



# Advisory Services Delivery in Office 365

User Guide

BDC Network Consultants



# User Guide Content

## **Introduction (P.3-5)**

## **How to start (P.6)**

## **Login to BDC Office 365 account (P.7)**

## **How to find my projects (P.8-9)**

## **Quick tour of the project site (P.10-12)**

### **Key action:**

- Tools and deliverables documents (P.13-15)
- Work and manage project task list (P.16)
- Update and use Notes section (P.17)
- How to access a previous version of a document (P.18)

## **How to collaborate**

- How to get an alert whenever a document is modified (P.19)
- How to publish final deliverables after client review (P.20)
- How to send a document's link to my BDC Project lead (P.21)

## **How to securely share documents with a client (P.22-24)**

## **How to upload a document received from a BDC client (P.25-26)**

## **Resources and contact (P.27)**



# Introduction

## → Why O365 for Advisory Services Delivery?

- BDC needs a **workspace** for its Network Consultants that is **secure**, **easy to access**, facilitating **information sharing** and **collaboration** on the deliverables we jointly develop.





# Introduction

## → What are the benefits of **Advisory Services Delivery Project Sites**?

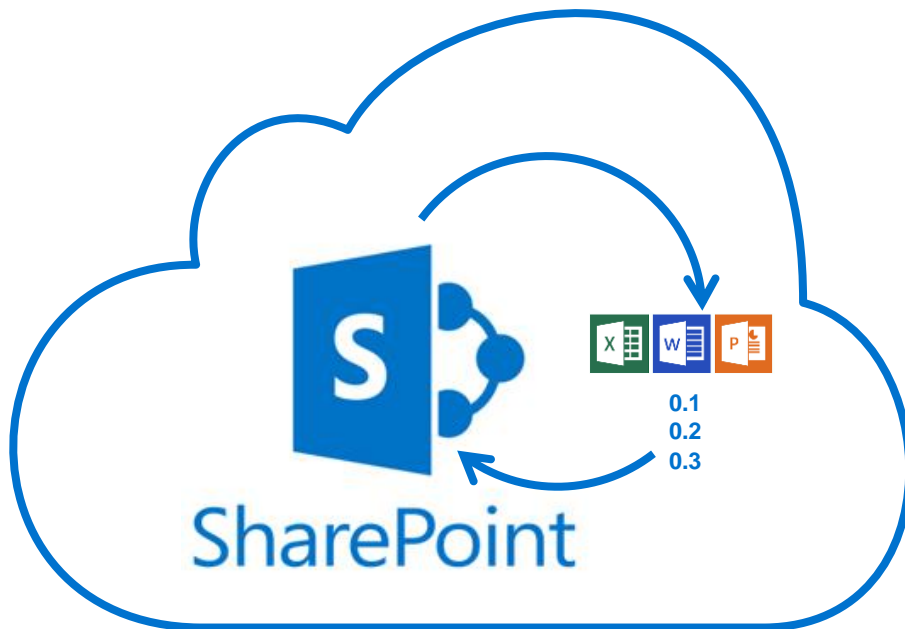
- Dedicated workspace including all project information:
  - All projects, tools and deliverables;
  - BDC Project Lead, Account Manager and Client Partner contact information;
  - Notes section, interesting links section, etc.
- Accessible everywhere, anytime, from any device, with an Internet connection
- Follow up of all project tasks
- Easier collaboration with document versioning and elimination of manual documentation transfers (via emails, Accelion, etc.)

# Working collaboratively in SharePoint means



Always work directly in the cloud

Never download documents to work on your computer



# How to start

## Project Site Invitation Email



- Once a project has been assigned to you, you will receive an email with the link to the new project in your BDC email. A link can be found in every project site invitation email.
- Each link is created with the [Client Name](#) and its [Project #](#) is displayed as a link in the email

**01.** Click on the “[Client Name - Project #](#).” You will be redirected to the connection page.

**bdc\*** | Advisory Services Solution Delivery

You've been invited to join the new Project site for ABC Company - 123456\_f. Project details are included within the site.

Go to [ABC Company - 123456\\_f](#) **1**

Follow this site to access it directly from the SharePoint section.

**Access my Dashboard**

If needed, you can refer to the [Quick Reference Card Office 365](#) and/or the [Detailed guide](#) on the [Consultant Zone](#). These tools will allow you to better understand Team Site functionalities.

**\*NEW\*** If you need to exchange or share documents with clients, you can securely do so in SharePoint. To request client access, please visit the project site and click on the **'Add Client' button**. This will generate an automated email for you to fill in the client email address(es) and submit. All requests will be processed within 24 business hours.

If you notice a problem with a document/tool, please email us at [OpSupCons@bdc.ca](mailto:OpSupCons@bdc.ca) with both the name of the document, the client name and project number as per your contract, and the details of the issue.

*For any Login issues, please contact the Help Desk at 1-844-834-4225.*

Thank you!

# Login to BDC Office 365 account



## BDC Credentials

**01.** Go to: <https://outlook.office365.com/owa>  
Enter your **BDC** email address and your **password**.  
Then click on “**Sign in**”.

Sign in with your work or school account

someone@example.com

Password

Sign in Cancel

Can't access your account?

**02.** Finally, enter your **username** and your **password**.  
Click on “Sign in”

*Note: Your username is made up of the first 4 letters of your last name and the first 2 letters of your first name. If you have a problem with your username, please call the BDC Service Desk.*

Username Examples:

Jamie McDonough: **MCDOJA**  
Rolanda Flynn: **FLYNRO**  
Amin Burnett: **BURNAM**

username

password

corp.bdc.ca

Sign in

Forgot password?

Change to a different domain

vmware



# How to find my projects

## My Dashboard

**01.** Once in the project workspace, click on “My Dashboard”

The screenshot shows the Microsoft Project workspace for 'Advisory Services Service Delivery'. The left-hand navigation pane includes 'Home', 'Client Home', 'Libraries', 'Links', 'Apps', 'Super Users', 'Learning', 'Recycle bin', and 'Edit'. The main content area is divided into several sections: 'Libraries' with 'Client Documents Limited', 'Other Related Documents Limited', and 'Tools and Deliverables Limited'; 'Notes' with a '+ New' button, 'Edit in grid view', 'Share', and 'All Items' options; and 'Links' with 'External Consultant SharePoint Guide', 'Consultant Zone', 'My Dashboard' (highlighted with a red box and a red circle containing the number 1), and 'BDC Images and icon bank'. A blue button at the top right says 'Add client Secure Client Document Sharing'.





# How to find my projects

## My Dashboard

**02.** You will be re-directed to the **BDC Advisory Services Service Delivery Dashboard** where you will have access to all of your active and closed projects.

Welcome on the BDC Advisory Services Service Delivery Dashboard

### Active Projects

Title  
ABC Company - 123456\_b  
Client Number  
1234567  
Project Number  
123456  
Solution  
Advanced Financial Management - Gestion financière avancée

### Closed Projects

Title  
TEST HIF English - 987456  
Client Number  
123456  
Project Number  
987456  
Solution  
Growth Driver Program - Programme directi on croissance


Title  
TEST HIF francais - 987645  
Client Number  
123456  
Project Number  
987645  
Solution  
Growth Driver Program - Programme directi on croissance


Title  
ABC Company - 123456\_d  
Client Number  
123456  
Project Number  
123456  
Solution  
Strategic Planning - Planification stratégique


Title  
Client Company - 987654  
Client Number  
123456  
Project Number  
987654  
Solution  
Financial Management for Small Business - Gestion financière pour petites entreprises

Français

### Links

 BDC Advisory Services Service Delivery Office : User Guide

 BDC Consultant Network

 My solutions



# Quick tour of the Project Site

## Main Page

- 01.** a) Folder that can be used to securely share documents with clients.  
b) Folder to store any documents that aren't tools or deliverables.  
c) Folder with the project tools, templates & deliverables.
- 02.** Request to give clients access to the "*Client Documents*" folder.
- 03.** Button to transition the home page from English to French.

**Libraries** **1**

- Client Documents Limited **a**
- Other Related Documents Limited **b**
- Tools and Deliverables Limited **c**

**Add client Secure Client Document Sharing** **2**

**Notes** **4**

+ New Edit in grid view Share Export to Excel All Items

Title

Meeting with a client.

**Links** **5**

- External Consultant SharePoint Guide
- Consultant Zone
- My Dashboard
- BDC Images and icon bank

**Tasks** **7**

Milestone Name	Target Date	Actual Date	Invoiceable	Status
Kickoff - DC	10/10/2021	3/3/2022	×	Completed
Visit 2	11/13/2021		×	In Progress
Final Report Review and QA - PL	11/23/2021		×	In Progress

**Project #** **6**

44

**Client #**

42

**Solution**

Operations optimization potential - 277

**Advisory Practice**

Operational Efficiency

**BDC Project Lead**

**Delivery Consultant**

**Français** **3**



# Quick tour of the Project Site

## Main Page (continued)

- 04.** Section to display/add notes for you and your Project Lead.
- 05.** Useful links and guides.
- 06.** Project notice information panel is where you will find contextual information related to the project.
- 07.** Detailed list of tasks that you must check as the project progresses.

**Libraries** **1**

- a** Client Documents Limited
- b** Other Related Documents Limited
- c** Tools and Deliverables Limited

**2** Add client Secure Client Document Sharing

**3** Français

**Notes** **4**

+ New ▾ Edit in grid view Share Export to Excel All Items ▾ ⓘ

Title ▾

Meeting with a client.

**Links** **5**

- External Consultant SharePoint Guide
- Consultant Zone
- My Dashboard
- BDC Images and icon bank

**6**

**Project #**  
44

**Client #**  
42

**Solution**  
Operations optimization potential - 277

**Advisory Practice**  
Operational Efficiency

**BDC Project Lead**

**Delivery Consultant**

**Tasks** **7**

Milestone Name	Target Date	Actual Date	Invoiceable	Status
Kickoff - DC	10/10/2021	3/3/2022	×	Completed
Visit 2	11/13/2021		×	In Progress
Final Report Review and QA - PL	11/23/2021		×	In Progress



# Quick tour of the Project Site

## Main Page (continued)

**08.** Add links to websites and/or other relevant content.

**09.** Quickly navigate to other sites that were recently visited.

**Interesting Links** 8 [See all](#)


+ New ▾ [Edit in grid view](#) [Share](#) [Export to Excel](#) [All Items](#) ▾ ⓘ

Title ▾

**Project Status**

Active


**Super Users**


 M&L Support Delivery/Livraison


**My recent project sites** 9 [See all](#)

**ME** ☆

Mukwa Expert Inc. - 441155


 Document is popular

 Document 1 is popular

 Document 4 is popular


**PE** ☆

Planchers de bois Exotique inc. (Planchers Amazonia) -...

 Document 1 is popular

**PL** ☆

Productions Lamajeure inc. - 440663


 You viewed Home on 2/24/2022


# Retrieve the tools and deliverables




**01.** All the project documents, templates, tools and deliverables can be found under the **Tools and Deliverables** section.

## Libraries

 Client Documents  
Limited

 Other Related Documents  
Limited

 Tools and Deliverables  
Limited

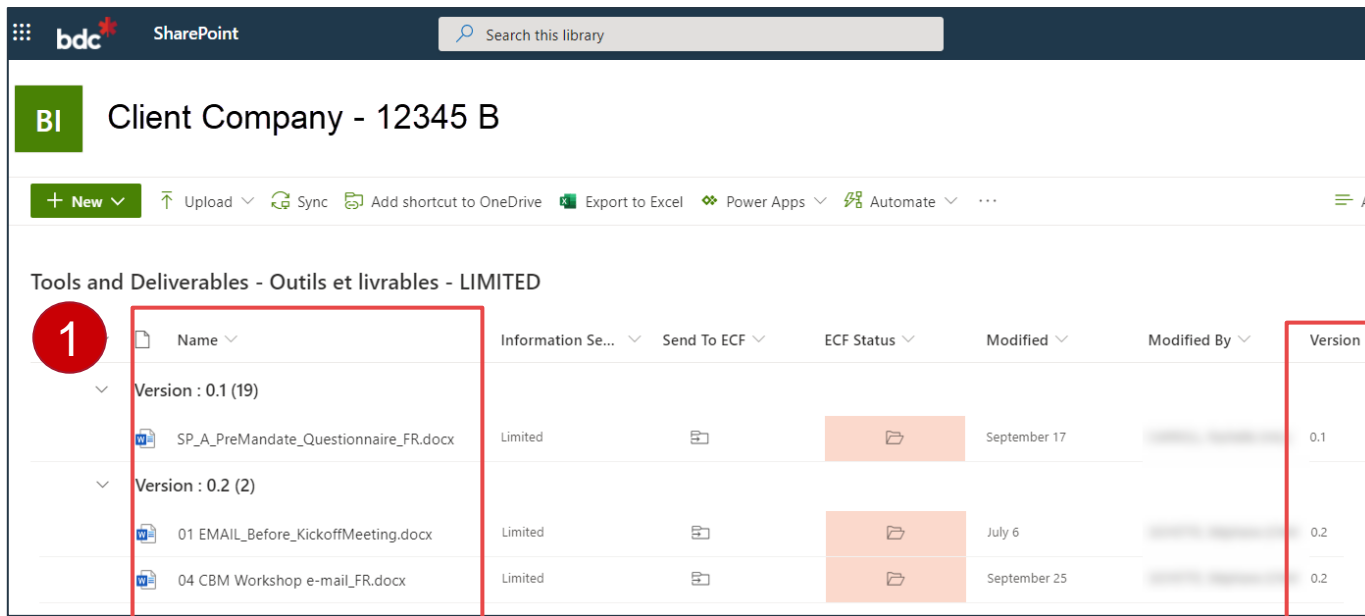
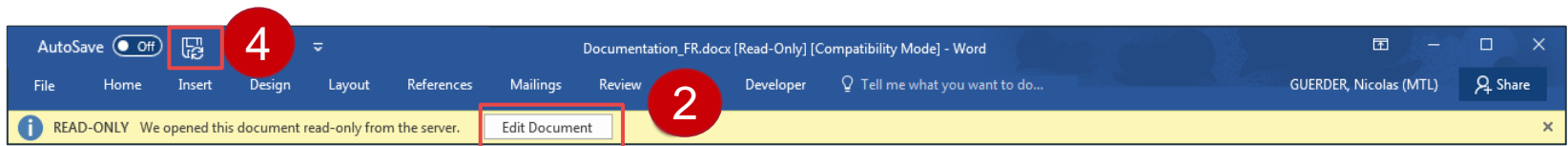
1

# Retrieve the tools and deliverables



## More about the tools and deliverables

- 01.** All the documents are listed alphabetically by name - no longer sorted by version.
- 02.** Click on the name of a document to open it, then click on “**Edit Document**” in the yellow bar.
- 03.** Thanks to the versioning feature, whenever you edit, close and save a document, a new version is created. The version number is indicated in the “**Version**” column.
- 04.** Notice arrows on the **Save button**. By clicking it you save directly in O365 under the same name.



# Retrieve the tools and deliverables



More about the tools and deliverables

- Do not make changes to the template file names to avoid duplication of the same document and to maximize the version history function.
- Save changes directly back into the cloud, or upload the file if you've been working offline.

# Task List



- 01.** Task name is assigned to the PL (Project Lead) or DC (Delivery Consultant) for completion.
- 02.** Target date for completion.
- 03.** Actual completion date is auto populated based on the day you mark the task as completed. *Subsequent target dates will be automatically updated to reflect a change in timeline.*
- 04.** A check indicates whether it is an invoiceable milestone.
- 05.** Click on the box when the task has been completed in order to update the status.

**Important:** Please complete your tasks as your project progresses. This reduces the back and forth to report project updates and timeline changes.

## Tasks

Milestone Name ↑	Target D...	Actual D...	Invoicea...	Status <b>5</b>
Kickoff - DC <b>1</b>	10/10/2021 <b>2</b>	3/3/2022 <b>3</b>	×	Completed
Visit 2	11/13/2021		×	In Progress
Final Report Review and QA - PL	11/23/2021		×	In Progress
Final report presentation - DC	11/27/2021		<input checked="" type="checkbox"/> <b>4</b>	In Progress



# Notes



- Leave notes regarding the project so colleagues can better understand the situation
- Please keep in mind that Urgent situations should always be communicated to the Project Lead by email or by phone and not with the Notes section
- To add a new note click on 'New', and fill out the relevant information in the fields provided

## Notes

[+ New](#) [Edit in grid view](#) [Share](#) [Export to Excel](#) [All Items](#) [?](#)

---

Title [v](#)

---

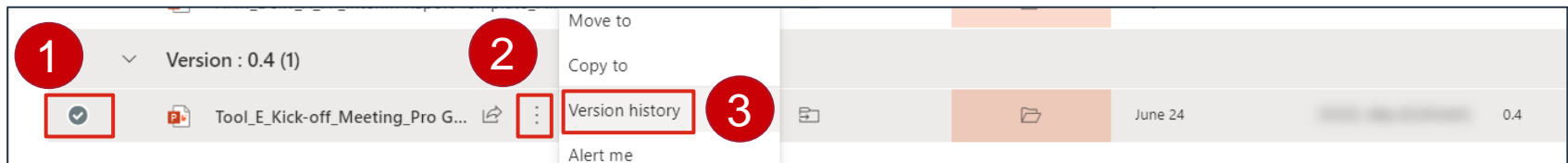
Meeting with a client.

---

# How to access a previous version of a document



- 01.** Select a document from the list.
- 02.** In the Actions Bar, click on the ellipsis “...”.
- 03.** Click on “**Version history**”.
- 04.** A pop-up opens with the list of previous and current versions available. To view a previous version, click on the date. The document will automatically open in Read Only mode.



### Version history

Delete All Versions | Delete Minor Versions

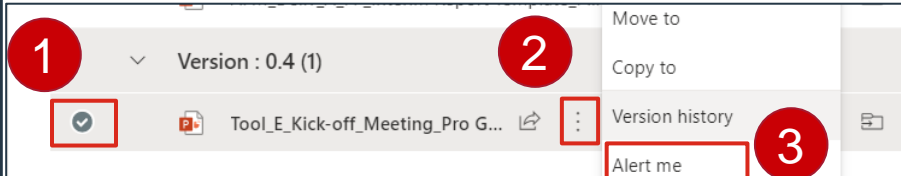
No. ↓	Modified	Modified By	Size	Comments
0.4	6/24/2020 12:41 PM	[REDACTED]	1.2 MB	
0.3	6/23/2020 12:12 PM	[REDACTED] (CNM)	1.2 MB	
0.2	6/23/2020 11:54 AM	[REDACTED] (CNM)	1.2 MB	
0.1	5/15/2020 12:51 PM	[REDACTED] (CNM)	1.2 MB	

A red box highlights the 'Modified' column, and a red circle with the number 4 points to the date '6/23/2020 12:12 PM' in the second row.

# How to get alerted whenever a document's version is changed



01. Select a document from the list.
02. In the Actions Bar, click on the ellipsis "...".
03. Click on "Alert Me".
04. A pop-up opens. Choose a **Alert Title** and choose among the available options.
05. Click "OK" to create the alert.



A screenshot of the "Alert me when items change" dialog box. The dialog has several sections with red callouts: a circle with '4' points to the "Alert Title" field, which contains the text "Tools and Deliverables - Outils et livrables -"; another circle with '4' points to the "Send me alerts by:" section, where "E-mail" is selected and the email address is partially visible as "@bdc.ca"; a circle with '5' points to the "OK" button at the bottom right. Other visible options include "Text Message (SMS)", "Send URL in text message (SMS)", "Send Alerts for These Changes", "Send me an alert when:" (with "Anything changes" selected), and "When to Send Alerts" (with "Send notification immediately" selected). The "Time" is set to "Thursday 8:00 AM".

# How to publish a final deliverable



Once the final deliverables have been reviewed and approved by the BDC Project Lead, you have to publish them in FINAL versions:

**01.** Select the document and click on the ellipsis "...". Choose "**More**", then click on "**Publish**".

<input checked="" type="checkbox"/>	FINAL VER AFM FP Pro-Gen Th...		Copy to	Properties		September
	Pro-Gen Inc Stmt by Class Aug 2020.xlsx		Version history	Workflow		September
	Tool_A_Delivery Methodology_FR.pptx		Alert me	Compliance details		May 13
	Tool B Introductory email EN.docx		More >	Check out		May 13
			Details	Publish		

**02.** A pop-up opens. Add a comment (i.e.: validated with client.).

**2**

**3**

*Note: It is important to publish your final deliverables as a major version because it clearly allows the project lead to see which documents are in their final form, ready for client delivery.*

**03.** Click on "**Publish**" to validate. Your comment will be displayed in the last column. Note that the document will now be on Version 1.0, 2.0, 3.0 etc. for each "final" version.

# How to send a document's link to my BDC Project Lead



**01.** Select a document from the list.

**02.** In the Actions Bar, click on the ellipsis "Get a Link"

The screenshot shows a SharePoint document library interface. At the top, there is a header with 'PT' and 'Client Company - 12345 B'. Below this is a navigation bar with 'Home - Accueil' and a ribbon with various actions: 'Open', 'Share', 'Publish', 'Copy link', 'Download', 'Delete', 'Rename', 'Automate', 'Move to', and 'Copy to'. The 'Copy link' action is highlighted with a red box and a red circle containing the number '2'. Below the ribbon, there is a list of documents. The first document is '3 Yr Income Statement.xlsx' with a version of '0.1 (23)'. It is highlighted with a red box and a red circle containing the number '1'. To the right of the document list, a dialog box titled 'Link copied' is open. It features a green checkmark icon and a red circle containing the number '3'. The dialog box contains the URL 'https://bdco365.sharepoint.co...' and a 'Copy' button, which is also highlighted with a red box. Below the URL, there is a note: 'People with existing access can use the link'.

**03.** A new window opens. Click Copy. Now that the link has been copied, paste it in an email and send it. Note that documents cannot be shared with clients or other external parties, only those with the access to the Project Site.

# Secure Client Document Sharing



**01.** Click “Add client”.

**02.** Enter the client’s email address(es) then send your request (all requests will be processed within 24 business hours).

The screenshot displays the SharePoint interface for Secure Client Document Sharing. On the left, there are sections for Libraries (Client Documents Limited, Other Related Documents Limited, Tools and Deliverables Limited), Notes (with options for New, Edit in grid view, Share, Export to Excel, and All Items), and Tasks (with columns for Milestone Name, Target Date, and Actual Date). On the right, there is a 'Français' button and fields for Project # and Client #. A red box labeled '1' highlights the 'Add client' button, which is labeled 'Add client Secure Client Document Sharing'. Below this, the 'Send' dialog box is open, showing a 'Send' button, 'From' field (with a dropdown arrow and '@bdc.ca'), 'To' field (with 'M&L Support Delivery/Livraison'), 'Cc' field, and 'Subject' field (with 'BDC Advisory Services Solution Delivery – Client Request'). A red box labeled '2' highlights the 'Client email address:' input field, which contains five empty lines for entering email addresses. A phone number '( ) - 440664' is visible below the input field.

# Presentation of the Client's Viewpoint



**01. Client Documents** folder to collaborate with BDC. Any documents you wish to share with the client will need to be copied or uploaded to this folder.

**02.** Information related to the project.

**03.** Link to client user guide.

The screenshot displays the BDC Client Viewpoint interface for 'Bis Solutions Inc. - 440891'. The interface includes a search bar at the top, a navigation menu on the left, and a main content area. Three red boxes with numbers highlight specific elements:   
1. A red box labeled '1' highlights the 'Client Documents Limited' folder in the 'Libraries' section.   
2. A red box labeled '2' highlights the 'Français' language selection button in the top right corner.   
3. A red box labeled '3' highlights the 'SharePoint Client Guide' link in the 'Links' section.   
The main content area features a large central image of a login page with the BDC logo and a 'Suivant' button. Below this, there are sections for 'Notes', 'Tasks', and 'Interesting Links'. On the right side, there is a sidebar with a 'Project #' header and a list of roles including 'Client', 'Solution', 'Advisory Practice', 'Project Status', 'BDC Project Lead', 'Delivery Consultant', 'Quality Assurance', 'Business Development Representative', and 'Super Users'.

# How to share a document with a client



01. Go in the **Tools and deliverables** folder.
02. Select the document(s) that you want to share with the client.
03. Click on **“Copy to”**.

PT Client Company - 12345 B

Home - Accueil

Open Share Publish Copy link Download Delete Rename Automate Move to **Copy to** 3

1 Tools and Deliverables - Outils et livrables - LIMITED

2 3 Yr Income Statement.xlsx

04. Select the appropriate **Project Site**.
05. Select the **“Client Documents”**.
06. Click **“Copy here”**.

Copy 1 item

3 Yr Income Statement.xlsx

Places

Choose a destination

Current Library

Your OneDrive

BDC

**Client Company - 1**

Copy 1 item

3 Yr Income Statement.xlsx

Choose a destination

Client Documents - D...

Documents for internal

Other Related Document

Tools and Deliverables -

Copy 1 item

3 Yr Income Statement.xlsx

Pro-Gen (Thund... Client Documents - D...

New folder

This folder doesn't have any subfolders.

**Copy here** 6



# How to upload a document received from a BDC client



All documentation received from a BDC client must be uploaded in Office 365

- 01.** Once in the **Tools and Deliverables** folder, click on **“Upload”**
- 02.** A new window opens. Select one or more documents from your computer drive or desktop.  
\*Hold Ctrl to select more than one document.
- 03.** Click **“Open”**. You will be notified when the document is being uploaded. The new document will appear at the top of the list

The screenshot shows the SharePoint interface for a BDC client. The 'Upload' button is highlighted with a red box and a '1' in a red circle. A 'Choose File to Upload' dialog box is open, showing a list of files in the 'Documents library' folder. The file '20161105\_Team\_meeting\_minutes.docx' is selected, highlighted with a red box and a '2' in a red circle. The 'Open' button in the dialog box is highlighted with a red box and a '3' in a red circle.

Name	Date modified	Type	Size
Sales_Analysis_Ontario.docx	29/08/2016 1:59 PM	Microsoft Word D...	
Procedure_Guide.docx	10/06/2015 3:45 PM	Microsoft Word D...	
20161105_Team_meeting_minutes.docx	02/12/2014 1:28 PM	Microsoft Word D...	
Atlantic_report.docx	02/12/2014 1:28 PM	Microsoft Word D...	
Documentation.docx	02/12/2014 1:28 PM	Microsoft Word D...	
Proposal_Example_EN.docx	02/12/2014 1:28 PM	Microsoft Word D...	
Proposal_Example_FR.docx	02/12/2014 1:28 PM	Microsoft Word D...	

# How to upload a document received from a BDC client



(continued)

**04.** If you are adding a new version of a document with the same file name, you will get a warning in the top right corner: “**1 item wasn’t uploaded**”. Click on it.

**05.** A right panel will open. Click “**Replace**” to add a new version to the existing document or “**Keep Both**” to create a distinct document.

The screenshot shows the SharePoint interface for a document library. The top navigation bar includes the 'bdc' logo, 'SharePoint', and a search bar. The main header displays 'BI Client Company - 12345 B'. Below this, a toolbar contains options like '+ New', 'Upload', 'Sync', 'Add shortcut to OneDrive', 'Export to Excel', and 'Power Apps'. A red circle with the number '4' highlights a notification in the top right corner that says '1 item wasn't uploaded'. A dialog box is open, showing a warning message: '1 item wasn't uploaded: Outil\_A\_Questionnaire\_Autoévalu... A file with this name already exists. Would you like to add this new file as the latest version of the existing file, or rename it and keep them both?'. A red circle with the number '5' highlights the 'Replace' and 'Keep both' buttons in the dialog box. The background shows a table of documents with columns for Name, Information Se..., Send To ECF, and ECF Status.

Name	Information Se...	Send To ECF	ECF Status
Version : 0.1 (19)			
SP_A_PreMandate_Questionnaire_FR.docx	Limited		
SP_A_PreMandate_Questionnaire_Short_Ver...	Limited		

# Resources & Contacts

## **BDC Service Desk**

1-844-834-4225 option #1 and #3

**Your BDC Project lead** or BDC key contact

## **The Consultant Zone:**

<https://www.bdc.ca/en/external-consultants>

**Visit <https://office.com> for further information**

Please don't hesitate to send us any comments!