified By, all showing 'Megan Bowen'. To the right of the list, a 'Group membership' section shows five members: System Administrator (Member), Patti Fernandez (Member), Nestor Wilke (Member), Megan Bowen (Owner), and Lidia Holloway (Member). A blue button labeled 'Add members' is also visible.

Contoso Electronics SharePoint

Search this library

Home Conversations Documents Shared with us Notebook Pages Site contents Recycle bin

+ New Upload Edit in grid view Sync Classify and extract Add shortcut to OneDrive Pin to Quick access ...

Humungous Insurance Merger

Documents

Name	Modified	Modified By
Humongous Close Date.pptx	A few seconds ago	Megan Bowen
Humongous Purchase Review.docx	About an hour ago	Megan Bowen
Humongous Restructure.pptx	About an hour ago	Megan Bowen
Humongous Takeover Financials.xlsx	About an hour ago	Megan Bowen

Group membership  
5 members

Add members

System Administrator Member

Patti Fernandez Member

Nestor Wilke Member

Megan Bowen Owner

Lidia Holloway Member

# Topic discovery

## Select SharePoint topic sources

- Allow all sites
- Allow all sites, except selected sites
- Allow only selected sites
- Block all sites

## Block specific topics by name

## Exclude content based on sensitivity labels

## NoIndex / NoCrawl search settings

- Block site content in search results
- Block list/library content in search results

## Topic Experiences

Topic discovery    Topic visibility    Topic permissions    Topic center

Choose how topics will be sourced. Existing security, compliance, privacy, and search crawl settings are enforced.

Select SharePoint topic sources

All sites (recommended)

Edit

Exclude topics

Don't exclude any topics

Edit

A	B	C
Name (required)	Expansion	MatchType- Exact/Partial (required)
Arc		Partial
Contoso		Exact
ATL	All time low	Exact

# Topic visibility

## Topic Experiences

Topic discovery    **Topic visibility**    Topic permissions    Topic center

To successfully modify these settings, you will need to have group admin permission.  
Contact your global admin.

### Who can see topics

Everyone in my organization

[Edit](#)

### Who can see topics

Topic details show on topic pages, in search results and when topics are highlighted in content like SharePoint pages. Users can only see discovered topics when they have access to the files and pages the topic was discovered in.

- Everyone in my organization
- Only selected people or security groups
- No one

# Topic permissions

- [Create and edit topics](#)
- [Validate candidate topics](#)
  - View, confirm, reject
- [Manage the topic lifecycle](#)
  - Delete topics
- [Curate topic](#)
  - Crowd-source
  - Crowd with approvals
  - Restricted

## Topic Experiences

Topic discovery

Topic visibility

**Topic permissions**

Topic center

To successfully modify these settings, you will need to have group admin permissions. Contact your global admin to be assigned group admin permissions.

**Who can create and edit topics**

Everyone in my organization

[Edit](#)

**Who can manage topics**

Everyone in my organization

[Edit](#)

# Name your Topic Site

## Administration

When you set up Topics, as part of the setup process, a topic center is automatically created. Think about what you want to name the topic center and what you want the URL to be. You can set both the name and URL as part of the setup process, and you can change the name (but not URL) later in the Microsoft 365 admin center. You can only have one topic center in each tenant.

### Note

If your organization has deployed [Microsoft 365 Multi-Geo](#), Viva Topics respects data sovereignty by ensuring topics data is always stored in the correct geo location. The topic center is provisioned in the central location and content from all geo locations is processed there. The resulting discovered topics are stored in the same geo location as the source content. If the topic source data moves between geo locations, the corresponding topic properties, such as the description, moves as well.

## Create topic center

The topic center is a SharePoint site where users have a personalized view of relevant knowledge across your organization and knowledge managers can manage topics. Topic pages are hosted here.

### Site name\*

Topics

### Site address

..sites/



Topics



<https://contoso.sharepoint.com/sites/Topics>

Available

### Description

Destination to learn more about topics in the organization and see a personalized view of topics associated to you

# Topic Centre: Managing Topics

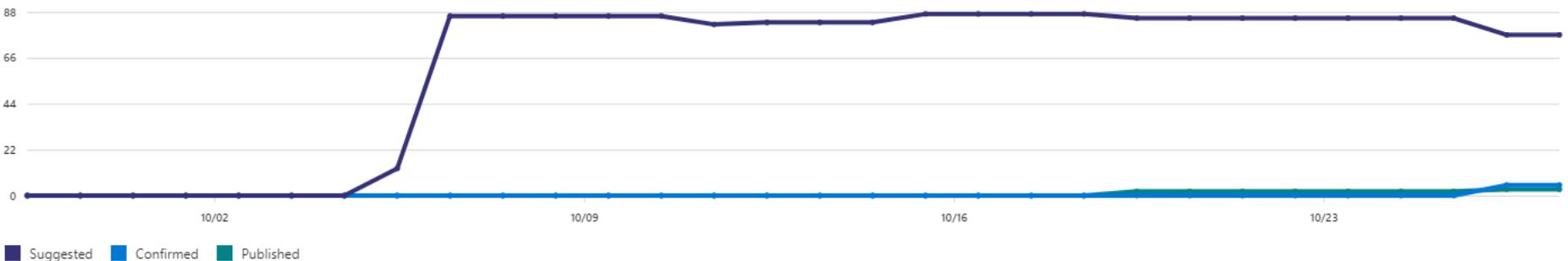
85 topics at Contoso

Last updated about an hour ago

77 Suggested 5 Confirmed 3 Published

[View removed topics](#)

[Trend of topics by status over the past 30 days](#)



## Filter

### Status

- Suggested
- Confirmed
- Published

Topics you can manage ⓘ

Search by topic name

[Filter](#)

Name	Alternate names	Status	Modified ↓	Modified By	Topic score	Org topic score	Impressions	Created
DC-320	DC 320	Confirmed	Oct 26, 2022	Megan Bowen	26	26	10	Oct 7, 2022
DC-330	DC 330	Confirmed	Oct 26, 2022	Megan Bowen	26	26	7	Oct 6, 2022
CS-275	CS 275	Confirmed	Oct 26, 2022	Megan Bowen	26	26	6	Oct 7, 2022
GR-188	GR 188	Confirmed	Oct 26, 2022	Megan Bowen	21	21	6	Oct 7, 2022
DC-330 Turbo	DC 330 Turbo	Confirmed	Oct 26, 2022	Megan Bowen	26	26	9	Oct 7, 2022
DC-310	Delivery Cloud 310,...	Published	Oct 19, 2022	Megan Bowen	38	38	33	Oct 19, 2022
Digital Services Initiative	DSI, Digital Service...	Published	Oct 19, 2022	Megan Bowen	39	39	39	Oct 19, 2022
VanArdsel Ltd		Suggested		[Viva Topics]	13	23	12	Oct 6, 2022
Rusty Galbraath Company	The Rusty Galbraat...	Suggested		[Viva Topics]	13	22	9	Oct 6, 2022



# Approach and Roles

## Roles support Security and Compliance

All licensed users in your organization can be **Topic viewers**

**Topic contributors** can edit an existing topic or create a new topic. They have an important role in manually “curating” the information in a topic page (both AI and manually provided) to support its quality.

**Knowledge managers** have a good overall knowledge of your business. They have the knowledge to know if topics are valid or not and might be able to suggest people related to those topics.

Solution architects and IT admins can act as **Knowledge admins** who set up and configure Viva Topics

### Tip

Knowledge managers must coordinate with all Viva Topics stakeholders in their organization to know how to configure it. For example, if a new project has sensitive information, the knowledge manager needs to inform the Knowledge admins to make sure the SharePoint site is not crawled for topics, or if specific topic names need to be excluded.

# Knowledge curation | manage topics

**Suggested-** a topic identified by AI that has enough supporting resources, connections, and properties

**Confirmed-** a topic has been discovered by AI and has been validated in one of two ways:

1. Knowledge manager confirms topic
2. Multiple users confirm topic

**Published-** a topic that has been curated through manual edits or manual creation

**Removed-** a topic that has been rejected in one of two ways:

1. Knowledge manager removes topic
2. Multiple users cast negative votes with the feedback mechanism

The screenshot shows a modal window titled 'SUGGESTED TOPIC' for a topic named 'Sunflower'. The card includes a 'View details' button, an alternate name 'Project Sunflower', a brief description about it being a regional initiative for operational staff, and a note from a document titled 'Notes on Project Sunflower.docx'. Below this, there's a section for 'Suggested people' with two entries: Lidia Holloway and Irvin Sayers, both of whom have contributed to resources. At the bottom, there's a section for 'Suggested resources' with a link to 'Project Sunflower Overview' last modified by Irvin Sayers on December 9, 2020.

# Better together: People + AI

## Planet Blue

Improve what was discovered

Suggest an edit

Project Planet Blue addresses the global challenges we face, primarily those related to climate and environmental degradation. This ...

From [Planet Blue Goals and Outcomes.docx](#)

---

### People

Miguel Garcia  
Program Manager  
Contributed to 14 resources

Annie Lindqvist  
Software Engineer  
Contributed to 14 resources

---

### Resources

Is Planet Blue relevant in this context? [Yes](#) [No](#)

## Planet Blue

Improve what was discovered

Suggest an edit

Project Planet Blue addresses the global challenges we face, primarily those related to climate and environmental degradation. This ...

From [Planet Blue Goals and Outcomes.docx](#)

---

### People

Miguel Garcia  
Program Manager  
Contributed to 14 resources

Annie Lindqvist  
Software Engineer  
Contributed to 14 resources

---

### Resources

Thanks! Your input will be used to improve your organization's knowledge network. Changed your mind? [Undo](#).

- ✓ End user feedback on relevancy and context on topics
- ✓ Encourages contribution
- ✓ Simple yes/no mechanism
- ✓ Loops for general feedback and disambiguation

# Make knowledge easy to discover and use

## Viva Connections

A screenshot of the Microsoft Teams interface. On the left, there's a sidebar with team navigation like 'The Landing', 'Departments', and 'Office documents'. The main area shows a topic card for 'Mark8 (Mark 8)'. The card includes a photo of a person, a title, a description, and several small cards below it. One card says 'Local weather' with a sun icon and '92°'. Another card says 'Resource (10+)'.

## SharePoint

A screenshot of the SharePoint interface. It shows a topic card for 'Gamma 7' which includes a photo of a drone, a title, a description, and an image of a beach with a drone in flight.

## Office

A screenshot of Microsoft Word showing a topic card for 'Mark8'. The card has a blue header, a title, a description, and a summary section at the bottom.

## Search

A screenshot of Microsoft Search showing a topic card for 'Rainier Project'. The card includes a photo, a title, a description, and a 'Resources (10+)' section.

## Topics in Teams

A screenshot of Microsoft Teams showing a topic card for 'Marketing'. The card includes a photo, a title, a description, and a 'Suggested resources (10+)' section.

Teams Chats

## Topics in Outlook Web

A screenshot of Outlook Web showing a topic card for 'Engagement clarification'. The card includes a photo, a title, a description, and a message thread below it.

## Topics in Yammer

A screenshot of Yammer showing a topic card for 'Planet Blue'. The card includes a photo, a title, a description, and a message thread below it. A red diagonal banner across the bottom right corner says 'Coming Soon'.

Coming Soon

# Analytics for Microsoft Viva Topics

≡

- Home
- Users
- Teams & groups
- Roles
- Resources
- Marketplace
- Billing
- Support
- Settings
  - Domains
  - Search & intelligence
  - Org settings
  - Integrated apps
  - Partner relationships
- Setup
- Reports
  - Adoption Score
  - Usage
- Health

Admin centers

- Security
- Compliance

Insights    Answers    Data sources    Customizations    Configurations

Overview    Query analytics    User analytics    Connection analytics    Feedback

Viva Topics

Filters    Time period: **Last 7 days**

[Learn more about insights for Viva Topics](#)

**Topics overview**

**87 topics visible**    No change in the last 7 days  
Updated on February 22, 2023

**89 discovered by Viva Topics**    No change in the last 7 days

**0 created by users**    No change in the last 7 days

**0 hidden**    No change in the last 7 days

**2 removed**    No change in the last 7 days

Knowledge managers can create, confirm, or remove topics in the topic center.

[Go to the topic center](#)

[Manage topic experiences](#)

---

**Sites processed for topic discovery**

**5 sites processed**  
Updated on February 22, 2023

Viva Topics processes SharePoint sites to discover new topics and update existing topics.

[Edit sites for topic discovery](#)

---

**Files processing for topic discovery**

**5.4K files processed**  
Updated on February 22, 2023

Viva Topics continuously processes content to discover new topics and update existing topics.

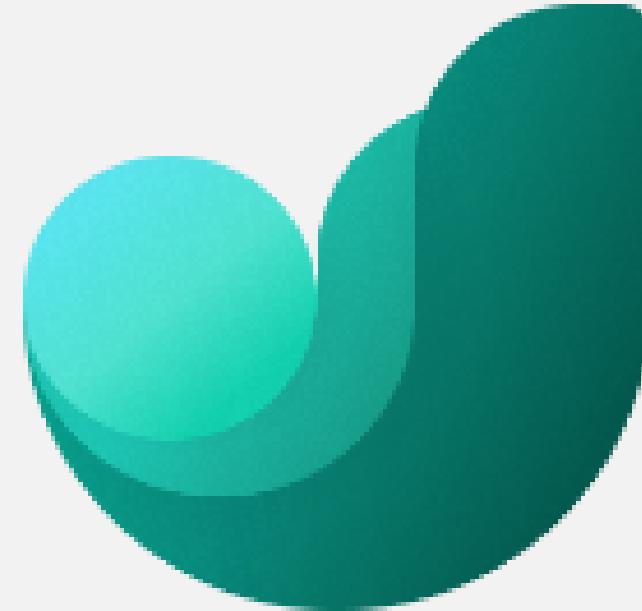
**Break – 10 minutes**



# Agenda

## Goals

- How to Navigate Goals
- Create, track and close your OKRs by using Microsoft Viva Goals
- How OKRs align with Microsoft Viva Goals
- Engage with activity and report on data by using Viva Goals
- Create data reports by using Viva Goals



# Leverage OKRs to align teams on a common business goal-setting and management methodology



96%

of employees who use OKRs understand how their work ties into broader company goals

# Viva Goals: Purpose and alignment



## Create clarity and stay aligned at scale

Define success as a team, connect work to outcomes, and align at all levels of the organization



## Focus teams on impact, not output

Share progress and insights across the organization, focus on work that moves the business forward, and stay agile at scale



## Bring goals into the flow of everyday work

Brings data and actions seamlessly into where people are working



# Objectives and Key Results (OKRs)



## Objectives

Qualitative, aspirational goals for a company or team



## Key Results

Measurable outcomes that contribute to the achievement of an objective



## Key Initiatives

These are the core activities that will be taken to achieve an objective

# Increase engagement and success with OKRs



## Alignment

Ensuring everyone is rowing in the same direction across the organization and pulling on the same rope



## Focus

3–5 OKRs per person per quarter, with the power to say "no" and prioritize work effectively



## Transparency

Ownership of core outcomes across the organization creates clear accountability and surfaces dependencies and roadblocks



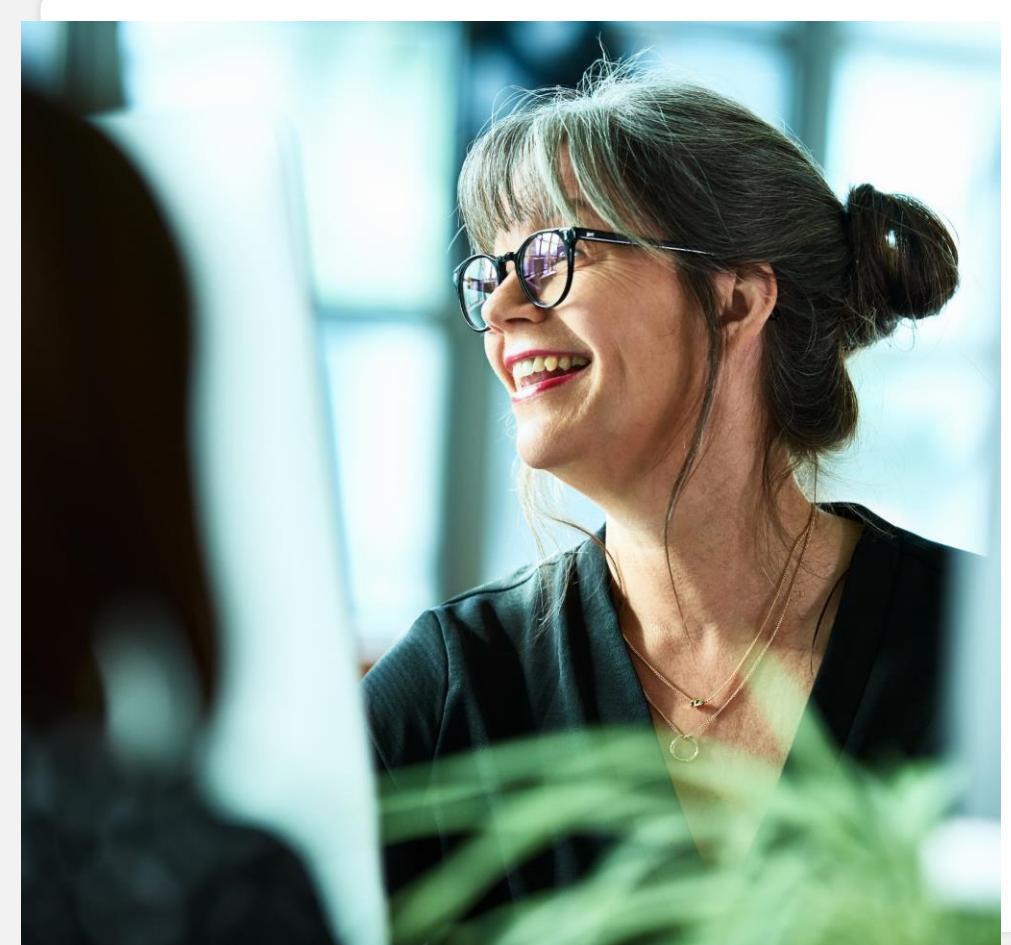
## Agility

Frequency of assessment is critical for agility, and dynamic real-time data enables faster decision making



## Achieve

Striving for incredibly ambitious outcomes and reaching for what's possible



# Navigating Viva Goals: Web Portal

Viva Goals  
Contoso

Search

Notifications

My OKRs

Marketing OKRs

Contoso OKRs

Bookmarks >

Explorer >

All Teams >

All Users >

Feed

Admin

Help

Megan Bowen

## Contoso

OKRs Projects Dashboards Settings

AVERAGE PROGRESS  
Private OKRs are not included in summary

Oct 01 Oct 08 Oct 15 Oct 22 Oct 29 Nov 05 Nov 12 Nov 19 Nov 26 Dec 03 Dec 10 Dec 17 Dec 24 Dec 31

OKRs BY STATUS  
Private OKRs are not included in summary

1 ON TRACK 2 BEHIND  
0 AT RISK 0 CLOSED  
0 POSTPONED 0 NOT STARTED

AVG. SCORE -

OKRs

View Options > View chart > Bulk Check-in > Add Objective

OKR	Type	Owner	Time Period	Progress	Score
1. Improve internal employee engagement Contoso Operations	Global	Patti Fernandez Check-in owner: Nestor Wilke	Q4 2022 OCT 1 – DEC 31	Behind 17% Complete • 7d	17% —
2. Achieve record revenues while increasing profitability Contoso Financial	Global	Patti Fernandez Check-in owner: Megan Bowen	Q4 2022 OCT 1 – DEC 31	Behind 16% Complete • 7d	16% —
a. Hit quarterly revenue of over £1000000 Contoso Financial	Global	Patti Fernandez Check-in owner: Miriam Graham	Q4 2022 OCT 1 – DEC 31	Behind Progress: 18% (Start: 0%   Target: 100%) • 9d	18% —
b. Start sales in 2 new countries and achieve first quarter revenues totalling over £100000 Contoso Financial	Global	Patti Fernandez Check-in owner: Miriam Graham	Q4 2022 OCT 1 – DEC 31	Behind Progress: 15% (Start: 0%   Target: 100%) • 11d	15% —
c. Increase gross profit margin % from 54% to 64%	Global	Lee Gu	Q4 2022 OCT 1 – DEC 31	Behind 15%	—

# Navigating Viva Goals: Microsoft Teams

Microsoft Teams Search ...

Viva Goals Organization OKRs My OKRs Chat About

Contoso Q4 2022 Oct 1 - Dec 31 + Add Objective

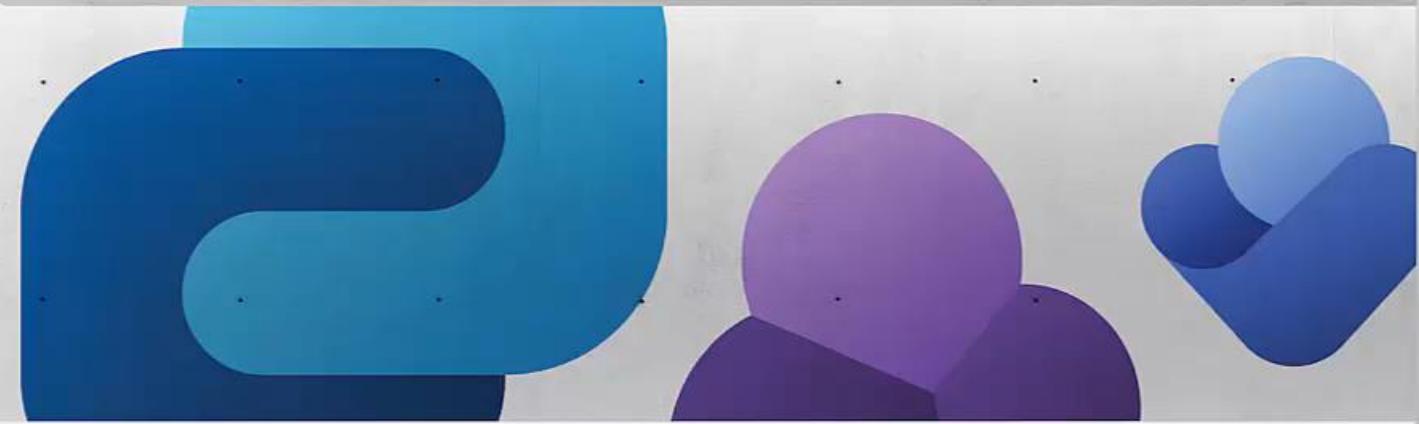
OKRs Projects Settings

OKRs View Options View chart Bulk Check-in

OKR	Type	Owner	Time Period	Progress	Score
1. Improve internal employee engagement Contoso Operations	Global	Patti Fernandez Check-in owner: Nestor Wilke	Q4 2022 OCT 1 – DEC 31	Behind 17% Complete • 7d	17%
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Activity 51 Chat 10 Teams Calendar Calls Files Apps Help

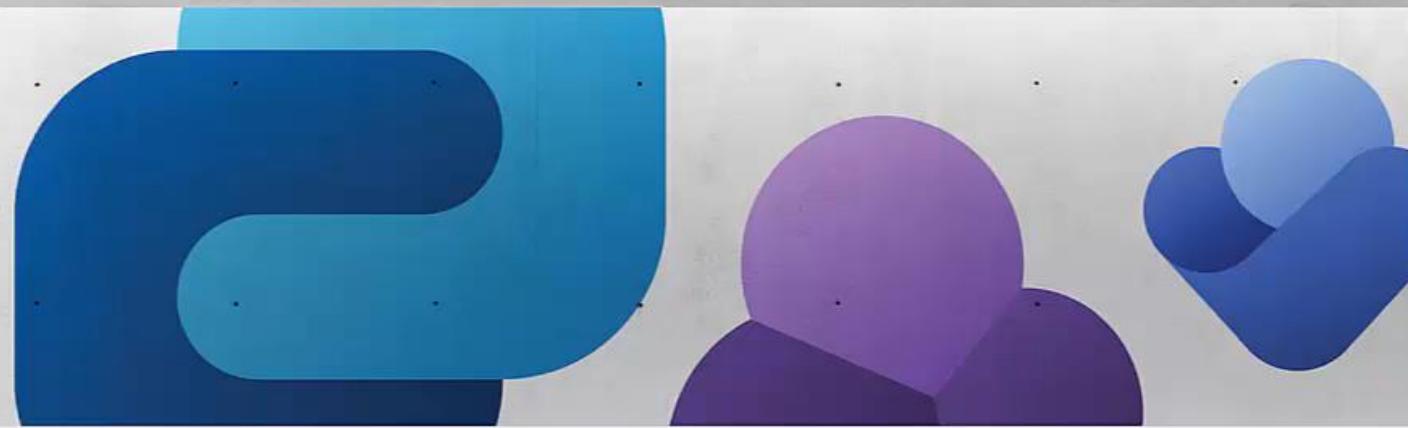
# Create, Track, Close OKRs and Understand Alignment



Viva Goals: OKR Life Cycle

#MicrosoftEmployee #MSPartnerUK

# Viva Goals Integrations



Viva Goals: Integration Examples

# Viva Goals Explorer

Viva Goals  
Contoso

Back to Main Menu

OKRs Not Updated in last 7d

Object Type: Objective AND Key Res... Time Period: Current (Q4 2022) Last Check-in: More than 7 days + Add filter

View Options Group By: Owner Sort By: Last Check-in

TITLE	TYPE	OWNER	WHEN	STATUS	SCORE
Owner: Alex Wilber					
Implement 10 new channels/mediums where to post old or new content	⌚	Megan Bowen	Q4 2022	Behind	30%
Implement 5 new channels/mediums where to post old or new content in England	⌚	Alex Wilber	Q4 2022 OCT 1 – DEC 31	Behind	20%
Achieve record metrics in all areas of marketing	⌚	Miriam Graham	Q4 2022	On Track	20%
170000 website visitors	⌚	Alex Wilber	Q4 2022 OCT 1 – DEC 31	On Track	38%
Achieve record metrics in all areas of marketing	⌚	Alex Wilber	Q4 2022	On Track	34%
Talk to 10 external editors to receive feedback on our articles and infographics	⌚	Alex Wilber	Q4 2022 OCT 1 – DEC 31	On Track	30%
Owner: Allan Deyoung					
Achieve record metrics in all areas of marketing	⌚	Miriam Graham	Q4 2022	Behind	20%
Increase trials from 1300 to 7500 using new automated portal	⌚	Allan Deyoung, Miriam Graham	Q4 2022 OCT 1 – DEC 31	Behind	10%
Megan Bowen					

# Viva Goals Dashboard

Viva Goals  
Contoso

- Search
- Notifications
- My OKRs
- Marketing OKRs
- Contoso OKRs**
- Bookmarks >
- Explorer >
- All Teams >
- All Users >
- Feed
- Admin

Help

Megan Bowen

## Contoso

Owner: Megan Bowen | 0 Followers | Bookmarked | Follow

OKRs Projects Dashboards Settings

### Contoso Goals Dashboard

Last change: Oct 19 at 3:49pm Owner: Megan Bowen

#### Contoso Board Meeting

##### OKR List

###### Key Updates

Megan Bowen 8d  
Since the last review the team has accomplished:

- 1) XXXX
- 2) YYYY
- 3) ZZZZ

###### Progress over time

In last 7 days overall progress has changed from 19% to 20%  
Status for 3 OKRs remained same • Status for 1 OKR was changed

###### Progress

Date	Actual	Expected
Oct 20	19%	20%
Oct 27	20%	28%

###### OKR

**Improve internal employee engagement**  
Contoso

**Achieve record revenues while increasing profitability**  
Contoso

Open in full view Close

Check-in Comment Share More

Overview Key Results Projects Child Objectives Activity

##### Progress

Manage contributions

Behind 17%

Last Check-in Note  
No check-in notes are available

This item has key results that need attention

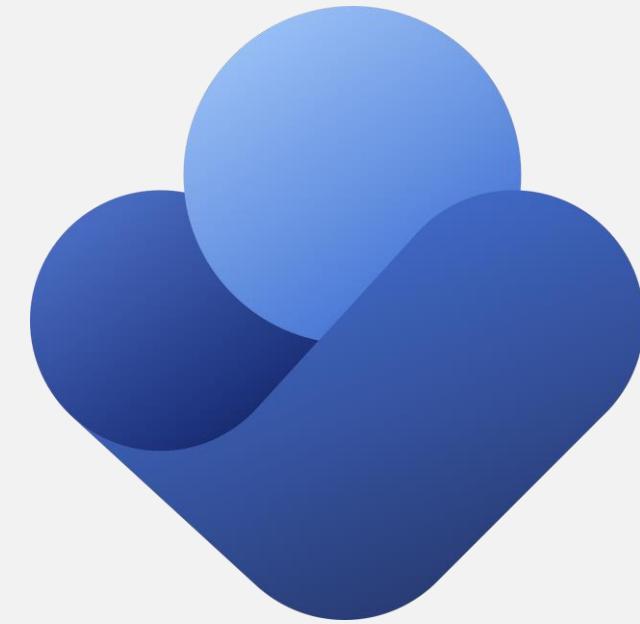
Owner: Patti Fernandez Type: Organization  
When: Q4 2022 (Oct 1 - Dec 31) Last updated: October 20, 2022  
Add a description  
Tags

Scroll down

# Agenda

## Insights

- Personal Insights
- Prerequisites for manager insights
- Advanced Insights
- Advanced metric descriptions
- Analyst setting for advanced insights
- Role based security and access
- Use organisational data for more effective analysis
- Set up Viva Insights
- Create custom analyses



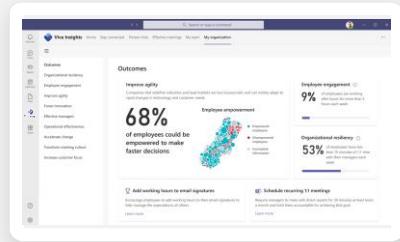
**Note:** Following slides based upon new Insights Platform. Assessment is based upon WPA

# Viva Insights Empower people and teams

## Data driven insights



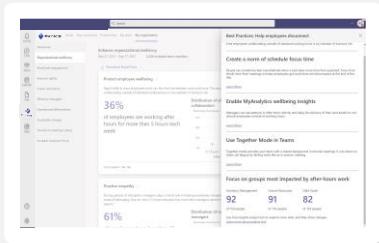
Leader insights



Understand the impact of work on people and the business



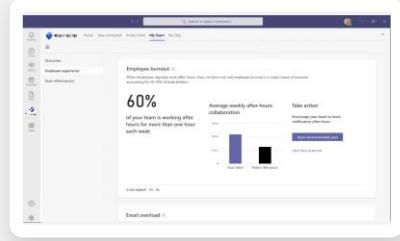
## Actionable recommendations



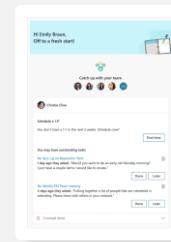
- Drive employee experience transformation
- Create a culture of data-driven empowerment



Manager insights



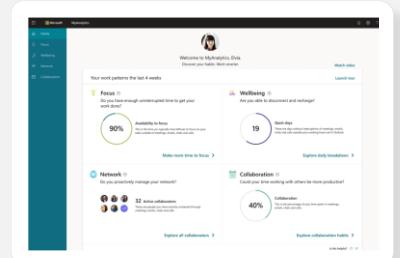
Identify work patterns that can lead to burnout and stress



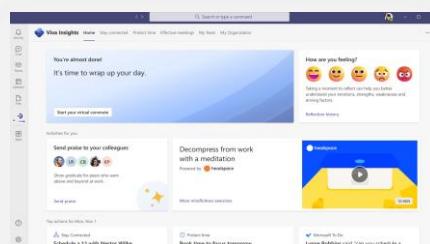
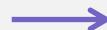
- Stay connected and invested in your team
- Help your team work smarter and stay balanced



Individual insights



Identify opportunities to change how you work



- Nurture your wellbeing
- Improve your productivity



IT Leader

Manage solutions and access to data sources/infrastructure

Key partners



Analyst

Conduct custom analytics based on business scenarios

Personal insights	Manager insights	Leader insights	Analyst tools
Requires Microsoft 365 license	Requires Viva Insights license	Requires Viva Insights license	Requires Viva Insights license
Viva Insights app in Microsoft Teams	Viva Insights app in Microsoft Teams	Viva Insights app in Microsoft Teams	Advanced Analytics web app
Personal Insights web dashboard and digest emails	Advanced Analytics web app	Advanced Analytics web app	
Briefing email			
Insights add-in and inline suggestions for Outlook			

# Viva Insights privacy principles & controls

## No new personal information revealed

- Personal insights visible only to the individual
- Manager and leader insights always aggregated
  - Differential privacy provides further protection

## Granular controls

- For admins
  - Whose data to include
  - Who should be given access to insights
  - What organization information to include
  - What sensitive information to exclude
  - What is the minimum aggregate size
- For individuals
  - Whether to opt-out from personal insights



# Summary | Privacy principles and controls applied to Viva Insights

Data source: Metadata from collaboration activities<sup>1</sup>

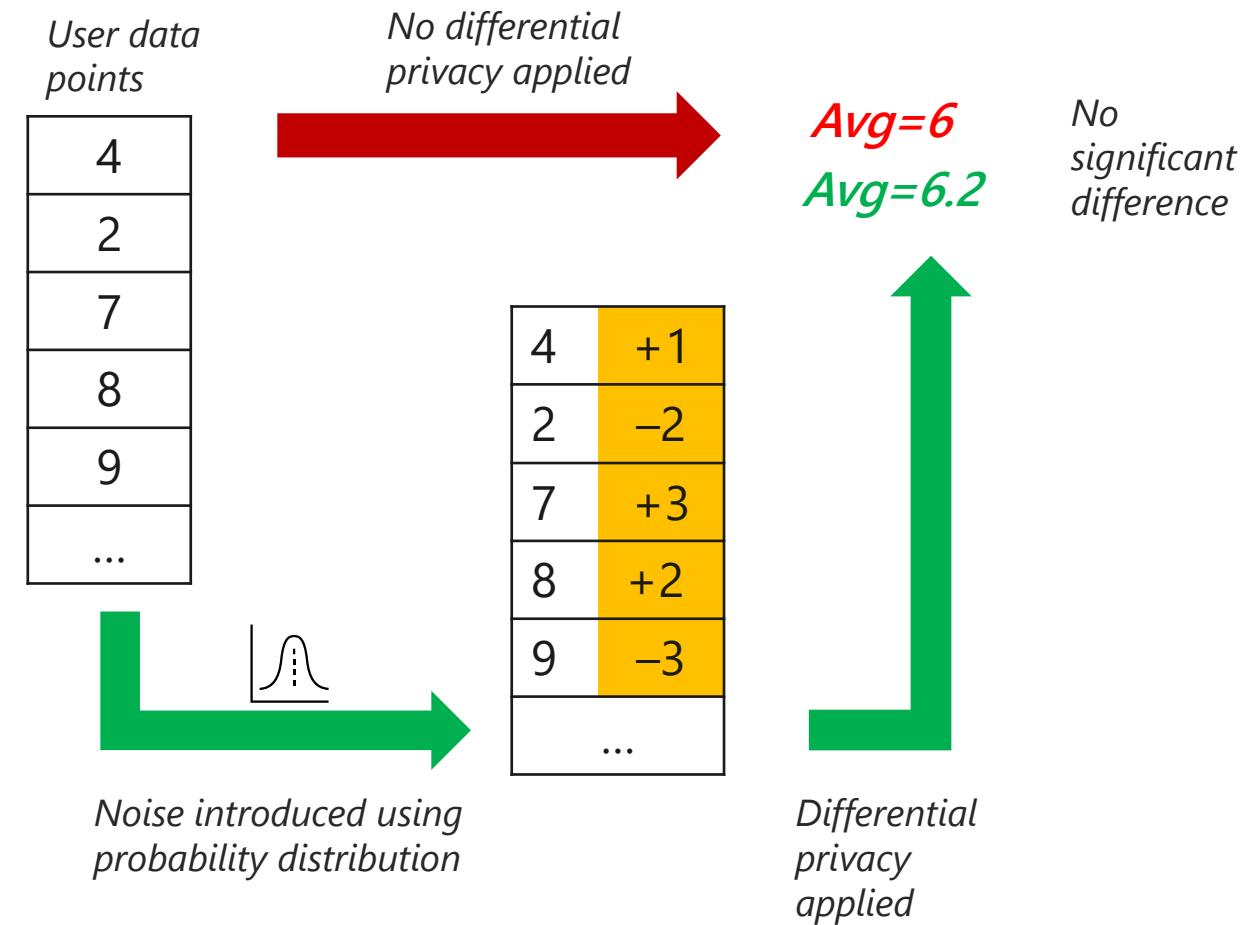
	Personal insights	Manager insights	Leader insights	Analyst tools
Individuals see personal data computed from their own activities		Manager insights provide group-level aggregates	Leader insights provide company-level aggregates	Analysts see aggregates, can drill-down through UX and query platform
<b>No new individual-specific info shown to others</b>				
Differential privacy	-	✓	✓	✓
Minimum aggregate size	✓ 5	✓ 9+	✓ 5+	✓ 5+
De-identification	-	-	-	✓
<b>Granular controls for tenant admins</b>				
Exclude users/mailboxes	✓	✓	✓	✓
Give explicit access to managers, analysts and org. leaders	-	✓	✓	✓
Configurable minimum aggregate	-	✓	✓	✓
Exclusions/Filters	-	✓	✓	✓
<b>Granular controls for individuals</b>				
Opt-in/out through UX	✓	-	-	-
Exclude from digest email	✓	-	-	-
Exclude from dashboard/ add-in	✓	-	-	-

1. Personal insights also presents tasks derived from email bodies

# What's differential privacy?

- Differential privacy protects the individual as if they were not part of the analysis
- Mathematically impossible to infer individual information from aggregates
- A form of data aggregation that adds 'statistical noise':
  - Significant enough to ensure that no individual identity can be established
  - Small enough that the analysis is still accurate and useful

## How it works (illustrative)



# Personal Insights Admin Settings

The screenshot shows the Microsoft 365 admin center interface with the following details:

- Header:** Contoso Electronics, Microsoft 365 admin center, Search bar, and various navigation icons.
- Left Navigation:** Home, Users (Active users, Contacts, Guest users, Deleted users), Teams & groups (Active teams, Deleted groups, Shared mailboxes), Roles, Resources, Billing, Support, Settings (Domains, Search & intelligence, Org settings, Integrated apps, Partner relationships), Setup, Reports.
- Main Content Area:**
  - Rollout scenarios:** A section titled "Select and complete one of the following scenarios:" with four options:
    - Default on.
    - Default off.
    - Mixed deployment.
    - Optional opt-in.
  - Optional opt-in:** A section explaining that some users have Viva Insights off by default and can opt themselves in, or if the service plan has been removed. It also states that while Viva Insights is not available to these users, their data contributes to email-read statistics for other users.
  - Office settings:** A list of settings including Microsoft Edge site lists, Microsoft Forms, Microsoft 365 Groups, Modern authentication, Multi-factor authentication, News, and Office installation options.
- Right Panel:** Microsoft Viva Insights (formerly MyAnalytics) summary, including a description, a link to learn how other organizations use it, a link to find out about user privacy, and a list of elements users have access to (checked boxes for Insights dashboard, Digest email, Insights Outlook add-in and inline suggestions, Meeting effectiveness surveys, Schedule send suggestions).
- Feedback Section:** A text area for users to let Microsoft know how Viva Insights can work better, and a checkbox for "Allow Microsoft to contact me about my feedback".
- Buttons:** Save and Cancel at the bottom right.

# Example: Mixed Deployment Set Up

Role – Microsoft 365 admin

1. Turn off Viva Insights on all surfaces for all users. To do this, follow the steps in [Set Viva Insights off by default](#).
2. Use the following steps to change access to Viva Insights for multiple users. Do this by running a PowerShell script that iterates through the users, changing the value one user at a time. (Also see [Exchange Online PowerShell V2 module](#).)
3. Create a comma-separated value (.csv) text file that contains the UserPrincipalName field of the users you want to configure. This will become your input .csv file. For example:

 Copy

```
UserPrincipalName
ClaudeL@contoso.onmicrosoft.com
LynneB@contoso.onmicrosoft.com
ShawnM@contoso.onmicrosoft.com
```

4. Specify the location of the input .csv file, the output .csv file, and the value of PrivacyMode that you want to set for each user. Note: The output.csv file will contain the results of running this PowerShell script. For more information about possible values for PrivacyMode, see [MyAnalyticsFeatureConfig / Parameters](#).

PowerShell

 Copy

```
$inFileName="<path and file name of the input .csv file that contains the users, example: C:\admin\users.csv"
$outFileName="<path and file name of the output .csv file that records the results, example: C:\admin\output.csv"
$privacyMode = "Opt-in"

$users=Import-Csv $inFileName
ForEach ($user in $users)
{
    $user.Userprincipalname
    $upn=$user.UserPrincipalName

    Set-MyAnalyticsFeatureConfig -Identity $upn -PrivacyMode $privacyMode
    Get-MyAnalyticsFeatureConfig -Identity $upn | Export-Csv $outFileName
}
```

5. Run the resulting commands at the Exchange Online PowerShell V2 module command prompt. For more information about the module, see [Exchange Online PowerShell V2 module](#).

This PowerShell script does the following:

- Displays the user principal name for each user.
- Sets the specified privacy mode for each user.
- Creates a .csv file with all the users that were processed and shows their status.

# Advanced Insights: Setup & Onboarding Steps

## Office 365 Tenant Admin



Assign licenses



Assign user roles

1

Scope the analysis population

2

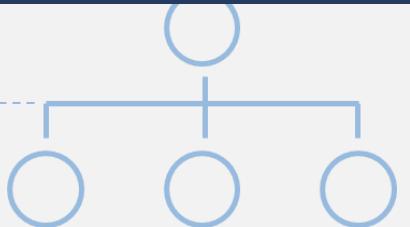
Control who has what access

## Insights Admin



Confirm settings

*Advanced Insights processes data*



Upload organizational data

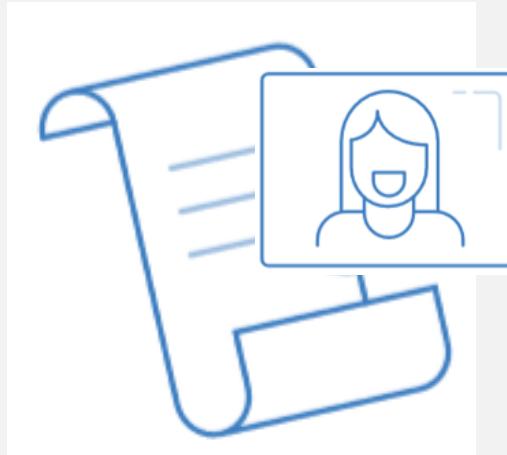
3

Manage protection of sensitive data

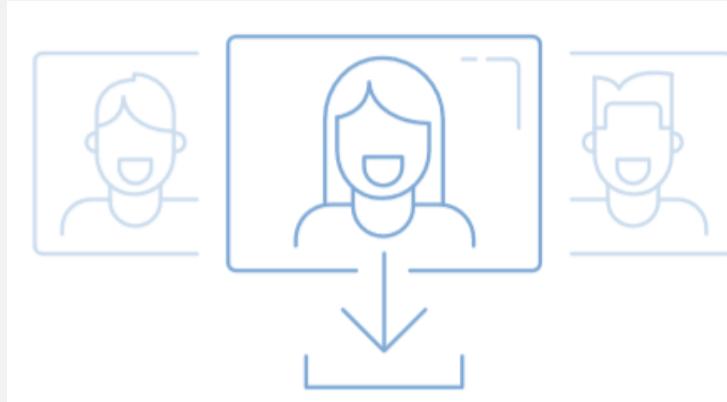
4

Adjust availability of employee descriptive data

# Step 1 | Assign Licenses



The project lead works with the executive sponsor to identify analysis population



The M365 tenant admin assigns licenses using PowerShell or group-based licensing

Online documentation: [Assign licenses to analysis population](#)



Unlike other applications, assigning a Viva Insights license **does not change the employee's end experience**



The Office 365 tenant admin should confirm that employees have the appropriate Microsoft 365 access and Exchange Online migration status

# Step 2 | Assign User Roles in Azure AD

## M365 Administrator

**No access to Viva Insights.**  
This role is used for assigning Insights licenses to user mailboxes for extraction and for assigning Insights roles to users. This assignment can be done via PowerShell or Azure AD, some in M365 Admin Center.

## Insights Admin

**Access to Admin and Data Sources features.** This role is used for the Advanced Insights administrator, privacy settings, upload and verify organizational data.

## Insights Analyst

**Full access to all product features, except Admin.** This role is used for the analyst who requires the most complete access to the data.

## Insights Business Leader

**Access to Home page, Explore Dashboard.** This role is used for the analyst who only needs access to insights generated from our curated set of Explore metrics dashboards.

## People Manager

**Assigned access by Insights Admin.** Managers can see their organisational trends within the Viva Insights App.

# Step 3a | Privacy Settings

**Privacy settings**

These privacy settings apply to organisational insights and group insights in Viva Insights Teams app, and analysis capabilities in web app.

Data protection with Viva Insights • Privacy and cookies

Minimum group size (i)

A

Save changes Cancel

	Setting	Purpose
A	Minimum group size	Set the minimum number of people in a group for when to display the group in insights and charts. Your minimum group size must be at least 5.

Online documentation: [Data protection with Viva Insights](#)

# Step 3b | Manager Settings

**Viva Insights for Managers**

Viva Insights can allow managers to see aggregate collaboration insights for their teams and start plans to help their teams change key collaboration behaviours that affect efficiency and overall well-being.

[Learn more about Manager Insights and Plans](#)

**Current managers**

49 measured managers  
18 managers enabled for aggregate group insights in Viva Insights

**Select managers**

All managers  
 Select managers (upload .csv)

[Upload .csv](#) 

**Minimum team size** 

10

18 measured managers that meet minimum team size

[Save changes](#) [Cancel](#)

	Setting	Purpose
	Select managers (upload .csv)	CSV upload option to control which managers see Group Insights. <b>Note:</b> Only managers whose team meets or exceeds the Minimum team size setting can access Group insights within My team in Viva Insights in Teams.
	Minimum team size	Set minimum team size for Manager to be enabled. It cannot be lower than 10 or tenant minimum group size, if the latter is higher than 10. Note that team size refers everyone in the organisation hierarchy under manager.

Online documentation: [Group insights within My team / Teamwork Habits](#)

# Old Platform: Step 3a | Confirm Settings | System defaults

The screenshot shows the 'Confirm Settings' step of the Workplace Analytics setup. On the left, there are four sections labeled A, B, C, and D:

- A Default time zone**: Set to (UTC-07:00) Arizona. Working days are Monday through Friday.
- B Working hours**: Start time is 12:00 AM, End time is 07:00 PM.
- C Hourly rate**: Set to USD 75.
- D Exclusions**: A note says: "If you want to exclude any data from analysis, choose it in this Exclusions section. You can also change these settings any time after setup is complete." A 'Learn more' link is provided.

At the bottom is a 'Next' button. On the right, a table maps these settings to their purposes:

	Setting	Purpose
A	Default time zone and working days	Used only if personalized Outlook settings are not available
B	Working hours	Used only if personalized Outlook settings are not available
C	Hourly Rate	Advanced Insights uses hourly rate to calculate the cost of low-quality meetings
D	Exclusions	Select Next to proceed to the Privacy section.



Changes made to these **system defaults** are applied after next data refresh of your organizational (HR) data or Office 365 collaboration data.

**These changes apply to data retroactively** and can affect calculations of historical metrics.

Original documentation: [Configure Advanced Insights Settings](#)

# Old Platform: | Confirm Settings | Privacy

Workplace Analytics

Admin settings

System defaults Privacy

Privacy settings

Confirm what data is excluded from analysis and what data is visible in queries and dashboards. [Learn more](#)

**E** Minimum group size ⓘ  Save

**F** Hash subject lines ⓘ Yes

**G** Exclude domains ⓘ example: contoso.com microsoft.com ×

Press Enter to add an entry

**G** Exclude email addresses ⓘ example: john@outlook.com sarah@contoso.com ×

Press Enter to add an entry

**G** Exclude terms from subject lines ⓘ example: attorney-client privilege No terms excluded yet.

Press Enter to add an entry

I confirm that all privacy settings are correct.

These changes will not be reflected until the next data refresh.

Changes to domain, email address, subject line term exclusion settings will apply to new data only and does not affect calculation of historical metrics. [Learn more](#)

	Setting	Purpose	Changes
<b>E</b>	Minimum group size	Suppress dashboard results for group size less than settings (smallest possible = 5)	<b>Immediately updated</b> no needed for data refresh  <b>Applies retroactively</b>
<b>F</b>	Hash (hide) meeting subject lines	Meeting subject line text will not be surfaced in meeting queries	<b>Immediately updated</b> no needed for data refresh  <b>Applies retroactively</b>
<b>G</b>	<p>Processing Exclusions:</p> <ol style="list-style-type: none"> <li>1) Domains</li> <li>2) Email Address</li> <li>3) Subject Lines</li> </ol> <p><b>CAUTION:</b> Exclusions will reduce the collaboration data processed from mailbox, (resulting in reduced data set available for analysis)</p>	Any activity involving these criteria will not be processed nor measured as part of dataset.  Exclusion example: If <a href="#">sarah@contoso.com</a> is excluded, any collaboration with this email address (either as the sender, receiver or meeting attendee) will be excluded from being processed or measured.	Applies to <b>new data</b> processed during next data refresh and <b>do not affect historical data</b>

**REMINDER:** Confirmation of privacy settings is required before data processing begins.

# Data Processing Timelines

- **Bootstrap Data Processing** will take ~3 days, once licenses are applied. After which, data will be live on Advanced Insights.
- **Subsequent license assignment** to new mailboxes will be processed on a **weekly basis** (over weekend).

# Organizational Design

Online documentation:

- [Prepare Organizational Data File](#)
- [Upload Organizational Data](#)

# Organizational Data | Required data attributes (1/2)

PersonId	EffectiveDate	ManagerId	Organization
----------	---------------	-----------	--------------

Once data is uploaded, the **PersonID** will be hashed and deidentified. It must reflect the employee's primary SMTP email address.

**EffectiveDate** helps understand the effect that promotions, relocations, changes in management, etc., may have in employees' collaboration patterns. It must be in mm/dd/yyyy format. If EffectiveDate column is not provided, the upload date will be used as the default EffectiveDate.

The first organizational data file that you upload to Advanced Insights should include multiple rows per employee

- Each row in your org file has a different Effective Date, and represents a different point-in-time snapshot
- **For example**, in May & June Ann reported to Jered but just before July she got a new manager

PersonId	EffectiveDate	ManagerId	Organization
ann@contoso.com	5/1/2021	jered@contoso.com	Marketing
ann@contoso.com	6/1/2021	jered@contoso.com	Marketing
ann@contoso.com	7/1/2021	carolina@contoso.com	Marketing

# Organizational Data | Required data attributes (2/3)

PersonId	EffectiveDate	ManagerId	Organization
----------	---------------	-----------	--------------

Advanced Insights uses the **ManagerID** column to measure how much time an employee spends with their direct manager. It must reflect the manager's email address.

# Organizational Data | Required data attributes (3/3)

PersonId	EffectiveDate	ManagerId	Organization
<p><b>Organization</b> is used to power the following insights for Leaders, Managers and Analysts</p>			
<ul style="list-style-type: none"><li>• Employee wellbeing</li><li>• Manager connection</li><li>• Meeting effectiveness</li><li>• Power BI template: Ways of working assessment</li><li>• Power BI template: Business resilience</li></ul>		<ul style="list-style-type: none"><li>• Power BI template: Manager effectiveness</li><li>• Power BI template: Wellbeing - balance and flexibility</li><li>• Power BI template: Hybrid workforce experience</li><li>• Filters and groups for metrics and Power BI templates</li></ul>	

# Who should be included in the organizational data file? (4)

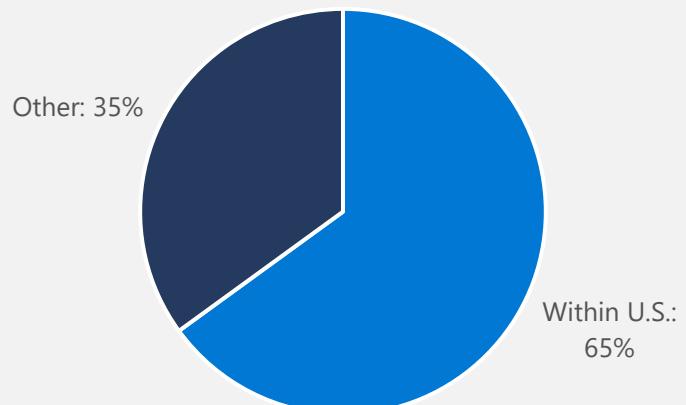
Include all employees in the broader company, even unlicensed employees.  
This enables you to measure how licensed employees worked with other teams.

**Example.** I only license employees in the United States in Advanced Insights, but I want to understand how my U.S. employees invested their time with teams across the globe.

**Scope of  
organizational  
data:**

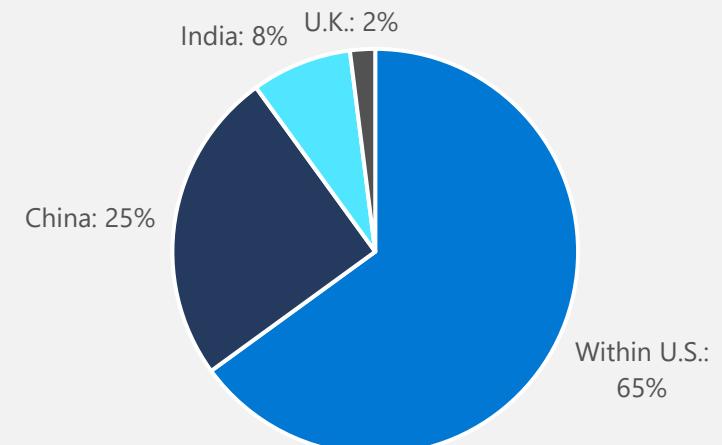
Licensed employees

U.S. employees allocated their time to:



All employees

U.S. employees allocated their time to:



# Additional organizational data attributes to enrich your analysis

You can include up to **100+** different attributes, including the required columns

	Description	Attribute Examples	
	Background	Employee type, status and job history, frequently used to scope an analysis	<ul style="list-style-type: none"><li>• Hourly Wage</li><li>• Employee Type (Regular, Contingent, Intern)</li><li>• Exempt/Non-Exempt</li></ul>
	Location	Describes where the employee sits geographically	<ul style="list-style-type: none"><li>• Region, Country, City</li><li>• Campus</li><li>• Building</li></ul>
	Organization	Describes the employee's position within the organizational reporting structure	<ul style="list-style-type: none"><li>• Business Unit</li><li>• Division</li><li>• Department</li><li>• Cost Center</li><li>• Leader Reports to</li></ul>
	Role	Describes the employee's skills, function, and responsibilities	<ul style="list-style-type: none"><li>• Functions, Title</li><li>• Manager Flag</li><li>• Career Level</li><li>• Level Designation</li></ul>
	Outcomes	Includes measures that are driven by how an employee works, and that contribute to overall business results	<ul style="list-style-type: none"><li>• Performance Rating</li><li>• Engagement Survey Score</li><li>• Sales Quota Attainment</li><li>• Manager Effectiveness Score</li></ul>

# Subsequent Uploads

## Subsequent Uploads.

Available Options	Definitions
Add new employees to existing organizational data	Adds new employees to your existing organizational data. You can also use this option to add new attribute values and edit existing attribute values in the same upload.
Add new data for existing employees	Adds new attributes to existing employees' organizational data by uploading the minimum required attributes of PersonId and EffectiveDate (if not provided, the process automatically adds the upload date for all EffectiveDate values) along with the edited employee data
Edit data for existing employees	Edits the current attribute values for existing employees' organizational data by uploading the minimum required attributes of PersonId and EffectiveDate (if not provided, the process automatically adds the upload date for all EffectiveDate values in the newly uploaded data) along with the edited employee data.
Delete data for existing employees	Deletes attributes that are not required in the existing organizational data. In Existing attributes, select one or more attributes to remove, and then select Delete (trashcan) icon. You cannot delete any required attributes. When you see the message confirming the deletion, select Confirm or Cancel (only if you want to select different or additional attributes to delete).
Upload a new organizational data file	Deletes all previously uploaded data and replaces it with a new upload.

# Sample Org Data File

Required fields: These fields must be present; they require non-blank values for each row.						
Reserved fields: These fields are not required, and can be included in your upload file.						
Header name	PersonId	ManagerId	Organization	EffectiveDate	LevelDesignation	FunctionType
<i>Definition (delete this row!)</i>	Unique identifier for the employee record. It can be an employee's primary SMTP address or email alias.	Unique identifier for the employee's manager. It can be the manager's primary SMTP address or email alias.	The internal organization that an employee belongs to. For more actionable insights, avoid using too few or too many unique Organizations.	Date that a given attribute value applies for the employee. The attribute applies until another record for the same attribute with a different EffectiveDate is specified. If no EffectiveDate is uploaded, the date of upload is used as default.	Level that represents an employee's experience, management level, or seniority within the organization. For more actionable insights, avoid using too few or too many unique LevelDesignation values.	The job function that an employee performs. For more actionable insights, avoid using too few or too many unique FunctionTypes.
<i>Data type (delete this row!)</i>	Email	Email	String	DateTime (MM/DD/YYYY)	String	String
<i>Examples (delete this row!)</i>	person.name@xyz.com	manager.name@xyz.com	Financial Planning and Analysis	12/31/2021	Director	Finance Management

Download a template Org Data File here:  
<https://go.microsoft.com/fwlink/?linkid=2194306>

# FAQs

- Personal Insights
- [FAQ for Viva Insights in Teams | Microsoft Learn](#)
- Advanced Insights
- [Advanced insights FAQ | Microsoft Learn](#)

# Partner University: Viva Technical Essentials

 <p><b>Microsoft Viva Connections technical essentials</b> Explore the destination for news, conversations, apps, and more.</p> <p>2022-05-05</p>	 <p><b>Microsoft Viva Insights technical essentials</b> Create a culture in which people and business can thrive.</p> <p>2022-05-05</p>	 <p><b>Microsoft Viva Learning technical essentials</b> Bring learning courses from multiple content providers to you.</p> <p>2022-05-05</p>	 <p><b>Microsoft Viva Topics technical essentials</b> Set up content and expertise automatically, and put knowledge to work.</p> <p>2022-05-05</p>
 <p><b>Microsoft Viva Goals technical essentials</b> Discover a goal alignment solution that connects teams and priorities.</p> <p>2022-06-15</p>	 <p><b>Customizing all Microsoft Viva apps in Microsoft Teams</b> Learn how admins can configure Viva modules in Teams.</p> <p>2022-05-02</p>	 <p><b>Microsoft Viva Employee Experience: Technical assessment</b> Take the assessment by first signing in to Partner University.</p> <p>2022-05-02</p>	 <p><b>FAQ for Partner University</b> Review the FAQ for Partner University.</p> <p>2021-10-05</p>

[Microsoft Viva Employee Experience: Technical learning path](#)

[Microsoft Viva Employee Experience: Technical assessment](#)

Thanks.

# Best practices for creating and refreshing the organizational data file

## Best practices

### Scope

- Initial organizational file should include one snapshot for each of the past 13 months to map to initial historical collaboration data load
- Include descriptive organizational data for all employees in the company, even if they are not part of the licensed population, to enrich custom collaboration metrics for the licensed group

### Updates

- Include one snapshot for each month historically and going forward to capture changes to employee attributes
- Upload files including “net new” employees, effective dates, and columns using “Update existing organizational data” option
- Avoid renaming columns
- Column names should begin with a letter and only contain alphanumeric characters (letters and numbers, for example Date1). No leading or trailing blank spaces or special characters (non-alphanumeric, such as @, #, %, &) are permitted

Avoid columns with:

Many missing values

Incorrect datatype in values

Too broad or detailed for useful grouping and filtering (e.g., company code, job title)

Redundant attributes (e.g., department name and department code)

Dirty data (e.g., multiple spellings of one value: “Marketing” vs. “Mktg”, etc.)

### Privacy

- To help ensure privacy, do not include employee names or ID numbers in the file.

# Subsequent Uploads

**LINK.** I only licensed employees in the United States in Advanced Insights, but I want to understand how my U.S. employees invested their time with teams across the globe.  
Learn more: [Subsequent Uploads](#).

Available Options	Definitions
Add new employees to existing organizational data	Adds new employees to your existing organizational data. Your file includes needs to include all required fields (PersonId, ManagerId, and Organization) and other optional fields.
Add new data for existing employees	Adds new attributes to existing employees' organizational data by uploading the minimum required attributes of PersonId and EffectiveDate (if not provided, the process automatically adds the upload date for all EffectiveDate values) along with the edited employee data
Edit data for existing employees	Edits the current attribute values for existing employees' organizational data by uploading the minimum required attributes of PersonId and EffectiveDate (if not provided, the process automatically adds the upload date for all EffectiveDate values in the newly uploaded data) along with the edited employee data.
Delete data for existing employees	Deletes attributes that are not required in the existing organizational data. You cannot delete any required attributes. When you see the message confirming the deletion, select Confirm or Cancel. If you delete fields used in auto-refreshing queries, those queries will be disabled.
Upload a new organizational data file	Deletes all previously uploaded data and replaces it with a new upload.