Webinar Q&A

“5 Ways to Get the Most Out of Office 365”

Question 1:

Q: How much admin and tweaking do the various features take? Looking at a scale of intuitive + 'set it and forget it' to 'constant admin by an experienced IT person or persons.

A: Microsoft has invested a lot of time and thought into making these tools in the Office 365 platform easy to use and implement. That being said there is a lot of value in working with your IT team, particularly your Aldridge CIO to choose and implement specific tools. Great implementations usually follow a format of “people, process, tool.” Creating good processes and policies that address the needs of the business and the people usually make implementing the technology easier and achieving low maintenance of the tool. Overall, the tools in the Office 365 ecosystem are easy to start using. That being said, the tools will continue to evolve which will require proper guidance and administration. I encourage you to reach out to your Aldridge team to work with you to create a roadmap for how you can use these tools to improve your business.

Question 2:

Q: If you are updating a file while off-line and someone else modifies it on the cloud shared location, how are changes reconciled when the offline file attempts to sync once reconnected?

A: When a file difference is detected the sync process will give you the option to either merge the file/document or keep both versions. As SharePoint and OneDrive are based on the same technology the process is the same.

Question 3:

Q: Is Power BI and Flow compatible with QuickBooks? Or Gen4?

A: Power BI can generally access any structured data source (spreadsheets, databases, etc.). With regards to QuickBooks, the easiest way to connect Power BI to QuickBooks is to be using QuickBooks Online. I am adding a link to a video on how to connect Power BI to QuickBooks Online. If you are using QuickBooks on a local server it is still possible to connect Power BI to the data source but it would require additional configurations to provide a connection.

Question 4:

Q: Is Microsoft Teams useful to connect with clients or only for internal operations?

A: Yes. Microsoft Team works well to collaborate and communicate with people both internally and external to your business. I am including a link to a YouTube video that shows how to add guest users to a Team. This also works well for one-off meetings. When you use Teams, you can create a meeting request in Outlook that includes a Team meeting link. The recipient can use that email to join a meeting via voice/video and you can even use the other features like screen sharing. The person receiving the request will have the option to use the web-based client or download the full client. In our experience, the web client works very well.