



Viva Technical Essentials

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Partner University: Viva Technical Essentials

 <p>Microsoft Viva Connections technical essentials Explore the destination for news, conversations, apps, and more.</p> <p>2022-05-05</p>	 <p>Microsoft Viva Insights technical essentials Create a culture in which people and business can thrive.</p> <p>2022-05-05</p>	 <p>Microsoft Viva Learning technical essentials Bring learning courses from multiple content providers to you.</p> <p>2022-05-05</p>	 <p>Microsoft Viva Topics technical essentials Set up content and expertise automatically, and put knowledge to work.</p> <p>2022-05-05</p>
 <p>Microsoft Viva Goals technical essentials 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 Learn how admins can configure Viva modules in Teams.</p> <p>2022-05-02</p>	 <p>Microsoft Viva Employee Experience: Technical assessment Take the assessment by first signing in to Partner University.</p> <p>2022-05-02</p>	 <p>FAQ for Partner University 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](#)

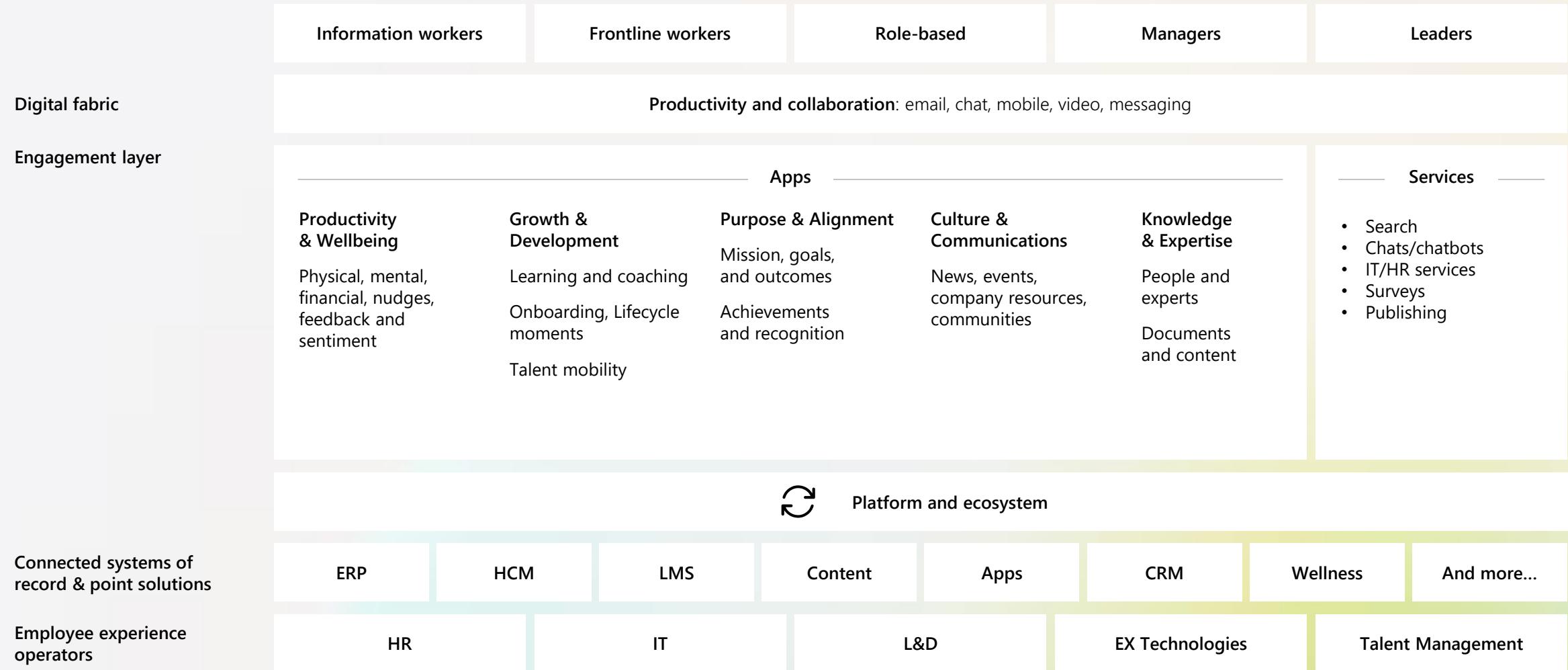
What is an employee experience platform (EXP)?

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



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



Microsoft Viva: the employee experience platform

Microsoft Viva suite

Includes all premium subscription capabilities¹



Viva
Connections²



Viva
Engage³



Viva
Insights



Viva
Goals⁴



Viva
Topics



Viva
Learning

Delivered through



(and other Microsoft 365 apps)

Extensible with

Partners • APIs

Managed in

Microsoft 365
admin center

Promotional price of \$9 per user per month⁵

¹Without the Viva suite, the premium subscription for Viva Insights, Viva Topics, and Viva Learning is each \$4 per user per month. ²Viva Connections is available at no additional cost to any employee licensed for SharePoint. ³Viva Engage is available with all Microsoft 365 enterprise (E) and frontline worker (F) plans at no additional cost. ⁴Formerly Ally.io. ⁵Promotional pricing ends Dec. 31, 2022, when the Viva suite will increase to the standard price of \$12 per user per month.

Agenda

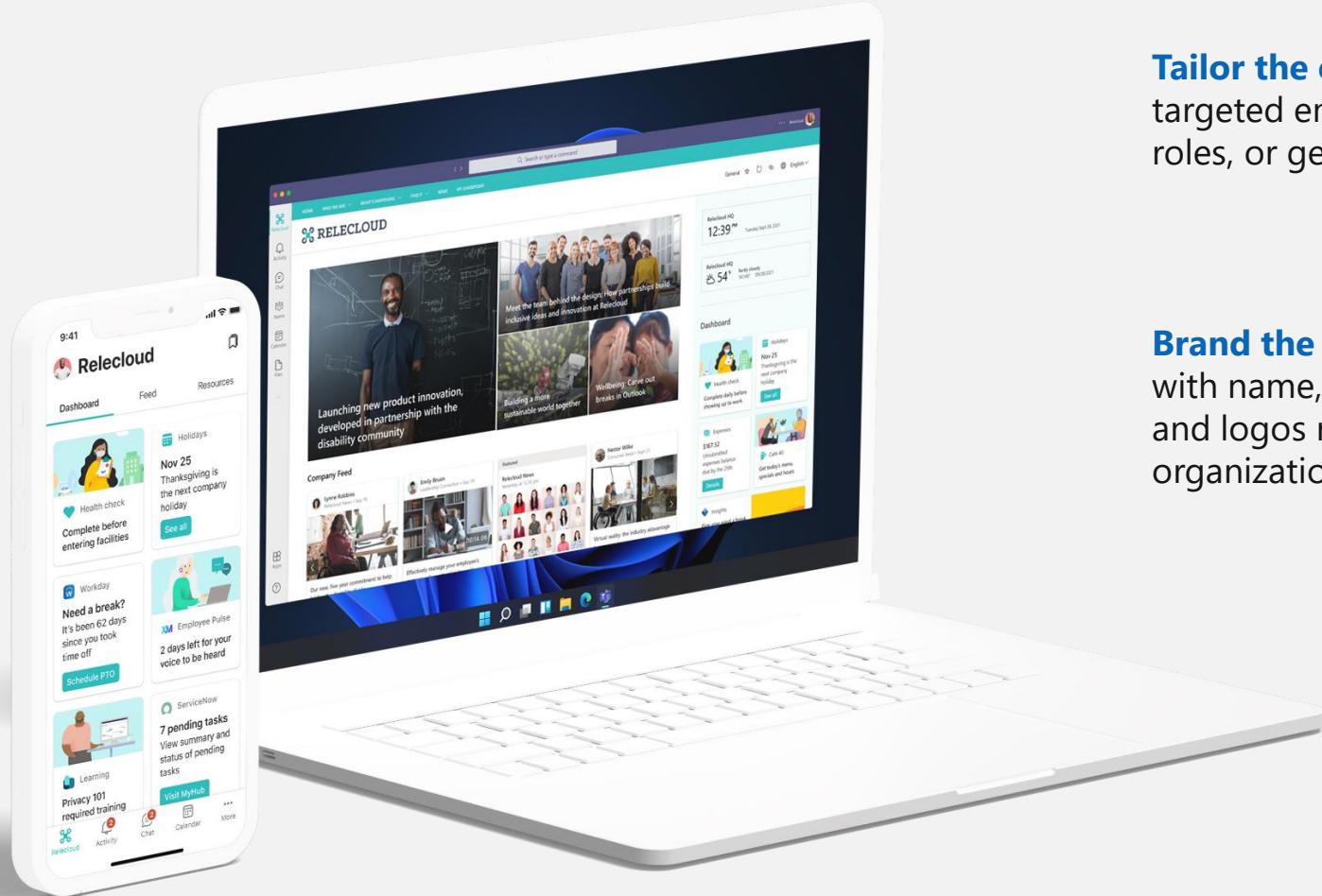
Connections

- 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

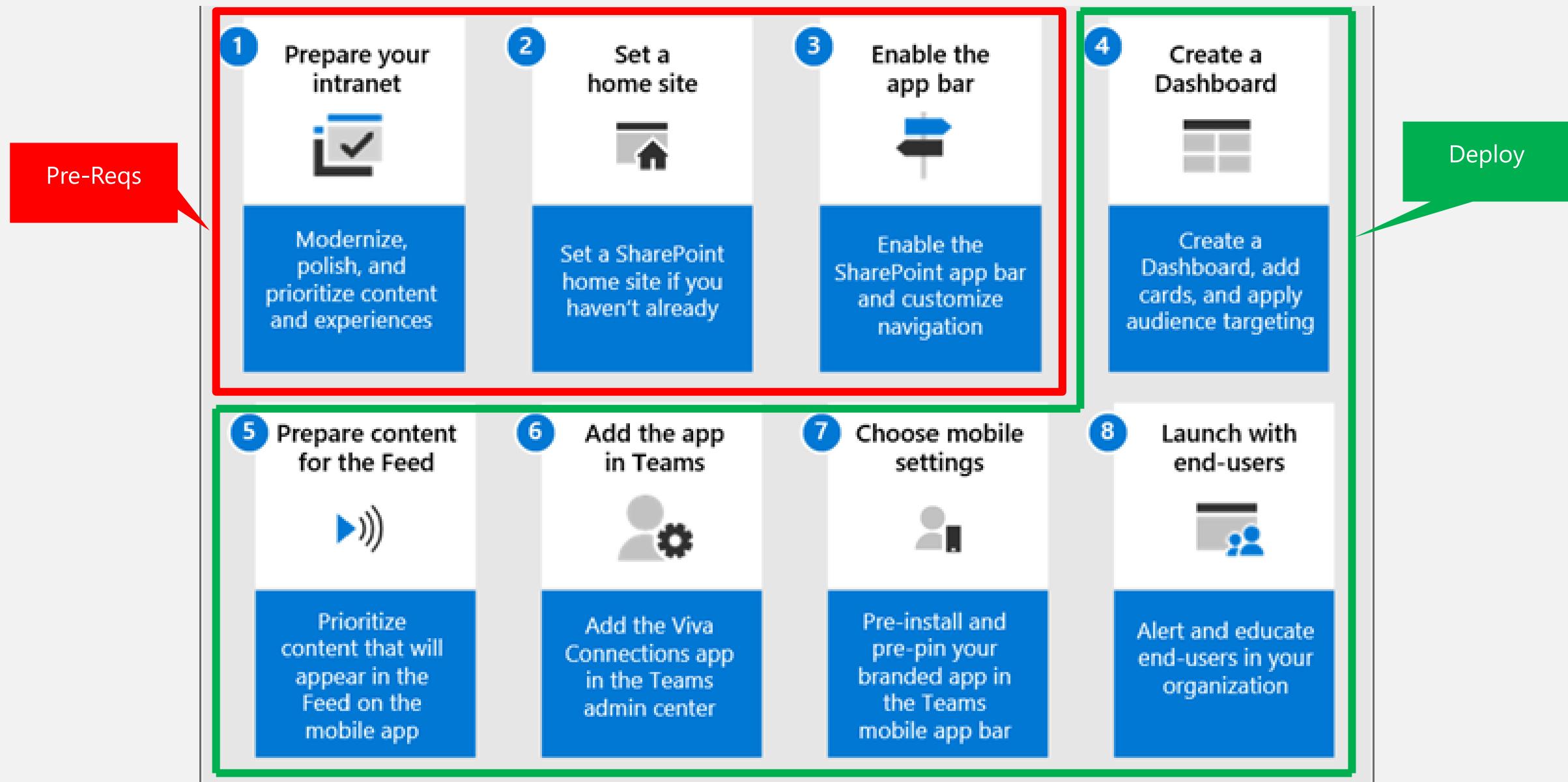
Personalized experience that delivers relevant content, information and resources, powered by Ai and Microsoft Graph

Create custom components that enrich the experience with powerful frameworks

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

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

Set up Viva Connections



Set a Home Site

Select

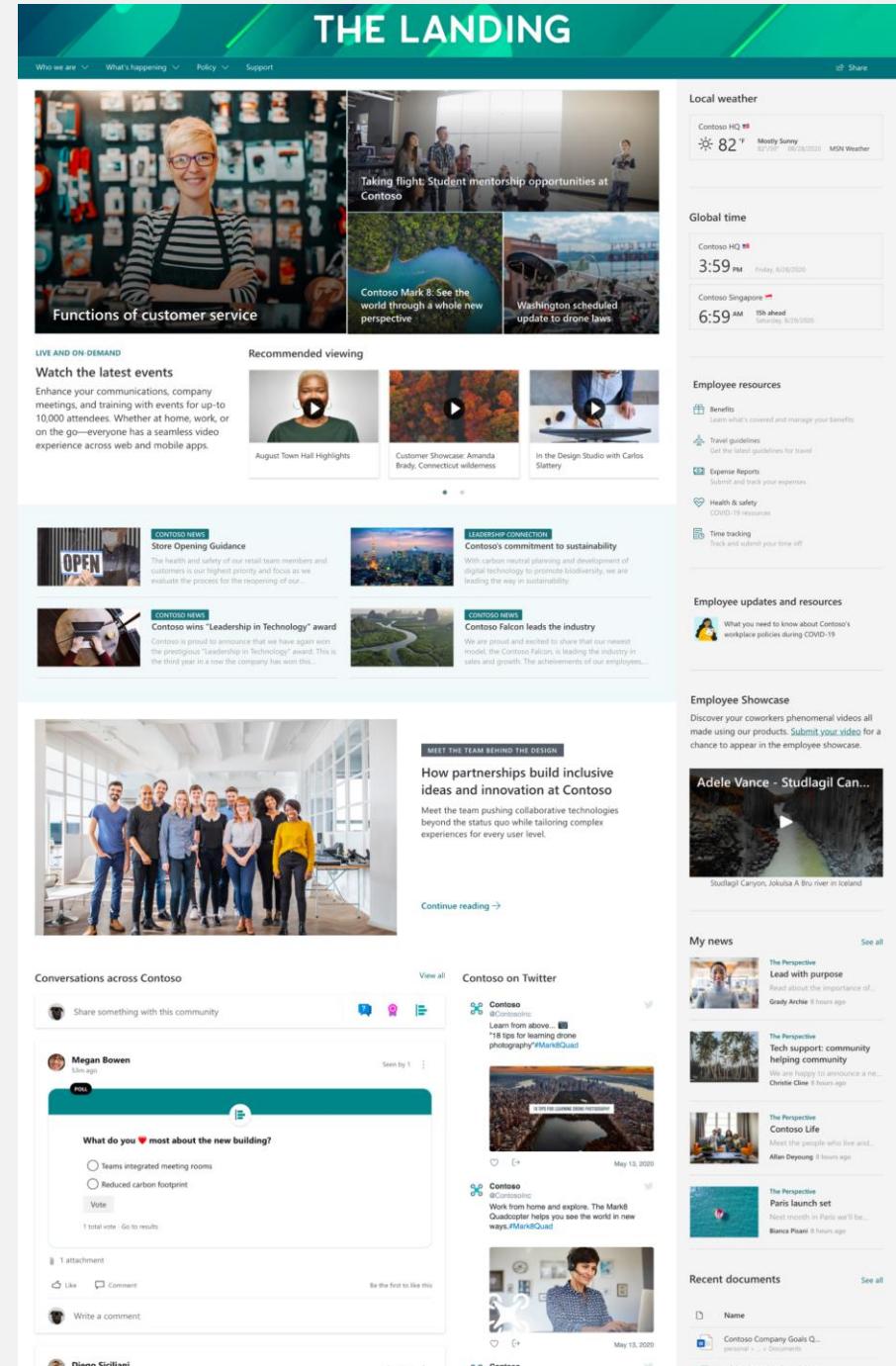
A modern home site is the top landing page for all users in your modern intranet. When you deploy Viva Connections, your SharePoint home site will become the intranet landing experience inside of Microsoft Teams.

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 her right are three smaller images: '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 is divided into several sections:

- LIVE AND ON-DEMAND**: 'Watch the latest events' section featuring 'August Town Hall Highlights'.
- Recommended viewing**: Three video thumbnails: 'Customer Showcase: Amanda Brady, Connecticut wilderness', 'In the Design Studio with Carlos Slattery', and 'Contoso Falcon leads the industry'.
- CONTOSO NEWS**: Two news items: 'Store Opening Guidance' and 'Contoso wins "Leadership in Technology" award'.
- LEADERSHIP CONNECTION**: An article about Contoso's commitment to sustainability.
- MEET THE TEAM BEHIND THE DESIGN**: A group photo of a team and an article about how partnerships build inclusive ideas and innovation at Contoso.
- Conversations across Contoso**: A poll asking 'What do you ❤️ most about the new building?' with options for 'Teams integrated meeting rooms' and 'Reduced carbon footprint'. It shows 1 total vote and a 'Go to results' button.
- Contoso on Twitter**: A feed of tweets from @ContosoInc, including one from Megan Bowen (@MeganBowen) and another from Contoso (@ContosoInc).
- My news**: A feed of news items from various users, such as Grady Archie (@GradyArchie), Cherie Clive (@CherieClive), and Alan Deyoung (@AlanDeyoung).
- Recent documents**: A feed of recent document uploads, including 'Contoso Company Goals Q...'.

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.

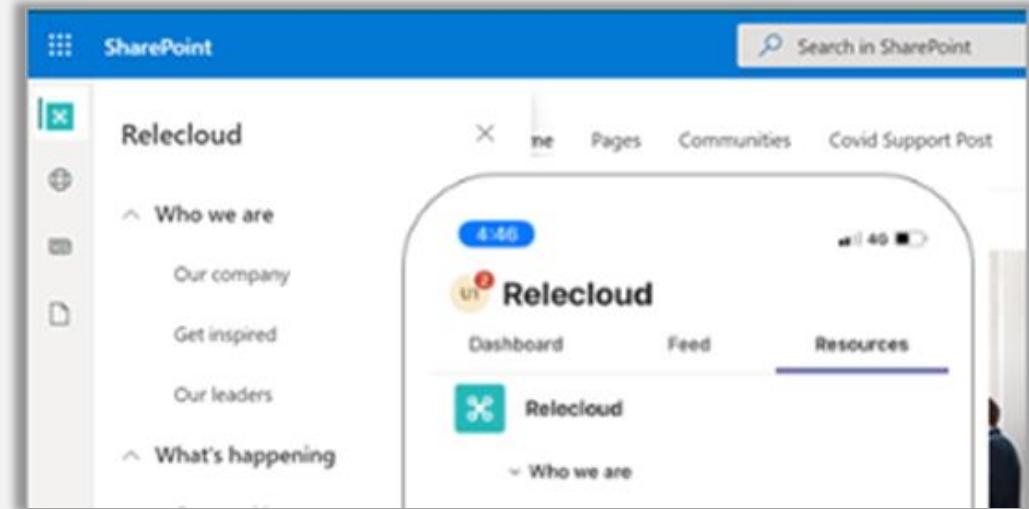
The SharePoint app bar cannot be disabled on specific sites.

The SharePoint app bar is not available on classic SharePoint sites today, however soon administrators will be able to add it to classic sites manually.

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.



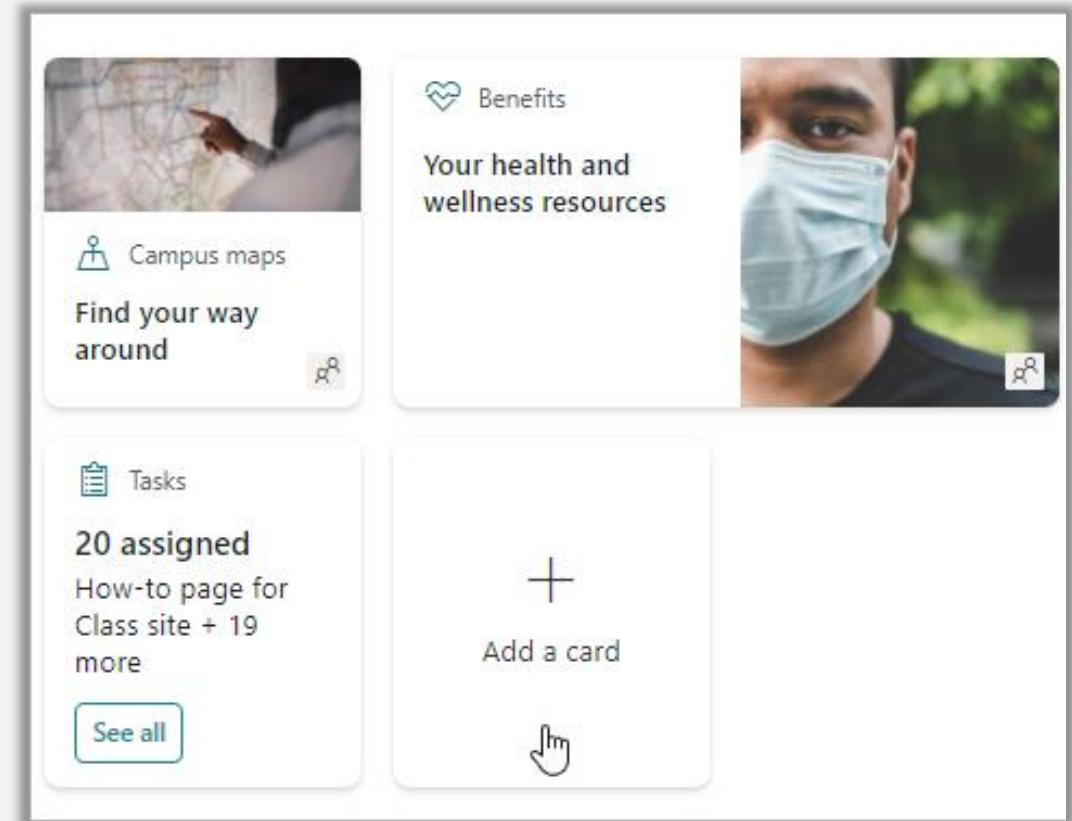
Create a dashboard

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 site

Dashboard Leverages Existing Investments

Configurable to company brand

Adaptive Cards + SharePoint & Teams Apps

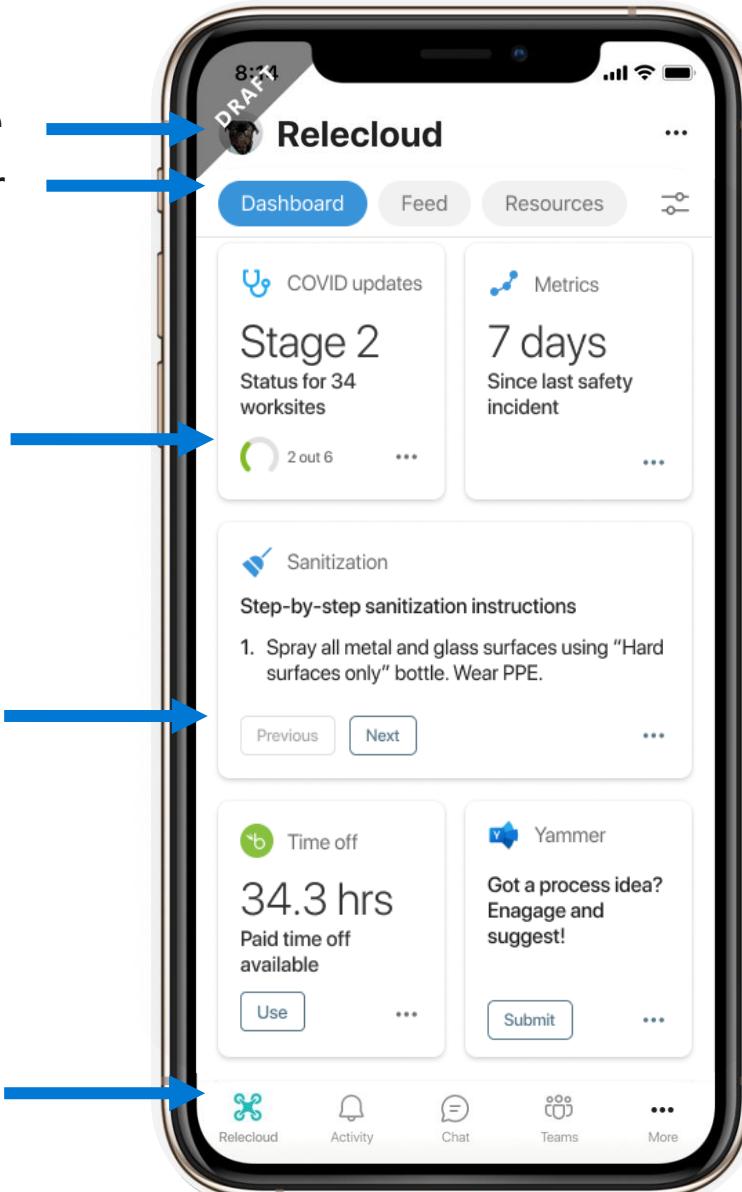
Custom Card capabilities
with Adaptive development

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

SPFX ACE



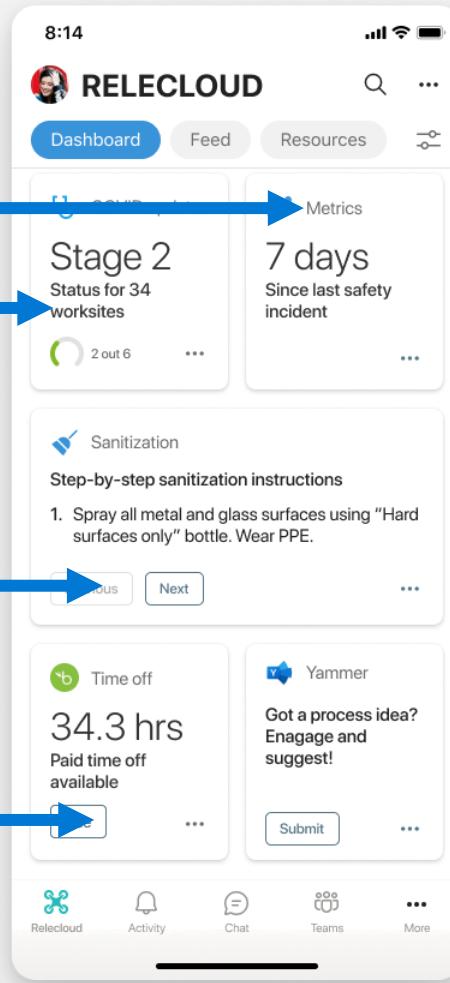
Platform for Customized Cards

1. Dynamic Title & Icon

2. Dynamic Desc

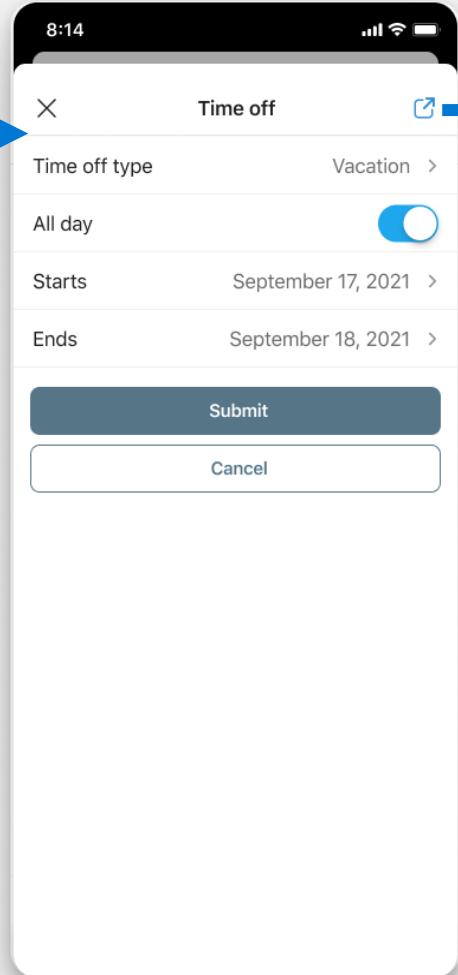
3. Multiple Buttons

4. Dynamic Button



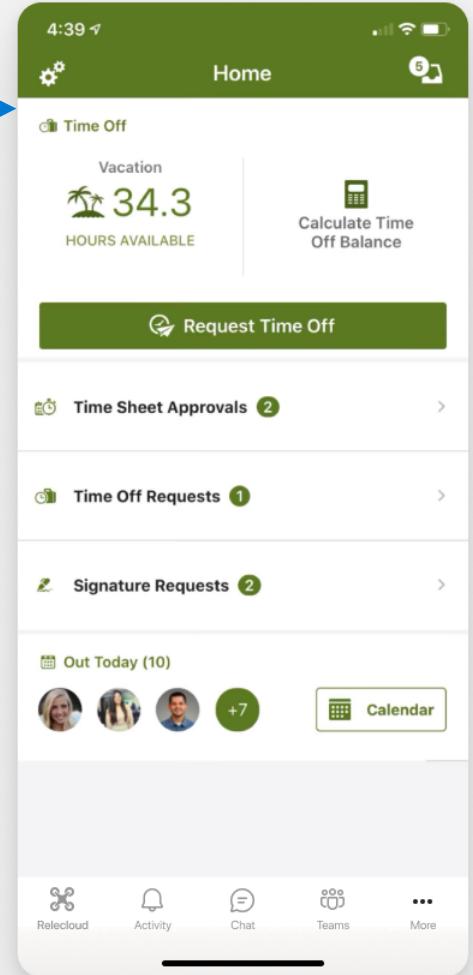
L1 Card

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.

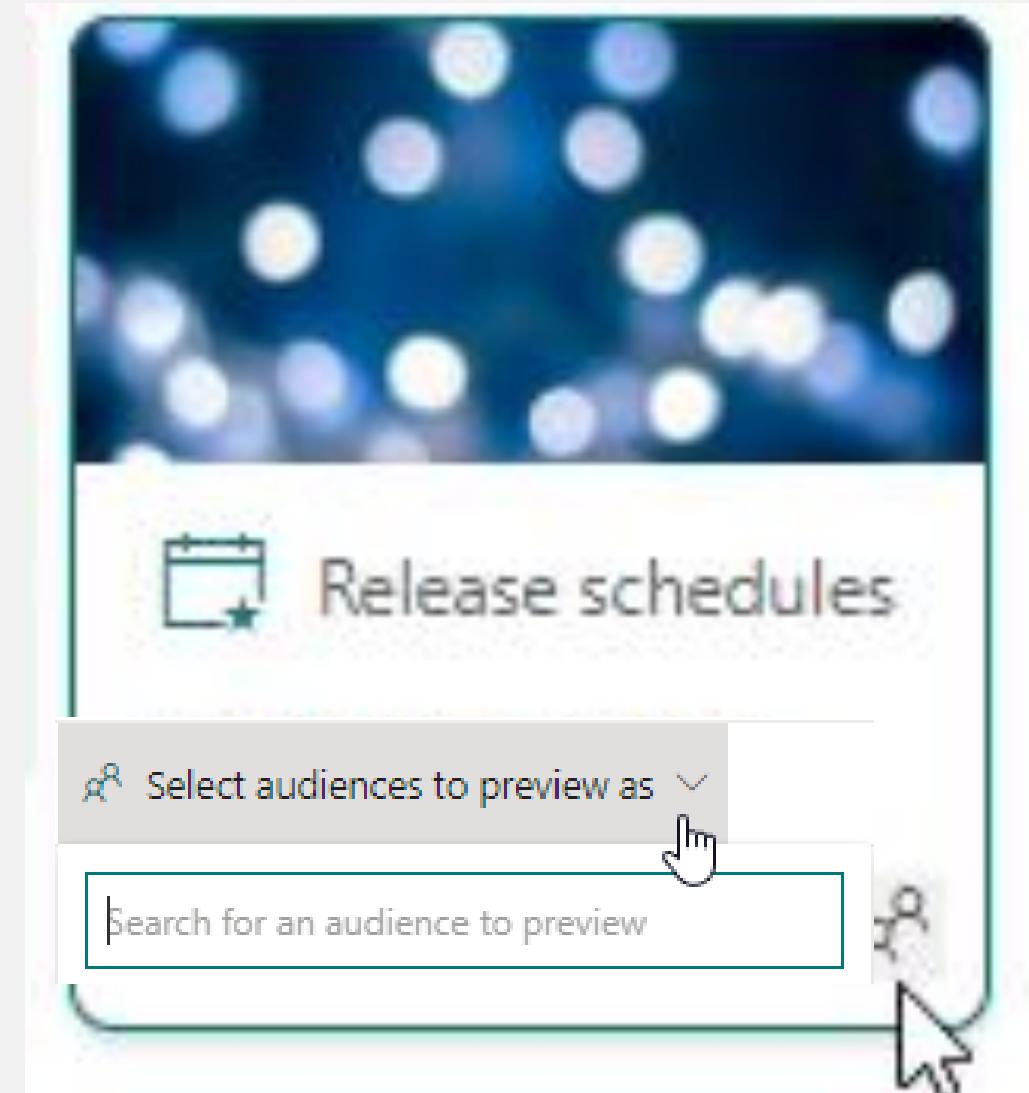
When a card is successfully targeted to an audience, you'll see a people icon in the lower left corner of the card.

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, desktop, and tablet.

Note

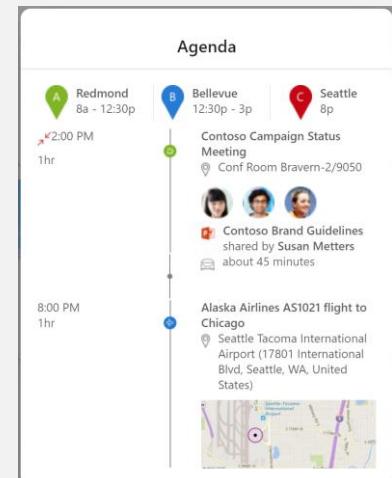
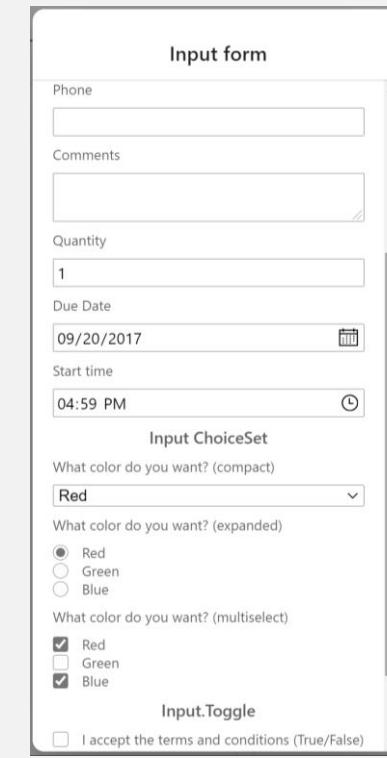
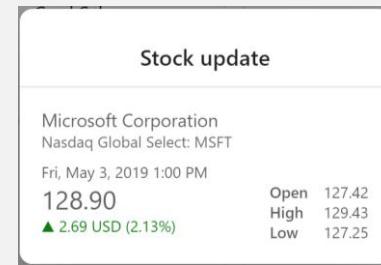
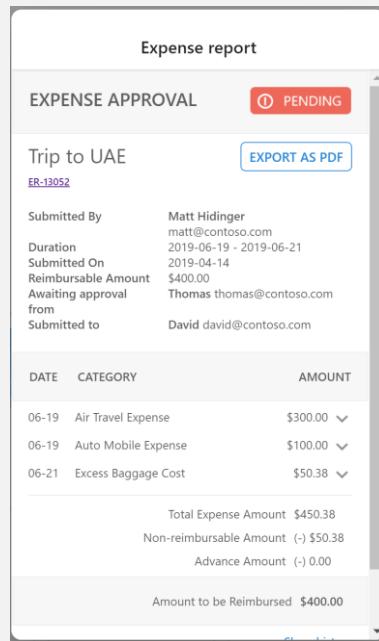
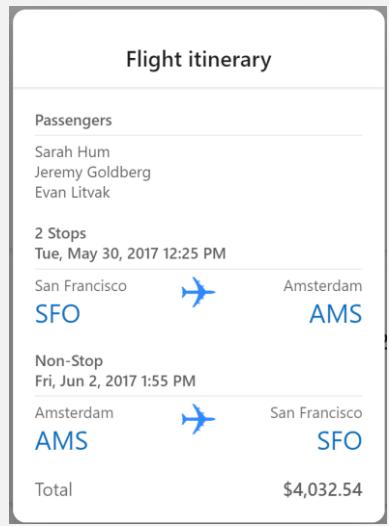
If you've selected an audience group that you recently created or changed, it may take some time to see targeting applied for that group.

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/>



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 displays the Microsoft 365 Home page. At the top left is the Relecloud logo, which is highlighted with a blue square. The main content area features several news cards:

- Company Feed:**
 - Boosted:** Lynne Robbins from Relecloud News (Sep 19) - Our new, five-year commitment to help bridge the disability divide.
 - Lynne Robbins:** Relecloud LGBTQI+ (Sep 20) - Expansion of benefits with Relecloud's new health plan.
 - Emily Bruan:** Leadership Connection (Sep 19) - Effectively manage your employee's concerns when returning to work.
 - Featured:** Relecloud News (Sep 19) - Meet the team behind the design: how...
- Meet the team behind the design: How partnerships build inclusive ideas and innovation at Relecloud**
- Building a more sustainable world together**
- Wellbeing: Carve out breaks in Outlook**

On the right side, there is a weather forecast for Relecloud HQ (12:39 PM, Tuesday Sept 28, 2021) and a dashboard section with various tiles for Holidays, Health check, Expenses, Insights, and more.

[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.

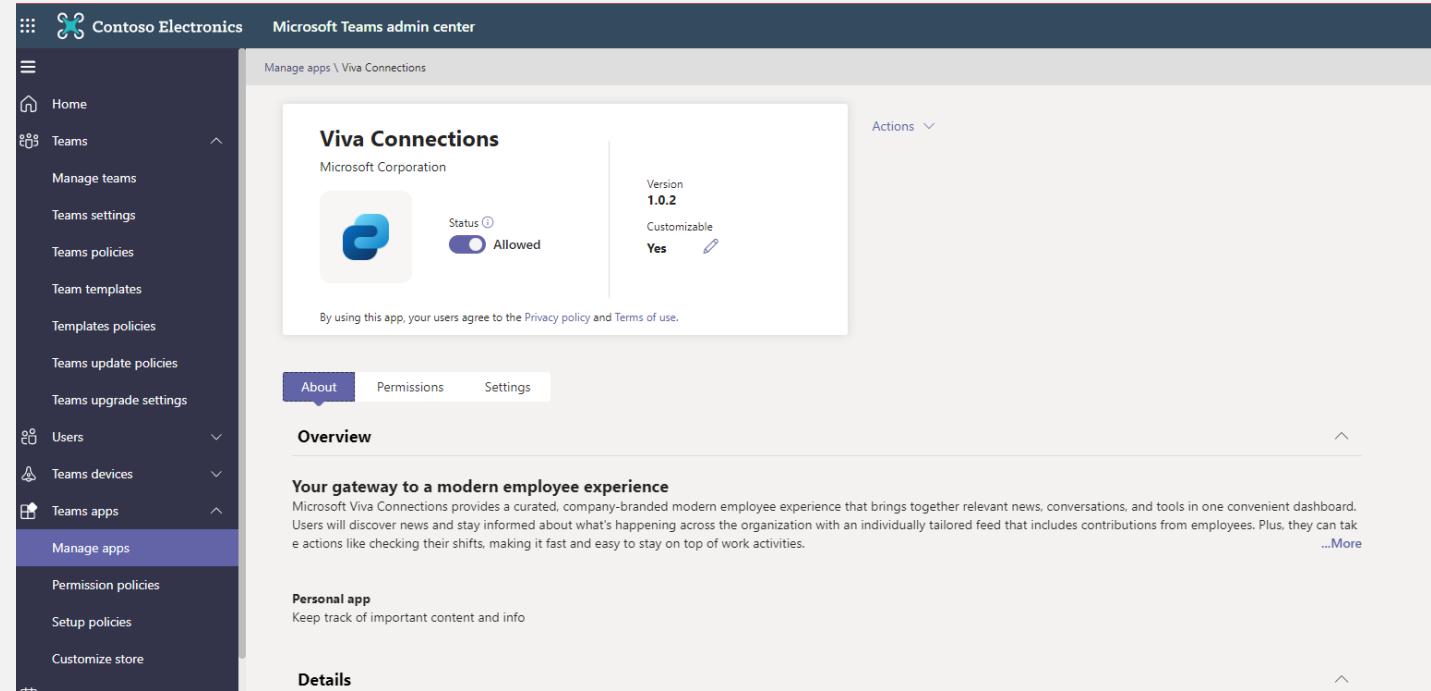


Add App in Teams Admin Center

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**



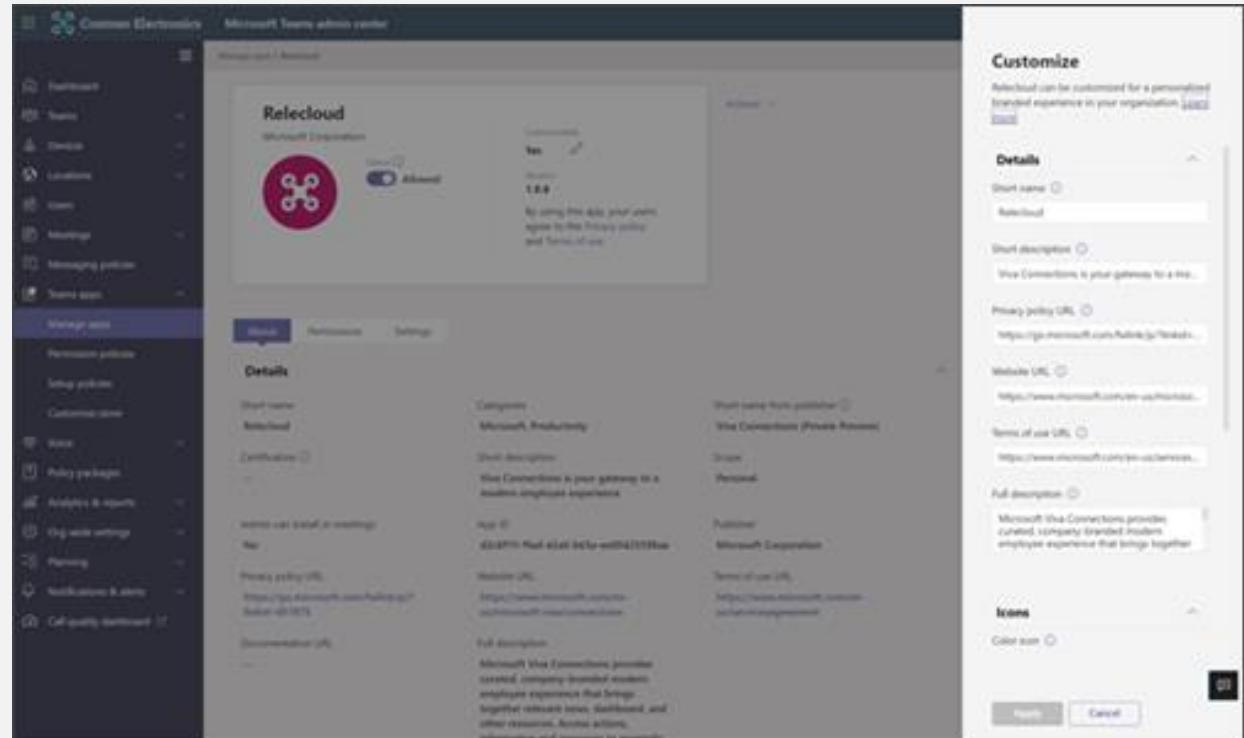
The screenshot shows the Microsoft Teams Admin Center interface. The left sidebar is dark blue with white text, showing navigation options like Home, Teams, Manage teams, Teams settings, etc., under the Teams category. Under Teams apps, the 'Manage apps' option is highlighted in purple. The main content area has a light gray background. At the top, it says 'Manage apps \ Viva Connections'. Below that is a card for the 'Viva Connections' app by Microsoft Corporation, version 1.0.2. The card includes a small blue icon of a person, a status switch labeled 'Allowed', and a 'Customizable Yes' button. A note below the card states: 'By using this app, your users agree to the [Privacy policy](#) and [Terms of use](#)'. Below the card are three tabs: 'About' (which is selected), 'Permissions', and 'Settings'. Under the 'About' tab, there's a section titled 'Overview' with the heading 'Your gateway to a modern employee experience'. It describes Viva Connections as a curated, company-branded modern employee experience that brings together relevant news, conversations, and tools in one convenient dashboard. It mentions that users will discover news and stay informed about what's happening across the organization with an individually tailored feed that includes contributions from employees. It also notes that users can take actions like checking their shifts, making it fast and easy to stay on top of work activities. There is a '...More' link at the end of this text. Below the overview, there's a 'Personal app' section with the subtext 'Keep track of important content and info'. At the bottom of the main content area, there's a 'Details' section.

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

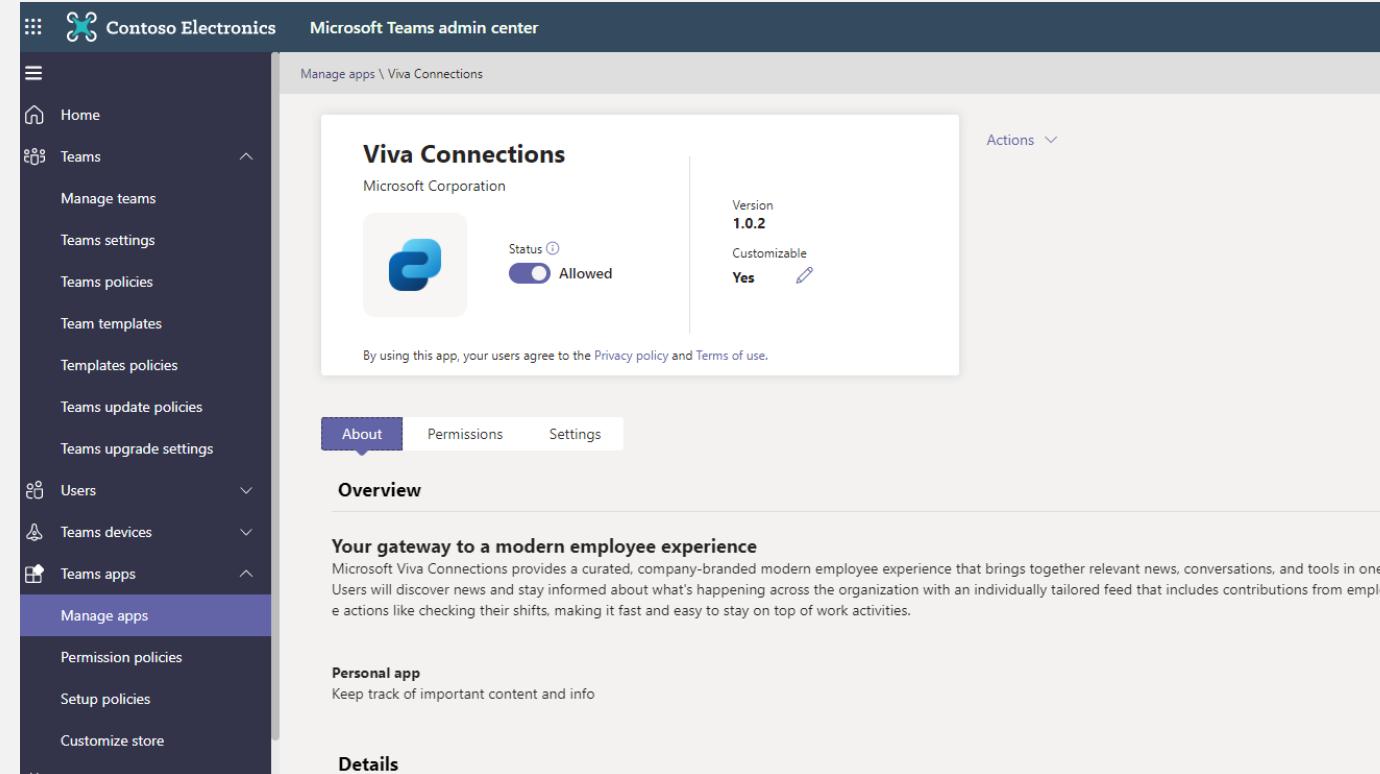
- We recommend renaming to one word so it displays better in the Teams App Icon (left rail)

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.

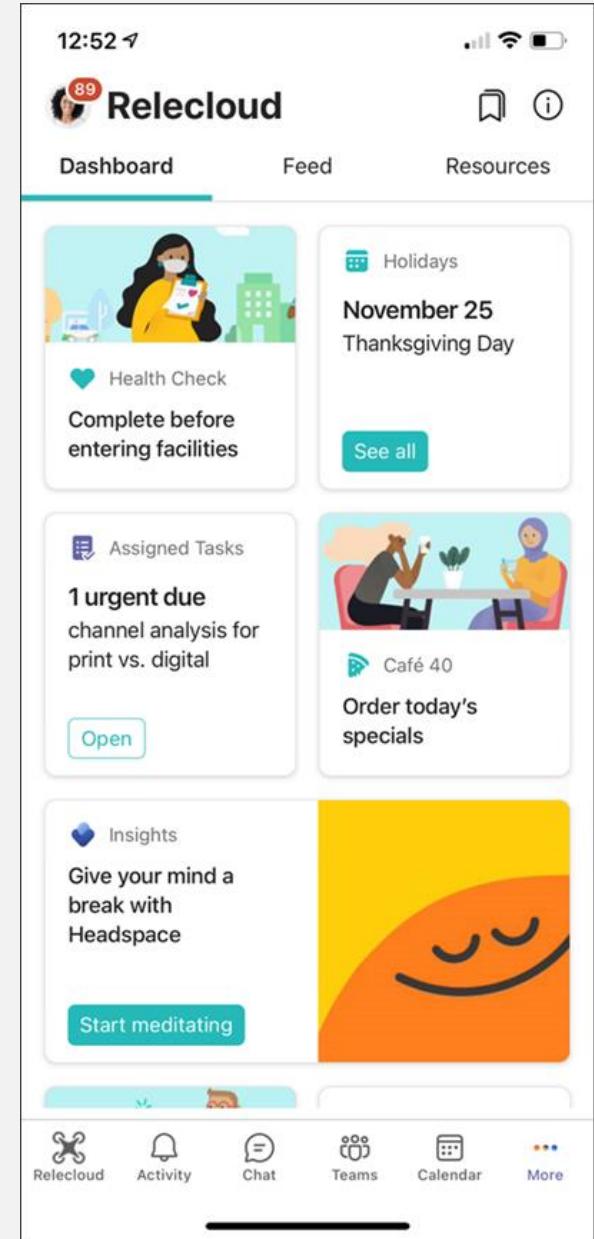
Important

- 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 displays the integration of Microsoft Viva Learning with Microsoft Teams. On the left, a desktop screenshot of Microsoft Teams shows the 'SOAR Learning' channel, which contains six items: 'Leading Remote Projects and Virtual Teams' (Cyndi Snyder Dionisio), 'Understanding and Applying Leadership Styles' (Stephen Haunts), 'Leading Diverse Teams Organizations' (Lindred Greer), 'Organize your Team's Tasks in Microsoft Planner' (Scott Allen), 'Inclusive Communication' (Kat Larsson), and 'Communicating with Charisma' (Vanessa Van Edwards). 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!!!'. At the bottom of the mobile screen, there is a course card for 'Teamwork Found...'.

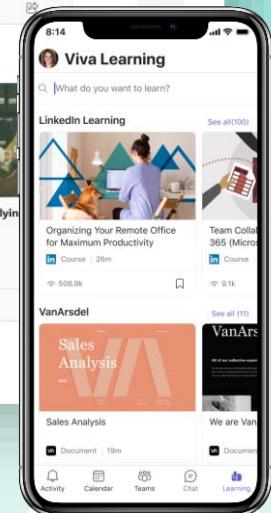
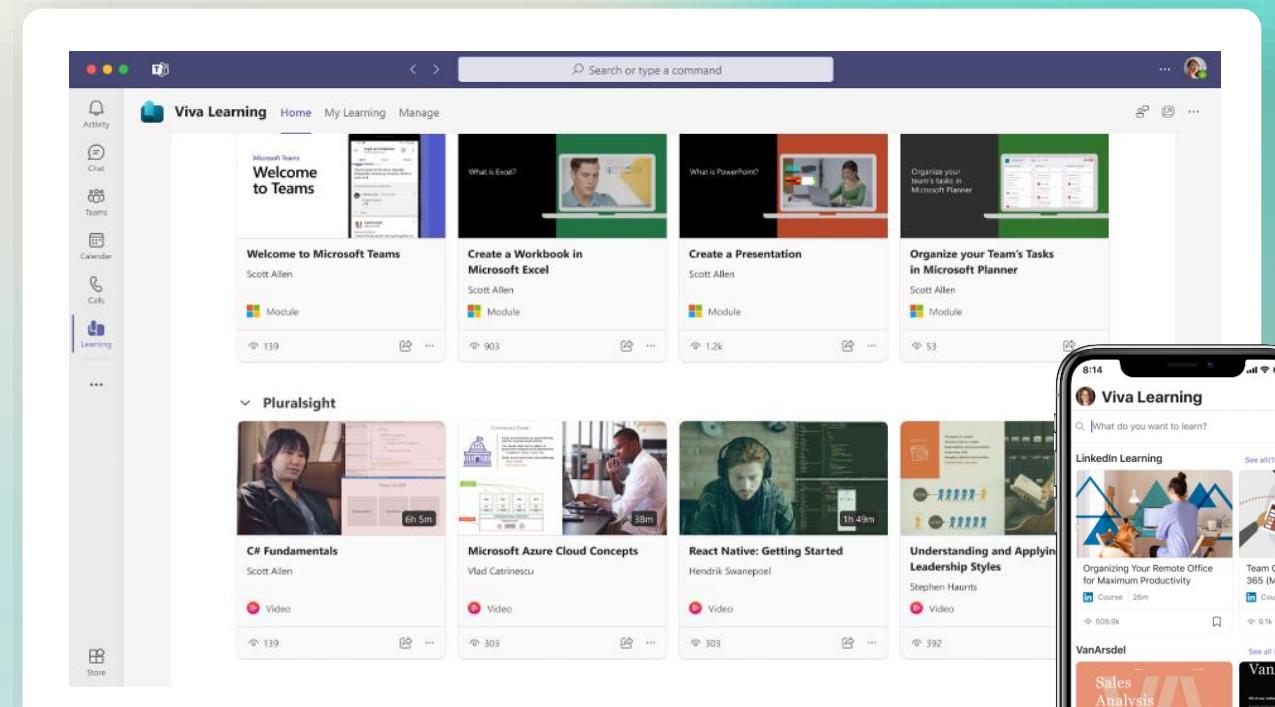
Simplify learning

Aggregate learning from across your organization

Discover content from connected learning providers and LMS's

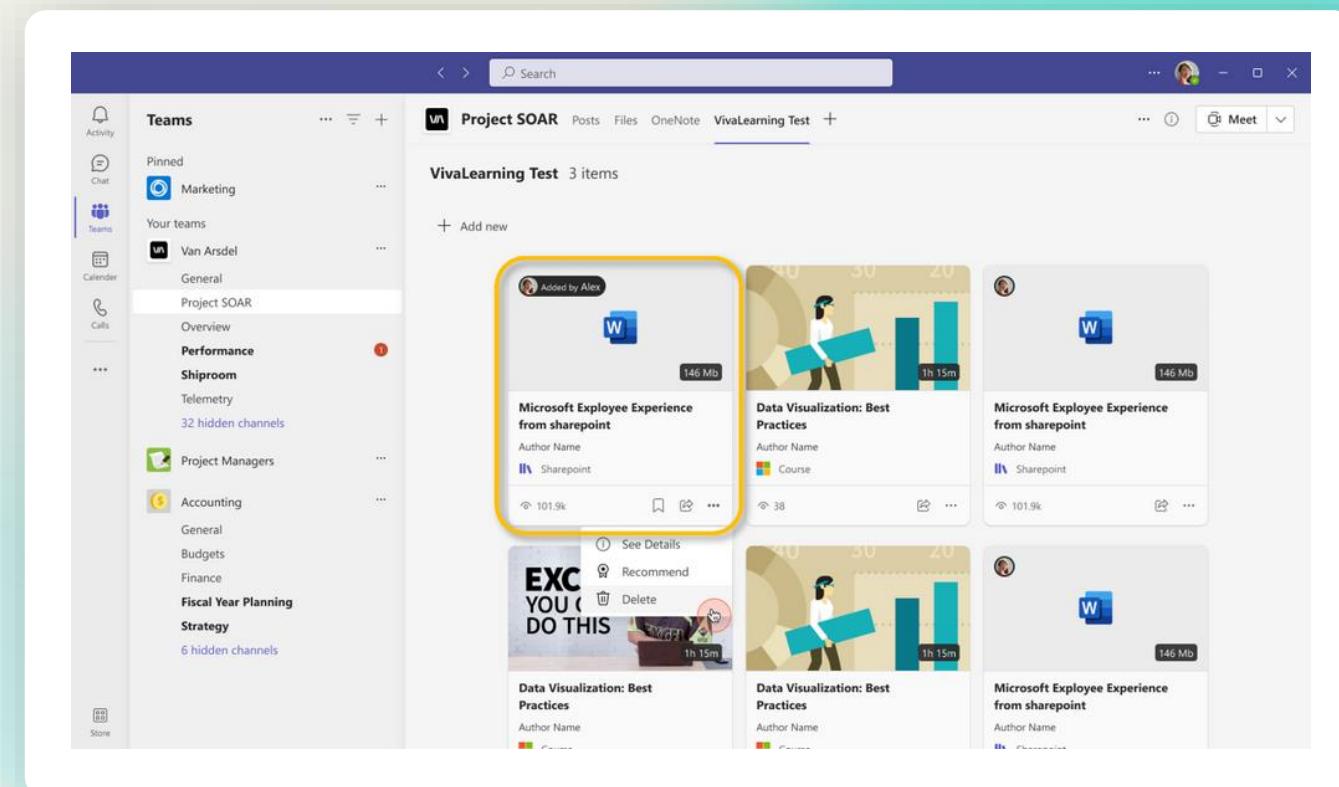
View assignments and records from connected LMS's

Integrate custom SharePoint content, including external URLs and SCORM content



SharePoint integration: Bring your own content

Employees can add their own content from SharePoint to their team's Learning tab in a Microsoft Teams tab.



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

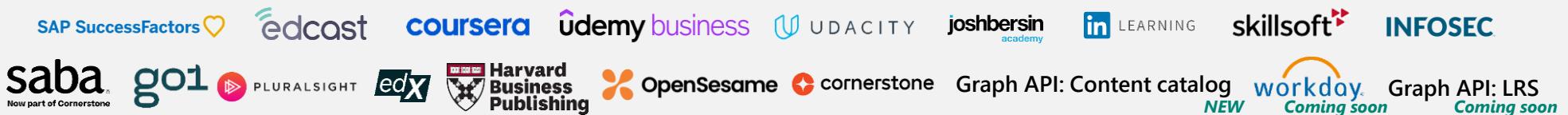
Aggregation layer

Data layer

Teams + Microsoft 365

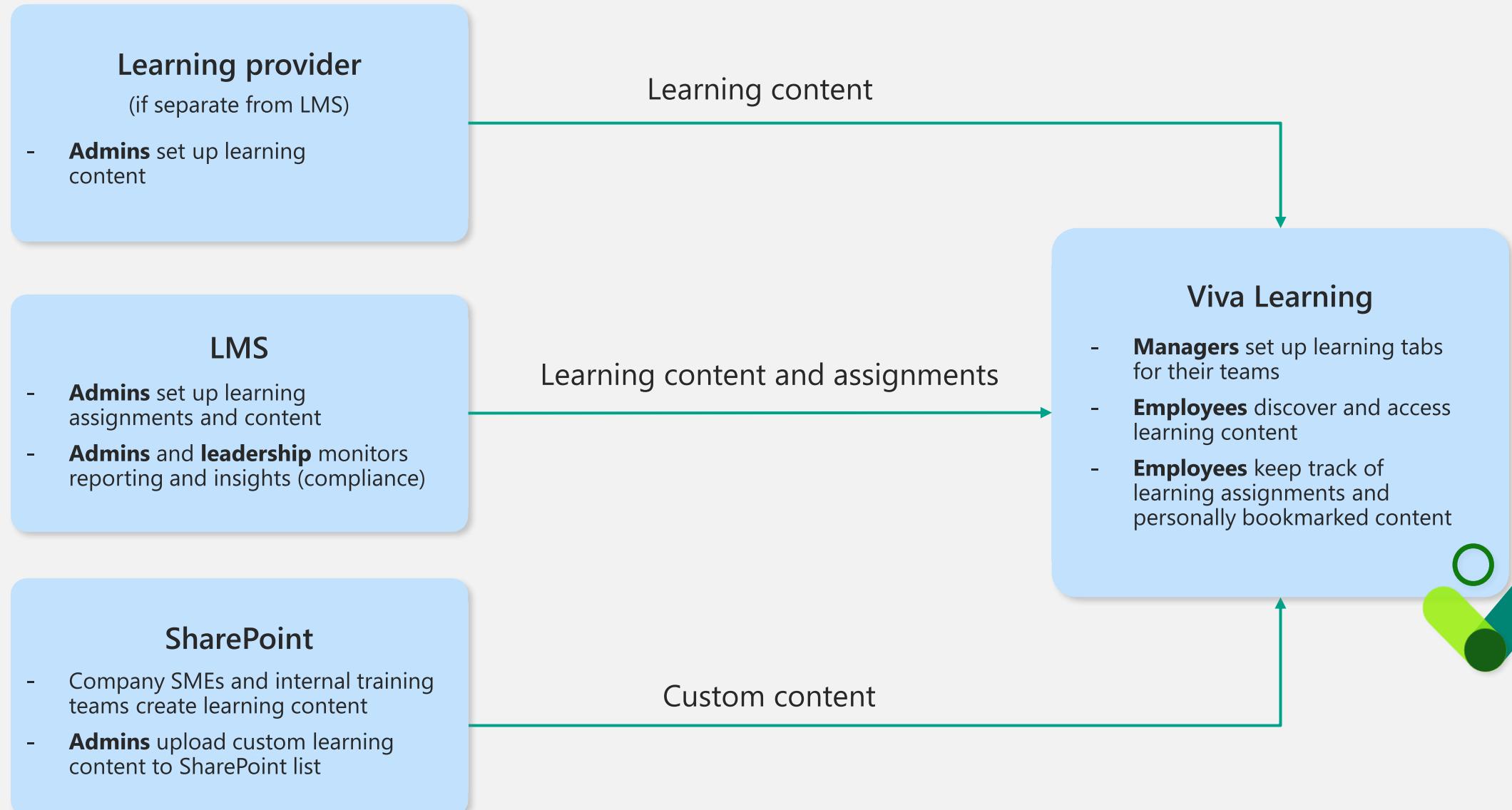


API enabled partner integrations



Microsoft Graph

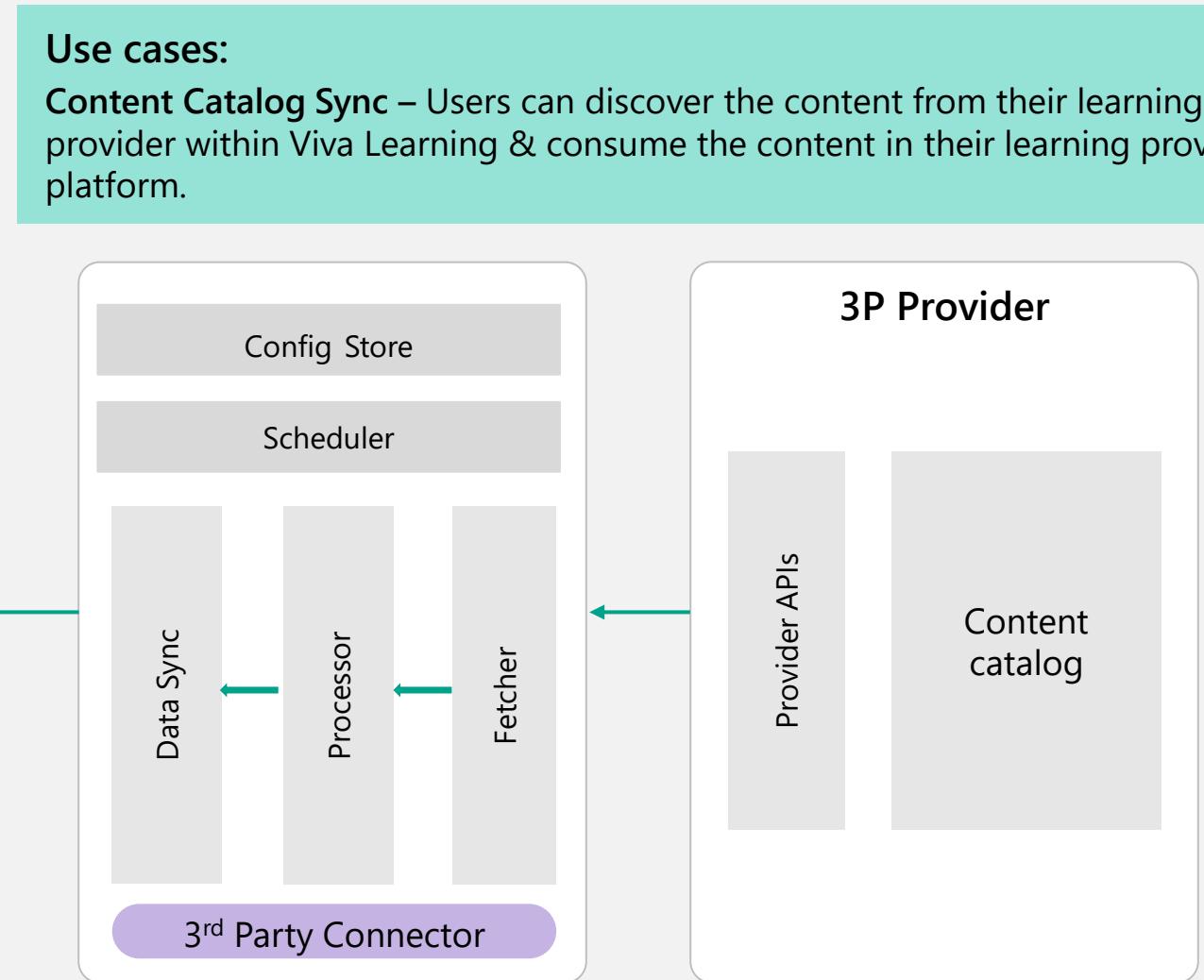
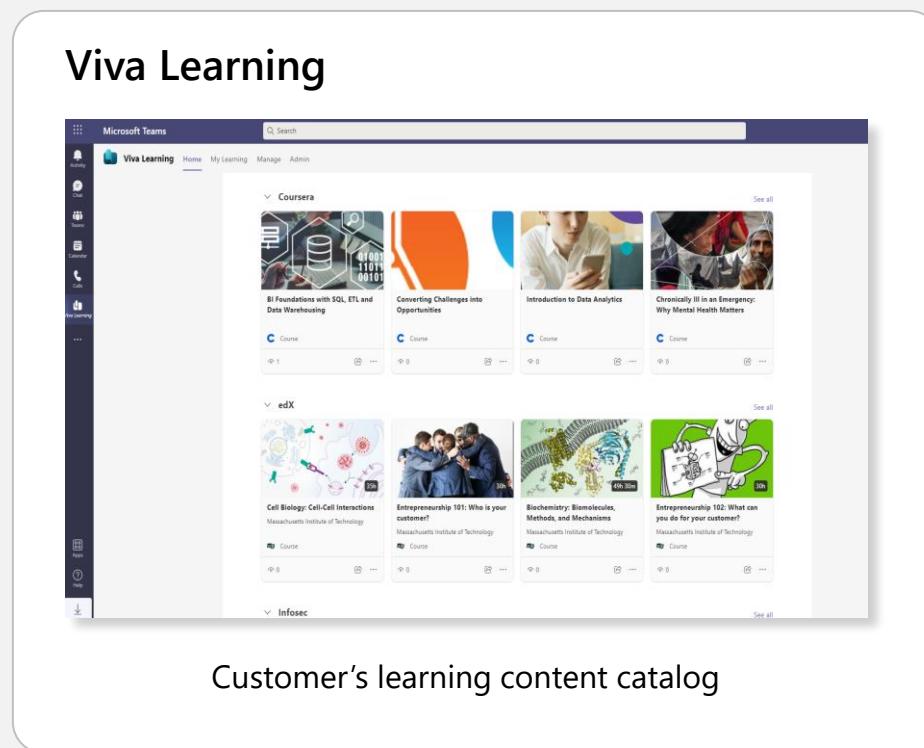
Streamlining the learning ecosystem



Understand Learning sources integration- Diagram

Learning provider content

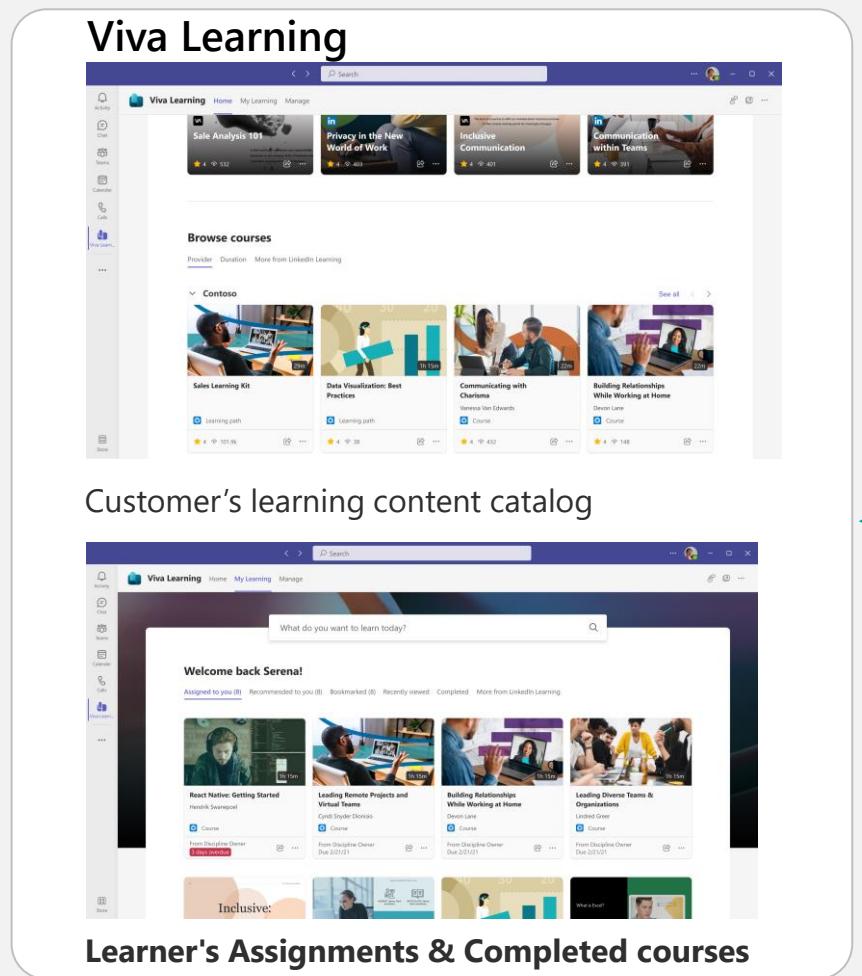
It can take 24 to 48 hours for Viva Learning users to see content for the sources you enabled in the admin portal.



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.

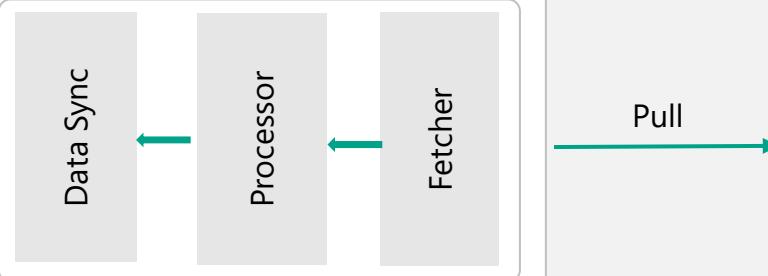


Assignment and Completion Status metadata extracted from LMS
Refer to the documentation to review required and recommended fields.

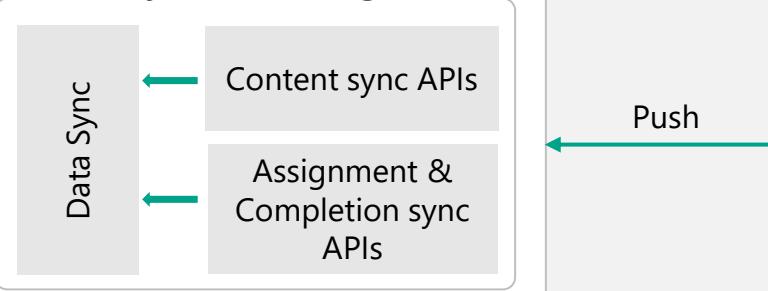
Use cases

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

Out of Box Integrations



Employee learning API



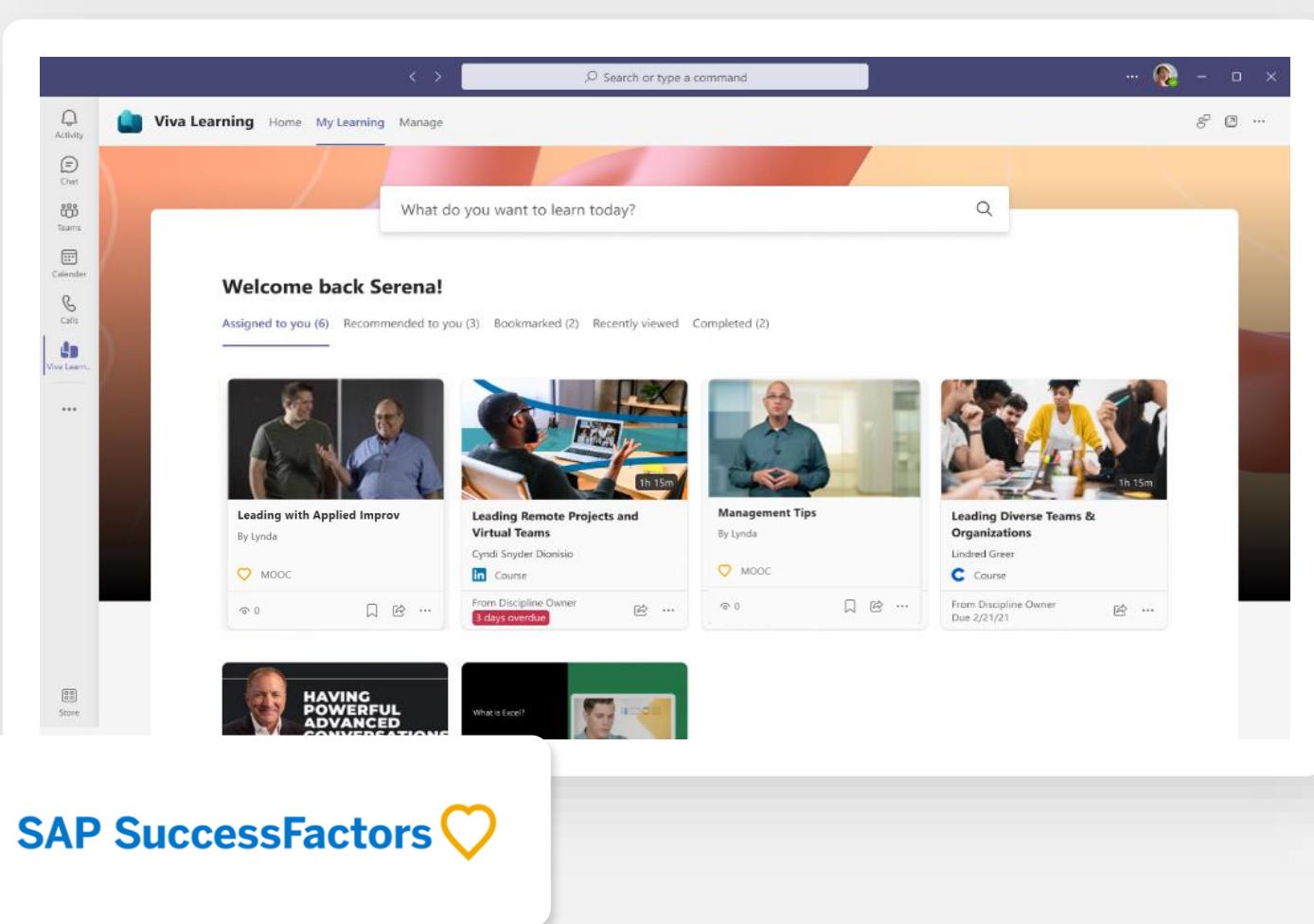
3rd Party Connectors

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 thumbnail images: "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

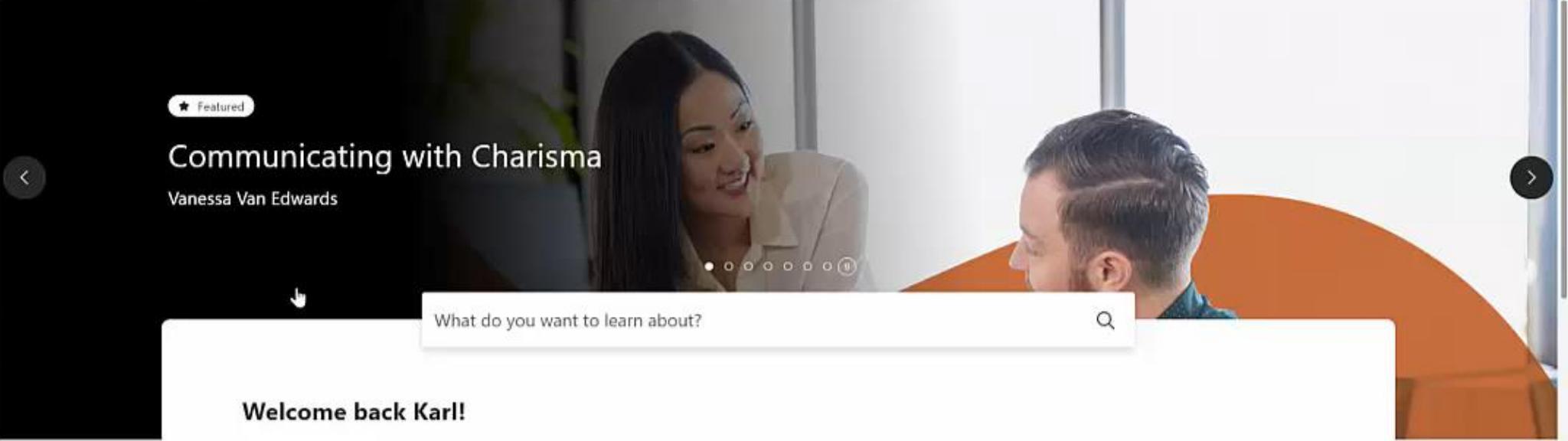
Micros Success Factors Administration - Assign...

Micros A Look at the One TrIP Platform (OTP)

Trending in Microsoft

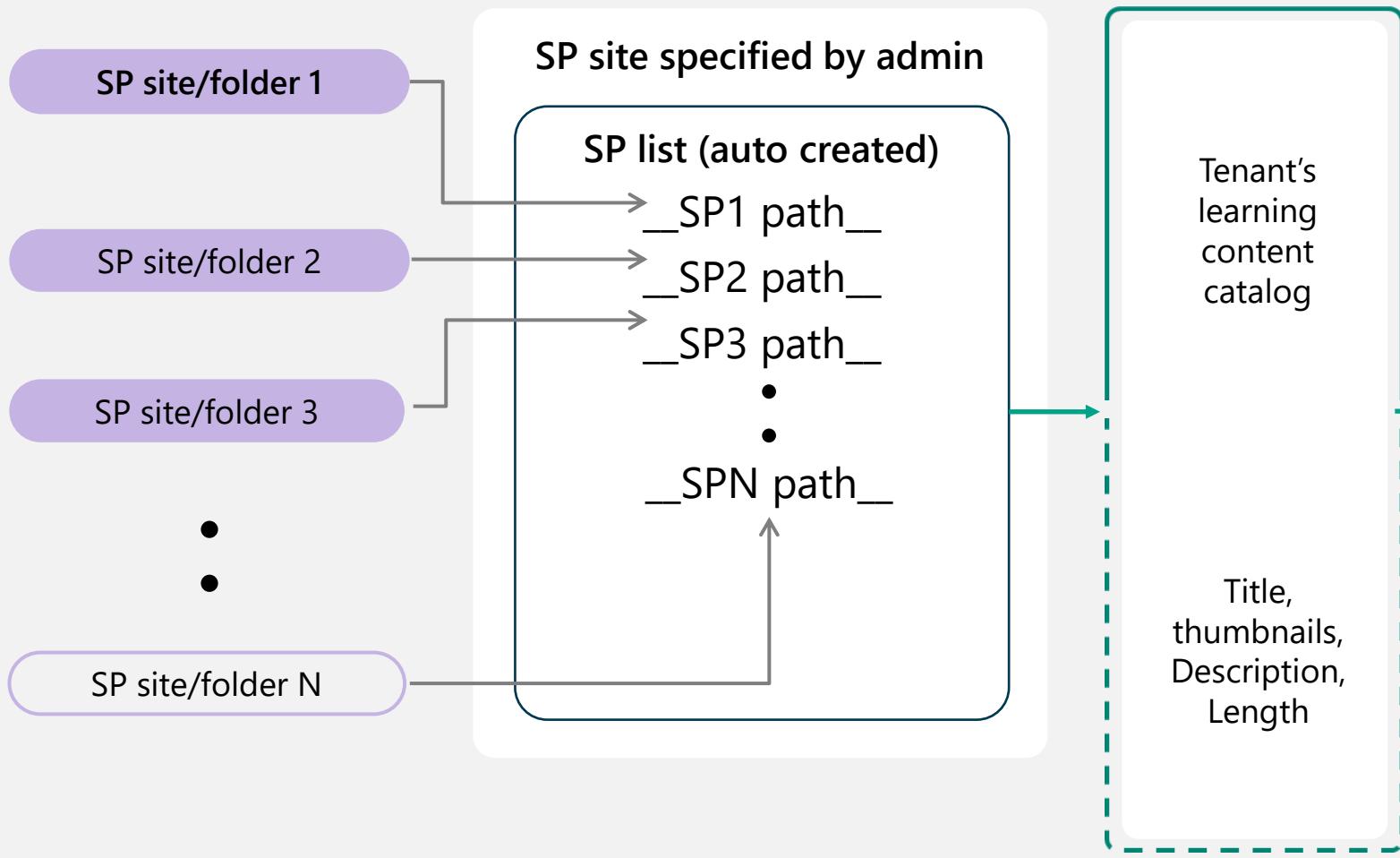
See all

? Help



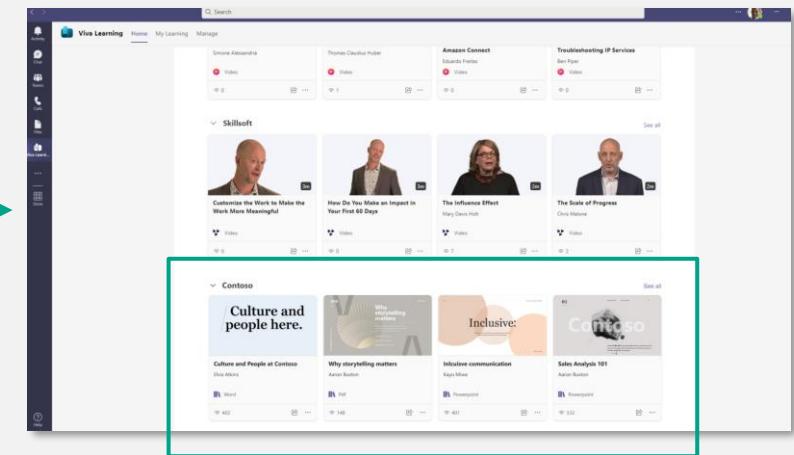
Understand Learning sources integration- Diagram

Custom Learning content in SharePoint



Use cases:

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



The SharePoint interface shows a list of documents with custom metadata columns. The 'SkillTags' column is highlighted, showing values like 'Business development', 'Negotiation', 'Creativity', 'Accessibility', 'Negotiation', and 'Communication Ideas'. The 'ContentAuthor' column shows names like 'Prapti Kush', 'Ayush Mittal', 'Praveen Mishra, Shivam Garg', and 'Paula Rizzo'. The 'ThumbnailWeb...' column contains URLs, and the 'ContentDescrip...' column contains brief descriptions of the content.

The Viva Learning interface shows a course card for 'Organizing Your Remote Office for Maximum Productivity' by Paula Rizzo. A search bar at the top right shows the results for 'collaboration'. Below the course card, there's a 'Welcome back' message and a 'Your progress' section showing 'All caught up!', 'Bookmarked', and a 'Pin to sidebar' option.

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	Choose columns
<input checked="" type="checkbox"/>	Knowledge Administrator	<input checked="" type="checkbox"/>	Can configure the knowledge network and content understanding.	Collaboration	

[Show suggested roles](#)

[Overview of Microsoft Viva Learning | Microsoft Learn](#)

M365 Admin Reporting: Viva

Contoso Electronics Microsoft 365 admin center Search

Home > Usage > Viva Learning Dark mode

Home Users Teams & groups Roles Resources Billing Support Settings Setup Reports Adoption Score Usage Health

Viva Learning

Activity

Last updated: October 23, 2022 (UTC) Help Past 30 days

Active users

Number of active users over time

1
0

Sep 24 Oct 3 Oct 13 Oct 23

ActiveUsers

User activities

Number of user activities

1
0

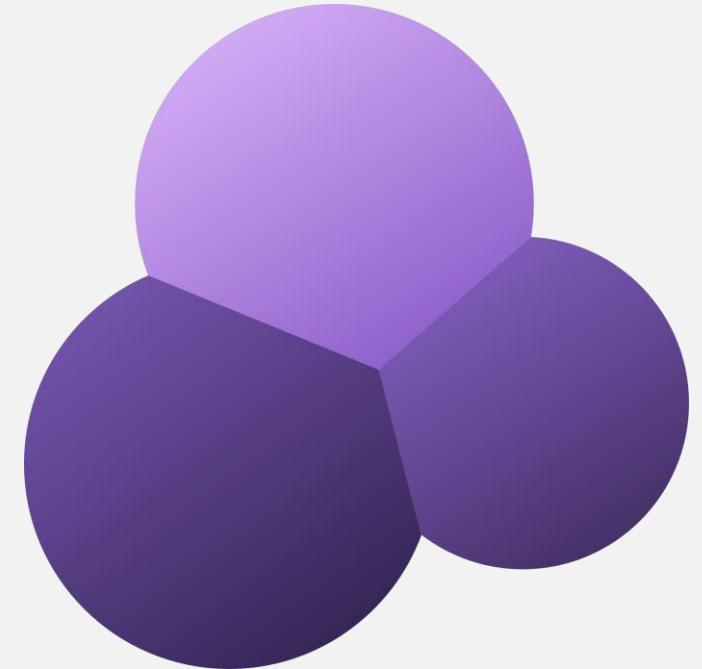
Consumed L... Viewed Les... Viewed Fea... Recommended... Bookmarks Learning T...

- **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

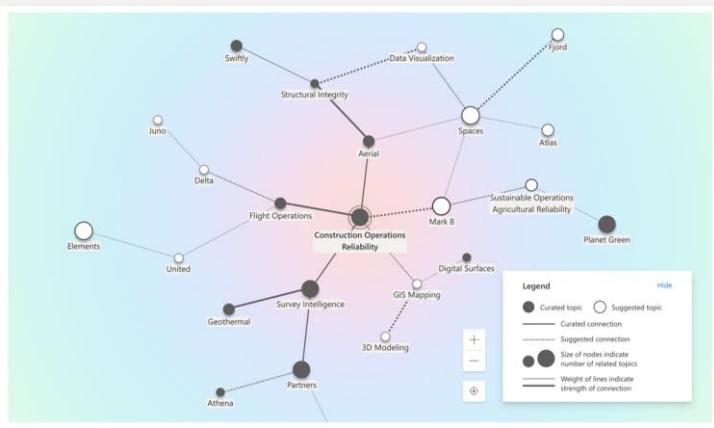
- Overview
- Set up Viva Topics
- Use Microsoft Viva Topics to create a Topic Centre and assign licenses
- Establish Security and privacy setting
- See how security and privacy works in Topics
- Manage Topics life cycle stages
- Manage content through the Topics life cycle
- Prepare your environment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

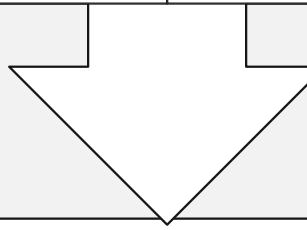
Migrate and prepare content for knowledge generation

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

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
Humongous Close Date HumongousInsuranceMerger > Shared Documents	English	about an hour ago	Megan Bowen	Megan Bowen	
Humongous Takeover Financials HumongousInsuranceMerger > Shared Documents	English	3 hours ago	Megan Bowen	Megan Bowen	
Humongous Purchase Review HumongousInsuranceMerger > Shared Documents	English	3 hours ago	Megan Bowen	Megan Bowen	

Suggested files and pages

Name	Language	Modified	Modified by	Activity	View count
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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

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

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 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, the topic center is provisioned in the central location. All processing and storage of content is done in the central location.

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

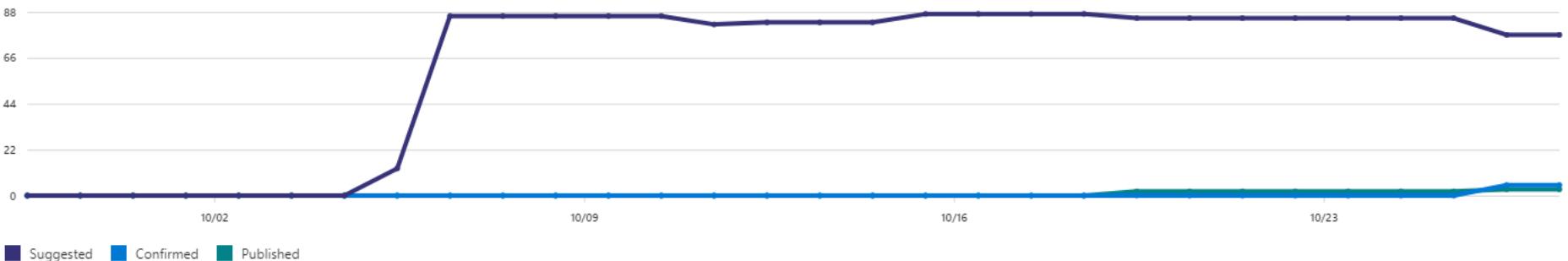
85 topics at Contoso

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 Galbraath...	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 'Suggested resources' section featuring a document titled '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', 'What's happening', 'Departments', 'File', 'Office documents', 'Topic Center', and 'English'. The main area shows a topic card for 'Mark8 (Mark 8)'. The card includes a photo of a person, a title 'Functions of customer service', a summary about the release of the Mark8, and a 'Breakings' section. There are also sections for 'Local weather' and 'Dashboard'.

SharePoint

A screenshot of a SharePoint site under 'Sales and Marketing'. The page shows a topic card for 'Gamma 7'. The card features a photo of a drone, a summary about its industry standards, and an image of the drone in flight. It also includes a section for 'Rainier' and a large image of a beach with a drone setup.

Office

A screenshot of Microsoft Word showing a topic card for 'The Delta project'. The card has a blue header with the title and a summary about quad copters and cameras. It includes a 'Search' sidebar and a 'Comments' section.

Search

A screenshot of Microsoft Search showing a topic card for 'Rainier Project'. The card includes a photo of a person, a summary about the Rainier Project, and a 'Resources' section. It also shows a 'See more' link and a note about the knowledge network.

Topics in Teams

A screenshot of Microsoft Teams showing a topic card for 'Marketing'. The card includes a photo of a person, a title 'Weekly Update', and a summary about investment areas. It also shows a 'Suggested resources' section and a 'New conversation' button.

Teams Chats Rolling Out

Topics in Outlook Web

A screenshot of Outlook Web showing a topic card for 'Engagement clarification'. The card includes a photo of a person, a summary about project timelines, and a 'Viva Topics found 2 topics' section. It also shows a message thread between Adele Vance and Megan Bowen.

Topics in Yammer

A screenshot of Yammer showing a topic card for 'Planet Blue'. The card includes a photo of a person, a summary about global challenges, and a 'Write a comment' button. It also shows a message thread between users and a 'Coming Soon' banner.

Coming Soon

Analytics for Microsoft Viva Topics

≡

- Home
- Users
- Teams & groups
- Roles
 - Role assignments
 - Administrative units
- Resources
- Billing
- Support
- Settings
 - Domains
- Search & intelligence
- Org settings
- Integrated apps
- Partner relationships
- Setup
- Reports
- Health

Admin centers

- Security
- Compliance
- Endpoint Manager

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

85 topics visible ▾ 2 fewer in the last 7 days
Updated on October 27, 2022

87 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 ▲ 2 more 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](#)

Files processing for topic discovery

5.4K files processed

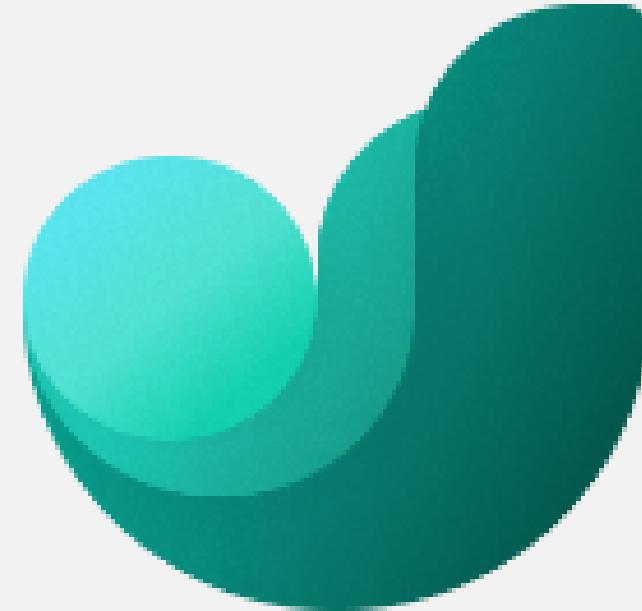
Updated on October 27, 2022

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

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



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



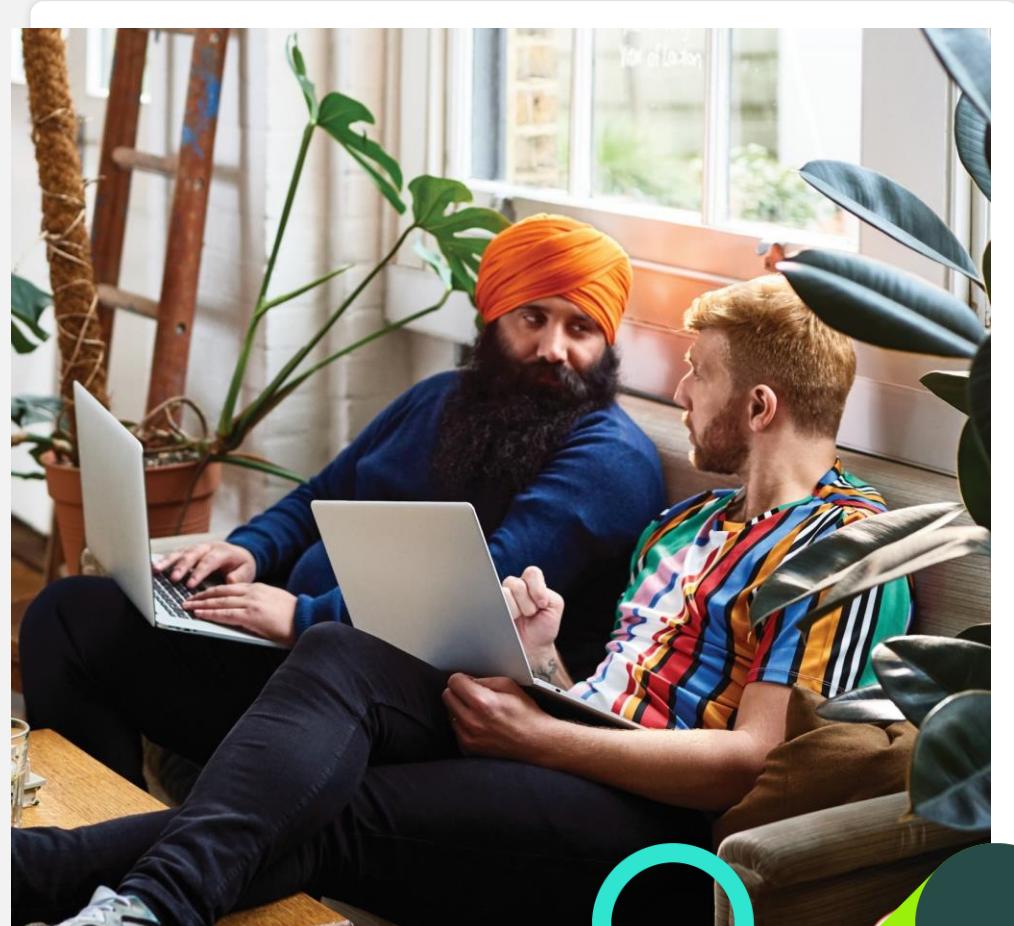
Focus teams on impact, not output

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



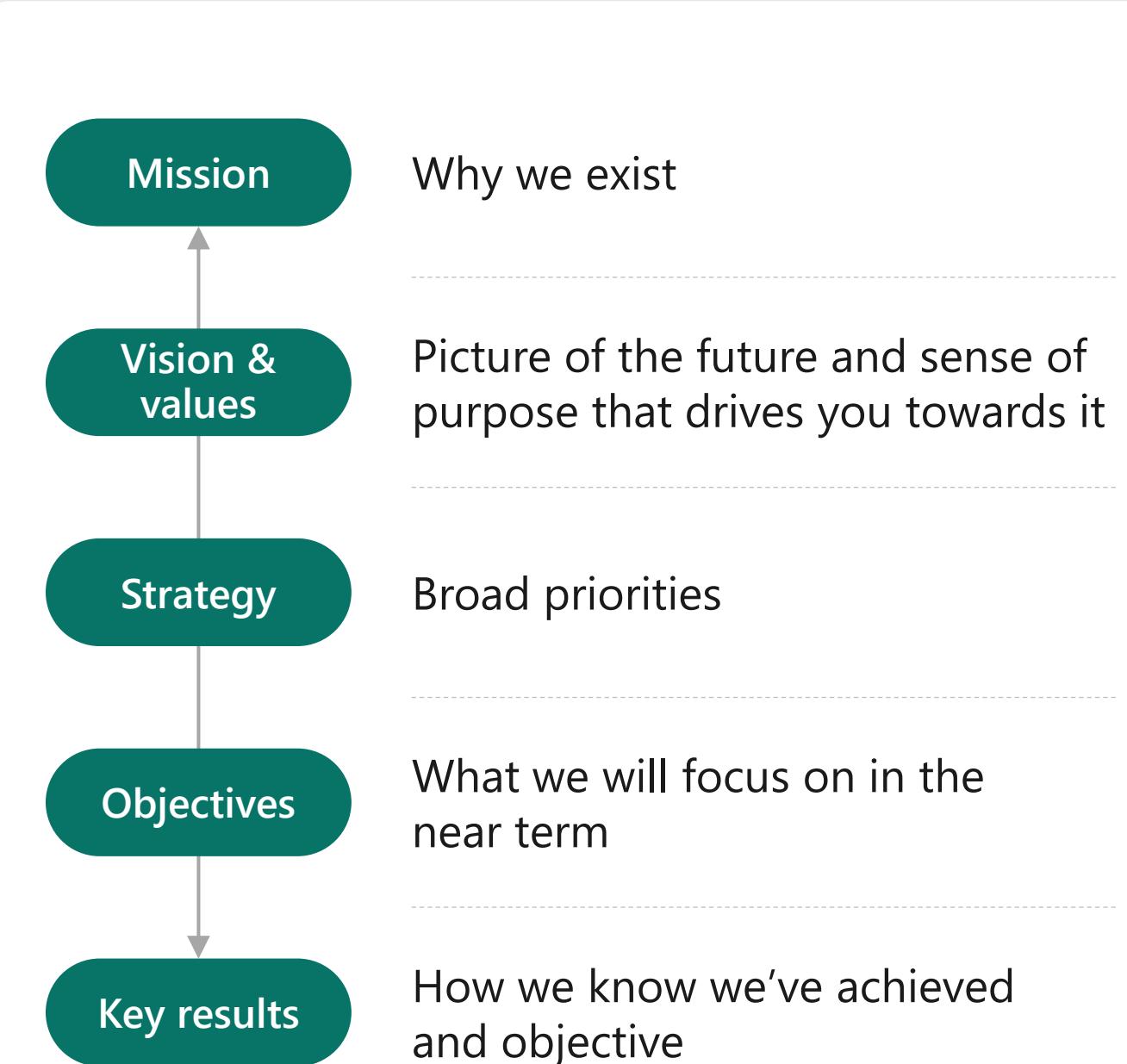
Bring goals into the flow of everyday work

Brings data and actions seamlessly into where people are working





OKRs help connect the work you do to the mission of your organization



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

OKRs BY STATUS
Private OKRs are not included in summary

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% Lee Gu	Global	Lee Gu	Q4 2022 OCT 1 – DEC 31	Behind Progress: 15% (Start: 0% Target: 100%) • 11d	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

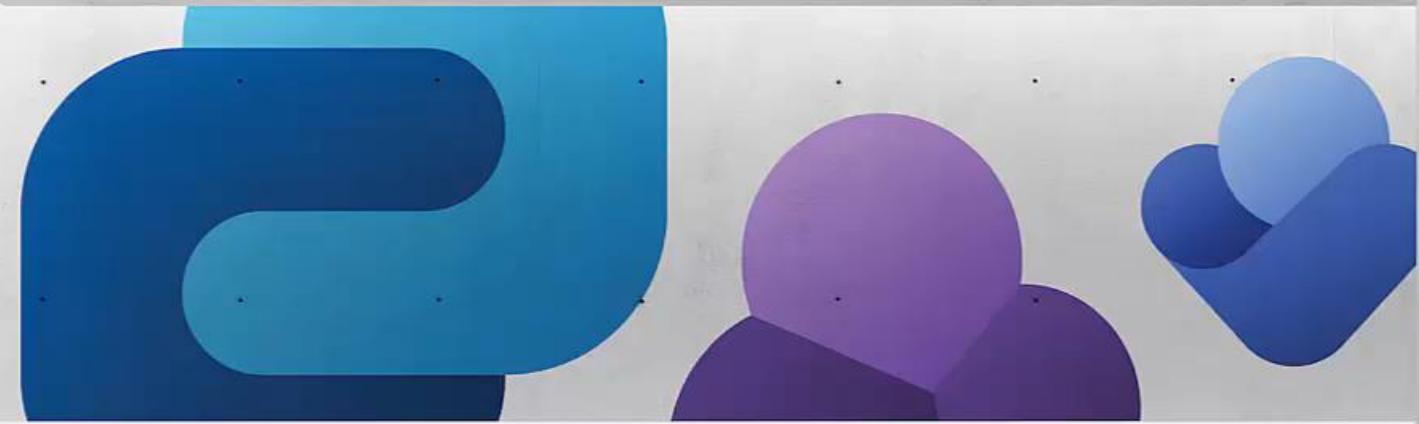
OKRs Projects Settings

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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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%
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c. Increase gross profit margin % from 54% to 64% Contoso Financial	Global	Lee Gu	Q4 2022 OCT 1 – DEC 31	Behind Progress: 15% (Start: 0% Target: 100%) • 7d	15%

Activity 51 Chat 10 Teams Calendar Calls Files Apps Help

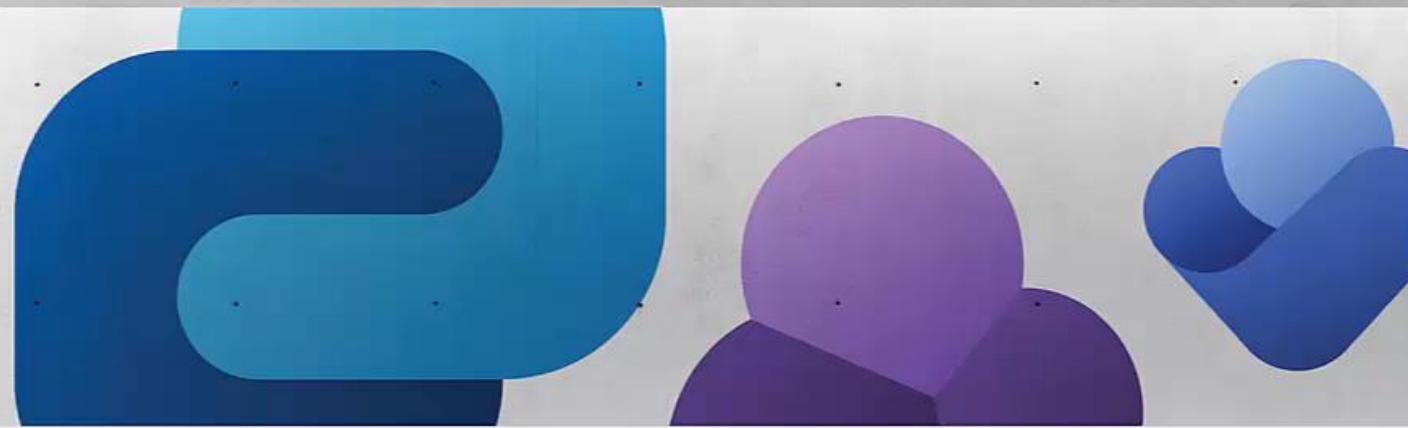
Create, Track, Close OKRs and Understand Alignment



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

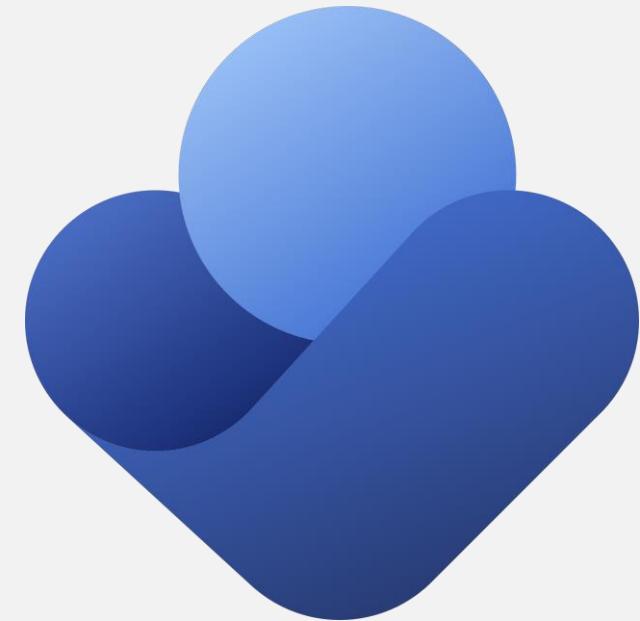
Tags

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



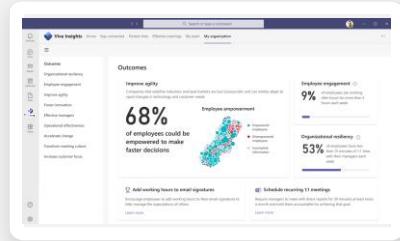
Note: Following slides based upon new Insights Platform. Assessment is based upon WPA

Viva Insights Empower people and teams

Data driven insights



Leader insights



Understand the impact of work on people and the business

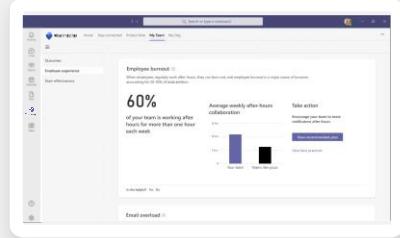


Actionable recommendations

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



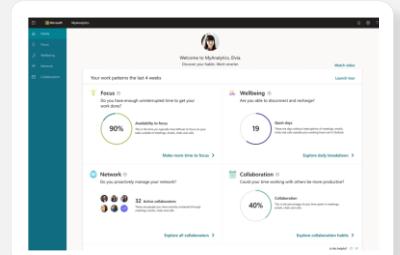
Manager insights



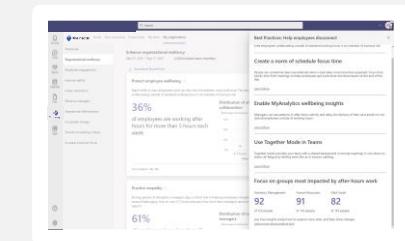
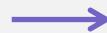
Identify work patterns that can lead to burnout and stress



Individual insights



Identify opportunities to change how you work



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



Key partners



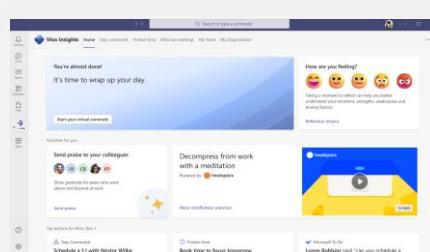
IT Leader

Manage solutions and access to data sources/infrastructure



Analyst

Conduct custom analytics based on business scenarios



- Nurture your wellbeing
- Improve your productivity

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

	Personal insights	Manager insights	Leader insights	Analyst tools
Data source: Metadata from collaboration activities ¹	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
No new individual-specific info shown to others				
Differential privacy	-	✓	✓	In development
Minimum aggregate size	✓ 5	✓ 9+	✓ 5+	✓ 5+
De-identification	-	-	-	✓
Granular controls for tenant admins				
Exclude users/mailboxes	✓	✓	✓	✓
Give explicit access to managers, analysts and org. leaders	-	✓	✓	✓
Configurable minimum aggregate	-	✓	✓	✓
Exclusions/Filters	-	✓	✓	✓
Granular controls for individuals				
Opt-in/out through UX	✓	-	-	-
Exclude from digest email	✓	-	-	-
Exclude from dashboard/ add-in	✓	-	-	-

1. Personal insights also presents tasks derived from email bodies

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.** For all users, all surfaces of Viva Insights are turned on by default. This is the default scenario.
 - Default off.** Viva Insights is off by default; users can individually turn on some or all Viva Insights surfaces.
 - Mixed deployment.** Some users are opted in and some users are opted out of all Viva Insights surfaces.
 - Optional opt-in.** Some users have Viva Insights off by default and can opt themselves in later.
 - Optional opt-in:** A section describing the optional opt-in scenario where some users have Viva Insights off by default and can opt themselves in.
 - Surfaces:** A list of Viva Insights surfaces with descriptions:
 - Microsoft Edge site lists: Set websites to open in Internet Explorer mode in Microsoft Edge, or other browser modes.
 - Microsoft Forms: Manage external sharing and record the names of people in your org who fill out forms.
 - Microsoft 365 Groups: Manage external sharing and ownerless groups.
 - Modern authentication: Change Exchange Online authentication settings for your entire organization.
 - Multi-factor authentication: Manage multi-factor authentication settings for your users.
 - News: Choose how news about your organization and industry is sent and displayed to your users.
 - Office installation options: Choose how often users get feature updates and the Office apps that users can install.
- Right Panel:** Microsoft Viva Insights (formerly MyAnalytics) summary, user access settings, feedback section, and save/cancel buttons.

Before the data is available: Setup & Onboarding Steps

Office 365 Tenant Admin



Assign licenses

1

Scope the analysis population

Assign user roles

2

Control who has what access

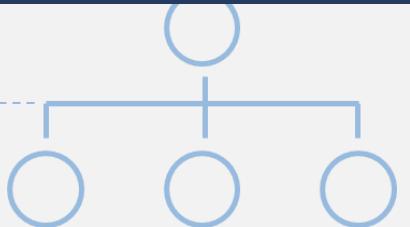
Insights Admin



Confirm settings

3

Manage protection of sensitive data



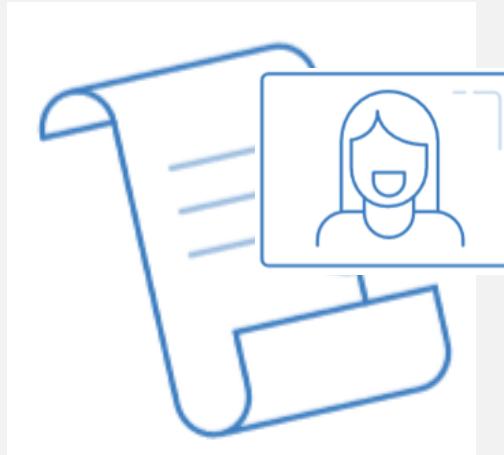
Advanced Insights processes data

Upload organizational data

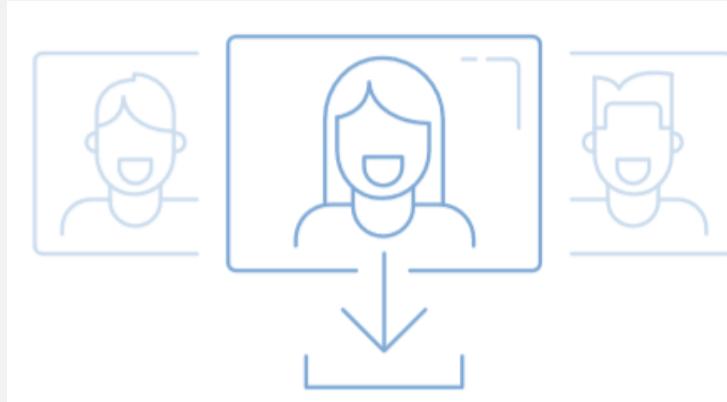
4

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.

Program Manager

Access to organisational data. Can also open, manage and track plans in the 1st Generation advanced App

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 Analyst (Limited Access)

Same access as Admin.
Except: No access to Query Designer
Read-only access to Analyst Settings

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. Note: 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
E	Minimum group size	Suppress dashboard results for group size less than settings (smallest possible = 5)	Immediately updated no needed for data refresh Applies retroactively
F	Hash (hide) meeting subject lines	Meeting subject line text will not be surfaced in meeting queries	Immediately updated no needed for data refresh Applies retroactively
G	<p>Processing Exclusions:</p> <ol style="list-style-type: none"> 1) Domains 2) Email Address 3) Subject Lines <p>CAUTION: 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 sarah@contoso.com 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 new data processed during next data refresh and do not affect historical data

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

Data Processing Timelines

- **Bootstrap Data Processing** will take ~3 days, once licenses are. 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, Ann was a senior individual contributor, but just before July, she was promoted to 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>Organization is used to power the following insights for Leaders, Managers and Analysts</p>			
<ul style="list-style-type: none">• Employee wellbeing• Manager connection• Meeting effectiveness• Power BI template: Ways of working assessment• Power BI template: Business resilience		<ul style="list-style-type: none">• Power BI template: Manager effectiveness• Power BI template: Wellbeing - balance and flexibility• Power BI template: Hybrid workforce experience• Filters and groups for metrics and Power BI templates	

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

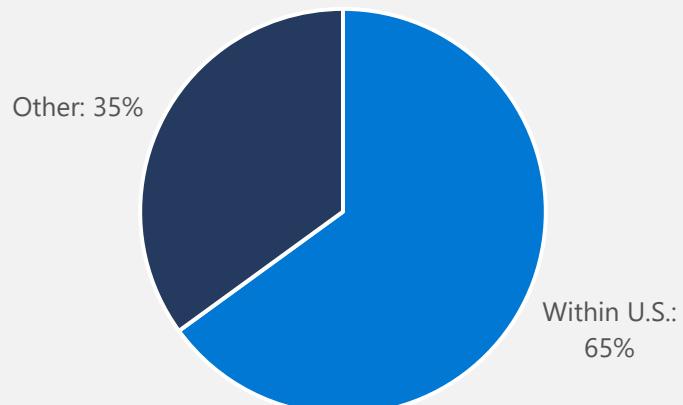
Include all employees in the broader company, even unlicensed employees.
This enables you to measure how licensed employees worked with other teams.

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:**

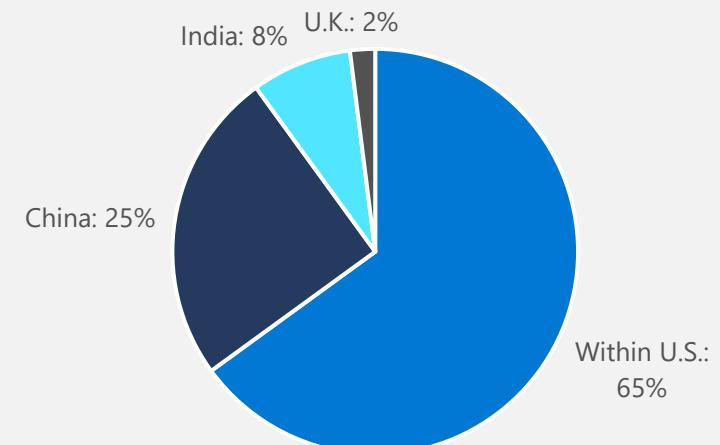
Licensed employees

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

Advanced Insights Setup & Onboarding Checklist

Setup Tasks	Owner
Setup Overview	All
Determine Key Personas and Roles	Project Leader
Assign Licenses	O365 Administrator
Assign Advanced Insights Roles	O365 Administrator
Configure Advanced Insights Settings	Insights administrator
Prepare and Upload Organization Data <i>Optional step now AAD is default</i>	Insights administrator, HR Information system administrator
Advanced Insights	All roles

Additional resources:

- Advanced Insights Online documentation: <https://docs.microsoft.com/en-us/viva/insights/index-orig>

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