Advisory Services Delivery in Office 365

User Guide

BDC Network Consultants

User Guide Content

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 collaboraton 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

0.1
0.2
0.3
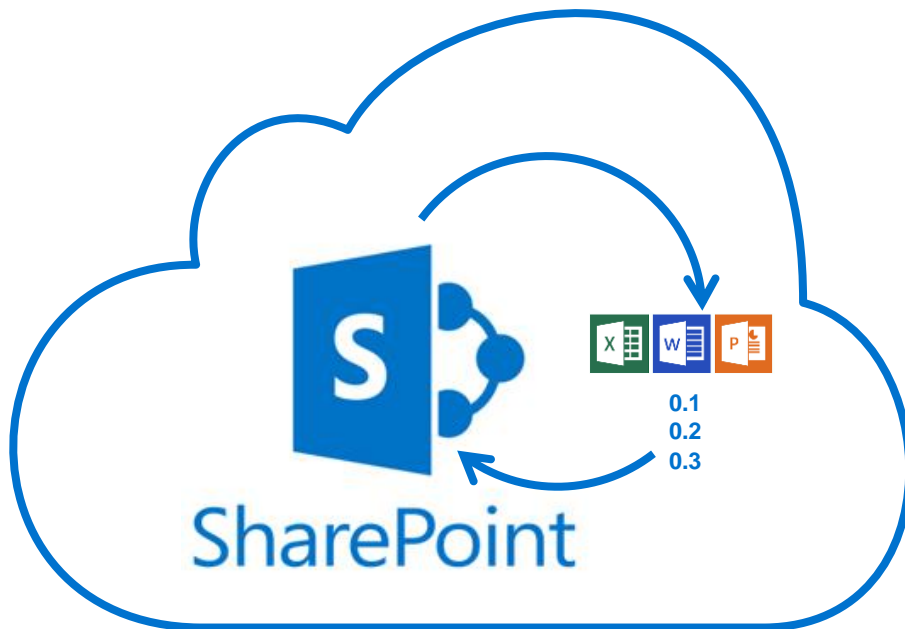
How to start
Project Site Invitation Email

➢ 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 it's 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** 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"**.

1

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**

2

How to find my projects
My Dashboard

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

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.

Quick tour of the Project Site
Main Page

01. **a)** Folder that can be used to securley 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 ❶

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

👤➕ Add client
Secure Client Document Sharing ❷

Français ❸

Notes ❹

➕ New ⌄   ▦ Edit in grid view   ↗ Share   📖 Export to Excel   ≡ All Items ⌄ ⓘ

Title ⌄

Meeting with a client.

Links ❺

📄 External Consultant SharePoint Guide

🗂 Consultant Zone

▦ My Dashboard

🖼 BDC Images and icon bank

Project #
44____

Client #
42____

Solution
Operations optimization potential - 277

Advisory Practice
Operational Efficiency

BDC Project Lead

Delivery Consultant

❻

Tasks ❼

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

10

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

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

Add client
Secure Client Document Sharing ②

Français ③

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

Project #
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Solution
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Advisory Practice
Operational Efficiency

BDC Project Lead

Delivery Consultant

Tasks ⑦

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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	PE	PL
Mukwa Expert Inc. - 441155	Planchers de bois Exotique inc. (Planchers Amazonia) -...	Productions Lamajeure inc. - 440663
📈 Document is popular	📈 Document 1 is popular	👤 You viewed Home on 2/24/2022
📈 Document 1 is popular		
📈 Document 4 is popular		

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

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.
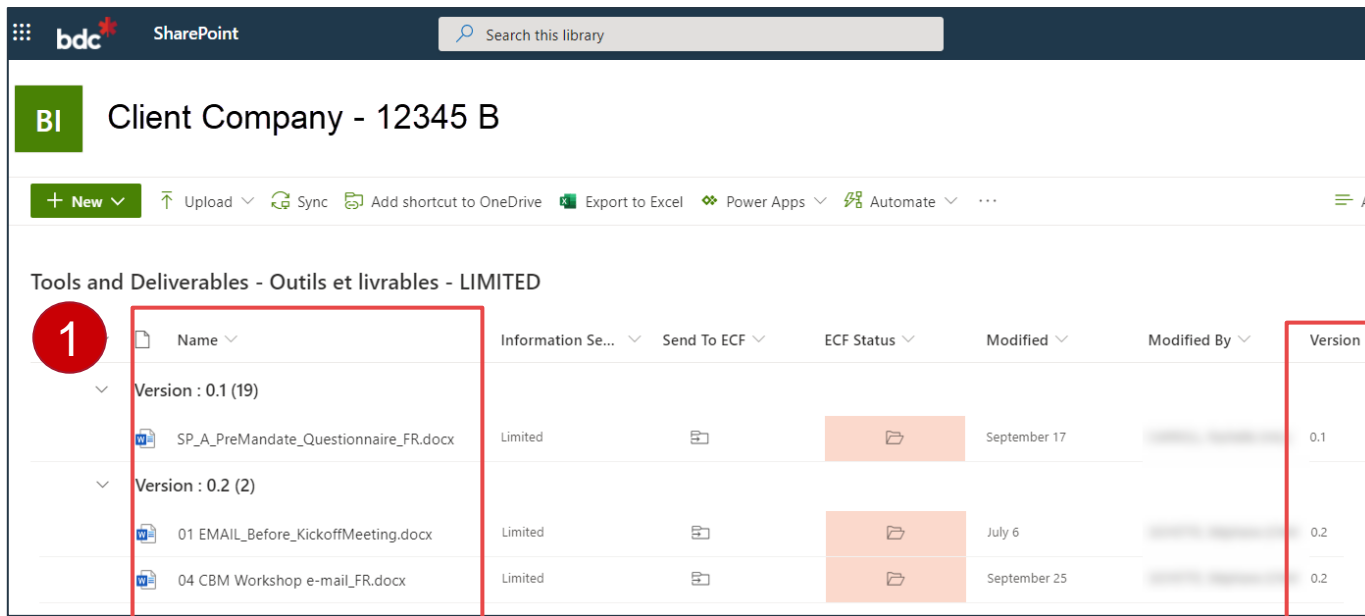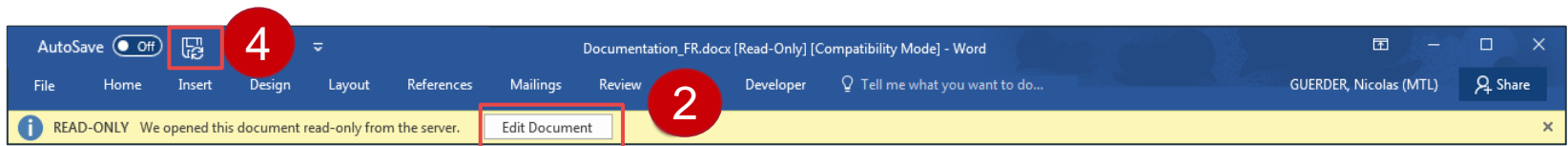
Retrieve the tools and deliverables

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
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
Final report presentation - DC		11/27/2021		✓	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

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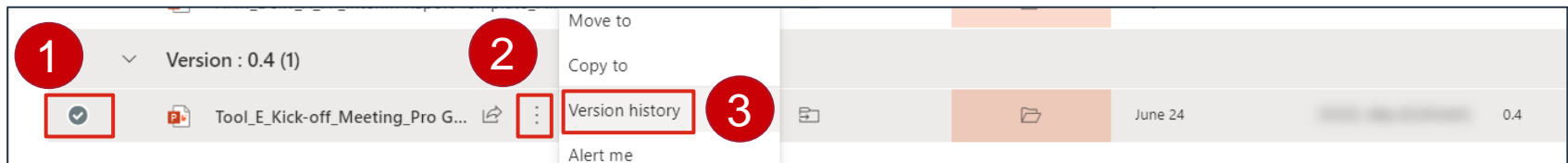
How to get alerted whenever a document's version is changed

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.

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**"**.**

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

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**"

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).

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.

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**".

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

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

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.

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!