



superhighways  
harnessing **technology** for **community** benefit

# Money A+E

Team Workshop July 2024



# Reflections from workshop 1

- ✓ Digital Maturity Matrix
- ✓ Digital tools used
- ✓ User personas
- ✓ User stories
  
- ✓ [See all input here](#)



# Some issues surfacing

- Client digital skills / access levels low
- Project & task management functionality lacking
- Data in different places – can't easily 'see it' e.g. funder reporting dates or info re contacts / organisations & relationships
- Old devices – slow, heavy...
- Better presentation / learning resources needed
- Efficiencies could be improved – working smarter. (Calendar scheduling of appointments a bit clunky?)
- Some compromises re Advice Pro
- Some duplication of tools – can these be rationalised? (e.g. Google & MS Forms)



# M365 Admin / configuration

- Looking at better set up e.g. file hierarchy and access permissions using groups
- Potentially reduce costs – e.g. using Shared Mailboxes
- Best practice / security features to be enabled... including Multi Factor Authentication

# Data breaches

Official Statistics

## Cyber security breaches survey 2024

Published 9 April 2024

<b>Types of breaches or attacks</b>	<b>Businesses</b>	<b>Charities</b>
Phishing attacks, i.e. staff receiving fraudulent emails or arriving at fraudulent websites	84%	83%
Others impersonating, in emails or online, your organisation or your staff	35%	37%
Organisation's devices being targeted with other malware (e.g. viruses or spyware)	17%	14%

# What is Multi Factor Authentication



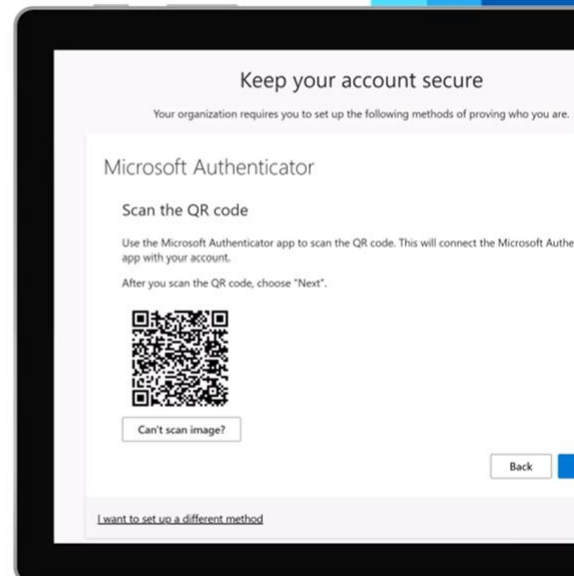
[Two Factor Authentication \(captioned\) Explained by Common Craft \(VIDEO\)](#)

# Adding the authenticator app

## Watch: Turn on multifactor authentication

Microsoft 365

### Set up multi-factor authentication (MFA)



00:00 / 02:16



# M365 apps

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Microsoft 365



Outlook



OneDrive



Word



Excel



PowerPoint



OneNote



SharePoint



Teams



Power Automate



Partner



Calendar



To Do



Forms



Planner



Whiteboard



Stream



Bookings



Lists



Sway



Delve



Microsoft Forms (Temp)



Add-Ins



Viva



Power BI





# Project management & work flow

- ✓ **Exploring M365 task apps:**
  - ✓ Planner
  - ✓ Lists
  - ✓ Loop

# Planner

## [Planner landing page](#)

**Digital Founda...** Linked plan Grid **Board** Charts Schedule Open in Microsoft Teams Members Filter (0)

**Key docs / processes index**

- Add task
- Partnership meetings
  - 9/10/2023 (online)
  - 13/11/2023 (online)
  - 11/12/2023 (in person)
- eNews schedule
  - Sep 2022 - dates for training
  - Nov 2022 - resources
  - Jan
  - Mar
  - May
- M & E
- Application form

**Q2 - Aug**

- Resourcing **Creating resources**
  - Funding landing page
    - Guidance on how to include tech / digital in funding bids plus some links to funders
- Comms
  - Year 1 learning blog
    - Important to feedback to groups involved in the co-design – a 'you said we did' type communication.
- Training
  - Autumn training programme
    - Agree courses and dates
    - Upload to Aide

**Q2 - Sep**

- Visibility, reach, co...
  - Application process for new websites
- Co-design **Peer spaces**
  - Visibility, reach, co...
  - Plan & promote Voice cohort
  - Open invite via Superhighways eNews end S...
- Data / security best...
  - Adapting to chang... **Research & learning**
    - Having an eye on Online Safety Bill & what this means for social etc.

# Lists

Money A+E test

Tools playbook ☆ 🕒


🔍 ☰ All Items ▾ Gallery view +

📄 Tool name ▾	📅 Renewal ... ▾	☰ Reason for using ▾	🔗 Website ▾	👤 Team ▾	☰ Training / documentation ▾	+ Add column
Canva		Used for all our designs - website graphics, social media graphics, infographics, presentations & video	<a href="https://canva.com">https://canva.com</a>	Digital team	See Canva design school here <a href="https://www.canva.com/designschool/">https://www.canva.com/designschool/</a> or ask Sorrel!	
AIDE	1/1/2025	Our CRM used for monitoring, events bookings, tech support tickets, events surveys, contacts & organisation relationships		Tech team Data team Digital team Digital inclusion team		
Power BI	7/7/2024	To visualise our data - connecting with AIDE API		Data team		

[Lists landing page](#)




[Loop landing page](#)

 Jacky Fung 08/02 15:39 👍 ❤️ 😄 😲 🗨️ ⋮ 📌

### Missing invoices, paid by credit card





Hi all (General),


If anyone has time and access, the following invoices, please send to me.  
[Task Component.loop](#)

 Loop component 🗨️ 📄 👤

Open in browser

↑↓ ☰ ⋮ Task apps ▾

	Task	Assigned to	Due date
1	Zoom Oct23	 Kate White	Select date
⋮	Survey Monkey Mar24 £372.00 <span>🔗</span>	 Kate White	Select date
3	Adobe 7/3/24 £19.97	 Kate White	Select date
4	Adobe 7/4/24 £19.97	 Kate White	Select date

 4

# Automating tasks using Power Automate

Start from a template

The image shows four template cards arranged in a 2x2 grid. Each card features icons, a title, author information, and usage statistics.

Template Title	Author	Usage Count
Notify and Email when a new file is uploaded to OneDrive	By Microsoft Power Automate Community	13195
Trigger a flow with a Power BI data-driven alert	By Microsoft	165706
Create a task in Planner from Microsoft Forms and post message in Teams	By Microsoft Power Automate Community	186546
Send an email to responder when response submitted in Microsoft Forms	By Microsoft Power Automate Community	477475

Or build your own

The screenshot shows the configuration for the 'When a new email arrives (V3)' trigger. A red box highlights the 'Folder' field, which is set to 'Purchase invoice step 1'. Another red box highlights the 'Include Attachments' field, which is set to 'Yes'. A red bracket on the left side of the configuration indicates that the highlighted fields are part of a larger configuration area.

Field	Value
Folder	Purchase invoice step 1
To	Recipient email addresses separated by semicolons (If any match, the
CC	CC recipient email addresses separated by semicolons (If any match, t
To or CC	To or CC recipient email addresses separated by semicolons (If any m
From	Sender email addresses separated by semicolons (If any match, the tr
Include Attachments	Yes

[PowerAutomate landing page](#)

# Microsoft Copilot

[Video link](#)

What you can  
do with Microsoft  
Copilot



What use cases can you think of for:

- ✓ Money A+E?
- ✓ Your teams?
- ✓ You?

[More Copilot videos](#)

# Training next steps

- ✓ Group sessions (as teams or just open)

Please suggest & Kate to follow up

- ✓ One to one sessions for specific tasks / applications

Book via [my Bookings page](#) (add what you'd like to cover in the Notes box)

