NYS Office 365[®] Community of Practice

July 14, 2020

NYS Forum

July 2020 Agenda

- Opening remarks Mike Torino (ITS), Steering Committee Member
- How DMV's transition to Teams increased productivity during physical closure (Beginner/Intermediate Level Topic) - Justan Foster (DMV), Steering Committee Member
- The Forms/SharePoint solutions employed by DMV for onsite work reporting (Intermediate/Advanced Level Topic) Justan Foster (DMV), Steering Committee Member
- Q & A, Closing Remarks Karim Cruz-Neal (DMV), Steering Committee Member



How DMV's transition to Teams increased productivity during physical closure

Justan Foster (DMV), Steering Committee Member



MS Teams @ DMV

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Business Units & Remote Workflow

Math Quiz!

Overall physical staff presence reduction of 90%. How did CDC/DS handle that transition?

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How many employees does your office have?

Certified Document Center: 10 Data Services: 10

How many are needed onsite?

Certified Document Center: 1 Data Services: 1

(Can all be handled by one person on site)

What is Microsoft Teams?

Microsoft Teams is a collaboration app that **helps your team stay organized and have conversations**—all in one place.

- Teams Find channels to belong to or create your own. Inside channels you can hold on-the-spot meetings, have conversations, and share files, and add apps, such as Microsoft Planner.
- **Meetings** See everything you've got lined up for the day or week. Or, schedule a meeting. This calendar syncs with your Outlook calendar.
- **Calls** In some cases, if your organization has it set up, you can call anyone from Teams, even if they're not using Teams.
- Activity Catch up on all your unread messages, @mentions, replies, and more.

Use the command box at the top to search for specific items or people, take quick actions, and launch apps.

Microsoft Teams Overview



Why do we like Microsoft Teams?

Microsoft Teams enables business units to address ongoing issues, catalog prior resolutions, encourages a collaborative approach to addressing the needs of a customer, and provides oversight opportunities that managers feel are out of reach or don't exist. As the program availability expands, so does the ability to set and follow priorities in a consistent manner.

Microsoft Teams usage has increased exponentially, the product recently hit 44 million daily users coming from 93 of Fortune 100 companies and over 650 organizations with more than 10,000 users.

Gadjo Sevilla, PCMag

By the numbers...

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130,000 in 365 for NYS Tenants 45,000 including Teams and Skype 15,000 or less statewide in WebEx

*As of May 2020

Business as usual is no more...

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The Shift to WFH: Work From Home

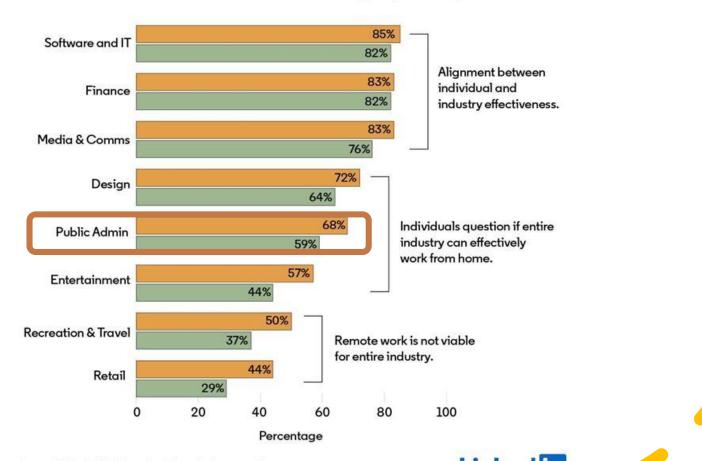
- Ability to operate
- Situational environments
- Opportunity to redefine productivity

Business as usual is no more...

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Can your industry WFH effectively?

How U.S. professionals across key industries feel about their ability to work remotely — on both an individual and industry level.



% say they can be effective, as an individual
 % say entire industry can be effective

Source: LinkedIn Workforce Confidence Index research Note: 5,447 professionals in the U.S. were surveyed April 27-May 3. Linked in

Challenges to DMV Remote Workforce

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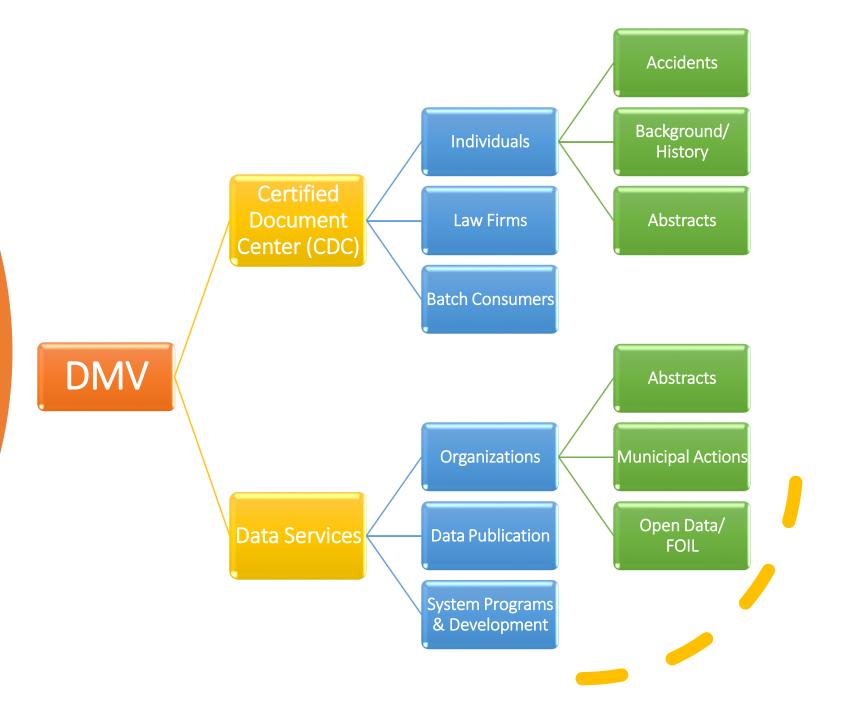
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Staff engagement
Production of physical records
Ability to transact remotely

- DMV Employees
- DMV Customers
- Technical Needs
 - Security
 - Consistency
 - Sustainability

About the case study...

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About the case study...

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Data Services

- Generates 5+% of annual DMV revenue
- Provides digital and physical DMV records
 - Programs: LENS, COMPASS, DIALIN, PREED
- Resource for FOIL, Exchange, Open Data

About the case study...

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Certified Document Center (CDC)

- Processes roughly 2-5K requests per month
- Provides physical DMV records
 - Applications: MV-15, MV-198C, Batch
- Resource for FOIL, Individuals, Firms



Concerns Regarding Security

- Cloud-based services produce vulnerabilities
- Using GCC-compliant software reduces the immediate threat
 - Teams vs. Zoom

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• Complete comparisons of all major office tech suites available at <u>www.techjockey.com</u>

Zoom Vs Teams	Microsoft Teams	Zoom
Exclusive Features	Integrated with Office 365, App Integrations, Live Collaboration in Real-Time, Conversation Threads, Collaboration with Clients vendors & Suppliers	Zoom conferencing with HD audio & video, Zoom Chat, Zoom Classroom, Zoom, Video Recordings, Zoom Webinars
Best For	Office 365 users for secure internal & external communications	Those who can navigate security settings to enjoy its interactive & simple user interface
Supported App Integrations	Office 365, Wrike, RingCentral, Freehand, Soapbox, etc.	Google Drive, Hipchat, Dropbox, Slack, HubSpot, Infusionsoft, etc.
Pricing	Get Microsoft Teams at the price at low as Rs 150/user/month.	Zoom Pro plan starts at Rs 1143/month/host
Security	Microsoft Teams is ISO 270001 and SSAE16 SOC certified	Zoom has recently introduced many new security features with the latest 5.0

Concerns Regarding Security

For companies using G Suite or Office 365, Google Meet/Chat and Microsoft Teams, respectively, are clearly the best choice. The functionality is not limited to video conferencing only, and there are no additional costs. On the other side of the playing field, you will find BlueJeans and Zoom, where Zoom is currently not recommended for privacy reasons. If these problems are addressed, then Zoom really does have the most extensive functions. Approximately in the middle of the spectrum, we find Webex, which is not part of an office suite. It is, however, a good choice if your business is already using Cisco solutions. Moreover, expansion to Webex Teams is possible when more collaboration functions are needed.

Erik Schurer, Techzine

Many scandals, including those involving fatal consequences, involved problems that were known, discussed, and often raised by employees without any constructive action to resolve them. Understanding why an organization's governance system failed is the key to improving its ethical culture. Determining if problems are isolated mistakes or evidence of a flawed culture at odds with ethics, compliance, and health and safety policies is critical.

More and more organizations conduct a root cause analysis when misconduct is discovered. This is true of 90% of highimpact programs. A root cause analysis helps identify the underlying factors that contributed to the misconduct and aids in the implementation of corrective and preventive measures.

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LRN Ethics & Compliance Program Effectiveness 2020 Report

Concerns Regarding Consistency

- Need for paper and digital products to be produced and retrieved
 - Administering record corrections and issuance of replacement credentials
- Ability to host office meetings with teams, individuals, and for training
 - Accounting for phone coverage and reporting system outages or exceptions across an office
 - Minimum need for ITS involvement

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- Document, investigate, and address customer requests and complaints in a timely fashion
 - Reducing turnaround and offering a concise, consistent response from DMV staff

Concerns Regarding Sustainability

What's next? Are we prepared?

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> Moving from management by crisis to management by objective

How do we improve our work culture and transparency?

> Communication, accessibility, accountability, singular sources of authority

Are we constructing an office specific knowledge base ahead of offboarding?

> Planning for retirement surge (up to 45% in 5 yrs), sudden illness, transfers, and cross-training

Can we harness the productivity of remote workflow for permanent solutions? > Options include streamlining onboarding/orientation processes that require only 365 presence

DMV Case Study: Data Services

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Needs: Collaboration, Documentation, Training



Produces: Productivity, Efficiency, Resolutions



How Teams Helped...

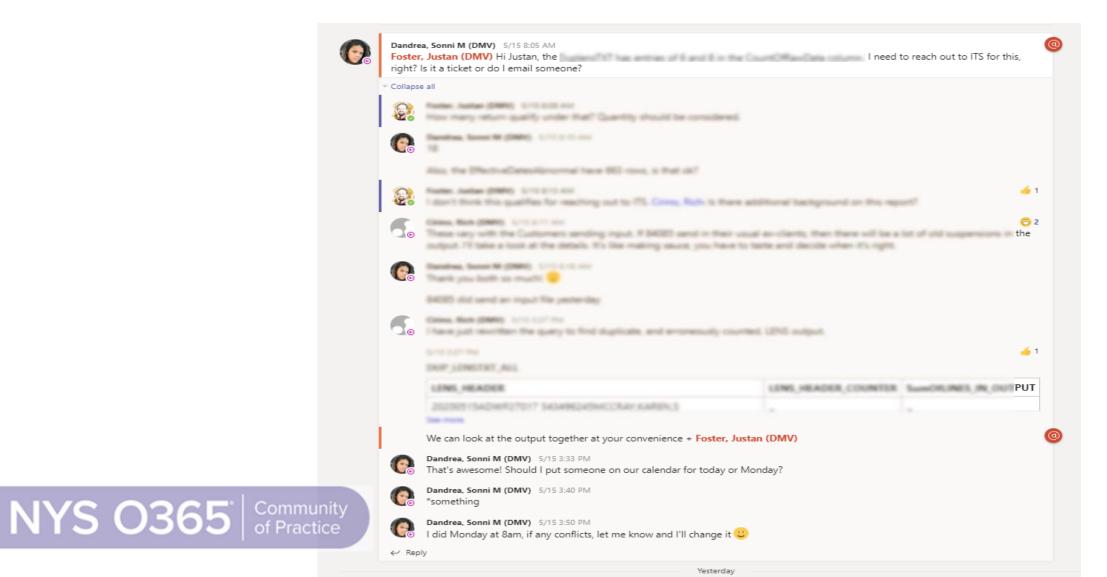
Planner integrated performance and delivery

Meetings enabled hands-on training



Wiki enabled a quick reference knowledge bank

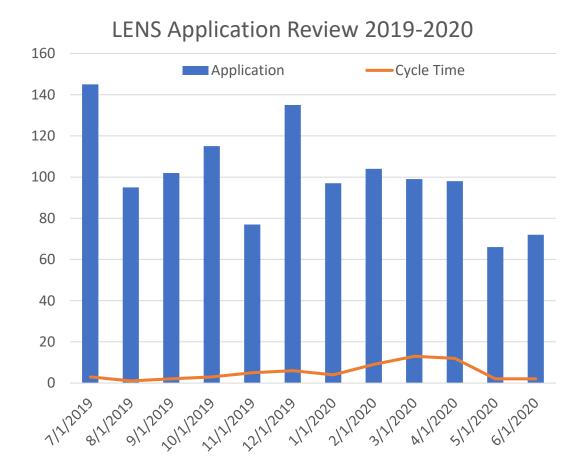
Data Services Collaboration: Issue Resolution



Data Services Collaboration: Teams Metrics

LICENSE EVENT NOTIFICATION SERVICE (LENS) PROVISIONING TURNAROUND

Period	LENS Applications	Business Days
	Accepted	to Acceptance
June 2020	72	2
May 2020	66	2
April 2020	98	12
March 2020	99	13
February 2020	104	9
January 2020	97	4
December 2019	135	6
November 2019	77	5
October 2019	115	3
September 2019	102	2
August 2019	95	1
July 2019	145	3



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DMV Case Study: Certified Documents

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Needs: Communication & Collaboration



Produces: Participation; no drama



How Teams Helped...

Promoted participation

Everyone is informed



Building a searchable library of challenging transactions to best serve customers and provide consistent results.

Phone FAQ

Ξ

1. Abstract / VAT Vehic...

...

2. Crash (Accident) rep...

3. AUO Aggravated Un...

4. Insurance

Phone FAQ

Last edited: 1h ago

Abstract / VAT Vehicle and Traffic Law §202 Fees for searches and copies of documents

Mail to CDC MV-15 REQUEST FOR CERTIFIED DMV RECORDS Request your own or another person's records

- License
 - What information shows on a license abstract in addition to the 4 year history?
 - Open suspensions,
 - Closed suspensions for 4 years from the date the suspension was closed,
 - A conviction for 4 years from the date of conviction, NOT from the date of offense,
 - Alcohol convictions for 15 years from the date of conviction, NOT from the date of offense.
 - Who may request a license abstract? Standard driving records (abstracts)
 - You may request your own record or another person's records if you have a DPPA Drivers Privacy Protection Act
 permissible use.
- License (Lifetime) Lifetime driving records
 - Since record creation, other than possibly original permit or license dates; dates prior to the early 1990s do not show due to a system conversion changing licensing class from a number to a letter.
- License (Address History) The individual may ONLY request their own history.
- License (Ticket Disposition)
- License (Revocation/Suspension Order)
- Vehicle registration and title records (abstracts)
 - Registration
 - Title

Crash (Accident) reports / VAT §604

- On Line How to Order and Access Motor Vehicle Accident Reports
- On Line Get Motor Vehicle Accident Reports
 - May i do a limited free search for an accident report?
 - Yes Get Motor Vehicle Accident Reports and select List Reports on File
 - Why did i not find an accident report on line?
 - It takes 14 60 days for an accident report to become available in AIS Accident Information Systemn.
 - I ordered an accident report on line and did not receive what i paid for. \$7 search + \$15 report = \$22
 - No record confirm information user has entered through Help CAST
 - Error user entered incorrect data in search fields, DMV records are incorrect, AIS is down
 - Wrong record confirm information user has entered through Help CAST
 - Error user entered incorrect data in search fields, DMV records are incorrect, AIS is down
 - No longer available Accident reports are available for 4 (four) years from the date of the accident. Accidents
 hereond 4 (four) years are only available if the drivers have an open systemation.

CDC Collaboration using a Wiki to create a Phone FAQ

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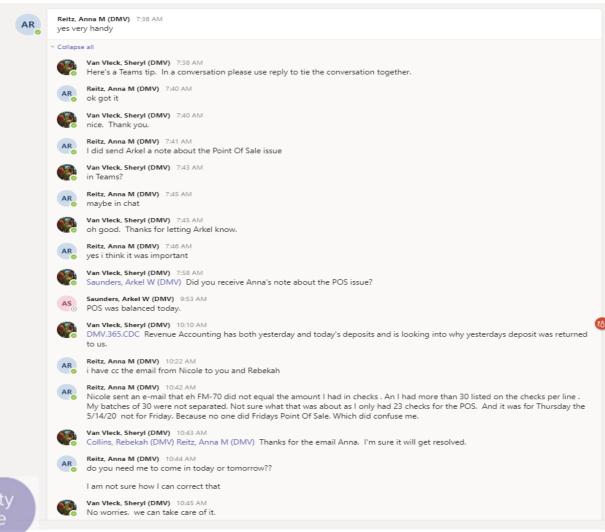
CDC Collaboration: Work Assignments

📫 Customer Help Desk

🖞 New 🚯 Upload 🐵 Get link 🕂 Add cloud storage 🔹 Open in SharePoint	
✓ Type Name	Modified 🕶
DA Aggravated Unlicensed Operation Request	6/12/20
Lifetime Abstract General Consent	6/12/20
License Address History	5/22/20
NFPs search fee VTL section 202	5/14/20
Phone Phone	5/8/20
Monroe County DOT Police Accident Reports	4/21/20
COMPASS.txt	7h ago

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CDC Revenue Collaboration: Chat vs. Email



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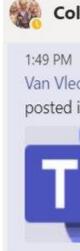
Activity Notifications

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Search Capability Example: Where is that conversation from last Friday you want to include others on, but only know who you had it with...?



Collins, Rebekah (DMV) Chat

Van Vleck, Sheryl (DMV): Foster, Justan (DMV) Phone Plan - I assigned 2 test follow ... posted in DMV.365.CDC / Customer Help Desk at May 15, 2020 12:01 PM

X

Join conversation

teams.microsoft.com

Did we mention you can add Microsoft Planner to Teams?

Microsoft Planner is a to-do app that comes with Office 365. It's used for personal and teamwork planning, with a simple card-based interface that's similar to Trello. ... **Planner** opens in what's called the "**Planner** Hub," which shows you the plans you've created yourself or been added to by other people.

Source: <u>HowtoGeek.com</u>

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Teams Integration

Call Follow Up and Escalation Solution using Microsoft Planner

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Call to Return Call Escalate to Manager Add task Add task +Hide completed 11 Hide completed \wedge return call to Kelly-Monica Smith, Lexi: What dates of Accident Completed by Christiansen, Doro... Ⅲ 05/29 Completed by Coll return call to Reniat Clark @ Completed by Christiansen, Doro...

E Schedule

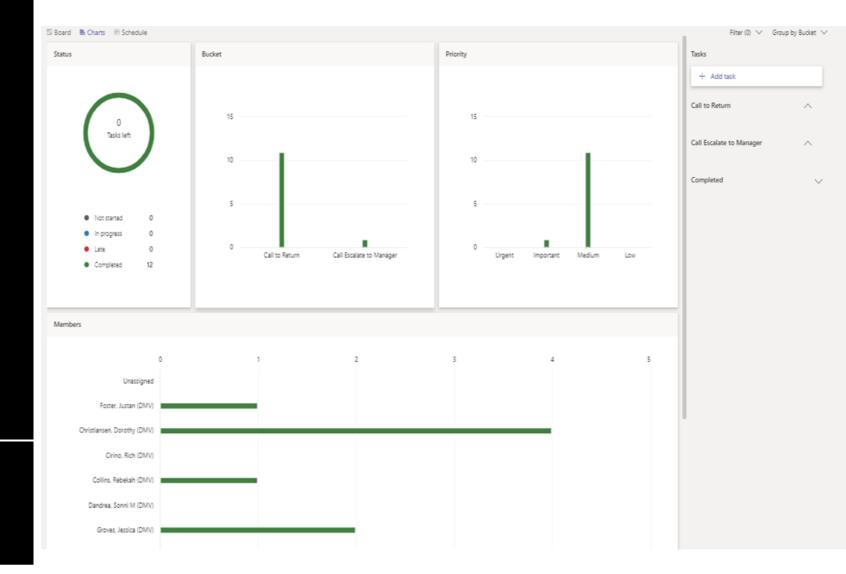
FI Board B Charts

Teams Integration

Call Follow Up and Escalation Solution using Microsoft Planner

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Business Units & Remote Workflow

The Forms/SharePoint solutions employed by DMV for onsite work reporting

Justan Foster (DMV), Steering Committee Member



SharePoint and Forms @ DMV NYS 0365 Community

Business Units & Remote Workflow As DMV returned, there were **questions**... What work requires a **physical presence**?

- Mail Room
- Some Transactions

NYS 0365 Community of Practice As DMV returned, there were **questions**...

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How can we **meet requirements**?

- Capacity
- Social Distancing
- Reporting

As DMV returned, there were **questions**...

How long will this need to continue?

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Case Scenario - Navigating Onsite Presence

Ed is returning onsite. What does this mean?

• Why, how often, where, and with whom?

Cindy supervises Ed. What is her responsibility?

• GOER, DMV, colleagues, customers



...and solutions.

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Microsoft Forms

- Internal/external collection
- Ease of access & deployment
- Met initial need

What is Microsoft Forms?

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Microsoft Forms enables you to:

- create surveys, quizzes, and polls
- invite others to respond to it using almost any web browser or mobile device
- see real-time results as they're submitted
- use built-in analytics to evaluate responses
- export results to Excel for additional analysis or grading.

...and solutions.

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SharePoint & SP Designer

- Internal/external collection
- Complex workflows
- Sustainable for development

What is **SharePoint**?

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SharePoint in Microsoft 365/Server:

A **cloud-based** service, hosted by Microsoft, for businesses of all sizes. This format does not require onsite deployment. Your employees can **Create sites to share documents and information** with colleagues, partners, and customers. Organizations can deploy and **manage SharePoint Server** onpremises or with an Office 365 Enterprise subscription to take advantage of all the latest features. And it **Offers additional features** and capabilities, such as modern site pages, modern web parts and authoring, modern lists and libraries, modern search, and **integration with other 365 programs**.

What is **SharePoint**?

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SharePoint Designer:

Used to build powerful, **workflowenabled** solutions. And used to **edit external content** types for an external data solution based on **Business Connectivity** Services.

This Photo by Unknown Author is licensed under CC BY-SA-No

Forms Solution

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Quickly deployed

- Ease of editing
- Available by link or QR

Permissions to distribute results

- Group Form
- Unique permissions via Teams SharePoint
- Centralized delivery via SharePoint

Mobile friendly

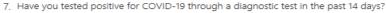
• Most employees utilize smart phones

Branching logic

• Messaging to employees

Link to test template

Forms Solution: Metrics & Delivery





8. Do you have a temperature equal to or greater than 100.0 degrees Fahrenheit? More Details

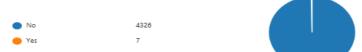


9. Do you have symptoms consistent with COVID-19?



10. Have you had any known close contact with a person confirmed or suspected to have COVID-19 in the past 14 days?





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(Un)Opened Data

𝒫 Search	+ New ∨ ↑ Upload ∨ 🖉 Quick edit 🔒 Sync 🖷 Export to Excel 🔅 Power Apps ∨ 🕫 Automate ∨ …				
Home	DMV Employee Screening				
Published Reports					
Report Catalog	\square Name \lor	Modified \vee	Modified By \vee	$+$ Add column \vee	
Reports You Requested	NYS DMV Employee_Self-Certification Scre	Yesterday at 12:01 PM	Foster, Justan (DMV)		

DMV Employee Scree...

SharePoint Solution

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From concept to beta deployment within one week

External environment for interaction with employees that did not have token or OWA access

View and workflows to reduce need for supervisor to collect/discern

Manageable permission structure for unfamiliar offices

SharePoint Solution: Landing Page



NYS DMV Employee Screening

✓ Search this site	+ New \checkmark <a> image details			
Home	Welcome to NYS DMV Onsite Personnel Management!	Quick links		
Documents Onsite Check-In	Please follow the links to the right of this page in order to complete the prescreening process, review	Report for Onsite Work		
Recycle bin	submissions, and document or respond to health alerts.	Edit or Review Your Check In		
Edit	Welcome Back Packet	Supervisor Reporting		
	Incident Response Form	Supervisor Reporting (Mobile)		
		Documents See all		
		+ New \checkmark \cdots = All Documents \checkmark ()		
		🗅 Name 🗸 Modif		
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SharePoint Solution: InfoPath Form

- Validation & Formatting
 - Acknowledgment (initials)
 - Phone number
- People picker
 - Multiples

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Conditional Responses

NYS DMV Employee Self-Certification Screening

During the COVID-19 public health emergency state agencies and authorities are required to enact a continuous health screening process for individuals to enter the workplace and continue tracing, tracking, and reporting.

You must be screened prior to, or within the first hour of, the start of your shift. If you have any questions regarding the screening process, please contact your supervisor.

The Office of Information Technology Services (ITS) has developed an application to standardize the daily health screening process for state agencies and authorities. We have been mandated to use ITS' application immediately. Please visit: https://screening.ny.gov to complete your daily health screening. Thank you.

Who is/are the supervisor(s) you report to?	\$ √ ⊞*
Type in this format: Last Name, First Name OR use the address book icon to the far right.	
What business unit do you work in for NYS DMV?	Select an answer
What location(s) or room(s) do you primarily work in?	* Example: Swan Street, Room 231
What is your personal phone number?	* Example: 518-486-9786
Have you tested positive for COVID-19 through a diagnostic test in the past 14 days?	Select an answer
Do you have a temperature equal to or greater than 100.0 degrees Fahrenheit?	Select an answer
You MUST use a thermometer to complete this question.	
Do you have symptoms consistent with COVID-19?	Select an answer 🗸 🗸
This may include cough, shortness of breath, troubled breathing, or a combination of chills, muscle pain, headache, sore throat, or new loss of taste or smell.	
Have you had any known close contact with a person confirmed or suspected to have COVID-19 in the past 14 days?	Select an answer
I certify that the above statements are truthful and accur Please type your first and last initials in	
Cubmit	

Onsite Check-In

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>	Supervisor \smallsetminus	Created By $\blacksquare \smallsetminus$	Created \smallsetminus	Business Unit \smallsetminus	Contact Phone Nu $$	Contact with COVI $$	COVID-19 Symptoms \smallsetminus	Temperature o
\sim	Created : 6/24/2020) (1)						
	> Created By : Miller, Amanda (DMV) (1)							
\sim	 Created : 6/23/2020 (2) 							
	✓ Created By : An	nanda Miller (2)						
	Foster, Justan (DMV)	Amanda Miller	June 23	AGENCY MODERNIZATION	518-515-	No	No	No
	Foster, Justan (DMV)	Amanda Miller	June 23	AC POWELL BUILDING HARLEM	518-256-	Yes	No	No

SharePoint Solution: Views

- 10.1	21/	1.01	F	-	on
1.14	aν	14			

Site Objects

NYS DMV Employee Screening

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- Lists and Libraries
- Ċ, Workflows
- 🙀 Site Pages
- Site Assets
- Content Types
- Site Columns
- External Content Types
- Data Sources
- Master Pages
- Site Groups
- 呆 Subsites
- All Files
- Workflows
- List Workflow
- COVID_Alert

👌 CC	0V	ID_Alert
	Ŧ	NYS DMV Employee Scre

eening
Workflows
COVID_Alert
Text-Based Designer

Notify Supervisor and HR

Pause for 0 days, 0 hours, 5 minutes

If Current Item: Contact with COVID positive in past 14 days equals Yes

- or Current Item:COVID-19 Symptoms equals Yes
- or Current Item: Temperature of 100 or more equals Yes
- or Current Item: Tested positive for COVID in past 14 days equals Yes

 - then Email Current Item:Created By

Email Employee

Pause for 0 days, 0 hours, 5 minutes

- If Current Item: Contact with COVID positive in past 14 days equals No
- and Current Item:COVID-19 Symptoms equals No
- and Current Item: Temperature of 100 or more equals No
- and Current Item: Tested positive for COVID in past 14 days equals No
 - Email Current Item:Created By

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Email Current Item:Supervisor

Solution: Workflow

SharePoint

Q&A Discussion

Karim Cruz-Neal (DMV), Steering Committee Member



Share your experiences

- Microsoft Teams
- Microsoft Planner
- Microsoft Forms

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- Microsoft SharePoint
- Microsoft SharePoint
 Designer

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Wrap-Up

Karim Cruz-Neal (DMV), Steering Committee Member



Related presentations

O365 Stream Channel

- SharePoint Live Training Broadcast
- Teams Training Live Broadcast



Call for Presenters

- Looking for volunteers
- Send us your topic ideas
- Scheduling 20 to 30 minutes





- Next O365 CoP Event tentatively scheduled for Tuesday, August 11, 2020 at 2pm
- Subscribe to NYS Forum to receive updates on events

