# **Overview of Viva Connections**

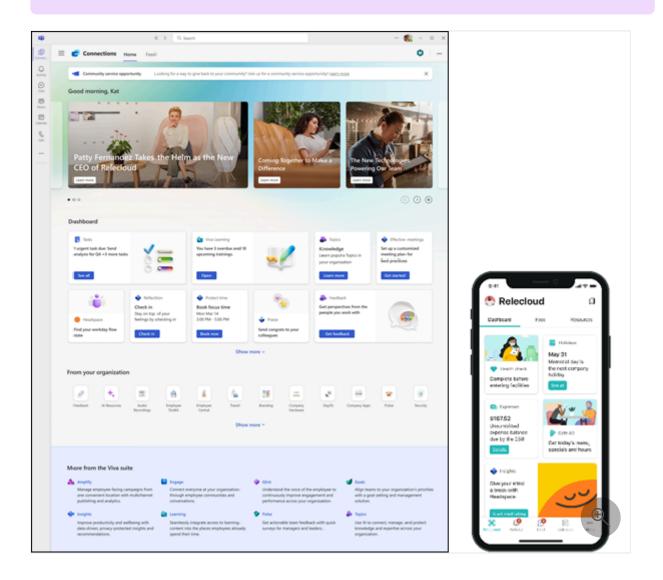
Article • 04/09/2024

Microsoft Viva Connections is your gateway to a modern employee experience and is designed to keep everyone engaged and informed. Viva Connections is a customizable app in Microsoft Teams that gives different audiences in your organization a personalized destination to discover other Viva apps your organization is licensed for, relevant news, conversations, and the tools they need to succeed.

https://www.microsoft.com/en-us/videoplayer/embed/RE4THB8?postJsllMsg=true ☑

① Note

Updates to the Viva Connections mobile app are planned for Q2 2024.



Use the quick guide to set up Viva Connections or get more detailed guidance on how to plan, build, and launch.

Viva Connections is:

- An employee experience app in Microsoft Teams that allows organizations to create unique experiences for different audiences like information workers and frontline workers.
- A gateway to other Viva apps and services with the ability to curate specific content and tools by providing easy access to resources, tools, relevant news, announcements, and popular destinations.
- Built on existing capabilities in Microsoft 365 like SharePoint, Teams, and Microsoft Entra (formerly Azure AD).

#### ① Note

A home site is not a requirement for setting up Viva Connections, but some organizations may choose to use a home site in addition to Viva Connections to provide a secondary landing experience that's more focused on organizational content. [Learn more about home sites and how they complement Viva Connections] (#how-sharepoint-home-sites-and-viva-connections-work-together).

# **Components to Viva Connections**

Viva Connections is composed of three primary components - the feed, the dashboard, and resources.

#### ① Note

- Components are expected to display slightly differently between desktop and mobile devices until Q2 of 2024.
- The News spotlight currently only displays updates from the home site. A
  future update is planned to include updates from organizational news sites.

**Expand table** 

Component	Description
Feed	The Viva Connections feed delivers updates to the right people at the right time with powerful targeting and scheduling capabilities. It's tightly integrated with SharePoint news to display a personalized feed, based on post-level targeting of the groups that employees belong to.
	Nestled on its own tab, the feed gives employees a constant stream of

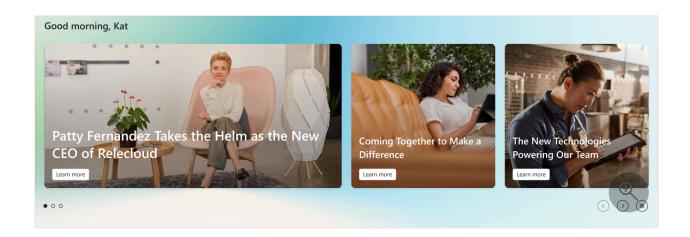
Component	Description
	organizational and industry news, information from colleagues they frequently collaborate with, insights from their meetings and other information. It supports both centralized corporate communication scenarios and democratized news scenarios. It's available in the Viva Connections Teams app and can also be used on SharePoint sites using the Viva Connections feed web part.
	At the top of connections experience, the News spotlight will cycle through news published to SharePoint news sites from across the organization.
Dashboard	The dashboard is your employee's digital toolset that brings together the resources your employees need whether they are in the office or in the field. The dashboard uses dynamic cards that employees can interact with to do things like clock in for a shift, access training materials, review paystub information, or book a shuttle. It can also be used as a web part on SharePoint home sites.
	Cards in the Viva Connections dashboard are based on adaptive cards ☑ and the SharePoint Framework (SPFx). They provide a low-code solution to bring your line-of-business apps into the dashboard. In addition, Viva Connections desktop combined with SharePoint home sites can also be further customized and extended using SPFx web parts and extensions.
Resources	The Viva Connections resources experience enables way finding across popular destinations. Organizations can curate a list of useful links that will appear to employees such as health benefits, important forms, and department websites.

# Viva Connections feed

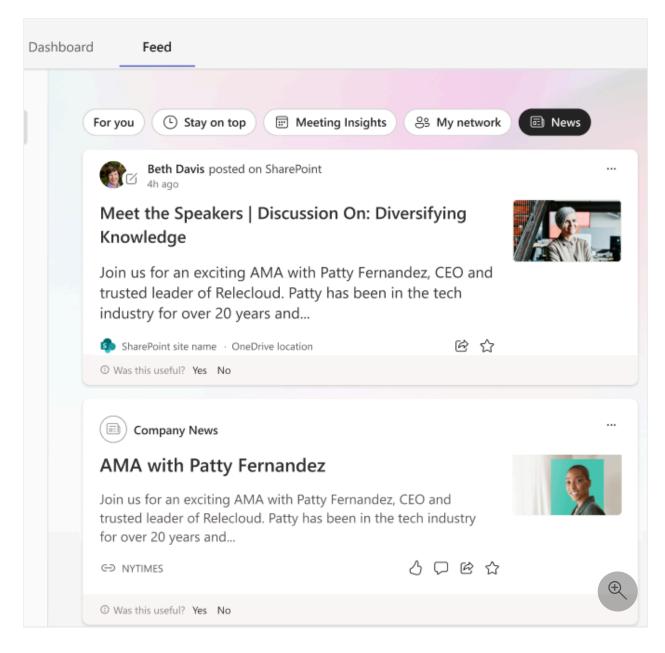
The News spotlight sits at the top of the Viva Connections experience and promotes news published to existing SharePoint home sites from across your organization, providing a steady stream of information. Employees can select news stories as they cycle through or use the navigation controls to scroll through the banner. If no news is available to display from across the organization, this section will collapse.

#### ① Note

• The News spotlight currently only displays updates from the home site. A future update is planned to include updates from organizational news sites.



Additional information can be accessed from the Feed tab. Here, employees can access their personalized feed with relevant information ranging from organizational and industry news, insights from colleagues in their network, upcoming and previous meetings, and updates on important collaborations. Content is curated based on the employee's network of people they work and communicate with across Microsoft 365 apps.



The feed automatically balances fresh and engaging content with corporate communications to keep users interested, while also ensuring that they see the most important information related to their daily work life.

#### Feed content sources

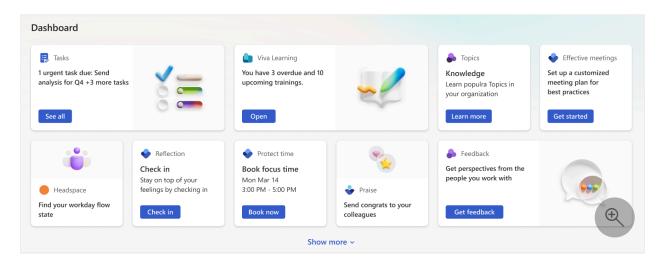
Individual content items in the Feed display for a 30-day period. Users will see content aggregated from their office feed. Refer to the article here of for more information about Microsoft Feed and where it pulls information from.

#### Feed resources

Overview of Microsoft Feed

### Viva Connections dashboard

The Viva Connections dashboard enables you to create a curated experience using dashboard cards that give your employees access to their most critical content and tools. These cards are designed to enable quick task completion either by interacting with a card directly or by opening a quick view in the dashboard. Think of the Viva Connections dashboard as a digital toolset for your employees.



The Viva Connections dashboard is available on desktop, mobile platforms (iOS, Android), and as a web part on SharePoint sites. This web part can be integrated into a SharePoint home site, which then is exposed as part of the Viva Connections for desktop experience in Teams.



The Viva Connections Desktop experience is unavailable in GCC, GCC High, and DoD environments. Please refer to the <u>list of service availability</u> for more information.

# Anatomy of a dashboard

A dashboard is made of medium-sized and large-sized cards which users can interact with to get information or complete a task.

Users can select cards or click the buttons on cards to do things like:

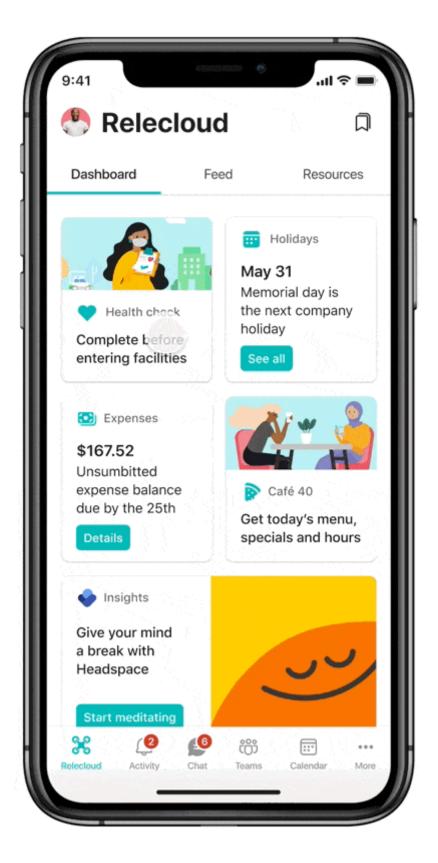
- Displaying a quick view with more information or an input form
- Navigating to a SharePoint page
- Accessing a Teams app
- Integrate with third party apps and services, including other Viva apps

Some cards can also reflect dynamic content that refreshes based on a user action or other event. For example, users can see new tasks assigned or required training courses when they open the dashboard. As the users mark the tasks as complete, the card updates to reflect their new number of tasks.

In this example, view the mobile experience for a dashboard card that enables a daily health check for on-site workers:

#### ① Note

Components are expected to display slightly differently between desktop and mobile devices until Q2 2024.



The dashboard experience has been designed to be consistent across mobile platform and desktop, but there are some differences:

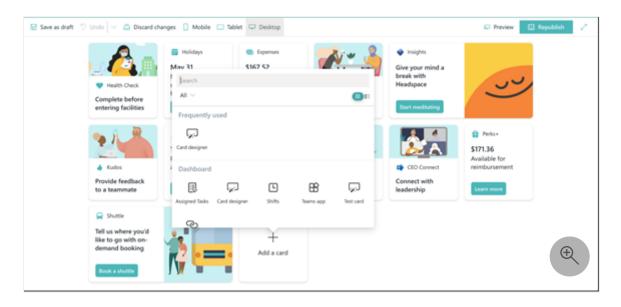
**Expand table** 

Mobile	Desktop
Displays as the default tab in the Viva Connections app in Teams.	It's prominently displayed in the desktop app and can be added to
	Displays as the default tab in the Viva

Element	Mobile	Desktop
		your SharePoint sites as a web part.
Dashboard layout	Fixed in portrait mode. Card sizes can be medium (which shows two cards on one row) or large (which shows one card on a row). Users can reorder, show, or hide the cards ② on their dashboard (this will not carry over to their desktop or tablet experience).	Can be portrait or landscape with varying numbers of cards on each row depending on whether the web part is used in a one, two, or three column page section layout.
Card UI	Native	HTML based
Card order	Same as in Desktop	Same as in Mobile
Card reflow	Same as in Desktop	Same as in Mobile
How many cards are shown	All cards without audience targeting plus audience-targeted cards where the viewer is part of the targeted audience.	The number of cards to show can be specified in the Dashboard web part settings, but which cards are shown may vary depending on audience targeting. Users can expand the number of cards show by selecting "See all".

# Dashboard authoring

The dashboard can be authored directly in the Viva Connections app in Teams desktop. If you're using a home site, the dashboard can also be authored from the SharePoint home site.

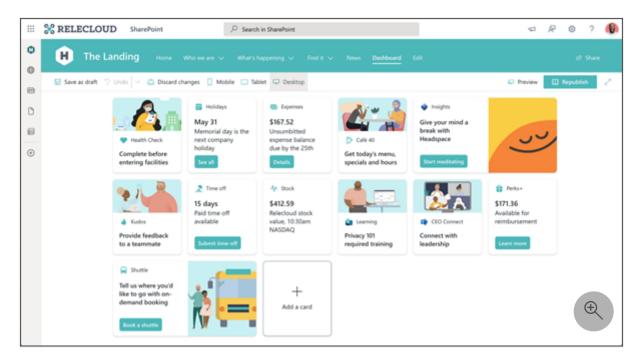


The layout of the dashboard, including the size of the cards (which can be individually set as medium or large) can be customized. The layout of the cards may look different

depending on whether the dashboard is being viewed on mobile, desktop, or in the dashboard web part. Users with edit permissions can preview how the dashboard will appear to users viewing on a mobile device or desktop.

#### Dashboard cards

The Viva Connections dashboard comes with a set of built-in cards, but is also designed to enable Software as a Service (SaaS) providers, system integrators, and in-house development teams to create their own cards to meet their business needs.



Cards in the Viva Connections Dashboard are based on adaptive cards and the SharePoint Framework (SPFx). They provide a low-code solution to bring your line-of-business apps into the Dashboard.

Learn more about how to add, remove, and edit dashboard cards.

#### Dashboard resources

Learn more about add, remove, and edit dashboard cards

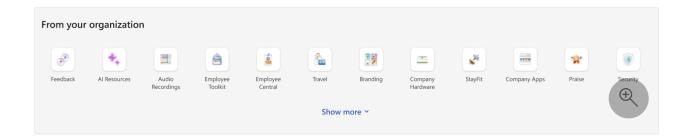
## **Viva Connections resources**

Resources are the navigational links that are set up and customized from the Teams app, or in the SharePoint global navigation for organizations with a SharePoint home site. These resources are displayed on both the desktop and mobile instances of Viva Connections and include customized navigational links and dynamically generated links

to frequent and followed SharePoint sites. Links can be further customized by applying audience targeting.

#### ① Note

- Links that are created via in-app editing via Viva Connections will not appear in mobile for targeted release customers at this time. Updates to mobile are planned for the end of Q2 2024.
- Up to 48 resource links can be created in the new Resources section.



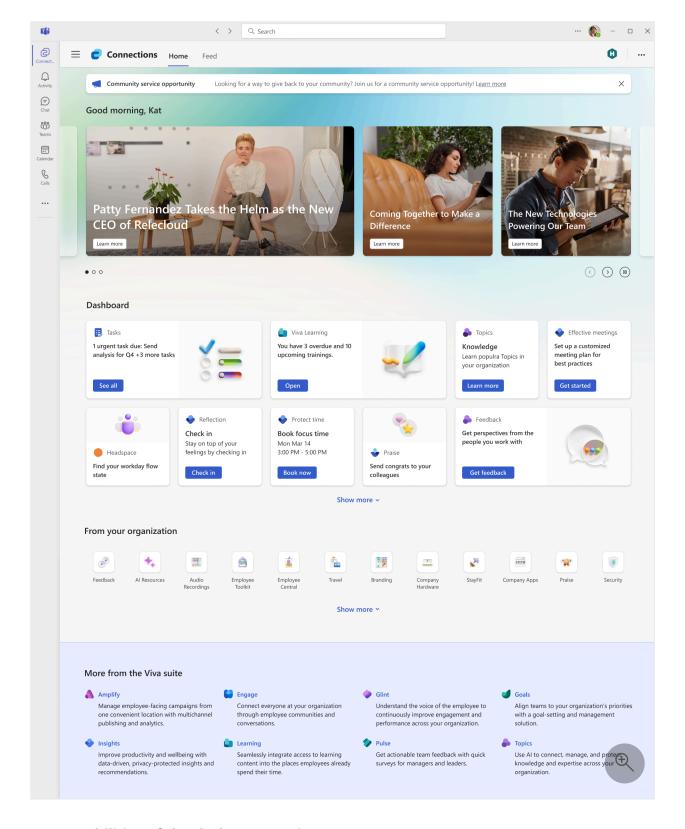
In the mobile app, users can view resources by selecting the **Resources** tab. This type of functioning provides users with a familiar navigation structure and allows them to open sites, pages, news, and more—right from their mobile devices.

# Viva Connections mobile and desktop experiences

Both desktop and mobile experiences are centered around the three main components of the dashboard, feed, and resources sections. The desktop app features all three components at-a-glance, in addition to announcements, News spotlight, and Viva Suite footer. The mobile view features a more compact experience and uses tabs to make it easier to scroll through content.

#### ① Note

- The News spotlight will not display in the mobile experience at this time. A future update is planned to bring this feature to mobile.
- Components are expected to display slightly differently between desktop and mobile devices until Q2 2024.



#### Key capabilities of the desktop experience:

- Access to the rest of the Viva suite: The desktop experience of the connections
  app offers easy discovery and navigation to all the Viva modules that the employee
  is licensed for, bringing together the connection, insight, growth, and purpose
  pillars of Microsoft Viva.
- Navigation between other Viva experiences: Navigational elements located in the top-right and top-left corners, navigational elements help viewers easily get to-and-from other landing pages and other Viva experiences ☑.

- Announcements: Important time-sensitive notices targeted to employees within the organization appear at the top of the Viva Connections experience.
- Company resources and way finding: The desktop experience provides employees
  the ability to navigate to important resources using links curated by your
  organization and the important sites your organization frequently engages with.
  This navigation panel appears when users select the branded app icon in Teams,
  and surfaces elements shared with the SharePoint global navigation.
- Access specific tools based on roles: Throughout the Viva Connections experience, content can be targeted to specific audiences to ensure they have the right tools at the right time.
- Stay updated on news personalized to the viewer: The News spotlight sits prominent at the top of the page and cycles through current happenings within your company. Users can stay up to date with news, conversations, and videos in a curated news stream based on the sites and communities that they follow. Additional content can be accessed from the feed tab.
- Easily share content: Content consumed within Teams can be easily shared into chats or channels, making collaboration easier.

# The Viva Connections mobile experience

The experience in the Viva Connections mobile app is anchored around three key concepts: the dashboard, the feed, and resources.

https://www.microsoft.com/en-us/videoplayer/embed/RE4TpyN?postJsllMsg=true ☑

# Curated and tailored experiences

Viva Connections gives you and your content creators the tools for both curated and tailored experiences. A curated experience is one in which the user sees content chosen by a site owner or author. For example, a site owner controls the content used on the site and whether the content is audience targeted. Audience targeting is accomplished using Microsoft Entra ID (formerly Azure AD) groups for card-level targeting in the dashboard and menu-item targeting in the global navigation.

A tailored experience is one in which content is automatically displayed according to what is most relevant to the users. This content includes content from the sites they follow, popular content, and more. An example of tailored content is the feed.

• Home site (optional, curated): A home site isn't required for Viva Connections, but can be used as a secondary landing destination for organizational content and

- news. A site owner controls the layout of the home site, the elements used on that site, and targeting content to specific audiences.
- Feed (tailored): The Viva Connections feed uses its own heuristics to tailor the feed for an employee by bringing in the most relevant content for that employee. It utilizes signals in the content created across the organization. Some of the signals used are sites where news is posted, highlights from colleagues, updated to documents you're working on, and more. News that is posted across the organization will also be featured in the News spotlight at the top of the experience.
- Dashboard (curated): A dashboard author controls the curation of the dashboard and can target each card on the dashboard to specific audiences using existing Microsoft Entra ID groups. These provisions allow dashboard authors to create different experiences for each group. And because Viva Connection uses Microsoft Entra ID groups, authors benefit from dynamic group memberships to reduce administrative overhead. Authors can easily preview what the dashboard looks like across devices and audiences.
- Resources (curated): The list of sites on the resources experience in mobile
  includes the global navigation defined at the organization level. The global
  navigation supports Microsoft Entra ID groups for targeting so that employees in
  different groups see relevant navigation items.

#### ① Note

Audience targeting for links in the new Resource section will be rolled out in Q2 2024. Audience targeting for global navigation will still be available.

**Expand table** 

Capability name	Curated vs. tailored	Details
Home site	Curated, optional	Organization's with SharePoint home sites (optional) can control the layout, web parts, and audience targeting of content.
Dashboard	Curated	Author selects cards to show and uses Microsoft Entra groups to target content to specific audiences.
Feed	Tailored	Content is automatically prioritized and displayed based on signals associated with content from SharePoint and Viva Engage.

Capability name	Curated vs. tailored	Details
Resources	Curated	Target menu items to specific audiences using Microsoft Entra groups.

# **Branding**

Matching your organizational brand is integral to your employees' connection with your company's values and goals. The branding you apply in Teams to the Viva Connections desktop app – including your logo and colors – is automatically applied to the mobile app. For information on how to apply your branding in an app, review how to customize apps in Microsoft Teams. The desktop app offers an opportunity for further branding by customizing the banner image and customizing the theme.

#### ① Note

Company branding in the Viva Connections app is currently disabled for users on mobile and desktop who have enabled dark mode under their Microsoft Teams Appearance and Accessibility settings.

# Localization

Viva Connections is available in most major languages used in Microsoft 365. Learn more about how to set up the Viva Connections mobile experience in a specific language and how to create a dashboard in more than one language.

- Dashboard: Content can be set by dashboard authors to support multiple languages.
- Feed: The content is available in the format in which it was authored, and SharePoint news posts display author-translated posts in the user's preferred language.
- Resources: Content will follow the tenant's default language.

# Extensibility

Many components to the Viva Connections experience can be customized. The SharePoint Framework (SPFx) is the recommended SharePoint customization and extensibility model for developers because of the tight integration between SharePoint Online, Microsoft Teams, and Microsoft Viva Connections. The SPFx is the only

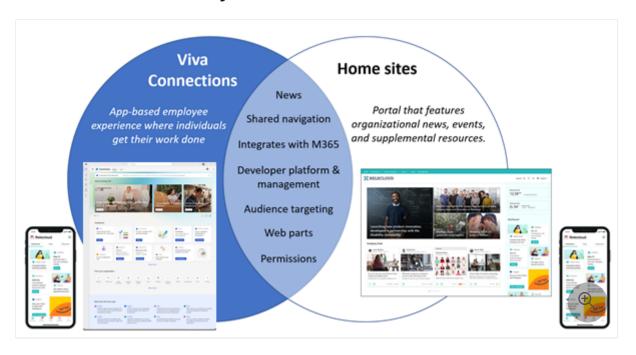
extensibility and customization option for Viva Connections. Learn more about Viva Connections extensibility.

# How SharePoint home sites and Viva Connections work together

Viva Connections and home sites are two complementary methods to creating powerful employee experiences that can be viewed on the web and in Teams. A SharePoint home site is an employee experience that serves as a landing destination, news hub, and the main entry-point to your organization's intranet. Both Viva Connections and home site experiences are designed to unite and empower your organization and automatically integrate with each other to form a cohesive and branded experience.

Use Viva Connections as the primary destination where employees access job-specific tools and news and home sites as a secondary source of organizational news and industry news, events, and resources. Viva Connections is where individuals get access to curated content based on their role, and the home site is where they can find more organizational-focused resources.

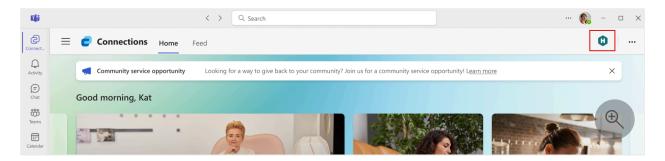
# **Shared functionality**



Both share many common capabilities like news roll ups, navigation, and third-party extensibility to ensure these solutions work together. Both types of experiences share basic functionality, like the ability to use audience targeting, distribute organizational news, industry news, and share the same permissions model to make it easy for editors to access and manage.

# Viva Connections automatically detects home sites

For organizations that already have a home site, or know they want one in the future, the home site is automatically detected by Viva Connections, and a prominent link will display at the top-right of the desktop experience. Users can easily navigate between both – so you don't have to choose one over the other.



# Viva Connections allows for multiple home sites across multiple experiences

Depending on the size of your organization and the information to communicate, you may decide to create a separate experience for each audience you wish to target. Organizations are able to set multiple home sites by using multiple Viva Connections experiences, thereby creating a targeted experience that is content specific for that group of employees (for example, a dashboard and resources with a frontline worker focus). This article provides some scenarios where you'd want to create more Viva Connections experiences.

#### ① Note

- SharePoint home sites are now set in the Microsoft admin center and can be setup when you create a Viva Connections experience that builds off an intranet portal.
- You must have an Enterprise (E) or Frontline (F) license type to create a Viva Connections experience.
- Users with a basic Microsoft 365 subscription (E license) are limited to creating one experience. Users are required to have a Microsoft Viva suite or Viva Communications and Communities license in order to create two or more experiences (up to 50). See <u>Microsoft Viva plans and pricing</u> 
   ✓ for more info.

# You can choose the default landing experience

Unless specified, Viva Connections is the default experience for the desktop app in Teams. When Viva Connections is the default, a link to the home site displays in the topright corner to ensure easy navigation between the two experiences. We recognize that some organizations with a home site want the home site to be the default experience. When the home site is the default experience, a link to Viva Connections will display in the top-right corner. Learn more about choosing the default experience.

# Step-by-step guidance to provision Viva Connections

There are several options to learn more about how to get Viva Connections for your organization.

**Expand table** 

Option	Description	Time to complete
Quick guide	Use the quick guide to get a high-level overview of how to get Viva Connections	10 minutes
Plan, build, and launch guidance	Get more detailed guidance that focus on tasks in the plan, build, and launch phases.	30 minutes
Learning path	Get in-depth guidance that includes fictitious business stories and examples. Complete knowledge checks to confirm learnings.	Two hours

# More resources

Join the discussion and see the latest events in the Viva Connections Community ♂.

Learn how to plan, build, and launch a home site

# **Feedback**









# Set up Viva Connections in the Microsoft 365 admin center

Article • 01/28/2024

#### ① Note

- You must have an Enterprise (E) or Frontline (F) license type to create a Viva Connections experience.
- Viva Connections does not have any requirements to get started.
- Users with a basic Microsoft 365 subscription (E license) are limited to creating one experience. Users are required to have a Microsoft Viva suite or Viva Communications and Communities license in order to create two or more experiences (up to 50). See <u>Microsoft Viva plans and pricing</u> ☐ for more info.
- You must have Global Admin or SharePoint admin permissions to access the Microsoft 365 admin center.
- You must have Teams administrator (or higher) permissions to pin the Viva
   Connections app in the Teams Admin Center.
- If your SharePoint home site is part of a multi-geo tenant outside of the main geo you will need to manage your permissions in the SharePoint Admin Center.
- Centralized Viva Connections administration in the Microsoft 365 Admin center is unavailable in GCC, GCC High, and DoD environments. Please refer to the <u>list of service availability</u> for more information.

Microsoft Viva Connections is an employee experience app in Microsoft Teams that brings together relevant news, conversations, resources, and tools in one place for every employee. It's built on your current Microsoft 365 ecosystem to help you engage, inform, and empower your workforce. The Viva Connections experience is deployed and accessed in Microsoft Teams.

Use these step-by-step instructions to help you set up and launch Viva Connections experiences in the Microsoft admin center (MAC) for your organization.

# Before getting started

Setting up Viva Connections only takes a few steps but there are some considerations to think through with other stakeholders at your organization before getting started:

- Consider the type of experience(s) that are best for your organization: You can create a stand-alone Viva Connections experience, or you can create a Connections experience that also builds off an existing intranet portal or SharePoint home site. You can create a single Connections experience for your entire organization with dashboard cards targeted to specific audiences (that is, Centralized HR communication), or you can create multiple experiences to meet the needs of distinct audiences (for example, separate content for front-line workers, subsidiaries needing separate content and branding, etc.). Keep in mind that if you have multiple experiences with overlapping content, each experience needs to be updated separately. Learn more on how to plan, build, and launch Viva Connections.
- Decide which audiences should be associated with each experience: You can
  create more than one Connections experiences if your organization has a need for
  different employee experiences for distinct audiences. Decide which experiences
  should be associated with specific audiences. You want to consider the order of
  experiences that should be seen for audiences that may belong to more than one
  experience.
- Think about who should have owner permissions to each experience: Owners
  have full permissions to edit the experience and manage access for others. As a
  best practice, it's recommended that each experience has a minimum of two
  owners assigned to it.
- Pick an icon and name for your app: Choose an app icon and name to apply to your entire Connections app. This icon and label will display as an app in the Teams app bar. Consider what the right branding elements are for your organization. You want to pick a name that aligns with your organization's brand, and that's also meaningful and recognizable to viewers.

#### ① Note

Currently the app icon and name can be managed only at a tenant level.

Organizations with multiple experiences will not see individual names and icons for each one in Teams.

# How to access Viva Connections in the Microsoft admin center

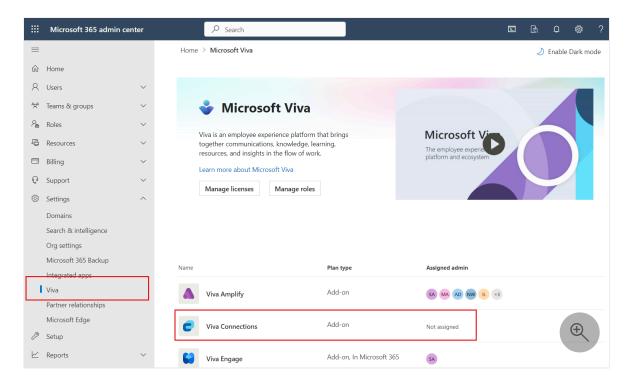
- 1. Navigate to admin.microsoft.com 

  and sign in with your credentials.
- 2. Select **Settings** to expand the selection and select **Viva**.

#### ① Note

If Settings does not show, select **show all** to reveal all available menu options.

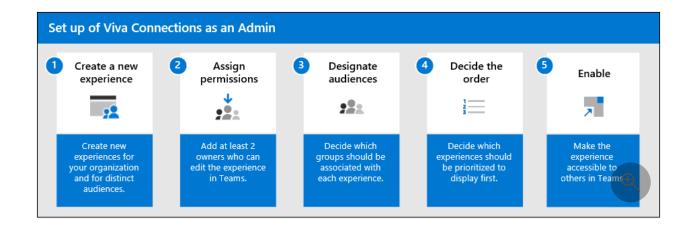
3. Select Viva Connections to open the Viva Connections admin center.



4. The Viva Connections admin center opens. If you already have a SharePoint home site (intranet portal), Viva Connections will display it as an experience automatically.

# Create a new Viva Connections experience

Create an all-encompassing Connections experience for the entire organization, or for distinct audiences. Optionally, when you create a new experience, you can choose to create a stand-alone Connections experience, or to create a Connections experience and build off an existing intranet portal (SharePoint home site).



#### (!) Note

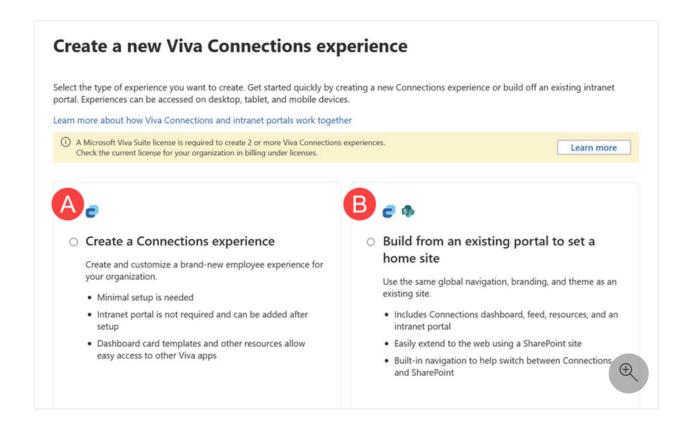
- Organizations are limited to creating a maximum of ten Viva Connections experiences overall per tenant.
- You must have Global admin permissions, SharePoint admin permissions, or higher to access the MAC.
- If this is the first time you're setting up Viva Connections, it's recommended you pin the app in Teams.

# Step 1: Create a new experience

Admins are able to create multiple standalone experiences well as intranet home sites having their own Viva Connections experience. As a result, there are now two options for creating a new experience:

- A. Creating a Connections experience: This option is the fastest way to get started. It creates a standalone, out-of-the-box Connections experience as an app in Teams without the need for an existing intranet portal. A special site container will be created where the dashboard, resources, and overall Viva home experience are hosted and sourced from. Owners can then begin adding their own content. An intranet portal can be added at any time and designated as a home site.
- **B. Build from an existing intranet portal**: This option is ideal for organizations that already have a SharePoint communications site and would like to use their own content, or would like to add an intranet portal that includes Connections components that can easily be extended to the Web. This option creates a new Connections experience and automatically designates the communications site as a

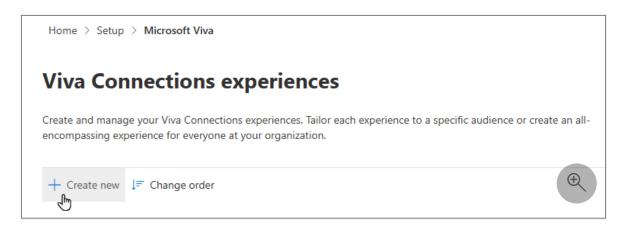
SharePoint home site (intranet portal) that displays navigational elements, and shares permissions.



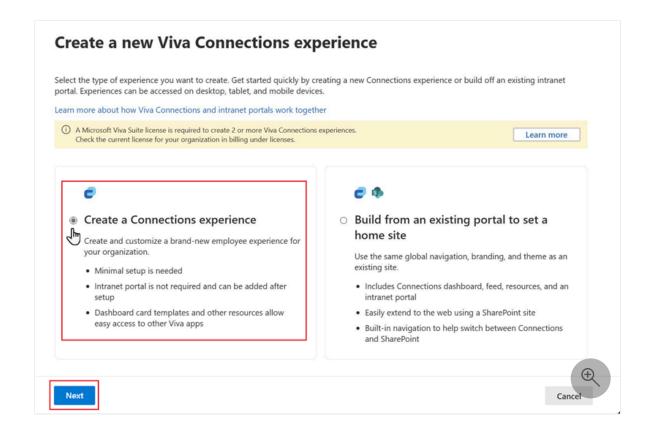
## Create a Connections experience

This option is ideal if your organization doesn't have an existing intranet portal and just needs to create an experience. This option provides a lightweight experience without a SharePoint intranet portal that users can use to add their own content. Once the Connections experience is created, it can be set as a SharePoint intranet portal (it can be accessed from SharePoint).

1. Select + Create new, displayed on top of the list of experiences.



2. Select Create a Connections experience, then select Next.



3. Give the new experience a name, add a description, decide the settings, and then select **Next**.

① Note

The name given to the experience in the MAC will also display for owners and members who help manage and edit experiences.

4. After reviewing your settings, select **Create experience**.

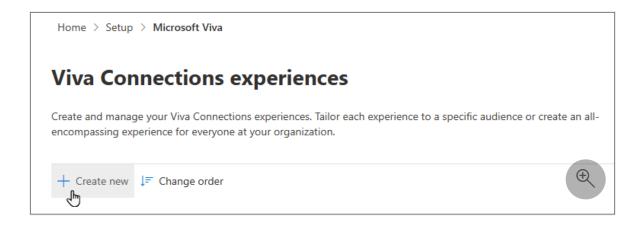
① Note

Each experience you create won't be accessible by viewers until permissions have been assigned by the experience's owners and it's been enabled.

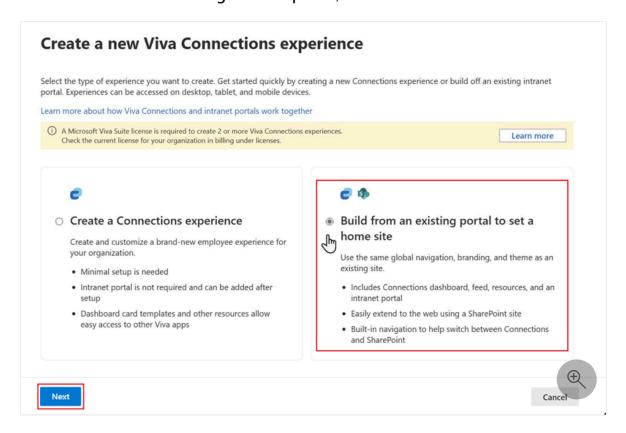
# Build from an existing intranet portal

If your organization has an existing intranet portal, then this option allows you to use the existing content, or add an intranet portal that includes Connections components that can easily be extended to the Web.

1. Select + Create new, displayed on top of the list of experiences.



2. Select Build from an existing intranet portal, then select Next.



3. Paste the URL of your SharePoint communication site in the **URL of the communication site you want to use** field.



The name given to the experience in the MAC will also display for owners and members who help manage and edit experiences.

# Set an intranet portal as a home site for Viva Connections Set a SharePoint communication site as the main landing page for your intranet that links to Viva Connections in Teams and can be viewed on the web. Learn more about how to plan, build, and launch a home site URL of the communication site you want to use

4. After reviewing your settings, select **Create experience**.

(!) Note

Each experience you create won't be accessible by viewers until it's been enabled, and permissions have been assigned by the experience's owners.

# Choose the landing destination in the Viva Connections app

Customers building from an existing intranet portal are able to choose the landing destination for audiences in Teams via PowerShell command. (See Choose the default landing experience for Viva Connections desktop for more info).

PowerShell functionality is limited initially as follows:

**Expand table** 

Command	Result
Get- SPOHomeSite	Returns the single SharePoint home site URL.
3FOHomesite	With multiple Viva Connections experiences, a warning message and the first Viva Connection experience from the list will be shown.
Set- SPOHomeSite	1. Initially it will continue supporting a single SharePoint home site setup. Setting up more SharePoint home sites can be done in the MAC. Support for setting up multiple SharePoint home sites will be supported at a later stage.
	2. It updates the Viva Connections default landing destination (Viva Connections, SharePoint home site, or draft status for a SharePoint home site). This functionality will continue getting support in multiple Viva Connection experiences. The cmdlet can be run with the SharePoint home site URL to set the landing destination.
Remove- SPOHomeSite	This won't be supported initially for multiple SharePoint home sites customers, but the MAC will support this operation. Users attempting to use the cmdlet will receive an error message and be redirected to the MAC.

# When to use a separate experience vs dashboard card-level targeting

Depending on the size of your organization, and the information to communicate, you may decide to create a separate experience for each audience you wish to target or use card-level targeting in your dashboard to provide a targeted experience. There are scenarios in which you may choose one or the other. For information on these scenarios, see Scenarios for creating additional Viva Connections experiences.

#### Scenarios for creating additional Viva Connections experiences

- Subsidiaries that need their own content.
- Not wanting employees to have to visit the experience of another subsidiary.
- International legal entities that need control over the content.
- Presenting international content in a different language that won't overlap with existing content (for example, English experience, Spanish experience, and so on).
- Content specific to frontline workers (for example, dashboard and resources with the frontline worker focus such as tasks, shifts, approvals, and top news).

If creating multiple experiences, make sure you don't have any overlap with your content authors, content plan, or audience groups. Overlap requires you to manually manage the content across each experience.

## Scenarios for card-level targeting and end-user personalization

- Creating a mix of corporate- and department-specific content (for example, centralized HR or corporate communications).
- Decluttering the dashboard to prevent cards from appearing to employees who wouldn't use them frequently.

When you're using card-level targeting, consider testing your dashboard with different audience groups to ensure your audiences are seeing the content you want them to.

# **Step 2: Assign permissions**

Assign two or more owners to each experience so that they have full access to edit the experience and manage permissions and access for others.

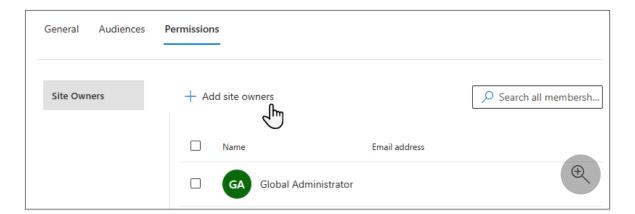
1. After creating your Connection experiences, select the experience to assign owners to it.

2. Select the **Permissions** tab from the settings panel. The owners assigned to the experience will display here.

① Note

If your SharePoint home site is part of a multi-geo tenant outside of the main geo you will need to manage your permissions in the SharePoint Admin Center.

- 3. Select Add.
- 4. Enter the names of the people you want to assign as owners to this experience in the search bar.
- 5. Select **Add** after you've finished entering the names.
- 6. If you want to add more owners later, select + **Add owners** under the **Permissions** tab.



# **Step 3: Designate audiences**

Decide which Microsoft Entra security groups or Microsoft 365 groups should be associated with each Viva Connections experience. Adding audiences doesn't grant permissions to the experience but creates associations to scope down who should see the experience by default. Later, owners will assign member- and visitor-level permissions to grant access to the experience, and will further filter the experiences through audience targeting.

① Note

Visitors are set to Everyone in the company except external users by default.

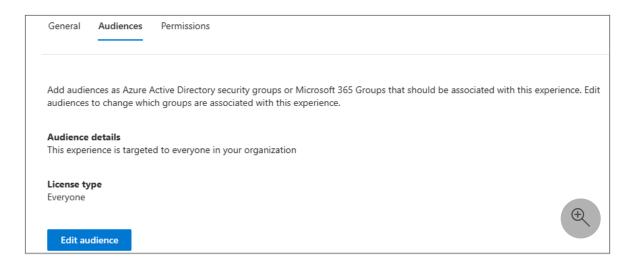
Audience targeting can be set up by doing either of the following tasks:

- 1. Assigning one or more Microsoft Entra security groups or Microsoft 365 groups to the experience (This is the most common scenario).
- 2. Assigning license-level filtering, and choosing if frontline workers (F-license holders) or non-frontline workers should be targeted. (This option has been introduced to account for a scenario where a targeted experience for frontline and information workers is needed.)

In this example scenario, Contoso Retail wants to target all sales frontline workers for a specific Connections experience. However, they have a Microsoft Entra group for 'Contoso Sales All' that includes sales directors and higher who are non-frontline workers. To set up the audience targeting, the Microsoft Entra group 'Contoso Sales All' license filtering option should be set to **frontline workers**. This setting will filter down the experience to only members of the 'Contoso Sales All' group who are also frontline workers (F-license holders). If the end user selects both options, an 'AND' operation is created, and the end user has to satisfy both the group and the license filtering criteria to access the experience.

Users who have already designated audiences for their experiences can use the following steps to manage their audiences:

- 1. After creating your Connection experiences, select the experience to assign audiences to it.
- 2. Select the **Audience** tab from the settings panel.
- 3. Select Edit audience.



4. To create an experience for the entire organization, select **Everyone in the organization**.

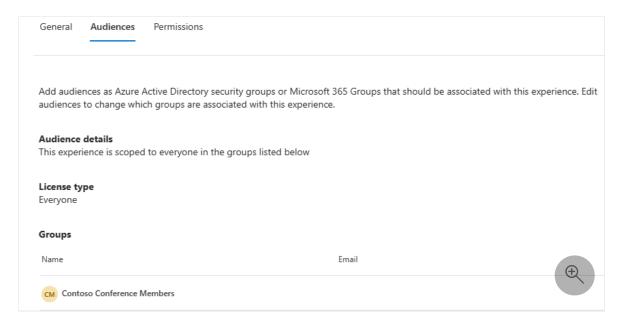
- 5. To create an experience for a distinct audience, select **Scope down the audience for this experience**. Then, you can filter audiences by license type, by Microsoft Entra group or M365 group, or by both.
  - a. **Add by group**: Filter based on the Microsoft Entra group or M365 group by typing the group name(s) in the search bar.
  - b. Add by license type: Filter based on the subscriber license type.

① Note

If filtering by Microsoft 365 group and license options, only audiences who belong to both will be associated. For example, an administrator may want to create a distinct experience for a subset of all the frontline workers.

6. Select **Save** when you're done.

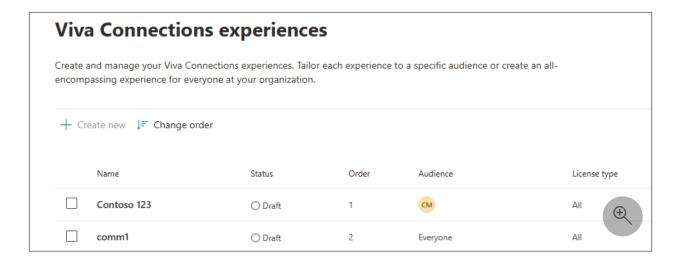
The audiences will display here under **Groups** and can be edited in the future.



# Step 4: Decide the order

If your organization has multiple experiences, some audiences may belong to more than one. By setting an order for each experience, you can determine the priority in which experiences will be seen first. Experiences should be ordered based on the size of the targeted audiences, from the smallest to the largest. This pattern will ensure your smaller audiences will see their tailored experience without being flooded with information that larger, more general, audiences may receive.

# Example of how ordering works with multiple experiences



In this example (in the screenshot), there are two Connections experiences for an organization. Both experiences have been enabled and can be seen by viewers.

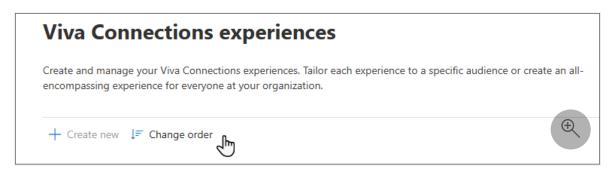
The experience named **Contoso 123** is scoped to workers at the organization who are members of the CM (Contoso Members) group. The **comm1** experience is targeted to all employees at the organization and provides information targeted to everyone.

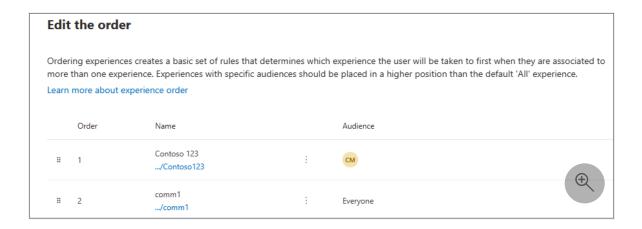
Since the CM workers belong to more than one experience, the **Contoso 123** experience should be ordered to come before the experience set to the **Everyone** audience. By ordering the scoped experience first, you create a rule that prioritizes displaying this experience over the default experience for users who belong to more than one experience.

If the example organization creates another experience scoped to a subset of the audience, they'll need to reorder experiences again to ensure the most scoped experiences are prioritized over the default experience.

## To set the order of experiences

- 1. Select Change order.
- 2. Drag and drop the handles next to each experience to reorder as desired.
- 3. Select **Save** when you're done.





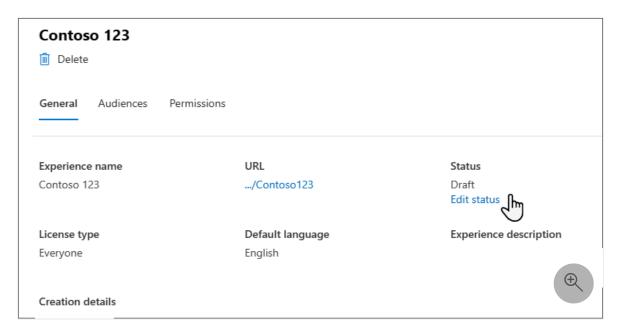
## Configure the dashboard

Follow the steps to create the dashboard to choose what your users will see when they open Viva Connections.

# Step 5: Enable the experience

Enable each Viva Connections experience to make it visible to your audience.

- 1. Select a Connection experience.
- 2. In the General tab, under Status, select Edit status.



3. Select the **Enable experience** checkbox, and then select **Save**.

If you need to update the experience, you can also return it to **Draft** status and hide it from viewers.

# Pin the Viva Connections app in Teams

#### ① Note

- The Viva Connections app only needs to be pinned to Teams once after the creation of your first experience, unless you are pinning by policy.
- If you are pinning by a policy, revisit your pinning policy to make sure the Viva Connections app is pinned correctly for intended users every time you add a new experience. See Manage app setup policies for more info.
- Teams administrator (or higher) permissions are required.

Viva Connections creates web parts for organizations who build off existing intranet portals, or home sites which can be accessed via Microsoft Teams. The app is auto enabled by default, but to make Viva Connections easily discoverable, it's recommended to pin the app. Once the app is pinned, your organization's icon and custom app name will appear in the Teams app bar.

#### (!) Note

Pre-pinning the Viva Connections app doesn't change the Microsoft Teams experience and doesn't automatically open the app in Teams. Pre-pinning makes it easier to discover and use the Viva Connections app.

- 1. Navigate to Teams admin center > Teams apps > Setup policies.
- 2. Select **Global (Org-wide default)** (this is the default policy for all users).
- 3. Scroll down to Pinned apps.
- 4. Select + Add apps.
- 5. In the second box, search for the Viva Connections app you enabled with the name you gave it; for example, Intranet.
- 6. Select **Add** next to the app name, and then, select **Add** at the bottom of the panel.
- 7. Use the two horizontal lines next to the app to drag it to the top of the app list.
- 8. Select **Save** at the bottom of the page.

Learn more about Adding the Viva Connections app in the Teams Admin Center.

# Options in the settings panel

The following settings are available in the settings panel:

- 1. **Open in Teams**: Open this experience in the Teams app.
- 2. **Analytics**: Download data for overall traffic, usage, and usage by platform for the selected experience in an Excel spreadsheet (Learn more about Usage data for Viva

#### Connections).

- 3. **Delete**: Permanently delete the selected Viva Connections experience.
- 4. General tab: Provides settings to manage the selected experience.
- 5. Audience tab: Create audiences to associate with the selected experience.
- 6. **Permissions tab**: Assign owners who have permission to edit content in the selected experience.
- 7. **Experience name**: Edit the name of the selected experience (visible only to administrators in the MAC).
- 8. Status: Indicates if the status of the selected experience is Draft or Enabled.
- 9. **Experience description**: A brief description of the experience for administrators (not commonly seen by users).
- 10. **URL**: Location of the intranet home site (if one has been added) or the special site container (if the experience wasn't created from an existing intranet portal).
- 11. License type: Which license type the experience has been scoped for (for example, frontline workers, enterprise, or all).
- 12. Creation date and details: Information on the creation of the experience.
- 13. **Time zone**: What time zone the experience is set for.
- 14. Default language: What default language the experience is set as.

# **Delete a Connections experience**

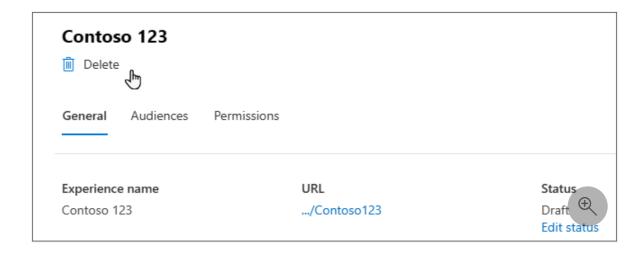
## (i) Important

Deleting a Viva Connections experience will remove it from your list of experiences. However the site will still remain available under the list of active sites in the SharePoint Admin Center (SPAC).

- If the experience was tied to an intranet portal-based experience, the SharePoint home site designation will be removed and the site will become a regular SharePoint communication site again.
- If the experience was a standalone Connections experience, it will be removed from the list but the special site container, and the content, will still be available through the active sites in SPAC.

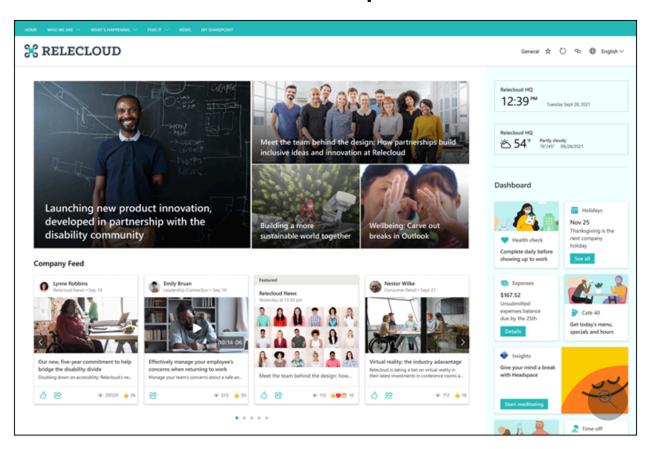
It is encouraged to move expired or 'out of service' experiences to a draft state to keep the experience intact.

- 1. Select the experience you wish to delete.
- 2. In the settings panel, select **Delete**.



3. A confirmation screen will display. Select **Delete** to remove the experience.

# Setting a home site after setting up a standalone Connections experience



## (i) Important

 Organizations that are not Viva Suite or Viva Communications and Communities subscribers are limited to creating one Viva Connections experience.  Viva Suite and Viva Communications and Communities subscribers are limited to creating a maximum of ten Viva Connections experiences.

Viva Connections experiences and SharePoint home sites (also referred to as intranet portals) are two complementary methods to creating powerful employee experiences that can be viewed on the web (via SharePoint) and in Teams. Users can choose to create a Viva Connections experience with or without selecting to build from an existing SharePoint communication site. Learn more about how Connections and homes sites work together.

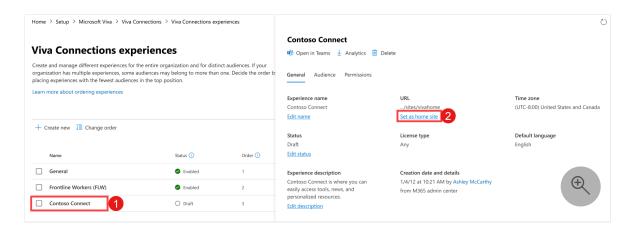
If you chose to create a Viva Connections experience without using your own SharePoint communication site as an intranet portal, you can set the special site container that was created to house your content as the home site. This will ensure you get the home site features on the existing site, without losing any of the previously configured Connections experience.

#### (i) Important

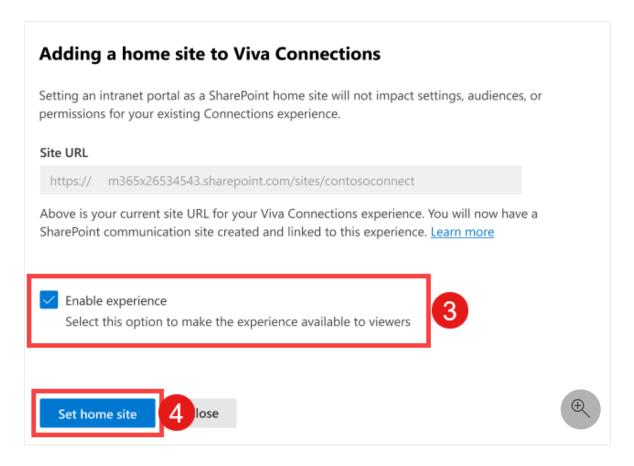
It is recommended that you first find the special site hosting the Connections experience in the list of active sites in SharePoint admin center and have the site owners make necessary content updates to that site. This step should be performed once your site is ready to be launched as the home site. Learn more about planning, building, and launching a home site for your organization.

To set the site that was created when creating your Viva Connections experience as a home site:

- 1. Select the experience from the Viva Connections admin page.
- 2. In the URL section, select Set as home site.



- 3. If the selected Viva Connections experience is in a draft state, you can select **enable experience** to take it out of the draft state and make it available to viewers.
- 4. Select **Set home site**.



Once your home site has been set up, it's time to plan the launch of the experience and make sure the rest of the organization can find and use the home site. Learn more about launching your SharePoint home site.

#### Frequently Asked Questions

I already have a SharePoint home site but I haven't set up a Connections dashboard yet. Where do I get started to set up a Connections experience?

If you already have a SharePoint home site, you'll be able to see it in your Microsoft 365 admin center under **Setup > Microsoft Viva > Viva Connections> Create and manage Connections experiences**. To add a dashboard, visit the site as site admin, owner, or member, and select **Manage Viva Connections** from the settings menu.

Will I be able to customize the Viva Connections app name and icon in Teams for each experience that I create?

You can only choose one icon and app name regardless of how many experiences you set up, so you'll need to choose an icon and name that make sense to your entire

organization. All of your users will see the same name and icon, but when they select the app icon, they'll land on their targeted experience.

#### I already have dashboard set up with card-level audience targeting. Will that change?

Card-level audience targeting will continue to be supported. This type of targeting is ideal for targeting a subset of cards for departmental scenarios where the majority of cards are still common across the organization.

# I'm looking to set up additional SharePoint home sites but not ready yet to deploy Viva Connections. What are my options?

Viva Connections and SharePoint home site administration are being combined in the Microsoft 365 admin center. If you only want to set up an additional SharePoint home site, choose the option to set up Connections by building from an intranet portal. This option will designate the intranet portal as the SharePoint home site. Enable the experience so the SharePoint home site can be accessed by others. Each additional SharePoint home site comes with the default Viva Connections dashboard content, so it's simple to set up Viva Connections. You have the option to set up Viva Connections later and pin the app in Teams for your users.

#### Will the license requirements be enforced as soon as the feature is released?

Initially, the feature will display a message on the admin UI stating that all the users will require the license when you set up more than one Viva Connections experience. Starting September 2023, the Viva Connections Premium service plan will be available under the Microsoft Viva Suite SKU and the Viva Communications and Communities SKU, enabling you to manage the service plan and license assignment. Future updates will enforce the license requirement at the end-user level. You'll receive additional communication when the license enforcement begins.

# I would like my employees to access more than one Viva Connections experience in Teams. Is that supported?

In Teams, employees will only be able to see the experience that they're targeted to. If the employees are targeted to more than one experience, they'll see the one with the highest rank order. On the web, employees will still be able to access more than one SharePoint home site based on the site access permissions. The multiple experiences feature is designed for subsidiaries and conglomerates who have non-overlapping content for their employees such that employees don't need to access more than one experience.

Can content authors (operators) access more than one experience for updating the content?

Yes, content authors can update intranet-portal-based Viva Connections experiences directly through the web as long as they have the required permissions. Additionally, if a content author has Owner or Member permissions to the Connections experience in Teams, they'll be able to switch among the different experiences that they have the permission to edit. To do this, they'll be able to select **Switch Experience** in the overflow menu.

I just changed the status or the rank order of an experience. How soon will the changes take effect for the users?

It may take up to 24 hours for changes to fully propagate. Consider this timing when you plan to make changes.

My current SharePoint home site is set up on the SharePoint root site. Now I want to set up additional SharePoint home sites. How do I ensure that the employees targeted to the new SharePoint home site don't see the news posts from the existing SharePoint home site (root site)?

If your SharePoint home site is set up on the root site, all your employees should have access to the root site for SharePoint access. This means that if some of your employees are targeted to a new SharePoint home site, they may still see content in their feed from the existing SharePoint home site (root site). To avoid this, it's recommended to not use root site as a SharePoint home site if you plan to set up multiple SharePoint home sites. Alternatively, you can decide to publish content on the existing SharePoint home site (root site) that is broadly applicable to everyone.

I would like to restore my original setup. How do I get back to my original setup?

Assuming you already had a single experience set up when you added additional experiences, you can take the following steps to restore your original setup:

- 1. Change the audience to **Everyone in the organization** for your original experience and change the rank order to one. This will start serving this experience to everyone.
- 2. Either change the status of new experiences to draft or delete them from the experiences list.

I don't see any experience listed in the Viva Connections experience list. However, I still see a dashboard experience in the Viva Connections app in Teams. Why am I seeing this experience?

Viva Connections offers a default out-of-the-box experience without any initial setup. This experience shows tailored out-of-the-box dashboard cards to information workers

and frontline workers. When a SharePoint admin edits the experience for the first time, a special site container gets created to host the customization, which then becomes visible in the Viva Connections experiences list in the Microsoft 365 admin center as **Viva Home**. Refer to Customize and edit the Viva Connections experience for more information about editing the out-of-the-box experience.

#### **Related Articles**

- Overview: Viva Connections
- Microsoft Viva Adoption ☑
- Overview of Viva Connections Extensibility
- Customize and edit the Viva Connections experience

## **Feedback**

Provide product feedback ☑

# Overview of how to plan, build, and launch Viva Connections

Article • 09/28/2023

Use Viva Connections to engage and empower different employee groups like frontline workers and information workers across your organization. Viva Connections integrates Microsoft 365 apps and tools to create experiences that meet users where they're and keeps them updated on news, announcements, and provides access to resources from a desktop or mobile device.

#### ( Note

- You must have an Enterprise (E) or Frontline (F) license type to create a Viva
   Connections experience. Users with a basic Microsoft 365 subscription (E
   license) are limited to creating one experience. Users are required to have a
   Microsoft Viva suite or Viva Communications and Communities license in
   order to create two or more experiences (up to ten). See Microsoft Viva plans
   and pricing ☑ for more info.
- Viva Connections does not have any requirements to get started.
- You must have Global Admin or SharePoint admin permissions to access the Microsoft 365 admin center.
- Centralized Viva Connections administration in the Microsoft 365 Admin center and multiple Viva Connections experiences are unavailable in GCC, GCC High, and DoD environments. Please refer to the list of service availability for more information.

Use Viva Connections to create experiences that engage and empower different employee groups like frontline workers and information workers across your organization. Manage your existing Viva Connections experiences in the Viva Connections admin center where you can create an experience with or without an existing SharePoint home site. Here you can also assign permissions, designate targeted audiences, order the view priority of your experiences, set existing SharePoint communication sites as a SharePoint home site (allowing for multiple experiences, each with their own SharePoint home site). Learn more about setting up Viva Connections using the Microsoft 365 admin center.

- In the latest release, the ability to set a SharePoint home site will move from the SharePoint Admin Center (SPAC) to the Viva Connections admin center.
- Use this guide to prepare your organization for Viva Connections through the planning, building, and launching phases.
- Review the different roles and activities in each phase.
- Discover planning considerations and best practices.
- Get guidance for change management, adoption, and end-user training.

# Step-by-step guidance to provision Viva Connections

There are three options that provide in-depth information about how to get Viva Connections for your organization.

Option	Description	Time to complete
Quick guide	Get basic instructions on how to set up Viva Connections.	10 minutes
Plan, build, and launch guidance	Get detailed guidance that focus on tasks in the plan, build, and launch phases.	30 minutes
Learning path	Get even more in-depth guidance that includes fictitious business stories and examples. Complete knowledge checks to confirm learnings.	Two hours

## Overview of setting up Viva Connections

Viva Connections doesn't require a SharePoint home site to get started and offers minimal setup and includes default cards on the dashboard to help get you started. Tasks marked with an asterisk (\*) are optional, or may only apply to customers who will use SharePoint home sites to complement the Viva Connections experience.

# Overview of activities in each phase

Phase	Steps and tasks
Plan	Step 1: Plan for Viva Connections Identify and align on key tasks and scenarios that can be supported by Viva
	Connections. Learn more about how Viva Connections and SharePoint home sites work

#### Phase Steps and tasks

together.

#### Step 2: Set a SharePoint home site (optional)\*

Determine if a standalone Viva Connections in Teams or one with an intranet portal is needed. If it's the one with the intranet portal, prepare your communications site.

#### Step 3: Plan the dashboard

Learn more about the different kinds of cards and how they can support specific scenarios.

#### Step 4: Get ready for the Feed

Consider ways to influence the order of content in the Feed.

#### Step 5: Plan Resources

Determine which links belong in the resources section.

#### Step 6: Create an adoption plan

Create a plan to help the rest of the organization adopt Viva Connections. Learn more about Viva Connections adoption ☑.

#### Step 7: Consider success metrics

Think about how your organization will determine if Viva Connections is meeting specific needs.

#### Step 8: Plan for maintenance over time

Consider which parts of the experience may need to be refreshed over time.

#### Build Step 1: Start creating a Viva Connections experience in the Microsoft admin center

Choose to create a single experience for the whole organization, or multiple experiences that service distinct audiences. You can create standalone experiences, or choose to build off an existing intranet portal to set it as a SharePoint home site.

#### Step 2: Pin the Viva Connections app in Microsoft Teams

After the creation of your first experience, pin the app in the Teams admin center to make Viva Connections easily discoverable to users.

#### Step 3: Ensure high-traffic sites and portals are healthy

Run a health check and make sure everyone has access to the right content.

#### Step 4: Test and refine the experience

Find people in your organization who can test the experience before it's released more broadly.

#### Launch Step 1: Consider tactics to spread the news

Think about where different audiences usually get news.

#### **Step 2: Announce Viva Connections**

Use more than one communication channel to reach audiences.

Phase	Steps and tasks
	Step 3: Use champions and provide continued support  Continue to use early adopters to help others get the most out of Viva Connections.

# Overview of roles in each phase

Phase	Roles
Plan	Work with <b>your organization's stakeholders</b> and business partners (from groups like HR, operations, facilities, communications specialists, and technology advocates) to identify the most valuable workflows and tasks that can be completed in Viva Connections.
	Key administrative stakeholders typically include:  - Business owners, who lead efforts in different departments like sales, operations, design, engineering, etc.  - HR professionals, who manage team members and oversee company and organizational structure and efficiency.  - Internal communication specialists, who facilitate and manage communications between employees and various internal teams.  - Communications coordinators and specialists, who execute and maintain companywide communications and brand management.  - Administrative assistants, who complete and oversee various administrative tasks.
Build	<ul> <li>The Microsoft admin center admin will set up the initial experience, add audiences, designate owners who can edit and customize each Viva Connections experience, and will pin the app in Teams.</li> <li>Site owners and authors for the SharePoint home site will design the SharePoint home site content, global navigation, and the dashboard.</li> <li>Additional site owners and authors may be involved to update content or news post that will be relevant to the Viva Connections experience.</li> </ul>
Launch	<ul> <li>Collaborate with champions (early adopters) to help other people at the organization implement Viva Connections.</li> <li>Leverage executive sponsors who can help evangelize Viva Connections at large company meetings and in broad communications.</li> <li>Business owners and managers at all levels can help teams and individuals find value and adopt new ways of working.</li> </ul>

# Next, plan Viva Connections for your organization

After you have reviewed the phases, tasks, and roles needed to get Viva Connections, get started planning.

# Learn more

Overview of security and compliance in Microsoft Viva

Combine Viva modules for a more powerful experience

# Plan Microsoft Viva Connections for your organization

Article • 09/28/2023

#### ① Note

- Viva Connections does not have any requirements to get started.
- You must have Global Admin or SharePoint admin permissions to access the Microsoft 365 admin center. Viva Connections is available on mobile and tablet devices in GCC, GCC High, and DoD environments with limited features.
   Please refer to the list of service availability for more information.

In this phase, build a team of stakeholders to align on the goals and primary use cases for your organization's employee experience strategy. Start by meeting requirements, and then planning for each component of the experience. In the planning phase, consider success metrics and adoption tactics to ensure Viva Connections meets the need of your organization and users.

Tasks below marked with an asterisk (\*) are optional, or may only apply to customers who will use SharePoint home sites to complement the Viva Connections experience.

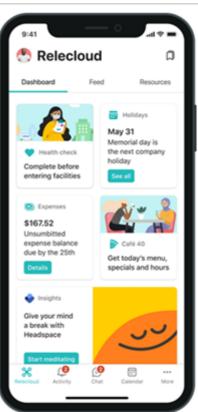
# **Step 1: Plan for Viva Connections**

Viva Connections is designed to help users complete high-priority tasks and access important information. This experience can be built on overtime as your organization adapts and scales. Organizations can use their existing SharePoint intranet home site if they have one, or create a standalone experience accessible in Microsoft Teams.

Viva Connections is composed of three main parts – the dashboard, the feed, and resources. These parts will display differently on desktop and mobile devices. Learn more about the differences between the desktop and mobile experience.

- Dashboard: The dashboard is your employee's digital toolset. It brings together the tools your employees need, enabling quick and easy access whether they are in the office or in the field.
- Feed: The Feed delivers updates to the right people at the right time and is tightly integrated with Viva Engage, SharePoint news, and Stream to display a personalized feed, based on post-level targeting of the groups that employees belong to.
- Resources: The Resources experience enables way finding across platforms. It uses navigation elements from the SharePoint app bar, which can be audience targeted ☑.

# Desktop Mobile The Landing > One house with the second wi



- Your organization's instance of Viva Connections will appear as an icon in the Teams app bar.
- When the icon is selected, users will see the default landing experience.
- When the icon is selected twice, the global navigation panel will display.
- Add the Feed web part to highlight personalized news.
- Add the Dashboard web part to make it easy to complete tasks

- Your organization's instance of Viva Connections will appear as an icon in the Teams mobile app bar.
- Once selected, users can pivot from the dashboard to the feed to resources.

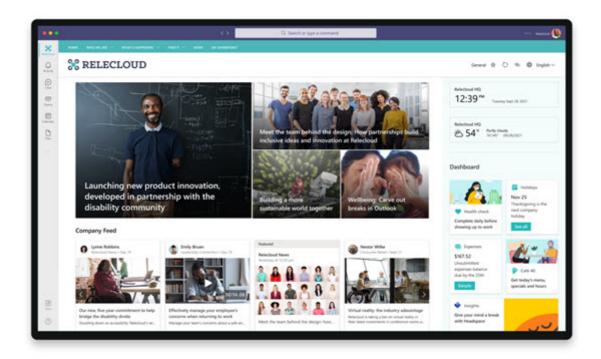
# Step 2: Consider using a SharePoint home site to complement the experience\* (optional)

A Viva Connections experience doesn't require a SharePoint home site (a communication site that has special capabilities) to be created, but providing one can complement the employee experience. A SharePoint home site acts as the front door to your organization's intranet and a gateway to other popular portals that are relevant to the entire organization. Some organizations will use a SharePoint home site to complement the Viva Connections experience and extend the experience to the web. Follow the steps below if your organization wants to use a SharePoint home site in addition to Viva Connections. A SharePoint home site can be added at any time.

Requirement	Description
Create a SharePoint home site* (optional)	A SharePoint home site is a SharePoint communication site that acts as the front door to your organization's intranet. They have extra capabilities such as the ability to prioritize news posted from the SharePoint home site across the rest of the intranet. Once a SharePoint home site is set, the news posted from that site will be prioritized across the intranet. SharePoint home sites are set in the Microsoft Admin Center when you create a new Viva Connections experience. To add a SharePoint home site, choose the option to build off an existing intranet portal.
	Learn more about how to think about planning navigation on your SharePoint home site ☑ in combination with hub and global navigation. Then, get started creating a SharePoint home site.
Set up global navigation* (SharePoint home site users only)	Once your SharePoint home site is set up, you can enable and customize global navigation in the SharePoint app bar. In the Viva Connections desktop app, resources in the global navigation panel will display when the Viva Connections icon is selected in Teams and in the resources section. In the Viva Connections mobile app, resources in the global navigation will display in the "Resources" tab.
	Learn more about how to enable and customize global navigation.
Audit, prioritize, and modernize sites* (optional)	After you've identified the key scenarios for Viva Connections, you'll need to identify content or sites that should be modernized if you're still using classic sites and pages. Not all content or classic SharePoint sites need to be modernized to take advantage of Viva Connections. Focus on the priority use cases that will need to be included in your organization's instance of Viva Connections.
	Learn more about how to modernize content and healthy portal guidance for high-traffic sites

# Create a SharePoint home site for your organization\* (optional)

A SharePoint home site is the front door to your organization's intranet and a gateway to other popular portals that are relevant to the entire organization. Your SharePoint home site will also be the landing experience for Viva Connections in the Microsoft Teams desktop app.

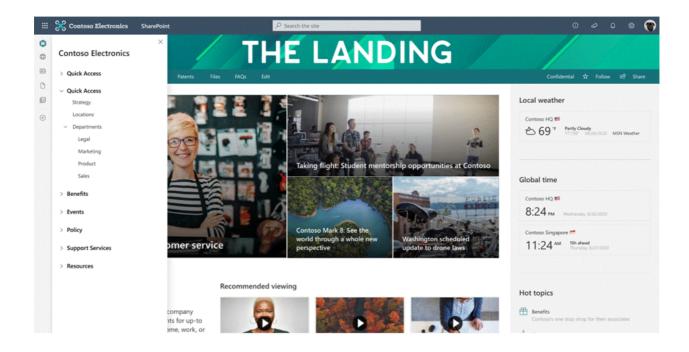


Start small by identifying a handful of resources and functions that the SharePoint home site can serve. Consider using a customizable site template from the SharePoint look book called The Landing of to quickly get your SharePoint home site up and running. Optionally, turn your SharePoint home site into a SharePoint hub site to add an extra layer of navigation and increase the search scope.

Learn more about how to plan your SharePoint home site and how to launch healthy SharePoint sites.

# Set up global navigation in the SharePoint app bar\* (optional)

Next, from the SharePoint home site Settings icon, select Set up global navigation to take advantage of full Viva Connections functionality. Design global navigation in a way that compliments and expands resources on the SharePoint home site. Learn more about navigation and information architecture in SharePoint.



Navigational links that appear in the global navigation pane in the SharePoint app bar will also display in the Viva Connections app in Microsoft Teams for desktop and mobile apps.

# Audit, prioritize, and modernize content to align with key scenarios and tasks\* (optional)

After defining the key scenarios and tasks in the planning phase, prepare for Viva Connections by ensuring priority content is located on modern SharePoint communication sites and team sites. Both modern and classic sites can be used, but only modern sites will appear in the Microsoft Teams app. Classic sites will open in a separate browser window.

If you have many classic SharePoint sites make sure you focus on sites, pages, and content that are relevant to the Viva Connections experience. Sites and content that are unrelated to key tasks and scenarios can be modernized later.

#### Sites that should be audited and prioritized:

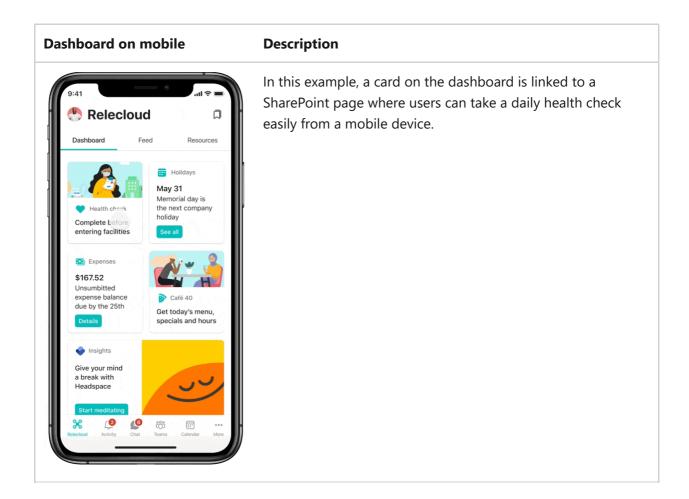
- Sites that connect to cards on the Viva Connections dashboard
- Sites that are displayed in global navigation
- Sites that frequently publish organizational news
- Sites that help employees complete the most important day-to-day tasks or access important information

#### Tools to help you modernize:

- Use the SharePoint modernization scanner to create a dashboard that helps you determine modernization readiness.
- Learn more about how to transform classic sites to modern sites, or consider creating new modern sites using SharePoint site templates ☑.
- For popular sites that are expected to get a high amount of traffic (1000s of views per day or more) learn more about best practices for high-performing sites and portals.

# Step 3: Plan the dashboard

Start by identifying the key scenarios that Viva Connections needs to support and identify owners of those employee experiences. Tasks and scenarios will be primarily supported by cards in the Viva Connections dashboard that can be targeted to specific audiences using Microsoft 365 groups. Consider which groups of employees will need access to specific resources.



Common scenarios include view paystubs and vacation hours, submit help tickets, catch up on news, check daily lunch menus, find people in a directory, and shift management. Collaborate and align with business groups that manage these experiences to determine the best design. Review the Adoption center's best practices from successful Viva

Connections customers \( \text{\tin}}}}}} adoption.}}}}}}}}}}

General	For information workers	For frontline workers
- View pay and benefits	- Find people and team	- View and manage shifts
- Submit a ticket to the help	information	- Access time sheets and
desk	- Complete required training	popular forms
- Access lunch and café options	- View company holidays	- View workplace policies and
- Catch up on news and		resources
announcements		

## Types of dashboard cards

As you plan, consider the different types of cards available. There are three different types of cards that can be used on the Viva Connections dashboard. Some cards may take longer than other to implement or may require work on the backend to set up.

- Out of the box cards: These cards require little configuring and include the Link,
   Shifts, Teams, and Assigned tasks cards.
- Adaptive extension cards: Also known as ACEs, are cards that can be extended and customized using the SharePoint Framework (SPFx).
- Third-party cards: These cards come from third parties like Qualtrics, ServiceNow, and Workday ☑.

#### Planning process



As you work with business owners and key stakeholders to align your Viva Connections design strategy, answer the following for each task:

- Who is the audience?
- What do users need to accomplish or learn?
- What tools or technology do they use today?
- What tools or technology do you want visitors to use to accomplish their key tasks?
- What information needs to be promoted?

#### Start with the most important workflows

Not *every* task should be turned into a card on the Dashboard. Focus on the most impactful tasks that can be executed within a short amount of time. Find opportunities that align with the fields "Quick wins" and "First successes" in the decision matrix below as a start.



#### Design with your audience in mind

As a best practice, it's important to make decisions that are rooted in specific tasks for certain audiences:

- Consider using a common framework for scenario planning that starts by selecting a certain role or audience "As an...".
- Then, narrow down the objective in "I need to...".
- Next, consider the ideal tool or process to meet the objective in "So that I...".
- Lastly, script out what success looks like in "I know this is successful when...".

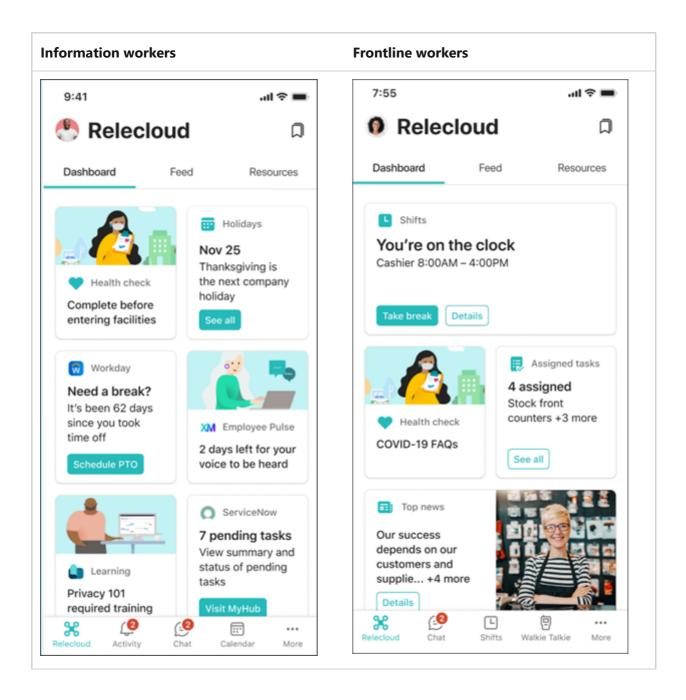
For example, create a table like the following to list business scenarios that you want to address with cards in the dashboard:

In my role as	I need to	So that	I know this is successful when
Full time employee	Easy access to benefit and payroll information	I can quickly check important information without needing help from HR	Requests for help with benefits and payroll to the HR team are reduced
Frontline worker	Clock in and out from a mobile device	I can create efficiencies in my workflow	Schedules and breaks are managed from Viva Connections
People manager	Welcome and onboard new team	I can grow and develop talent	I spend less time managing standard

In my role	mæedero	So that	bkhowding functions
<b>as</b> Sales representative	Access specific product training materials while on a mobile device	Can quickly resolve customer issues	successful when Most customer issues get resolved in real- time
HR specialist	Promote the use of the self-service benefits	I can spend more time working with employees on unique benefits questions and scenarios	All of my employee interactions are about individual critical scenarios

## **Examples of different dashboard designs**

The dashboard should focus on the most important tasks. Tasks that are specific to certain audiences should be targeted to make sure users only see cards that are relevant to their day-to-day jobs.



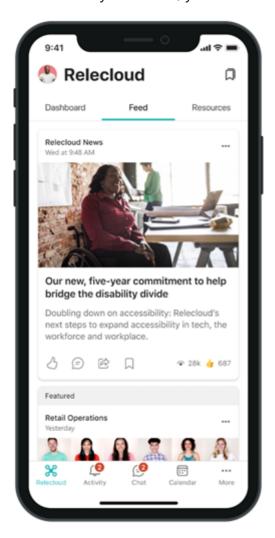
#### Content for planning Dashboards

- Create and customize a dashboard
- Learn more about adaptive cards ☑ and third-party cards ☑
- Use existing Microsoft 365 groups ☑ or create news groups if needed so that you can quickly create cards and target them to specific audiences

# Step 4: Get ready for the feed

The feed brings communications from across the organization into one place where it can be easily viewed. This feed helps keep frontline workers, information workers, and hybrid workers alike engaged and informed on important news and announcements. This solution also gives content publishers a reliable method of distributing important news and information.

Technically, you do not need to do anything to set up the feed because content will sync automatically. However, you can influence the content hierarchy.



#### Tips on how to influence content hierarchy in the feed

The feed is designed to be dynamic, personalized, and a place where the most relevant news and announcements can be consumed. The feed relies on a constant flow of new content and the best experience contains a balance of organizational news, organic content, and curated content.

- Publish SharePoint news from official organizational news sources like the SharePoint home site
- Use news boost to elevate the most important news posts on organizational news sites to surface news posts to the top of the feed
- Post news as a video news links hosted by stream to share updates, rebroadcast an all-hands meeting, or provide reusable training materials
- Highlight community discussions by featuring posts in Viva Engage that you'd like seen by the entire organization
- Encourage your organization to engage and participate in discussions in Viva
   Engage ☑, especially leaders and workplace champions

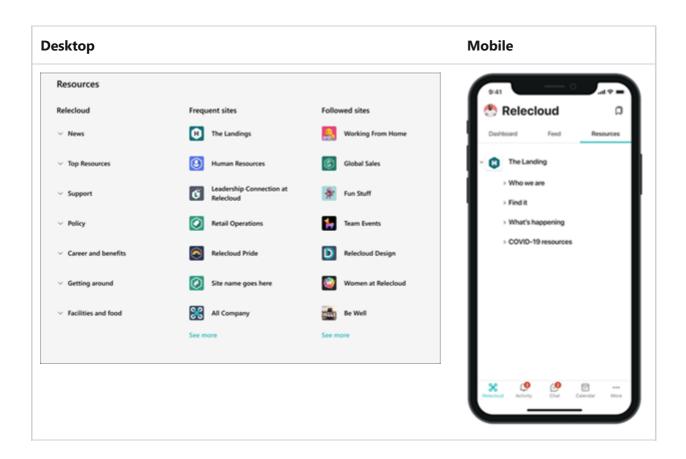
• Use audience targeting ☑ to make sure specific content is seen by different audiences using Microsoft 365 groups

#### Content for planning feeds

- Review frequently asked questions about the feed for Viva Connections
- Consider using the Feed web part ☑ on popular SharePoint pages to surface news and announcements
- Learn more about best practices for higher feed engagement ☑

## Step 5: Plan the resources

Resources are the navigational links to portals and other popular destination. Resources should be the most important and popular portals for your target audience and can be targeted to specific audiences. While preparing your Viva Connections, know that these resources will display from the SharePoint app bar (if your organization has a SharePoint home site) and in the Teams app bar when Viva Connections is set up.



For organizations with SharePoint home sites, consider how links in the global navigation will complement resources highlighted on the SharePoint home site.

Depending on the content you want to make available in the global navigation, you can

design your SharePoint home site navigation and global navigation in three different ways.

## **Content for planning Resources**

- Set up for the first time, or customize navigational links in the global navigation from the SharePoint home site
- Get more guidance on how to design navigation in SharePoint

## Step 6: Create an adoption plan

Planning for change and helping users adopt new resources will be different for every organization. Use the considerations and best practices here as a starting point to creating an adoption plan that fits your organization's needs. Include considerations for change management and training materials for end-users in your plan.

#### **Adoption considerations**

- Viva Connections can only be accessed in Microsoft Teams. If your organization isn't already using Microsoft Teams, you'll need to plan the adoption of Microsoft Teams ☑ alongside Viva Connections ☑.
- Make adoption easy for end-users by pre-pinning the app in Teams while picking settings. This only needs to be done once (Viva Connections is auto-enabled by default in Teams).
- Find early adopters and champions and create ways to extend their enthusiasm to the rest of the organization.
- Plan to engage with users where they typically meet and share information (for example, if your organization already meets in Teams, plan to post in channels.)
- Determine who and where questions about Viva Connections should go to.
   Consider using Viva Engage ☑, a SharePoint site ☑, or a Teams channels ☑ allow users to ask questions or see commonly asked questions.

#### Change management considerations

- Start by creating awareness and interest in multiple channels to appeal to different audiences. Consider common spaces for on-site users like the break room or conference rooms. For remote workers and the rest of the organization, plan to post announcements in Teams, Viva Engage, and SharePoint.
- Make sure different audiences of end-users can easily understand how this new tool will help improve their day-to-day work.

- Create opportunities for users to ask questions, get help, and see live demonstrations. Consider setting up weekly training sessions or office hours during the first month of adoption. Use champions where possible.
- Reinforce change by creating incentives for using the new tools.
- Clearly explain how to use Viva Connections on desktop and mobile apps, how to engage with the Dashboard, the Feed, and Resources, and where to view the latest news and announcements.
- Create specialized guidance for different audiences like frontline workers or hybrid workers.

## **Training considerations**

- Use training to help raise awareness about where resources can be accessed in Teams on desktop or mobile devices ☑.
- Showcase different ways to connect and engage with cards on the dashboard and content in the Feed. Consider providing different training guidance for different audiences.
- Highlight popular portals in SharePoint that can be found in the Resource tab when on a mobile device.

#### **Adoption resources**

Learn more about adoption, best practices, and get communication templates in the Viva adoption center  $\square$ .

# **Step 7: Consider success metrics**

Part of the planning process includes determining which metrics will be used to measure how effective Viva Connections is in bringing your organization together and keeping specific audiences informed. Start by considering the tasks and tools that the dashboard will offer. For example, if you create a card that links to your human resources SharePoint site or a specific page, you should expect to see more traffic and engagement for that site in usage reports.

#### ① Note

The analytics feature is unavailable in GCC, GCC High, and DoD environments. Please refer to the list of service availability for more information.

- Viva Connections analytics: Understand how and when users engage with
  components of the Viva Connections experience by using Viva Connections
  analytics. Review the number of people who have viewed and engaged with Viva
  Connections experiences, the content types users engage with, and the platforms
  used to access Viva Connections.
- **High-level view of usage across M365 apps:** Use Microsoft 365 usage analytics to access a pre-built dashboard that contains several pre-built reports that focus on adoption of M365 apps, usage, communication, and collaboration.
- Site or page level data: Get site level and page level usage reports in SharePoint to gauge engagement and learn more about when users access content and what devices they're using.
- Get direct feedback from users: Usage analytics aside, you can ask users directly about their overall satisfaction. Consider creating a card on the Dashboard that links to a Microsoft Form ☑ where you can ask users to rate satisfaction and provide feedback.

## Step 8: Plan for maintenance over time

Generally, Viva Connections needs minimal ongoing maintenance once it's set up. As your business grows and evolves, you'll likely identify new scenarios that can be supported by Viva Connections. Over time, you may decide to retire cards on the dashboard or rearrange global navigation in resources. Additionally, users will share feedback that can be used to improve the experience. Each of these scenarios will require time to implement and to communicate as needed. Plan to have a point-person, or team of people, who can manage these tasks over time.

- **Dashboard**: Once designed and tested, the dashboard will only need to be updated to support new scenarios or retire old scenarios.
- Feed: Content is dynamically displayed and aggregated from SharePoint news posts and Viva Engage.
- Resources: Like the dashboard, once links to portals have been established, the Resources will only need updates as needed.

# Next, build and customize Viva Connections for your organization

After you meet requirements (for customers who want a SharePoint home site), have a plan for the dashboard, and are prepared to help users adopt Viva Connections, it's time to move on to the build phase.

## **Build Viva Connections**

Article • 04/10/2024

After deciding which tasks, audiences, and resources to promote using Viva Connections in the planning phase, you're ready to move onto the building phase.

You know you're ready to move onto the building phase if you've met the following requirements and have reviewed best practices:

- You've got a SharePoint home site, global navigation setup, and modernized sites (optional and only if needed.)
- The most valuable tasks and processes can be completed using Viva Connections.
- Considerations have been made for specific audiences.
- You have an adoption and launch plan along with success metrics.

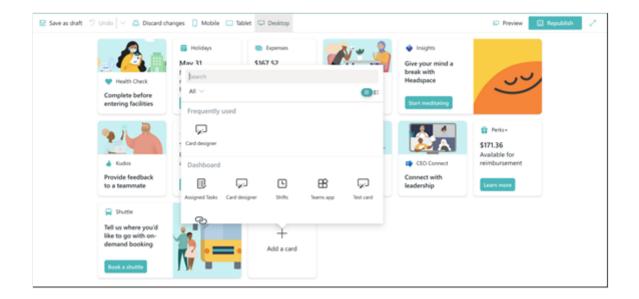
Start by creating the Viva Connections dashboard. Then, select settings for the mobile app. Next, make sure content that's on the organization's SharePoint home site, and linked to cards on the dashboard that can be accessed by the right audiences and offers the ideal viewing experience. Lastly, test and refine the experience before launching to the rest of the organization.

# Step 1: Enable the Viva Connections app in the Microsoft Teams admin center and choose settings

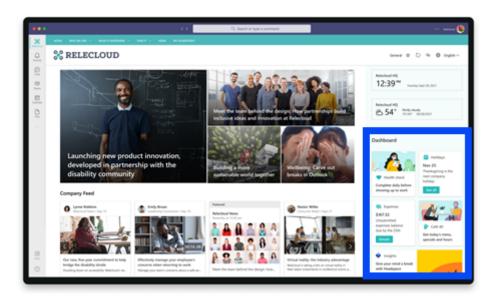
Setting up Viva Connections creates a custom app in Microsoft Teams. Your organization's custom app appears as a branded company app in the Microsoft Teams app center. Once the app is added, your organization's icon appears in the Teams app bar in the desktop and mobile Microsoft Teams app. Make sure to pin the app so your users can find it.

# Step 2: Customize the Viva Connections dashboard (if needed)

The dashboard brings it all together – it provides a personalized landing experience and is designed to be the central destination where everyone can discover your organization's resources and complete daily tasks.



- 1. Start by customizing the dashboard.
- 2. Next, apply audience targeting to dashboard cards to give your users an experience tailored to their role and interests.
- 3. Once you feel confident in the dashboard design, **Preview** it on all devices, and then **Publish** the dashboard.



4. Once you publish the dashboard, you'll be able to use the Dashboard web part on SharePoint home sites.

# Step 3: Ensure high-traffic content provides an ideal viewing experience

For a smooth launch, you want to make sure information can be easily accessed and that high-traffic sites and pages are high-performing.

- 1. As a first step, test the performance of the SharePoint home site (for organizations that have one or add one later) to ensure an optimal viewing experience.
- 2. Then, check the performance for SharePoint sites that receive a high amount of traffic. For example, sites that relate to human resources, organizational news, and popular services like transportation or café menus.
- 3. Then, share the SharePoint home site with the entire organization ☑ (for organizations that have one or add one later) before launching. Next, make sure that the target audiences for the cards in the Viva Connections dashboard are shared with the right audiences.
- 4. Consider using the Portal launch scheduler to monitor performance for high-traffic sites that are being shared for the first time.

# Step 4: Test and refine the Viva Connections experience

Before sharing Viva Connections with the rest of your organization, recruit a small group of users to test and refine popular workflows to ensure end-users have a great experience using Viva Connections for the first time. Consider recruiting specific people from different audiences to complete popular tasks. Make improvements until the experience is ideal for the rest of the organization.

#### Best practices for testing:

- Use the approved web browser for your organization
- Test Viva Connections on a desktop device and mobile device
- Make sure all the links are active and there aren't any dead ends
- Pay attention to labels on dashboard cards and buttons do they make sense to the rest of the organization?
- Evaluate the quality and effectiveness of icons and images
- Check for performance issues like slow loading times or missing images
- Ask testers about the navigation experience
- Test with early adopters and champions 

   and capture their feedback

# Next, launch Viva Connections for your organization

After planning, building, and testing Viva Connections, it's time to let the rest of the organization know that it's available for use. Learn more about how to launch Viva Connections.

# Feedback

Was this page helpful?

🖒 Yes

 $\ \, \mathsf{No}$ 

Provide product feedback  $\[ \]$ 

# Launch Viva Connections for your organization

Article • 07/12/2023

After planning, building, and testing Viva Connections, it's time to let the rest of the organization know that it's available for use.

## Step 1: Consider tactics to spread the news:

Consider where and how different audiences get news and announcements. For example, frontline workers might get the most important news in team meetings and hybrid workers might be used to getting SharePoint news in Outlook.

- Announce your organization's instance of Viva Connections at an event: Kick off
  the announcement about the availability of Viva Connections at an all-hands (or
  sometimes called a Town Hall) meeting where everyone in the organization will
  attend or can view a recording later.
- Use communication tools like SharePoint news and Viva Engage communities:

  Share details about the Viva Connections launch along with any change management guidance or end-user training in an organizational news post <a href="#">Z</a>, Viva Engage communities <a href="#">Z</a>, and Microsoft Teams channels <a href="#">Z</a>.
- Consider hosting training events or offering office hours: Make sure end-users get the most from Viva Connections by offering ongoing support the first 30 days after launching.
- Use the Viva email and poster templates: Get a jump start on creating communication materials for the Viva Connections launch ☑.

## **Step 2: Announce Viva Connections**

One final task is announcing Viva Connections. Communications should be engaging and interactive where possible. Ensure end users can quickly understand how this new tool will improve their jobs and makes getting news and access to important resources easier than before.

Emphasize that Viva Connections is a customized and personalized experience that is accessed in Microsoft Teams, or through SharePoint (if the experience was created using an existing intranet home site), so it's likely there aren't any brand-new tools being introduced.

## **Best practices for launching Viva Connections**

- Plan to engage with users where they already meet and share information (for example, if your organization already meets in Teams, plan to post in channels.)
- Use multiple communication methods and channels in order to reach most your target audience.
- Share tutorial videos with end users ☑ to help them understand how to use the tool
- Continue to engage early adopters and champions 

   and use their enthusiasm and expertise to engage the rest of the organization during meetings or training sessions.
- Regularly revisit success metrics over the first 90 days to track progress and learn more about how audiences engage with Viva Connections.
- Ask end users for feedback and provide multiple ways to connect so that the experience can be improved over time

# Step 3: Use champions and provide continued support

Champions are critical to the success of adoption. They're power-users with a desire to help others along the way. Often, they're closest to the business outcomes your organization is trying to realize. Empower them with our programs or become one yourself by learning in our world wide community. Use champions to help others adopt Viva Connections by providing ongoing support in training events and other learning opportunities.

#### Learn more

Microsoft Viva adoption resources ☑

Combine Viva apps for a more powerful experience

# Microsoft Viva: Privacy, Security, and Compliance

Article • 05/08/2024

Privacy, security, and compliance are essential aspects of your organization. Microsoft Viva takes advantage of Microsoft 365 tools and services, which are governed under the Microsoft Product Terms  $\Box$  and the Data Protection Agreement (DPA)  $\Box$ . For more information, see the Microsoft Trust Center  $\Box$ .

For a more detailed look at security, compliance, and privacy for the Microsoft Viva suite, see the following articles:



Understand how privacy works in Microsoft Viva.



Learn how security works in Microsoft Viva.



Understand how compliance works in Microsoft Viva.

#### **Feedback**

Provide product feedback ☑

# Understand how privacy works in Microsoft Viva

Article • 11/01/2023

Microsoft is transparent about the specific policies, operational practices, and technologies that help you ensure the privacy of your data across Microsoft Viva.

- You control your data.
- We're transparent about where data is located and how it's used.
- We secure data at rest and in transit.
- We defend your data.

Privacy is built into all Microsoft Viva experiences. Microsoft Viva and the Viva apps adhere to the Microsoft Privacy Statement  $\Box$  and follow Microsoft's compliance with General Data Protection Regulation and the Microsoft EU Data Boundary  $\Box$ .

Microsoft Viva inherits privacy features and settings from Microsoft 365, Teams, SharePoint, and Viva Engage, where applicable.

In addition to the inherited controls, each Viva app has its own set of privacy controls that lets you customize the information you share. The following information describes how the Viva apps handle and store data, who can access it, and, if applicable, how you can manage it.

## **GDPR** compliance

Microsoft Viva and the Viva apps support compliance with General Data Protection Regulation (GDPR) requirements.

Additionally, see the following GDPR information for specific apps:

- Viva Connections and Viva Learning (SharePoint): Safeguarding your SharePoint data
- Viva Engage (Yammer): Manage GDPR data subject requests in Viva Engage
- Viva Goals: Viva Goals security, privacy, and compliance
- Viva Insights: Personal Insights privacy guide

## Data residency

Data residency refers to the geographic location where data is stored at rest. The way that data is transferred and stored in Microsoft Viva is defined in the Microsoft Products and Services Data Protection Addendum (DPA) .

If you are using Viva Connections, you can purchase the Advanced Data Residency addon in Microsoft 365, which provides more tools to address data residency requirements.

All data within Viva is stored within the customer tenant for any given Viva application and follows the standard Microsoft 365 data storage guidelines by available geography. The following table provides information about where the data for each app resides, along with links to more information.

**Expand table** 

Viva app	Where the data resides	More information
Viva Amplify	Data is stored in the data center where the associated Microsoft 365 tenant resides. If your organization is using SharePoint, Amplify follows the SharePoint data residency policy.	Privacy and security in Microsoft Viva Amplify
Viva Connections	Data is stored in the data center where the associated Microsoft 365 tenant resides. For tenants located in Germany or the EU, none of the data is transferred to a third country.	Data Residency for Viva Connections
	<b>Note</b> : Data from third-party apps is governed by the data and privacy agreements for those apps. This information applies to data from Microsoft apps.	
Viva Engage	Committed to storing message bodies and files attached to messages at rest within a specific geographical area (Geo). Data is stored in either Yammer cloud storage or SharePoint. Files saved in SharePoint are stored in SharePoint Online per your SharePoint Online data residency policy.	Data residency - Yammer
	Mobile push notifications require sending data to a third party notification service (Apple or Google), which might be outside your Geo.	
Viva Glint	The data region for Viva Glint is determined by the default geography of the tenant, not individual users, and is stored in US or EU data centers based on central tenant location.	
Viva Goals	Data for customers located in the European Union Data Boundary (EUDB) or the United Kingdom is	Viva Goals data residency

Viva app	Where the data resides	More information
	stored in data centers located in the EU. The data for all other tenants is stored in data centers located in the United States.	
Viva Insights	Personal insights - Processed and stored in the employee's Exchange Online mailbox. Data residency is based on the employee's mailbox location.  Manager/Leader/Advanced Insights - The data region for Manager/Leader and Advanced is determined by the Default Geography of the tenant, not individual users.	Viva Insights - Advanced/Manager/Leader Viva Insights - Personal
	Data at Rest (header info and metadata sourced from Exchange Online and Teams, but not message content or attachments) is stored in US, EU, EMEA, APAC based on central tenant location.	
Viva Learning	Viva Learning doesn't store any personal data since usage and consumption data is aggregated.  Integration with SharePoint is currently only supported for sites hosted from the home geography of the tenant. For example, a French tenant can only link SharePoint sites hosted in France to Viva Learning.	Viva Learning data residency
Viva Pulse	Data for customers located in the European Union Data Boundary (EUDB) is stored in data centers located in the EU. The data for all other tenants is stored in data centers located in the United States	Data residency for Viva Pulse

#### For more information, see:

- Microsoft 365 data locations
- Microsoft Privacy Where is Your Data Located ☑
- Licensing Documents (microsoft.com) □

## How Microsoft Viva uses Al

#### (i) Important

We're extending <u>Copilot to Microsoft Viva</u> to help leaders boost employee engagement and improve business performance. The Copilot System combines the power of large language models (LLMs), including GPT-4, with the Microsoft 365

and Microsoft Viva apps, as well as your business data in the Microsoft Graph—and makes it accessible through natural language.

More information about additional AI capabilities in Microsoft Viva and the Viva apps will be available soon.

Viva Connections uses AI to rank content in the feed. Microsoft's use of artificial intelligence is governed by the Responsible AI Standard ☑.

For more information on how Viva uses AI, see the following:

• Get answers to common questions about the Viva Connections Feed

## App-specific data information

Each of the Viva apps collects and stores data in different ways, based on the intent of the app. You control your data, but how you control it differs depending on the app.

## Viva Amplify

Viva Amplify campaigns are set as private by default because campaigns are designed to be a private collaborative space for campaign team members to work and build their communications. Changing this setting is not recommended.

For more information about Viva Amplify, see Overview of Microsoft Viva Amplify.

#### **Viva Connections**

Privacy and security controls:

- You control what content is available through the app.
- Privacy settings inherited from SharePoint, Teams, Viva Engage/Viva

**Expand table** 

What info is available?	Who can access it?	How is it managed?
Conversations, resources, and apps from Microsoft services (like Teams and SharePoint) and third-party apps (by using the SharePoint	Users with access to the SharePoint resources  For analytics, users with site	Information is visible to users based on the setting and their role in the organization
Framework)	member or higher access to the SharePoint home site	Different permission levels

What info is available?	Who can access it?	How is it managed?
For users with elevated permissions, aggregated analytics data about traffic, usage by experience, and usage by platform.	that supports the Connections instance.	are required based on the content creator role (for example Home site or Dashboard).
		Dashboard authors can target the cards to specific audiences by using Microsoft Entra groups.

For more information about Viva Connections, see Overview of Viva Connections.

## Viva Engage

Privacy and security controls:

- Security and privacy settings are managed as a part of Viva Engage.
- Role-based access

**Expand table** 

What info is available?	Who can access it?	How is it managed?
Public announcements,	All users with a paid Microsoft or Office	The Engage admin can
private messages, posts,	365 subscription (as part of the Viva	set up and configure
polls, and videos shared in	Engage license) and accessible through	Viva Engage through
communities, the inbox, and	Microsoft Teams.	the Engage admin
the Storyline.		center (present in the
User profiles (through Viva	By default, private content is restricted	Teams app).
Engage)	to the participants in the content (for	
Questions and answers	example, the sender and recipient of a	
Rewards and recognition	private message); however, admins can	
Sentiment/usage analysis	be temporarily granted access to private	
(personal analytics, audience	content. (You'll need to manually	
analytics, campaign	remove this access as well.)	
analytics, Answers analytics)		

For more information about privacy in Viva Engage, see Overview of security and compliance in Viva Engage.

## **Viva Goals**

For information about privacy in Viva Goals, see Viva Goals security, privacy, and compliance.

### **Viva Insights**

Privacy and security controls:

- Role-based access
- Everyone's data is kept private
- Mailbox security through Exchange

**Expand table** 

What info is available?	Who can access it?	How is it managed?
Personal insights (visible only	Insights only available to	Admins can configure what
to the individual)	licensed users (Personal	information to include in
Manager and leader insights	Insights) and assigned analysts	insights, set access levels, and
(always aggregated and	or managers (Manager /	opt individual users in or out by
deidentified)	Leader / Organization insights)	using the Microsoft 365 admin
Organization insights		center.
(aggregated and deidentified,		
with data access restricted to		Individual users can opt in or
assigned analysts)		out by going to the Settings >
<b>,</b>		Privacy menu in the Viva
Note: A manager or leader		Insights app in Teams or on the
needs to have nine direct		web.
reports for the data to be		wes.
•		
aggregated. The admin can		
increase this threshold.		

For more information on how to manage access to data in Viva Insights, see Managing who has access to data.

For more information about privacy and data protection in Viva Insights, see the following articles:

- Privacy guide for the Insights app
- Privacy guide for admins
- Technical privacy guide for organization insights and advanced insights

### Viva Learning

Privacy and security controls:

- SharePoint integration supports local content
- Role-based access

What info is available?	Who can access it?	How is it managed?
Training content from	The Viva Learning app is	Admins can control whether
Microsoft, third party	discoverable to all users with a	individual users can use Viva
providers, and customer-	paid Microsoft or Office 365	Learning and what they can
owned content.	subscription and access to	do by changing user and
Learning object content	Microsoft Teams.	group settings in the Teams
metadata, such as title,		admin center.
description, author, and	Individual completion data and	
language	recommendations are available to	Admins can also turn on or off
User data, such as	those individuals and anyone that	the storage of diagnostic data.
bookmarks, recently	they share recommendations	
viewed, recommended	with.	
courses, assigned courses,		
and completion records		
Required service data, such		
as error logs		
Diagnostic data		

For more information about Viva Learning, see Microsoft Viva Learning.

## More resources

- Microsoft Viva compliance
- Microsoft Viva security
- Viva admin roles and tasks

## **Feedback**

Was this page helpful?





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## Understand how security works in Microsoft Viva

Article • 05/08/2024

Microsoft Viva and the Viva apps work with and integrate into Microsoft 365. This means that the Microsoft 365 security capabilities—like role-based access, identity and app management, and others—apply to Microsoft Viva. The Viva apps can also use specific settings and policies of the apps that Viva interacts with. For example, while all users can access Viva Learning in Microsoft Teams by default, you can use app permissions policies in Teams to allow or block access for specific users.

Before setting up Microsoft Viva, consider the following security recommendations:

- Protect data by implementing appropriate access controls and role-based access controls so only authorized users have access to certain data and features. Use Microsoft Entra ID to handle user authentication and authorization.
- Provide another layer of security for users by setting up multifactor authentication (MFA).
- Make sure that you have a plan for incident response to tackle any security breaches that may occur.

#### ① Note

All the scenarios and suggestions provided are general in nature and may vary depending on the type of business and organization. It's important to consult with security experts and conduct your own risk assessments to ensure that you have adequate security measures in place for your specific environment.

## **Understand Teams and SharePoint security**

Depending on which Viva app you're using, you may inherit much of your security configuration and options from Teams and SharePoint, which in turn rely on identity management through Microsoft 365 users and groups. Check out Settings interactions between Microsoft 365 Groups, Teams and SharePoint for information about how changes to one area can affect other services. For more information about configuring secure access and collaboration in Microsoft 365, see Set up secure file and document sharing and collaboration with Teams in Microsoft 365.

## Viva apps security options and controls

In addition to the security capabilities available to Microsoft Viva through Microsoft 365, SharePoint, and Teams, each app has its own security controls and considerations.

### Viva Amplify

Viva Amplify uses SharePoint and Microsoft 365 roles to control access and security of your content.

For more information about security in Microsoft Amplify, see Learn about roles and permissions in Viva Amplify.

#### **Viva Connections**

Viva Connections integrates your organization's SharePoint intranet into Microsoft Teams, providing employees with relevant news, information, and resources accessible from desktop or mobile devices.

Security for Viva Connections is largely inherited from Microsoft 365, SharePoint, and Teams. For example, if you configure Viva Connections to include content from Viva Engage in the Feed, your users only see community content from the Engage communities that they already have access to.

#### (i) Important

This applies to content and cards sourced from Microsoft apps.

When you're setting up Viva Connections, be sure to confirm who has access to certain sites within SharePoint [27] to ensure only authorized users have access to certain data and features.

For more information about Viva Connections, see Overview of Viva Connections.

### Viva Engage

The admin tools in Viva Engage help protect your Engage data and determine who can access your Engage network, along with controlling access, managing users, providing secure access on mobile devices via Microsoft Intune, assigning roles, and limiting file uploads. The Engage admin can set up and configure Engage for your organization and manage data, network-related settings, and the various core or premium features within

the application. To make someone an Engage admin, make them an Viva Engage administrators in Microsoft Entra ID.

For more information about security in Viva Engage, see Configure and review privacy and security settings.

#### Viva Glint

Microsoft Glint is a people-driven platform that provides visibility into the health of your organization and guides effective action.

This happens through the analysis of Microsoft 365 collaborative data and organizational (HR) data that you provide or that's used in Microsoft Entra ID. Because of the potential sensitivity about how data could be used, Viva Glint uses role-based access to control who has access. Learn about assigning roles for viewing feedback in reporting.

#### Viva Goals

Microsoft Viva Goals is a goal-alignment solution that connects teams to your organization's strategic priorities, unites them around your mission and purpose, and drives business. For information about security in Viva Goals, see Viva Goals security, privacy, and compliance.

#### **Viva Insights**

Microsoft Viva Insights produces useful insights about how your organization and employees function by analyzing Microsoft 365 collaboration data and organizational (HR) data that you provide or that's used in Microsoft Entra ID.

Because of the potential sensitivity about how data could be used, Viva Insights uses role-based access to control who has access.

The Personal Insights feature is built on Microsoft Graph, which includes a set of REST-based API calls that enable developers to interact with the Microsoft technologies used by your organization. To use these API calls, developers must have specific permissions to access any data they request. Admins control both the deployment of any Microsoft Graph application and permissions to access these applications. You can't turn access to Microsoft Graph on or off globally in the Microsoft 365 Admin Center; instead you can achieve the same effect by blocking employees' ability to install third-party apps or by restricting developer access permissions. For more information, see Microsoft Graph and Microsoft Graph security API.

For more information about Viva Insights, see Introducing Viva Insights.

### Viva Learning

Viva Learning is a centralized learning hub in Microsoft Teams that brings in content from different sources including Microsoft Learn, your organization's SharePoint sites, LinkedIn Learning, and third-party content providers and learning management systems. Non-Microsoft content that is accessible through Viva Learning is subject to terms other than the Microsoft product terms. Learn more about Viva Learning content terms and conditions.

Viva Learning is enabled by default for all Microsoft Teams users in your organization.

You can turn off or turn on Viva Learning at the organization level on the Manage apps page in the Microsoft Teams admin center. For more information, see Manage your apps in the Microsoft Teams admin center. To control whether specific users have access to Viva Learning, create a custom app permission policy and assign it to those users. For more information, see Manage app permission policies in Teams.

For more information about Viva Learning, see Microsoft Viva Learning.

#### Viva Pulse

Viva Pulse enables team leads to send brief surveys using research-backed templates to get a snapshot of team sentiment and act on feedback. Additionally, Viva Pulse reporting enables analysis of results and trends so leads can pinpoint what's working well and which areas to focus on over time.

Security for Viva Pulse is largely inherited from Teams. Viva Pulse also supports using access control policies to grant or restrict access to specific features for users and groups. For more information about access control at the feature level in Viva Pulse, see Granular access controls for Viva Pulse.

#### **Feedback**

Provide product feedback ☑

## Microsoft Viva Compliance

Article • 05/08/2024

Microsoft offers a comprehensive set of compliance offerings to help your organization comply with national, regional, and industry-specific requirements governing the collection and use and data. Microsoft Viva is also covered under the Microsoft Product Terms and Data Protection Agreement (DPA).

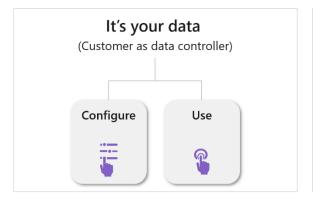
For more information, see the Microsoft Trust Center ☑.

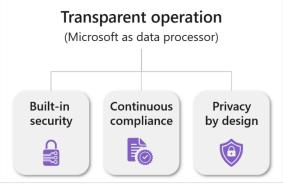
This article covers the following information:

- Shared responsibility model
- Inheritance of compliance features and settings
- System and Organization Controls (SOC) 2
- General Data Protection Regulation (GDPR)
- Data residency
- Microsoft Purview

## Shared responsibility model

Microsoft works to ensure that we are compliant with industry and international standards, and customers are responsible for ensuring their data within the Microsoft Cloud is protected in a manner that is compliant with the standards and regulations imposed on the customer.

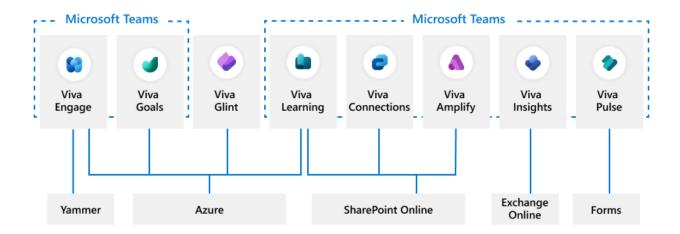




Microsoft Online Services Terms + Data Protection Agreement

## Inheritance of compliance features and settings

Microsoft Viva apps are built on your existing infrastructure and, depending on the app, inherit compliance features and settings from Microsoft Teams, Exchange Online, SharePoint Online, Azure, and Viva Engage. In addition, all Viva modules are built on the Microsoft Graph API.



For detailed information on each service, see:

Microsoft 365 Plan for security and compliance

Microsoft Teams Overview of security and compliance in Microsoft Teams

Microsoft SharePoint Plan compliance requirements for SharePoint and OneDrive

Microsoft Graph Use the Microsoft Graph compliance and privacy APIs

Viva Engage Overview of security and compliance in Viva Engage

Microsoft Entra ID Microsoft Entra security baseline for Microsoft Entra ID

Azure Azure, Dynamics 365, Microsoft 365, and Power Platform compliance offerings

## System and Organization Controls (SOC) 2

A SOC 2 report is an independent assessment of a service organization's systems and processes that are relevant to the trust services criteria. The report is conducted by a third-party auditor and evaluates the effectiveness of the controls in place to meet these criteria. Following is the SOC 2 audit report status for each Viva app:

Viva app	SOC 2 report
Viva Connections	Covered within scope of SharePoint Online SOC 2 report , although not individually called out in the report. Excludes third-party content.
Viva Learning	Covered by Microsoft 365 Microservices T1 - SSAE 18 SOC 2 Type 1 Report (2022) ☑
Viva Engage	Covered by Office 365 – Viva Engage – SOC 2 Type 2 (2022) ☑
Viva Goals	Covered by Microsoft 365 Microservices T1 - SSAE 18 SOC 2 Type 1 Report (2022) ☑
Viva Insights	Covered by Microsoft 365 - Microservices Type 2 - SOC 2 Report (9-30-2023) ☑

## **General Data Protection Regulation (GDPR)**

All Viva apps built on your Microsoft 365 infrastructure support compliance with EU General Data Protection Regulation (GDPR) requirements. For detailed information, see Microsoft Viva Privacy.

## **Data residency**

Data residency refers to the geographic location where data is stored at rest. Many customers, particularly in the public sector and regulated industries, have distinct requirements around protecting personal or sensitive information. In addition, in certain countries, customers are expected to comply with laws and regulations that explicitly govern data storage location.

For information about data residency for Viva apps, see Microsoft Viva Privacy.

### **Microsoft Purview**

Microsoft Purview is a family of data governance, risk, and compliance solutions that can help your organization govern, protect, and manage your entire data estate.

Currently, certain features in Viva Engage and Viva Connections (through SharePoint) are supported by Microsoft Purview.

The Viva Engage features eDiscovery and Data Retention are supported by Microsoft Purview; sensitivity labels and data loss prevention aren't supported. Native Mode is required to take advantage of eDiscovery and the Microsoft Purview compliance portal.

This functionality is unavailable for networks in non-Native mode. For more information, see Overview of Native Mode.

Viva Connections inherits eDiscovery and Data Retention support from SharePoint Online for files involved in each service.

### More resources

Microsoft Viva Privacy

Microsoft Viva Security

Viva admin roles and tasks

## **Feedback**

Was this page helpful?





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## Customize and edit the Viva Connections experience

Article • 04/03/2024

The new Viva Connections desktop design serves as a new experience that centers essential job tasks, personalized content, easy access to other Viva experiences, and better aligns with the mobile experience. Learn more about the new Viva Connections desktop experience

Elements of the new Viva Connections experience can be customized to fit your organization's brand and the needs of your end users. Learn more about how to customize the banner, Dashboard content, and navigational links in Resources. Then, learn how to influence content in the Feed. Finally, learn how to manage access and permissions.

#### (!) Note

- If you already have Viva Connections set up, the new experience design uses current content and settings (like audience targeting) from your Dashboard and Resources and there will not be any impact to the mobile experience.
- If your organization has a SharePoint home site, you can choose to use it as the default landing destination.
- If you haven't set up Viva Connections yet, the default experience includes cards on the dashboard but otherwise doesn't impact <u>the mobile experience</u>.
- The new Viva Connections experience uses a similar permission model to SharePoint and can be managed from Microsoft Teams.
- You must have member level permissions or higher to edit the new desktop experience.

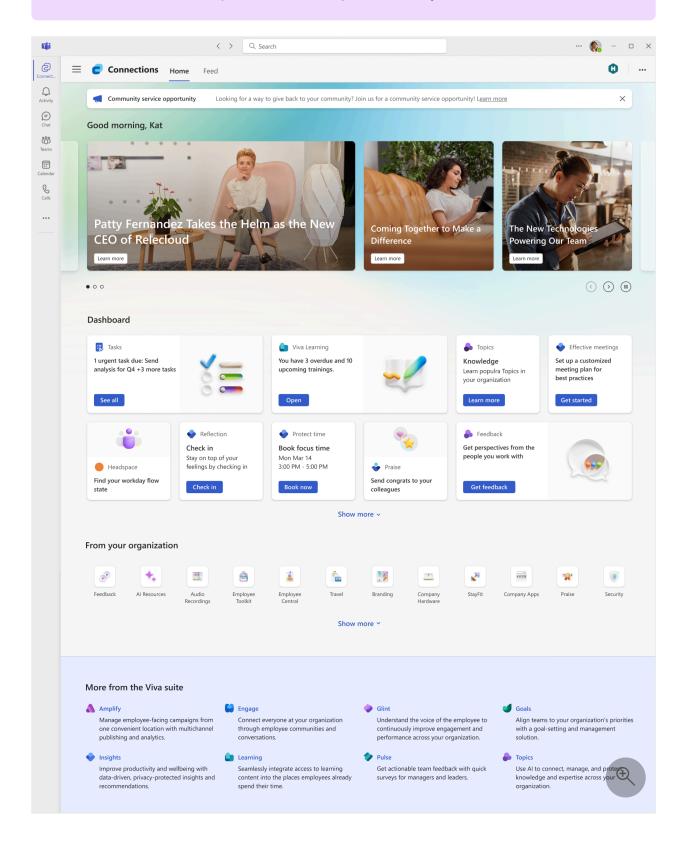
## About the updated Viva Connections experience

The Connections experience has been redesigned to highlight news across your organization and still provide easy access to the top tasks, tools, and resources that help people in your organization get their jobs done. The updated design prominently features the following key elements to the Viva Connections experience 2 -

Announcements, Feed & News Spotlight, Dashboard, Resources, and Viva suite footer. Content for some of these elements can be filtered using audience targeting to create a personalized experience.

#### ① Note

Audience targeting is unavailable to targeted release customers using the new resources section and is planned to be implemented by the end of Q1 2024.



**Announcements:** Announcements from the organization display at the top of the Viva Connections experience and convey time-sensitive information to employees.

Feed: The Feed now has two areas:

- The News spotlight displays updates from the home site in a scrolling banner. A future update is planned to include updates from organizational news sites.
- The Feed tab provides access to more content that offers a personalized feed based on post-level targeting of groups that an employee belongs to, more updates and other organizational news content.

Dashboard: The Dashboard is your employee's digital toolset. It brings together the tools your employees need, enabling quick and easy access whether they are in the office or in the field.

**Resources:** The Resources experience enables navigation across portals and destinations.

**Viva Suite footer:** Information and links to other Viva Suite apps licensed and enabled by your organization appear at the bottom of the experience.

Navigational elements: The navigational elements located in the top-right and top-left corners help viewers easily get to-and-from other landing pages and other Viva experiences ☑.

## Get started customizing the experience

#### ① Note

- You must have member level permissions (or higher) to edit the new desktop experience.
- If your organization has a SharePoint home site, you can choose to use it as the default Connections experience.

## How to edit the Viva Connections desktop experience for the first time

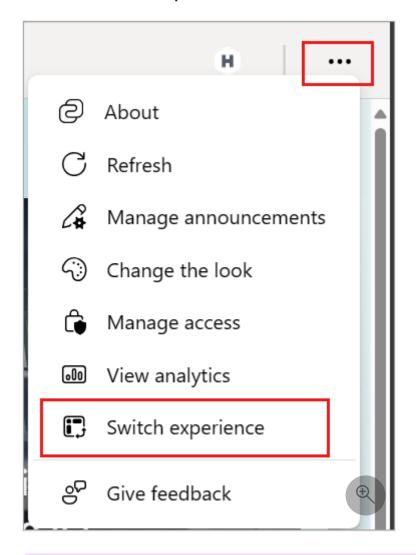
If you already have Viva Connections setup, editors who have site owner or member permissions to the SharePoint home site will automatically have owner or member permissions to the new Connections experience in Teams. People with member permissions or higher will automatically see **Edit** buttons in the Connections experience.

If you're setting up Viva Connections for the first time, only owners of the SharePoint root site will be able to edit. When the home experience is edited for the first time, a special site container gets created on the backend. You want to assign (at least two) owners and members from this site to give permissions to others so they can edit the experience for the rest of the organization.

## How to switch between multiple Viva Connections experiences

If your organization has created multiple Connections experiences, you can switch between enabled and draft experiences from within Connections in order to edit them.

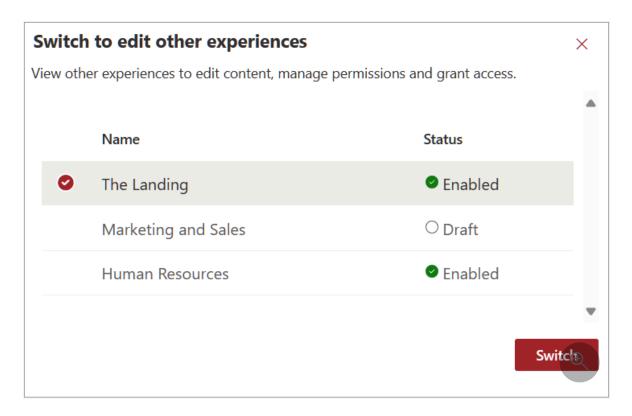
- 1. Navigate to the Viva Connections app in Teams.
- 2. Select the **ellipsis** in the upper-right of your experience.
- 3. Then select **Switch Experience**.



① Note

Only users with edit privileges will be able to see the Switch Experience option in the menu.

- 4. A list of created experiences display along with their status (enabled or draft). Select an **Experience** to switch to.
- 5. Select Switch.



① Note

#### Give permission to edit from Viva Connections in Teams

If you're setting up Viva Connections for the first time, navigate to the Viva Connections app in Teams to assign owners and members who can edit the Viva Connections desktop experience.

- 1. Navigate to the Viva Connections app in Teams.
- 2. Select the **ellipsis** in the upper-right of your experience.
- 3. Then select Manage access.

- 4. Select Grant access.
- 5. Under **Site Access** add users and select their level of permission from visitor, member, or owner.
- 6. Select Add.

#### Choose default cards for the intended audience

When you set up Viva Connections for the first time in Teams, you are asked to choose a set of default cards. The default cards help you get started creating a dashboard and don't need anything to get set-up. Default cards can be removed and edited after the initial selection.

**Expand table** 

Card descriptions	Frontline worker	Information worker
Audience description	This audience consists of employees who are customer-facing, or don't work primarily at a desk with a computer.  Sometimes these roles are referred to as essential workers. Popular roles for frontline workers are retail sales associates, nurses, line workers, and teachers.	This audience consists of employees who usually get their work done from a desk using a computer. Popular roles for information workers are project managers, finance associates, administrative personnel, and business executives.
Default cards	Approvals, Assigned tasks, Shifts, and Top news.	Assigned tasks, Top news, Viva Learning, and Viva Topics.

## Summary of default dashboard cards and how to set them up

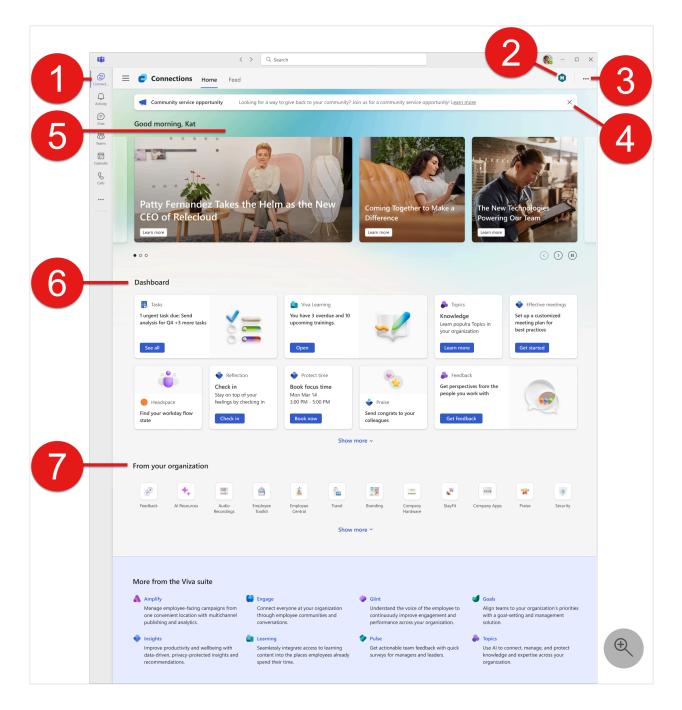
By default, cards will already be on the dashboard and require minimal setup. Edit and preview the dashboard until you're ready to share with others. To edit existing cards, select the pencil icon to **Edit** the card. In the property pane that opens to the right of your experience, choose your card size from the **Card size** drop-down list.

Apply **Audience targeting** so this card is filtered to specific roles, regions, or departments. Learn more about audience targeting for Viva Connections.



Dashboard cards	How to use the card	Default card by audience
Approvals	Request time off, approve expense reports, and sign documents.	Frontline worker
Assigned tasks	Review and complete daily tasks assigned by your manager or team.	Frontline worker and Information worker
Shifts	Clock-in and clock-out of shifts and view upcoming shifts and break times.	Frontline worker
News	View the most important news from inside your organization. Use Boosted news ☑ to get news posts from organizational news sites to display in this card.	Frontline worker and Information worker
Viva Learning	View recommended and required training courses.	Information worker
Topics	Share and contribute to your organization's knowledge base.	Information worker

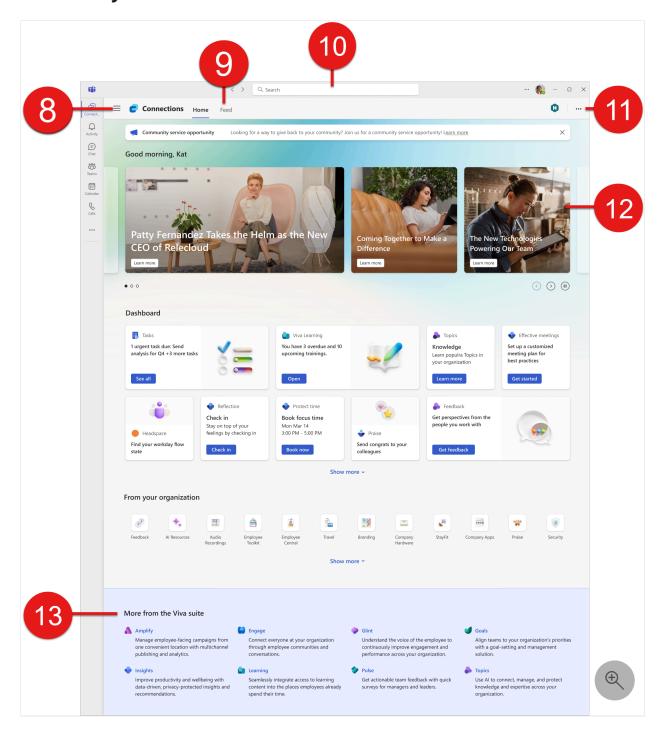
## Summary of customizable elements



- 1. **App icon and label in the Teams app bar:** Customize the app name and label in the Teams admin center.
- 2. **Entry point to secondary landing page**: A link to the preferred default desktop experience will automatically display here.
- 3. **Change the look**: Access the settings to apply themes to reflect your organizational brand colors consistently across experiences.
- 4. **Announcements:** Create important time-sensitive notices targeted to members within your organization.
- 5. **Banner image**: Upload a banner image and set the focal point to create a branded look consistent across desktop and mobile.

- 6. **Dashboard:** Customize with cards and content specific to roles, regions, departments, and popular tasks.
- 7. **Resources:** Create a list of navigational links and icons to useful sites and information.

### Summary of non-customizable elements



- 8. **Shared Viva navigation:** Helps viewers navigate between Viva experiences. Viva apps will automatically display in this menu when Viva licenses are detected.
- 9. **Feed tab:** Content in the Feed is dynamically generated based on user interests, organizational news, and industry news. Learn more about how content in the

#### Feed is sourced.

10. **Scoped Search**: Users can search within Viva Connections when using the search bar while in the Connections experience. As users type, the option to search for results within Connections (or Teams) will display.

#### ① Note

Scoped search in the new Teams client is not available for GCC and GCC High customers, and will be made available with a future update.

- 11. Ellipses menu: Access more information about the Connections experience depending on your level of permissions.
- 12. **News spotlight:** Content in the banner is dynamically displayed based on content from the home site. A future update is planned to include updates from organizational news sites.

#### ① Note

A future update is planned to make the News spotlight customizable.

13. **Viva navigational bar:** The Viva navigational bar provides an opportunity to discover more Viva experiences □ and gets automatically generated when Viva licenses are detected.

## Customize the app icon and label in the Teams app bar

#### ① Note

For customers with at least one F license:

The Viva Connections app is automatically pinned in the Teams app bar. If you don't want the app pre-pinned, either <u>turn off tailored apps for frontline workers</u>, change the <u>app settings</u>, or <u>edit how apps in Teams are managed</u>.

Your organization's Viva Connections app can display a custom icon and label in the Teams app bar. This customization takes place in the Teams admin center, which requires Teams admin permissions or higher. It is recommended that you also apply app

settings that pre-pin and pre-install the app. Doing so will make sure people in your organization can more easily discover the Viva Connections app and start using it. Learn more about customizing the Viva Connections icon, label, and app settings.

## **Customize announcements**

Create targeted, time-sensitive messages that display at the top of your Viva Connections experience to members of your organization. Learn more about using announcements in Viva Connections.

## Customize the banner image

Change the banner image in the header and set the focal point for the image. The banner image and focal point can only be set on the desktop app but will be visible across desktop and mobile.

#### ① Note

- The greeting is automatically generated and cannot be customized.
- Depending on your organization's license type, you may see additional dynamic information displayed in the banner.
- The banner image and focal point will resize when viewed via the tablet and mobile app.

#### To change the banner image:

- 1. Start by selecting **Edit** and then select **Change image**.
- 2. Select the image you'd like to use and then select Reposition.
- 3. Once you're satisfied with the focal point, select **Set focal point** and then **Save**. There's no draft state for the banner image. It is displayed for all users when you select Save.

### Customize the look

Further customize your Connections experience and SharePoint home site by applying pre-existing SharePoint themes or a custom theme to reflect your organizational brand colors consistently across all instances of your desktop, tablet, and mobile experiences. Users can apply themes from within their Connections experience, or

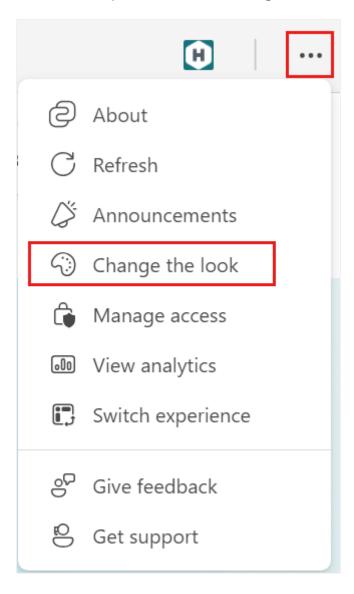
SharePoint home site. Only users who have permissions to edit the Connections experience can apply themes.

#### ① Note

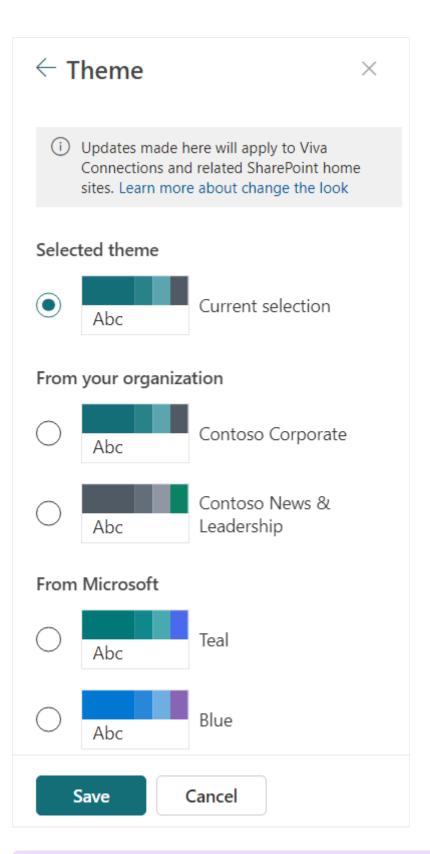
• If you have never selected a theme for your home site, the default SharePoint theme will be used for the home site and Connections experience.

To apply a SharePoint or custom theme:

1. Select the **ellipsis**, then select **Change the look**.



- 2. Select Theme.
- 3. Make a selection from the list of available themes.
  - Themes from your organization can't be customized.
  - SharePoint themes from Microsoft can be customized.



#### ① Note

- If an end user has selected dark mode on their mobile or tablet device, the dashboard and other Connections components will render in dark mode with the default color and will not apply the theme colors.
- Dark themes (has the property isInverted=True), won't be applied to the mobile experience. If the dark theme is selected, mobile will continue

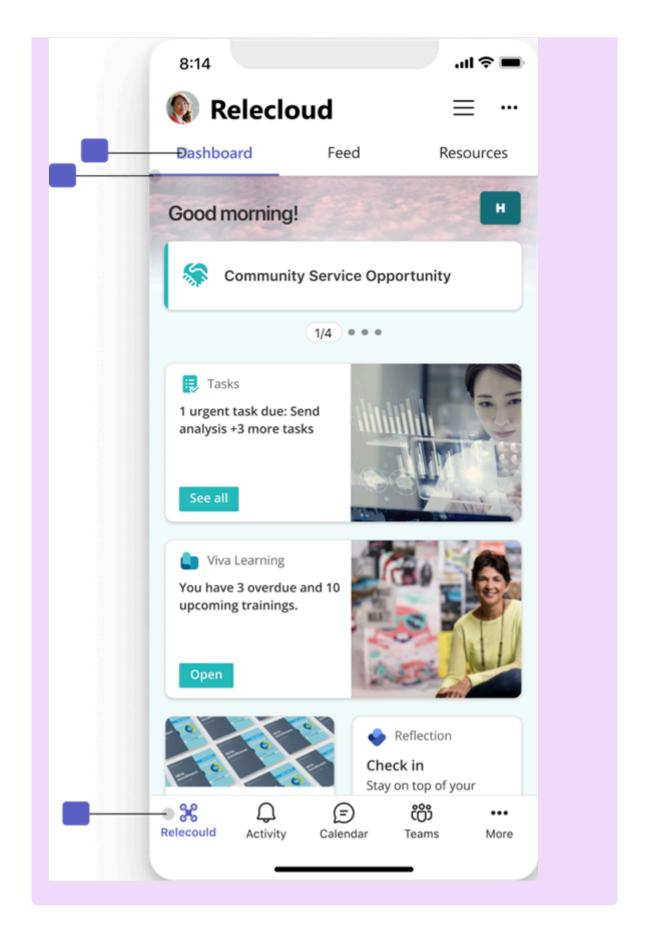
showing Connections with the user's selected mode (light or dark) and the default colors.

#### 4. Select **Save**.

The home site color theme reflects automatically in the Viva Connections desktop experience.

#### ① Note

Using <u>accent colors under the app customization feature</u> will only apply to the app icon outline color on the Teams chrome, and will not apply all colors to the Connections experience. For consistency of theming, it is a best practice to set the accent color same as the theme primary color from SharePoint.



### Customize the dashboard

The Viva Connections dashboard provides fast and easy access to information and jobrelated tasks. Add and edit cards that help users quickly access the tools and resources they use in their day-to-day role. Cards on the dashboard can be targeted to users based on specific roles, regions, and interests. Edits (including audience targeting settings) made to cards on the dashboard will also automatically be applied to the Dashboard web part and the mobile experience.

#### ① Note

- If your organization already has Viva Connections set up, you'll see your existing cards and settings displayed in the new home experience.
- If your organization doesn't already have Viva Connections set up, you'll see a set of default cards that need minimal configuration.

## Learn more about adding third-party cards and creating custom cards

In addition to the core set of dashboard cards, cards from third-party partner solutions can be added to the card toolbox from the SharePoint store. Learn more about third-party cards and how to request them. Additionally, customers can create custom cards for the Viva Connections dashboard by using the SharePoint Framework (SPFx) to create Adaptive Card Extensions (ACEs). Learn more about this framework and view the ACE solution gallery ...

### Preview the dashboard before sharing with others

After creating or editing cards on the Dashboard, make sure you preview the experience for each audience and on both desktop and mobile devices by selecting Preview in the top-right corner of the editing experience. What you see in preview mode approximates how the Dashboard displays for certain audiences and devices. When you apply audience targeting to cards, you can preview how different people view the Dashboard depending on the audience or device.

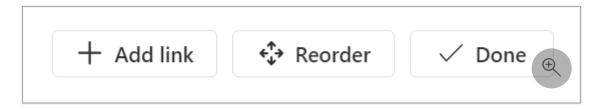
### **Customize resources**

Resources provide links to the most popular portals and destinations at your organization and can be found below the dashboard of the Connections experience. Links in the Resources section can be targeted to specific audiences and any edits made will affect the mobile experience as well.

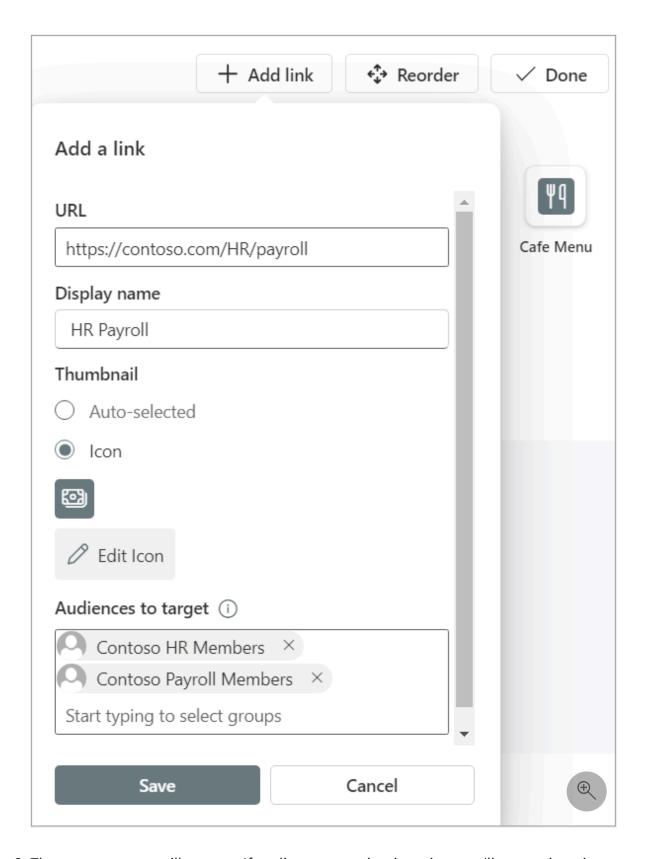
Global navigation can be accessed by clicking on the **Connections** icon in the Teams app bar. Refer to this document if you're setting up global navigation for the first time.

#### To edit Resources

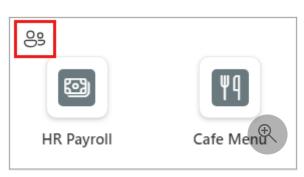
- 1. Start by selecting **Edit**.
- 2. To add a new link, select + Add Link.



- 3. In the Add a Link window that opens, paste the link to the site in the URL field.
  - Only modern SharePoint sites and certain Microsoft 365 experiences will display in Teams. All other types of content will open in a separate browser window.
- 4. Enter a Display name.
- 5. Under Thumbnail, select a choice to represent your resource link.
  - Auto-selected: the icon is generated based on the URL, if applicable (a link icon displays by default if one can't be auto-generated).
  - **Icon**: choose an icon from a pre-existing list by selecting **edit icon**.
- 6. To apply audience targeting to this resource, enter one or more M365 groups in the **Audiences to target** field (up to 10 audiences can be targeted). Learn more about audience targeting for resources.
- 7. Select Save.

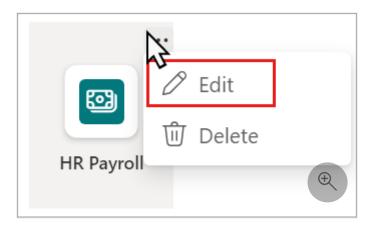


8. The new resource will appear. If audience targeting is active, you'll see an icon in the upper left of the resource link.



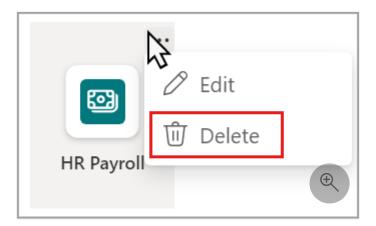
### Edit an existing resource link

- 1. Start by selecting **Edit** in the Resources section of your Connections experience.
- 2. Hover over the resource link and select the ellipsis.
- 3. Select **Edit** to open the resource link and change its settings.



## Delete and existing resource link

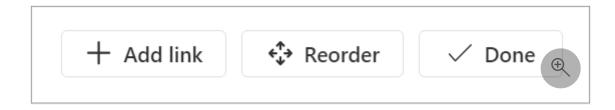
- 1. Start by selecting **Edit** in the Resources section of your Connections experience.
- 2. Hover over the resource link and select the ellipsis.
- 3. Select **Delete**.



4. When asked to confirm, select **Delete**.

### Reorder existing resource links

- 1. Start by selecting **Edit** in the Resources section of your Connections experience.
- 2. Select Reorder.



3. Select a resource link and drag it to its new location.

## Learn more about how to influence content in the feed

There's no configuration required to get the Feed working in the desktop or mobile apps. Content in the Feed can't be edited because content is aggregated from across your Microsoft 365 environment. Content comes from multiple sources: organizational news published in SharePoint, industry news, meeting insights, and files and information from frequent collaborators.

The Feed web part for Viva Connections displays the same content and can be added to other SharePoint sites. Content that is displayed in the Feed can't be edited but the ranking can be influenced with the following actions:

- **Promote important 'official' communications** Use News boost ☑ to raise the visibility of crucial news posts from organizational news sites.
- **Highlight community discussions** Feature posts in public Viva Engage communities that you'd like seen by the entire organization.
- Publish from official news sources Like organizational news sites or SharePoint home sites. Where content is from impacts the ranking.
- Follow colleagues within your organization Users can see information and posts added to their own feed that made by colleagues they have followed.
- Learn more about how the feed works here: Discover and learn with Microsoft Feed ☑.

## Language and multilingual settings

#### ① Note

Viva Connections desktop applies the users' SharePoint preferred language but not the Microsoft Teams language setting. However, for the mobile app, Viva Connections applies the device settings. The Viva Connections experience can be set in more than one language. Learn more about how different elements of the experience can be edited to display in more than one language and how to create a multilingual dashboard.

## Manage permissions

The permissions model for the new Viva Connections landing experience is similar to the permissions in SharePoint. Certain levels of permission grant access to specific editing tools and the ability to manage permissions and sharing.



At least two people should be assigned to Owner level permissions.

**Expand table** 

Owner	Member	Visitor
Can edit content in the banner, Dashboard, and Resources.	Can edit content in the banner, Dashboard, and Resources.	Visitors are the end users in your organization.
Can add or remove owners, members, and visitors.		They can view and interact with content but can't edit content or share the page with others.

If you already have Viva Connections setup, editors who have site owner or member permissions to the SharePoint home site will automatically have owner or member permissions to edit the new Connections experience in Teams.

- People with member permissions *or higher* will automatically see **Edit** buttons in the Connections experience.
- People with member permissions or higher will be able to view permissions to the page by navigating to the ellipsis menu in the top-right and selecting Manage permissions.

If you're setting it up *for the first time*, only the SharePoint root site owners are able to edit the Connections experience in Teams. When the Connections experience is edited for the first time, a SharePoint site on the backend gets created. You'll want to assign owners and members from this site to give permissions to others so they can edit the experience for the rest of the organization. Manage permissions from the Viva Connections app in Teams to assign owner or member level permissions. Once

permission levels are assigned, people with owner or member permissions will automatically see **Edit** buttons in the Connections experience.

#### How to add, view, and edit permissions

If you have member permissions or higher, you can view who has permission to view and edit the Connections experience. Access permissions by navigating to the ellipsis menu (...) in the top-right corner and then select **Manage permissions**.

If you have owner permissions or higher, you can give access to new people and change the roles of the people who already have access. Select **Share** to give access to new people. Edit the roles of existing people by selecting the drop-down arrow and then select a new role. Changes are applied immediately.

## Help end users in your organization learn more

#### ① Note

For customers who already have Viva Connections setup, your end users will be automatically routed to the new Viva Connections home experience in Teams if your organization decides to use the new design as the default experience. If your organization has a SharePoint home site, you can choose to keep it as the default home experience when the new experience is available.

If your organization already has a SharePoint home site, and you want to keep it as the landing experience for the Connections desktop experience, use the PowerShell command listed in the following section to use the SharePoint home site. Learn more about setting up Viva Connections in the Microsoft 365 admin center.

## Choose the default landing experience for Viva Connections desktop

If your organization already has a SharePoint home site and you want to keep it as the landing experience for Viva Connections desktop, use the PowerShell command listed below in this section. If you decide to change the default experience from a home site back to the Viva Connections home experience, you'll need to run this command again using the \$false parameter. To run this cmdlet, you must be a Global admin or a SharePoint admin.

1. Download the latest SharePoint Online Management Shell ☑.

#### ① Note

- If you installed a previous version of SharePoint Online Management
   Shell, go to Add, or Remove programs and uninstall "SharePoint Online
   Management Shell".
- Run the command as a Global Administrator or a SharePoint Administrator.
- This command allows you to choose the default experience for the desktop app and doesn't impact the mobile experience.
- 2. Connect to SharePoint as a Global Administrator in Microsoft 365. To learn how, see Getting started with SharePoint Online Management Shell.
- 3. Run Set-SPOHomeSite -HomeSiteUrl <homesiteURL> -VivaConnectionsDefaultStart <\$true/\$false>.
  - The parameter should be set to **\$false** to use the new Connections desktop experience as the default landing experience.
  - The parameter should be set to **\$true** to use a SharePoint home site as the default landing experience.

#### **Example:**

Contoso's SharePoint home site URL is <a href="https://contoso.sharepoint.com/sites/homeSite">https://contoso.sharepoint.com/sites/homeSite</a> in this example.

#### To set the default landing to the SharePoint home site:

Set-SPOHomeSite -HomeSiteUrl "https://contoso.sharepoint.com/sites/homeSite" VivaConnectionsDefaultStart \$true

#### To set the default landing to the new Viva Connections desktop experience:

Set-SPOHomeSite -HomeSiteUrl "https://contoso.sharepoint.com/sites/homeSite" VivaConnectionsDefaultStart \$false

#### (!) Note

• It may take up to 15 minutes to see the updated default landing experience.

If you change the SharePoint home site to a different SharePoint home site, it
may take up to a week for users in Viva Connections to be directed to the new
site. However, users can logout and log back in to clear the cache to view the
new SharePoint home site sooner.

## Make the experience available to the end user

Once finished customizing your Viva Connections experience, follow the steps to enable the experience to make it visible to your audience.

#### Learn more

More options coming soon for the Viva Connections desktop experience ☑

**Overview: Viva Connections** 

Use audience targeting in Viva Connections to personalize the experience

Overview of Microsoft Feed

#### **Feedback**

Provide product feedback ☑

# Use audience targeting in Viva Connections to personalize the experience

Article • 03/08/2024

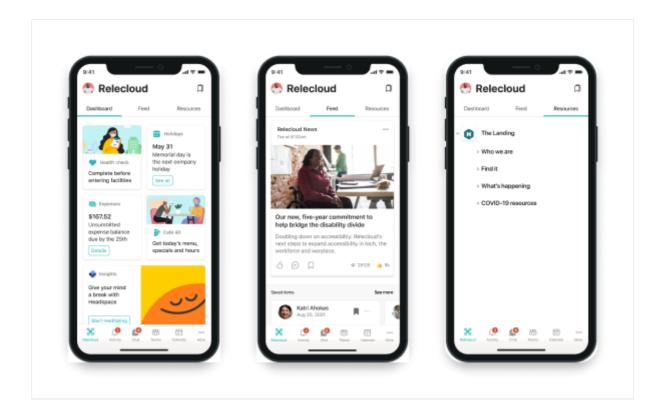
Learn more about the ways audience targeting can be used to make sure the right audiences see the right content in Viva Connections. Audience targeting can be applied to the three components that make up Viva Connections – the dashboard, the Feed, and the Resources.

You can make sure that your content is seen by the right people by using audience targeting within your Viva Connections experience, which is detailed in this article. You can also create separate Viva Connections experiences for different audiences. Learn about the difference between audience targeting and different experiences.

#### ① Note

- Audience targeting filters content but is not meant to manage permissions, access, or secure confidential content.
- <u>Microsoft Entra groups</u> (including security groups, Microsoft 365 groups, and Microsoft Entra dynamic groups) are supported.
- While in edit-mode, the author will be able to view all content. In read-mode, the content will be filtered based on the audiences selected.
- Publish (or republish) to save changes made to existing page content, page metadata, and audience targeting settings for audience targeting features to take effect.
- If you've selected an audience group that you recently created or changed, it
  may take some time to see targeting applied for that group.

## How audience targeting works for each component



**Expand table** 

Dashboard	Feed	Resources
Audience targeting can be applied to cards on the dashboard.	Audience targeting can be applied to SharePoint news posts that display in the Feed.	Audience targeting can be applied to links that display in Resources.

## Apply audience targeting to cards in the dashboard

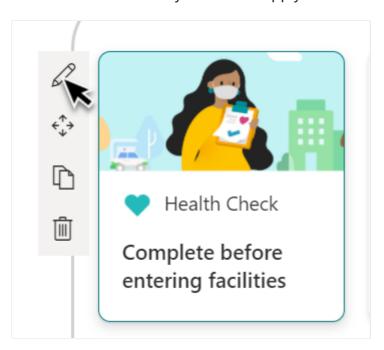
Create a personalized experience by targeting dashboard cards to specific audiences to ensure only the most relevant cards are seen. Use audience targeting to create custom views for distinct roles and regions, generate as many different views as needed to create unique experiences, and to ensure the most important content is seen by the intended audience. Follow these instructions if you're setting up the Viva Connections dashboard for the first time.

#### ① Note

You must be a site owner of the <u>SharePoint home site</u> to edit the Viva Connections dashboard.

1. From the select the **Settings** and then select **Manage Viva Connections**.

- 2. Select View dashboard and then select Edit.
- 3. Select Edit on the card you want to apply audience targeting to.



- 4. At the bottom of the edit pane, apply groups to the **Audience to target** field. Exit the edit pane when you're done.
- 5. Preview the viewing experience for different audiences and devices by selecting **Preview** from the command bar and then Select **audiences to preview as**. Make sure you preview the experience for each audience and on both desktop and mobile devices.

#### While in preview-mode, make sure:

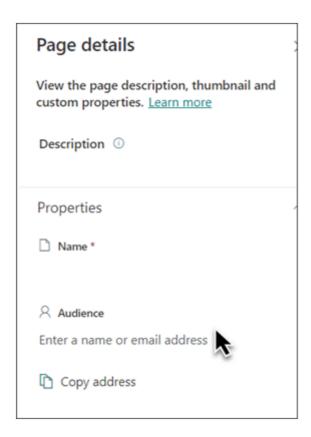
- There aren't any physical gaps between cards that may appear while
  previewing different audiences and devices. If you see gaps, rearrange cards
  so that every audience and device will have a high-quality viewing
  experience.
- Icons, graphics, and images are easy to identify and understand.
- Buttons and links are active and go to their intended destinations.
- Labels and description text are helpful, easy to read, and make sense for the intended audience.
- 6. **Republish** the dashboard when you're done for the audience targeting to take effect.



# Apply audience targeting to news posts that will display in the feed

Apply audience targeting to SharePoint news posts 🗗 helps surface individual news posts within the Feed. Content that displays in the Viva Connections Feed is aggregated from a few sources – posts from official organizational news sites, news that has been boosted, 🗗 and video news posts. Learn more about how content is sourced and ranked in the Viva Connections Feed.

- 1. Start from the site where the news is published. Select **Settings**, then **Site contents**.
- 2. Select the library where the news post is located. select **Settings** again and then select **Library settings**.
- 3. Under **General settings**, select **Audience targeting settings**. Then select the checkmark box next to **Enable audience targeting** and then select **OK**.
- 4. Next, navigate to the news post in **Site contents**. Select the news post you want to apply audiences to and select **Page details** from the command bar.
- 5. In the panel that opens, apply groups to the **Audience** field. Select **Save** when you're done and **Republish** the news post for the audience targeting to take effect.

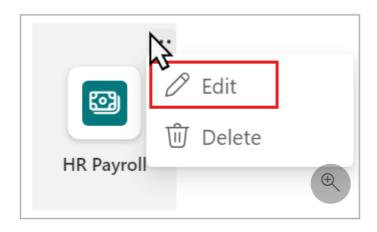


## Apply audience targeting to links in resources

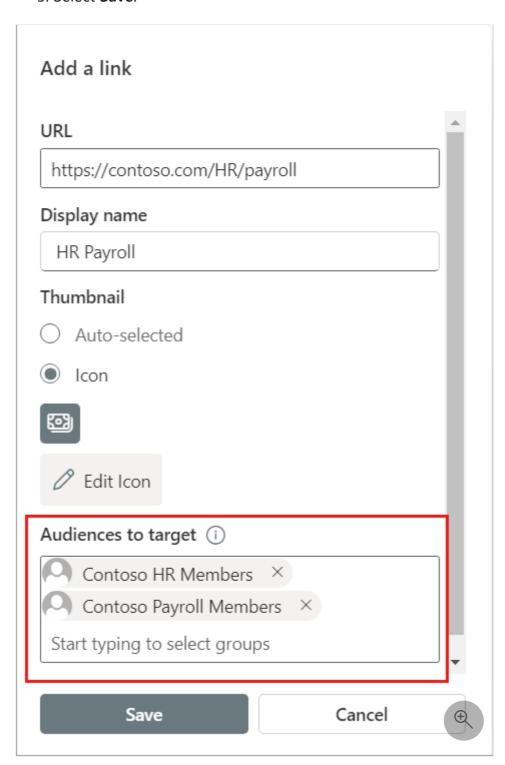
Resources are the navigation links that display beneath the dashboard. You can provide another level of customization to your Resource links by applying audience targeting. Resource links that have audience targeting applied will only appear to users who are part of the selected audience.

For example, an organization could use audience targeting to provide a set of resource links for users working in Human Resources that would only be seen by these employees.

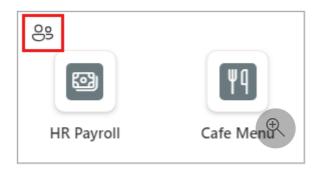
- 1. Start by selecting **Edit** in the Resources section of your Connections experience.
- 2. Hover over the resource link and select the **ellipsis**.
- 3. Select Edit.



- 4. Under **Audiences to target**, enter the M365 group(s) that you want to see the resource link. Up to 10 audiences can be targeted.
- 5. Select **Save**.



6. Links that have been targeted to specific audiences will display an audience targeting icon in the upper left of the resource link.



Learn more about customizing resources.

#### More resources

Overview: Viva Connections

Create the Viva Connections dashboard

Frequently asked questions about the Feed for Viva Connections

Set up global navigation in the SharePoint app bar

## **Feedback**

Was this page helpful? <a> ✓ Yes</a> <a> ✓ No</a>

Provide product feedback ☑

# Set up the Viva Connections experience in a specific language

Article • 09/28/2023

Viva Connections is available in most major languages used in Microsoft 365. Learn more about how to create and deploy the Viva Connections mobile experience in a specific language other than your organization's default language.



Teams and SharePoint may individually support more than the following languages.

# **Available languages**

English

**Japanese** 

German

Chinese (Simplified)

Spanish

French

Portuguese (Brazil)

Russian

Italian

Chinese (Traditional)

Korean

Dutch

Polish

Swedish

Turkish

Czech

Portuguese (Portugal)

Thai

Danish

Hungarian

**Finnish** 

Indonesian

Greek

Romanian

Ukrainian

Catalan

Norwegian Bokmål

Broadly, Viva Connections has four components that influence the end user's overall language experience - the Viva Connections dashboard, feed, resources, and the Teams mobile app. Learn how to set up Viva Connections components to display content in another language other than your organization's default language. The following steps use English as an example, but the steps apply for any one of the 27 languages specified in the available languages.

#### Viva Connections dashboard

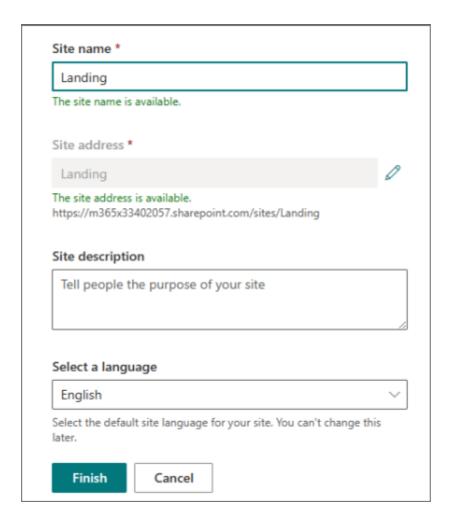
The dashboard is intended to enable quick access to content and tasks from various sources including intranet content, line-of-business applications, HR tools, frontline worker tools, and other internal or third-party applications.

# For organizations using an intranet portal (SharePoint home site)

#### ① Note

The latest release of Viva Connections doesn't require you to have a SharePoint home site. Learn how to choose a dashboard language without a SharePoint home site.

1. Create a communication site and make sure to select English as the default language at site creation time.



- 2. Create a Viva Connections experience using this site as your existing intranet portal.
- 3. When creating the dashboard, make sure the dashboard author is typing the content in the English language for details like card titles and descriptions even if their own preferred language setting ☑ in Microsoft 365 isn't English.
- 4. Then, you can create dashboards in more than one language using the SharePoint multilingual feature.

① Note

For **custom cards on the dashboard**, ask your card developer to include content localized in English language.

#### For organizations using just Viva Connections

- 1. Navigate to the Viva Connections app in Teams.
- 2. Select Edit in the dashboard section.
- 3. Then select Dashboard details.

- 4. Create dashboards in more than one language using the SharePoint multilingual feature.
- 5. Copy the link to the dashboard under **Properties > Name**.
- Paste the link in a browser. Then go to Settings > Advanced site settings > Language preferences.

### **Viva Connections Feed**

The Feed experience will display SharePoint news posted from organizational news sites, sites you frequent and follow, videos hosted on SharePoint, Viva Engage posts in the All-company group, Viva Engage posts in communities you follow, and SharePoint news that has been boosted .

#### Organizational news

Make sure that authoritative news sites (there can be more than one organization news site) are created with English as the default language and that authors of news post are creating the news posts in English language – even if their own preferred language setting in Microsoft 365 isn't English. In order for content in the feed to display in a language other than your organization's default language, SharePoint news posts will need to be available in more than one language ...

#### All company Viva Engage

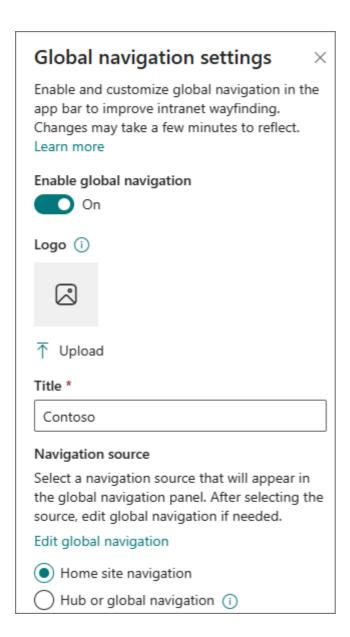
Announcement posts in the All-company group in Viva Engage should be created in English.

# **Viva Connections resources**

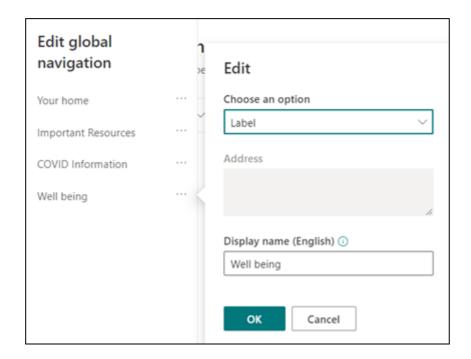
The resources experience displays intranet resources from global navigation in the SharePoint app bar and can be configured from the SharePoint home site.

#### ① Note

Global navigation and a dashbaord can only be enabled and customized from the **SharePoint home site** and required site owner (or higher) permissions. The default language of that site should already be English.



- 1. Navigate to the **Settings** panel from the SharePoint home site and select **Global navigation**.
- 2. The global navigation **Title** should be in English.
- 3. The navigational node in the global navigation must be entered in English.



4. After navigational nodes have been set up for the first time in English, enable multilingual functionality, select languages, and translators ☑. Follow guidance for creating copies of a site that can be translated and published for viewers with a preferred language that's different from the default language.

## Microsoft Teams mobile app

In the Teams mobile app, Viva Connections is displayed as another tab in the Teams app bar. The language experience of the mobile app is driven by the device language set by the user. Make sure to inform your users to set it to English for a cohesive experience – although it isn't required.

If a user has a device set to the French language the Teams mobile app "system" strings (text that Microsoft provides out-of-the box for end-user experience in the app) will all be in French while the dashboard cards, feed, and resources content will be in English.



### More resources

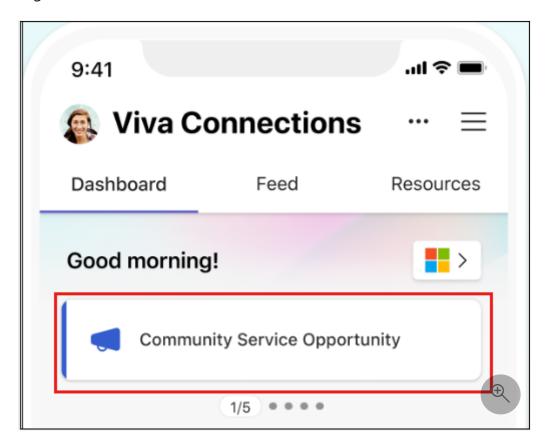
**Overview of Viva Connections** 

Set up a Dashboard in more than one language

# Use announcements in Viva Connections

Article • 02/16/2024

Announcements allow you to create and share time-sensitive messages in Viva Connections. You can set up, manage, and schedule announcements from your organization's SharePoint home site.



#### ① Note

- Announcement notifications are currently only supported on mobile experiences. A future update is planned to support announcement notifications on desktop experiences.
- Users will be required to have a Microsoft Viva suite or Viva Communications and Communities license to utilize the announcements feature. See <u>Microsoft</u> <u>Viva plans and pricing</u> ☐ for more info.
- You must have edit permissions or higher to your organization's SharePoint home site or Viva Connections to author and manage announcements.
- Announcements are unavailable in GCC, GCC High, and DoD environments.
   For more information, see the <u>list of service availability</u>.

#### When to use announcements

Announcements are the best way to communicate targeted, time-sensitive information in the Viva Connections app.

#### **Example Scenarios:**

- Remind users in a specific role of an upcoming deadline.
- Share details about open enrollment benefits for full-time employees.
- Send a specific call to action for new employees.

#### (i) Important

For emergencies such as a safety hazard, it's recommended to use multiple modes of communication.

#### Best practices for using and writing announcements

- Use announcements sparingly so that users understand their importance. Sending them too frequently can cause users to disregard the notifications.
- Be aware that delivery time increases with the size of the targeted audience. Sending an announcement to a group of 50 users might take just a few minutes but sending one to 100,000 users can take several hours.
- Announcements aren't designed for life-threatening emergencies.
- Keep messages short with a clear call to action. Plan to link to more information for complex topics.
- Specify which audiences need to receive the announcement to ensure the highest engagement possible.
- Allow users to dismiss announcements for less-urgent topics or when there are several high-impact announcements active at the same time.

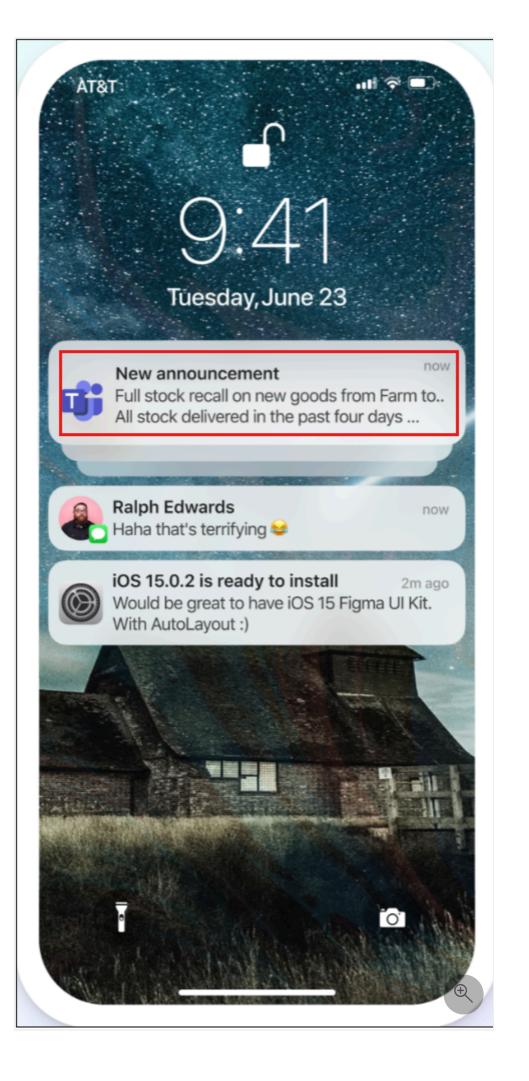
# How announcements display in Viva Connections

Announcements are viewable to users from mobile experiences through Viva Connections.

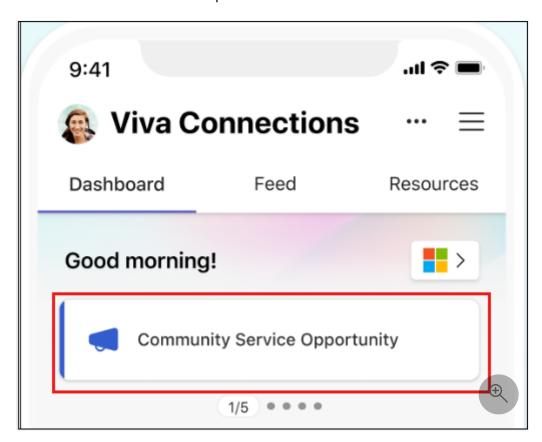
① Note

Announcement notifications are currently only supported on mobile experiences. A future update is planned to support announcement notifications on desktop experiences.

• In Teams: Users will get a Teams notification displayed on the lock screen of their mobile device alerting them of a new announcement when the user has enabled it.



• In Viva Connections: Announcements will display towards the top of the Viva Connections mobile experience.



# Teams Channel announcements displaying in Viva Connections for frontline workers

Microsoft Teams Channel announcements will also display in the Viva Connections announcements banner on desktop and mobile experiences for Frontline workers only. Frontline managers can communicate important updates from their Teams Channel by using an @mention. Frontline workers can then select the link within the announcement in Connections to be redirected to the Teams Channel where the announcement was made.

A Teams Channel announcement is displayed in the Viva Connections experience only if:

- The user has been assigned a Microsoft 365 F1 or F3 license;
- Channel mentions are enabled under the Teams Channel notification settings; and
- The Teams channel announcement has been tagged with an @mention and is unread.

#### ① Note

• If you have authentication issues, disable the Limited-access user permission lockdown mode under site collection features from your SharePoint site.

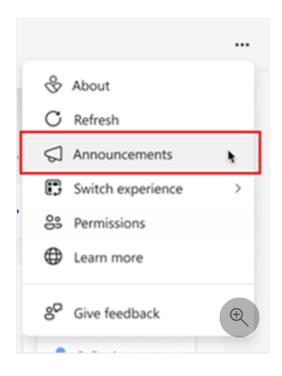
- Vanity domains are not supported. Contact your organization's support team for more information.
- Additional updates to an existing Teams Channel announcement will not be displayed in Viva Connections. Users will need to follow the link from the original announcement in Viva Connections to view the Teams Channel announcement.
- Teams Channel announcements that are deleted and then undone will show as unread.

For more information, see Sending an announcement to a channel in Microsoft Teams 2.

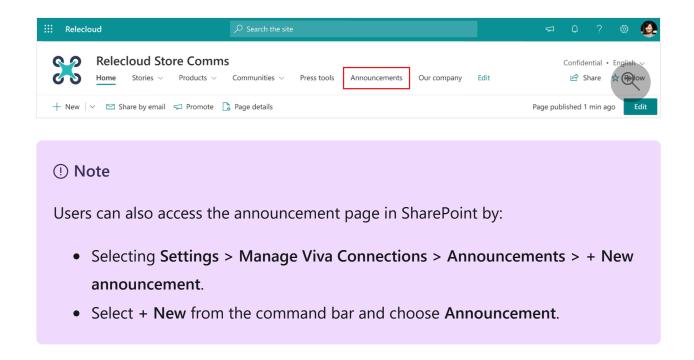
# Accessing the announcements page

Experience owners are able to create announcements through the Viva Connections desktop experience or from their SharePoint home site using the announcements page. To access the announcement page:

• In Viva Connections: Experience owners can select the ellipsis in the upper-right of Viva Connections then select Announcements. The announcements page will open where users can select + New announcement to begin drafting an announcement.



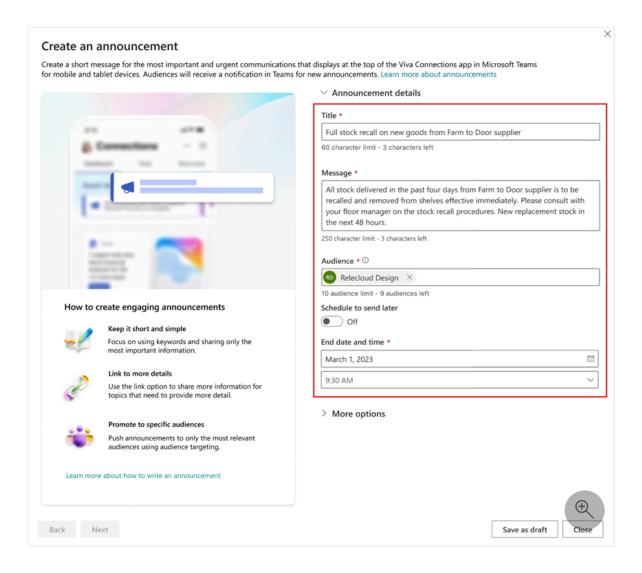
• From the SharePoint home site: The easiest way to access the announcements page is to select Announcements from the site navigation and then + New announcement.



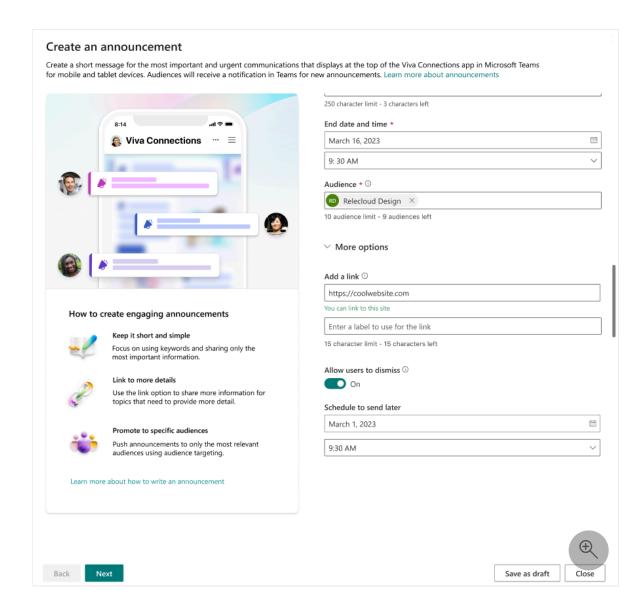
## Drafting your announcement

After choosing to create a new announcement either from your Viva Connections experience or from the SharePoint home site, you'll be presented with the following fields for drafting your announcement.

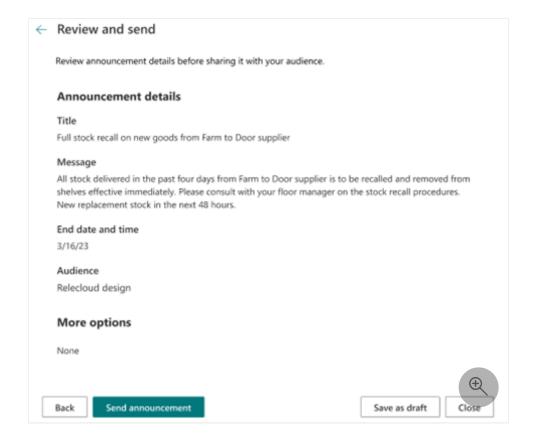
- 1. Add a title and message.
- 2. Select up to 10 audiences to distribute the announcement to. Audiences can be Microsoft Entra groups, Microsoft 365 Groups, or Microsoft Entra dynamic groups.
- 3. Select an end date and time for when the announcement should no longer appear (up to two weeks from the original posting date).



- 4. To add a link to more information, add a URL and label for the link under **More** options.
- 5. To allow users to dismiss the announcement after viewing, toggle the **Allow users** to dismiss setting on under **More options**.
- 6. Select Next to review the details of your announcement.



7. If the announcement is ready to send immediately, select the **Send announcement** option.



#### ① Note

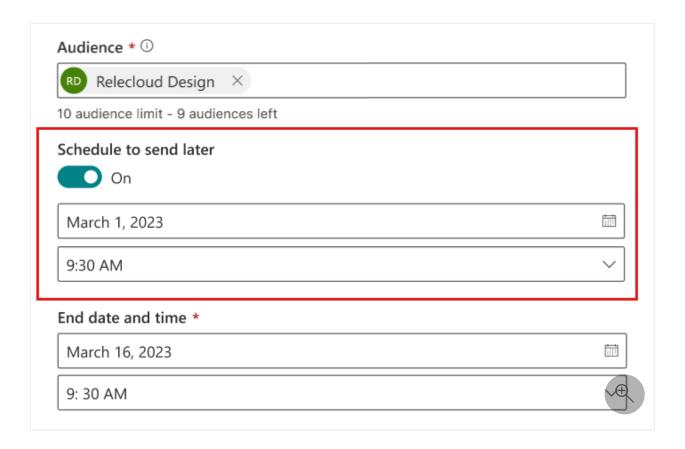
Once an announcement has been sent, message details and end date can still be edited.

# How to schedule an announcement to send later

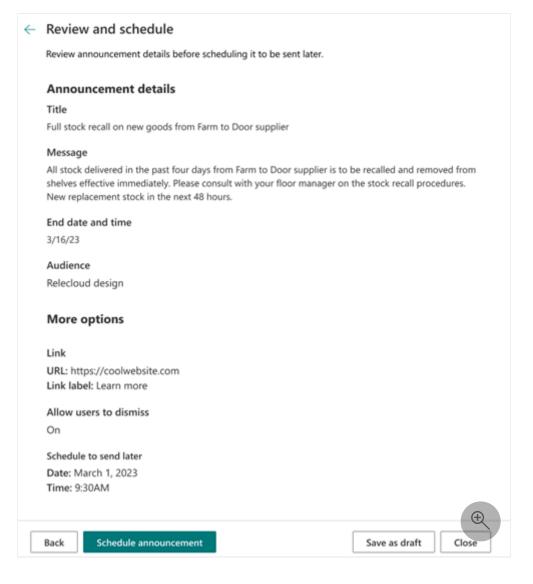
- 1. Follow the steps to access the announcement page and to drafting your announcement.
- 2. Toggle on the **Schedule to send later** option and enter a date and time:

#### ① Note

- The end date can be up to two weeks from the original posting date.
- Scheduling is only available in half-hour increments (e.g. you could schedule a post to send at 10:30 but not 10:15).



- 3. Select **Next** to review the details of your announcement.
- 4. If the announcement is ready to be scheduled, select **Schedule announcement** and the announcement will be sent at the scheduled time.



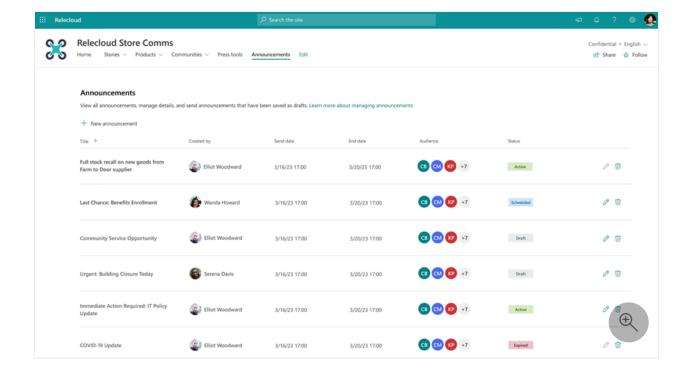
5. The scheduled date and time can be edited anytime before the announcement has been sent.

### Save an announcement as a draft

- 1. Follow the steps to access the announcement page and to drafting your announcement.
- 2. After writing the title and message, choose the **Save as draft** button.
- 3. You can come back and edit the announcement later from the announcements page.

# Manage announcements from the announcements page

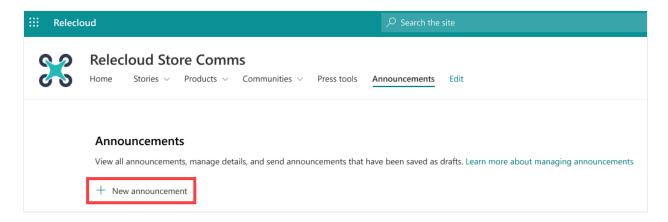
You can view all announcements that are active, scheduled, saved as drafts, and expired from the **Announcements** page.



From the Announcements page, you can complete the following tasks:

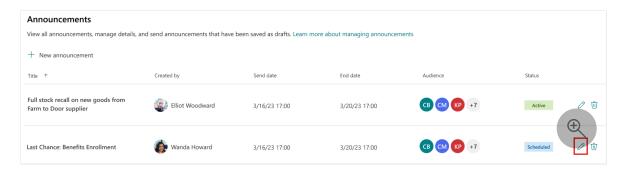
#### Create a new announcement

Choose + New announcement and follow the steps to draft your announcement.



#### Edit an active, scheduled, and drafted announcement

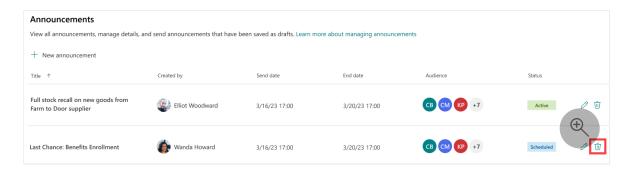
1. From the **Announcements** page, select the **edit** (pencil) icon for the announcement you want to make changes to.



- 2. Make any desired changes in the **Announcement details** pane.
- 3. Choose to send or schedule drafted announcements.

#### Delete an announcement

1. From your **Announcements** page, select the delete (trash can) icon for the announcement that you want to delete. Deleted announcements can't be recovered.



- 2. When prompted, choose Yes, delete.
- 3. If the announcement was active, users won't be able to view it, but it might still be accessible through a Teams notification.

## **Feedback**

Provide product feedback ☑

# View usage data for Viva Connections

Article • 09/22/2023

Understand how and when users engage with components of the Viva Connections experience by using Viva Connections analytics. Review the number of people who have viewed and engaged with your organization's Viva Connections experiences, the content types users engage with, and the platforms used to access Viva Connections.

#### ① Note

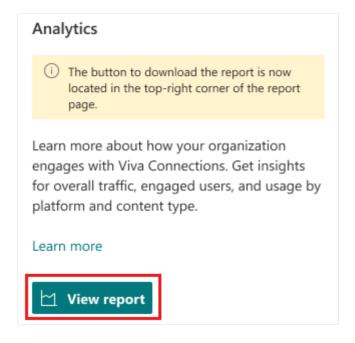
- Site member permissions (or higher) to your organization's SharePoint home site or Viva Connections app are required to view usage analytics for Viva Connections.
- Currently, up to 30 days of usage data (if available) can be viewed in the analytics report or downloaded in an Excel (.xlxs) format.
- Usage reports are only supported for Worldwide Production Environments and for some Special Cloud deployments of Microsoft 365. Refer to the usage report section for details.
- For tenants that are setup for more than one region, the option to access analytics will have to be disabled for each region using the PowerShell command.
- Usage analytics data is aggregated and cannot be tracked to an individual user.
- The analytics feature and centralized Viva Connections administration in the Microsoft 365 Admin center are unavailable in GCC, GCC High, and DoD environments. Please refer to the list of service availability for more information.

## How to access the report

People with site member (or higher) permissions to your organization's home site or Viva Connections app in Teams can view usage data.

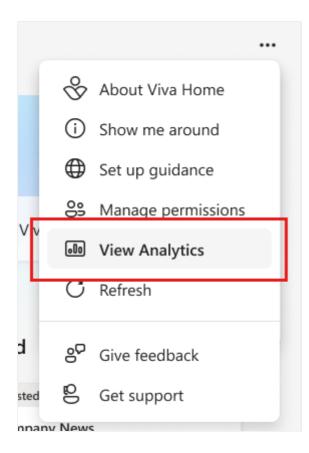
# To view usage data for Viva Connections from a SharePoint home site

- 1. Navigate to your organization's home site.
- 2. Select the **Settings** icon.
- 3. Then, select Manage Viva Connections.
- 4. Next, go to the **Analytics** section and select **View report**.



### To view usage data for Viva Connections from Teams

- 1. Navigate to your organization's Viva Connections app in Teams.
- 2. Select the **ellipsis** in the top-right corner.
- 3. Then, select View Analytics



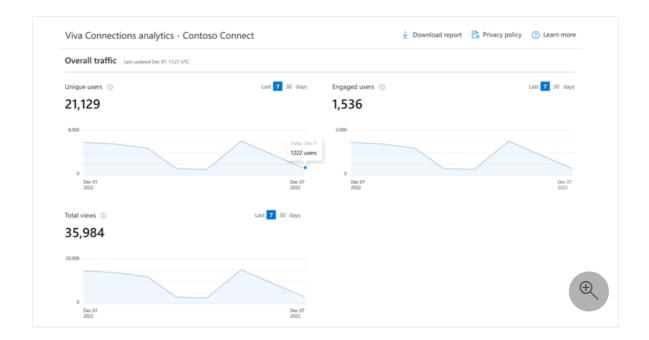
# What's in the usage report

The Analytics page contains charts and graphs providing information on overall traffic, usage, and engagement.

#### **Overall traffic**

This section provides usage data for unique users, engaged users, total visits, and returning users. It also includes activity for desktop, web, and mobile usage; regardless of the platform.

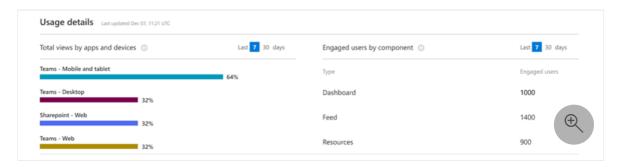
- **Unique users:** Total number of individual viewers across all Viva Connections apps and devices.
- **Engaged users:** Total number of individual viewers who interact with Viva Connections components.
- **Total visits:** Total number of all visits, aggregated across Viva Connections apps, devices, and components.



## **Usage details**

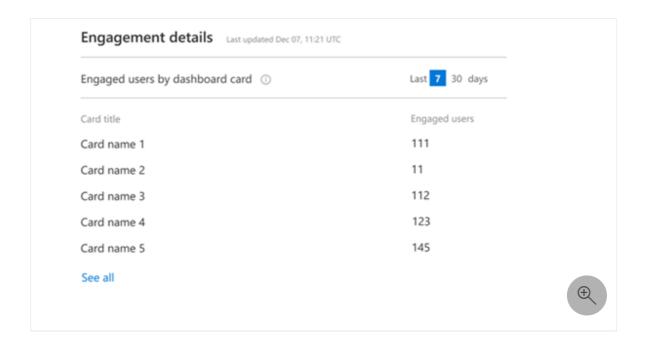
This section breaks down usage data across apps and devices, and includes activity for the Dashboard, Feed, and Resources web parts.

- Total views by apps and devices: Includes views for desktop, web, and mobile usage.
- Engaged users by component: Includes number of engaged users for the Dashboard, Feed, and Resources web parts.
  - Dashboard: Includes usage from the Dashboard web part
  - Feed: Includes usage from the Feed web part
  - **Resources**: Includes usage from the tab in the mobile app and the desktop app (The global navigation bar in SharePoint isn't included).



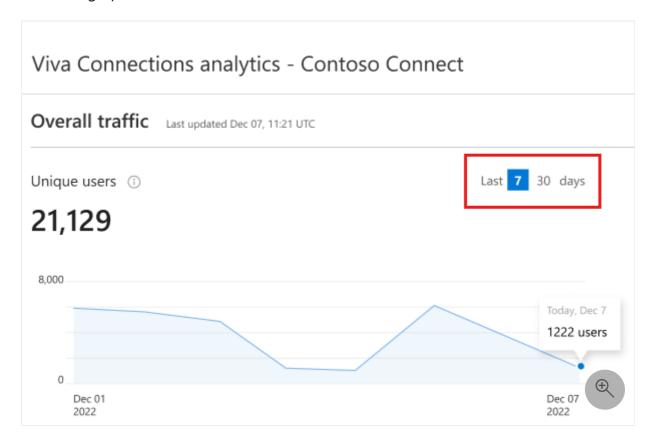
### **Engagement details**

• **Engaged users by dashboard card**: Includes usage data for each dashboard card on your dashboard, indicating how often each user engages with a card.

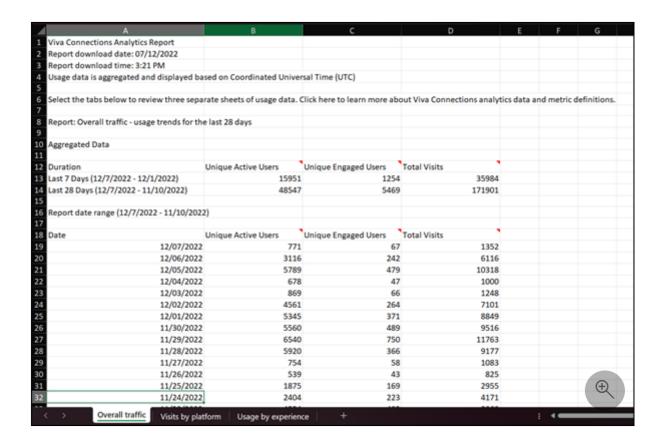


# Filter and download reports

Reports can be filtered on the last seven days or the last 30 days. Select a range of days next to a graph to filter the data.



Select **Download report** at the top of the analytics page to download an Excel spreadsheet that contains all the information on the analytics page across three separate tabs and sheets of data.



## How to to disable analytics features

Your organization might not want to see analytics data due to local data and compliance regulations or other reasons. The following steps can be followed to disable the Viva Connections analytics feature using PowerShell:

1. Download the latest SharePoint Online Management Shell 2.

#### ① Note

- If you installed a previous version of SharePoint Online Management
   Shell, go to Add, or Remove programs and uninstall "SharePoint Online
   Management Shell".
- For tenants that are setup for more than one region, the option to access analytics will have to be disabled for each region using the PowerShell command.
- Connect to SharePoint as a Global Administrator or SharePoint Administrator in Microsoft 365. To learn how, see Getting started with SharePoint Online Management Shell.
- 3. Connect to the tenant's SharePoint service by running the following command:

- 4. Enter the password in the password prompt.
- 5. Run Get-SPOTenant to view the tenant admin Settings.
- 6. Locate the "DisableVivaConnectionsAnalytics" setting.
- 7. Enable or disable the setting by running the following command:

```
Run Set-SPOTenant -DisableVivaConnectionsAnalytics $True
```

8. Run Get-SPOTenant to confirm the setting is updated.

# **Explanations for common report errors**

You may see an error in the Analytics section. Review common errors to learn more about how to resolve them so you can download reports to view usage data for Viva Connections.

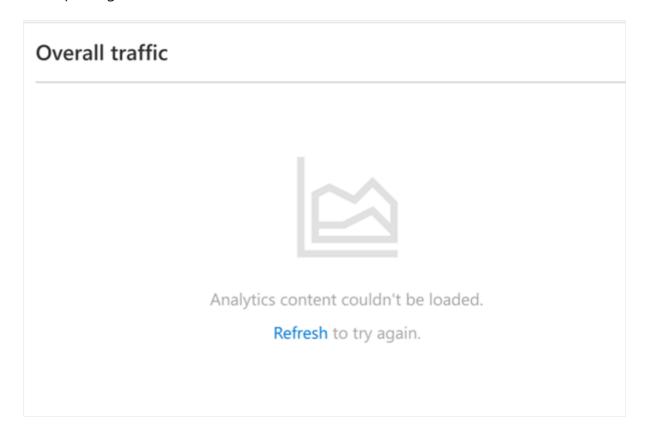
#### Not enough data to generate a report

This message displays if there isn't enough usage data to generate a report. Finish setting up Viva Connections and try to access the report again. Learn more about how to set up Viva Connections.

# Overall traffic We do not have enough data to show here. Please try again later

#### **General error**

Sometimes due to connectivity issues or other technical problems, the analytics report may not be available. Check your network connection, refresh the page, and try loading the report again.



### Errors within the downloaded report

Within the downloaded Excel report, you may notice that certain sections aren't available due to insufficient usage data. Learn more about how to amplify your organization's instance of Viva Connections and the available Microsoft Viva adoption resources ...

## The report has been disabled

You may get the following message: "Viva Connections usage data has been disabled for your organization by your administrator." This message means you won't be able to access usage reports unless your admin enables the feature for your organization.

#### Overall traffic



Viva Connections usage data has been disabled for your organization by your administrator

## Learn more

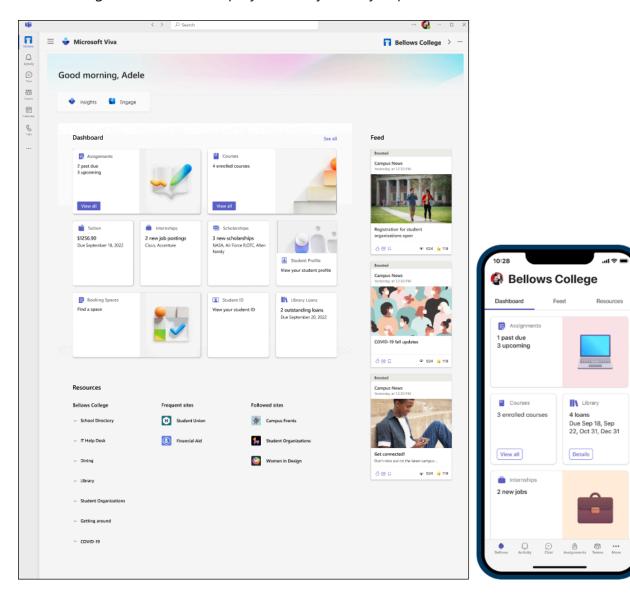
Overview: Viva Connections

Getting started with Microsoft Viva

# Overview of Viva Connections for Education

Article • 09/28/2023

Microsoft Viva Connections for Education is your gateway to a modern faculty, staff and student experience and is designed to keep everyone engaged and informed. It's a customizable app in Microsoft Teams that gives different audiences in your organization a personalized destination to discover other Viva apps your organization is licensed for, relevant news, conversations, and the tools they need to succeed. Viva Connections for Education provides a digital experience for your users allowing them to stay connected with the organization and simplify their day-to-day experience.



Use the quick guide to set up Viva Connections or get more detailed guidance on how to plan, build, and launch.

**Viva Connections is:** 

- An education experience app in Microsoft Teams that allows organizations to create unique experiences for different audiences like faculty, staff, students, educators, and researchers.
- A gateway to other Viva apps and services with the ability to curate specific content and tools by providing easy access to resources, tools, relevant news, and popular destinations.
- Built on existing capabilities in Microsoft 365 like SharePoint, Teams, Viva Engage (formerly called Yammer), and Stream.

#### ① Note

- A SharePoint home site is not a requirement for setting up Viva Connections, but some organizations may choose to use a SharePoint home site in addition to Viva Connections to provide a secondary landing experience that's more focused on organizational content. <u>Learn more about SharePoint home sites</u> and how they complement Viva Connections.
- You must have an Academic (A) or Enterprise (E) license type to create a Viva
   Connections experience. Users with a basic Microsoft 365 subscription (A or E
   license) are limited to creating one experience. Users are required to have a
   Microsoft Viva suite or Viva Communications and Communities in order to
   create two or more experiences (up to 50). See <u>Microsoft Viva plans and
   pricing</u> for more info.
- Viva Connections is not currently supported on tablet devices. Check the
   Microsoft 365 Roadmap 

  for the status of tablet support.

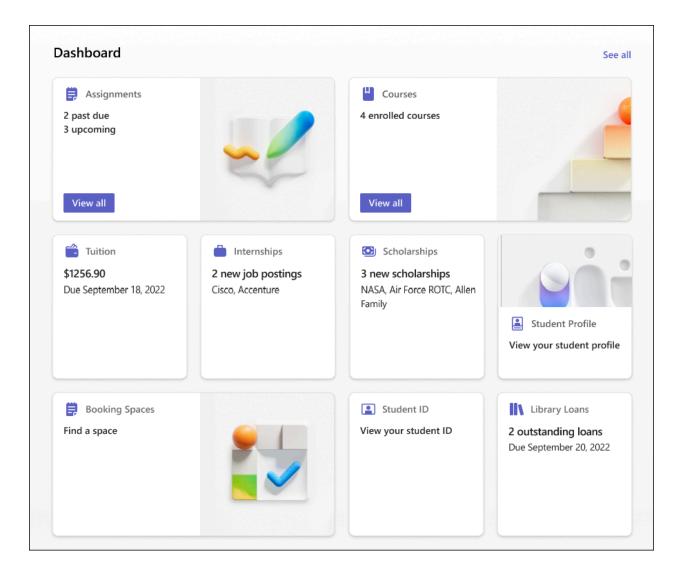
## **Components to Viva Connections**

Viva Connections is composed of three primary components - the dashboard, the feed, and resources. Components display slightly differently between desktop and mobile devices.

Component	Description	
Dashboard	The dashboard is the digital toolset that brings together the resources your users need whether they are on campus, at home, or on the go. The dashboard uses dynamic cards that they can interact with to do things like finding their assessment, their enrolled courses, available internships, accessing training materials, reviewing paystub information, or check and book a shuttle. It can also be used as a web part on SharePoint home sites.	
	Cards in the Viva Connections dashboard are based on adaptive cards and the SharePoint Framework (SPFx). They provide a low-code solution to bring your line-of-business apps into the dashboard. In addition, Viva Connections desktop combined with SharePoint home sites can also be further customized and extended using SPFx web parts and extensions.	
Feed	The Viva Connections feed delivers updates to the right people at the right time with powerful targeting and scheduling capabilities. It's tightly integrated with Viva Engage, SharePoint news, and Stream to display a personalized feed, based on post-level targeting of the groups that your users belong to. It supports both centralized organizational communication scenarios and democratized news scenarios. It's available in the Viva Connections Teams app and can also be used on SharePoint sites using the Viva Connections feed web part.	
Resources	The Viva Connections resources experience enables way finding across popular destinations. It uses navigation elements from the SharePoint global navigation and links can be audience targeted.	

### Viva Connections dashboard

The Viva Connections dashboard enables you to create a curated experience using dashboard cards that give your users access to their most critical content and tools. These cards are designed to enable quick task completion either by interacting with a card directly or by opening a quick view in the dashboard. Think of the Viva Connections dashboard as a digital landing page and toolset for your users.



The Viva Connections dashboard is available on desktop, mobile platforms (iOS, Android), and as a web part on SharePoint sites. This web part can be integrated into a SharePoint home site, which then is exposed as part of the Viva Connections for desktop experience in Teams.

#### Anatomy of a dashboard

A dashboard is made of medium-sized and large-sized cards which users can interact with to get information or complete a task.

#### Users can select cards or click the buttons on cards to do things like:

- Displaying a quick view with more information or an input form
- Navigating to a SharePoint page
- Accessing a Teams app
- Integrate with third party apps and services, including other Viva apps.

Some cards can also reflect dynamic content that refreshes based on a user action or other event. For example, users can see new tasks assigned, assignments to complete, online lectures to join, library books to return or required training courses when they open the dashboard.

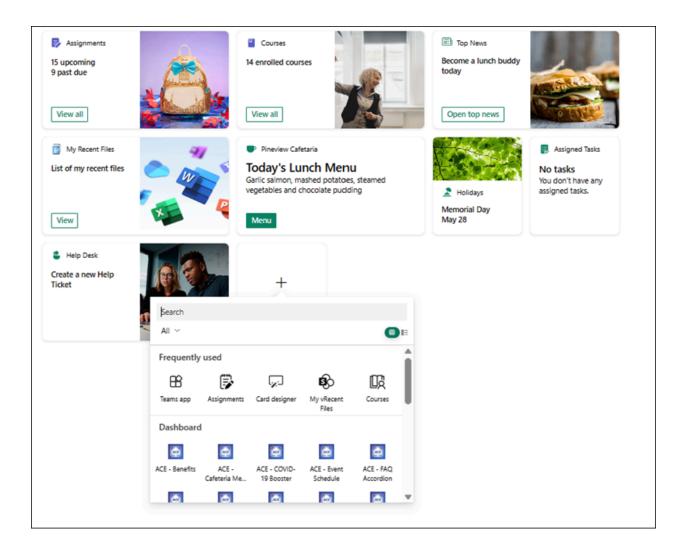
The dashboard experience has been designed to be consistent across mobile platform and desktop, but there are some differences:

**Expand table** 

Element	Mobile	Desktop
Dashboard	Displays as the default tab in the Viva Connections app in Teams.	It's prominently displayed in the desktop app and can be added to your SharePoint sites as a web part.
Dashboard layout	Fixed in portrait mode. Card sizes can be medium (which shows two cards on one row) or large (which shows one card on a row).	Can be portrait or landscape with varying numbers of cards on each row depending on whether the web part is used in a one, two, or three column page section layout.
Card UI	Native	HTML based
Card order	Same as in Desktop	Same as in Mobile
Card reflow	Same as in Desktop	Same as in Mobile
How many cards are shown	All cards without audience targeting plus audience-targeted cards where the viewer is part of the targeted audience.	The number of cards to show can be specified in the Dashboard web part settings, but which cards are shown may vary depending on audience targeting.

## Dashboard authoring

The dashboard can be authored directly in the Viva Connections app in Teams desktop. If you're using a SharePoint home site, the dashboard can also be authored from the SharePoint home site.

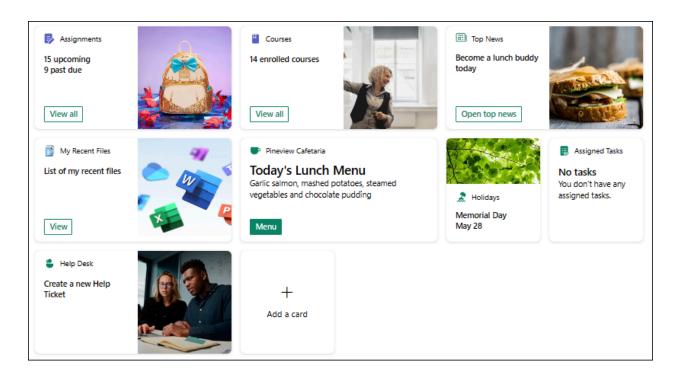


The layout of the dashboard, including the size of the cards (which can be individually set as medium or large) can be customized. The layout of the cards may look different depending on whether the dashboard is being viewed on mobile, desktop, or in the dashboard web part.

Learn more about how to edit your dashboard.

#### **Dashboard cards**

The Viva Connections dashboard comes with a set of built-in cards, but is also designed to enable SaaS providers, system integrators, and in-house development teams to create their own cards to meet their business needs.



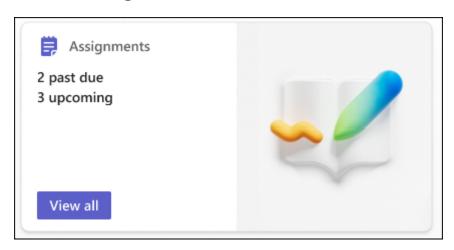
Cards in the Viva Connections Dashboard are based on adaptive cards and the SharePoint Framework (SPFx). They provide a low-code solution to bring your line-of-business apps into the Dashboard.

#### ① Note

Education tenants have several unique Viva Cards, Teams assignments, and Teams classes.

Learn more about how to add, remove, and edit dashboard cards.

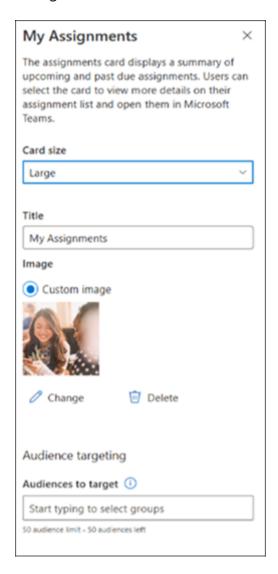
#### Add an Assignments card

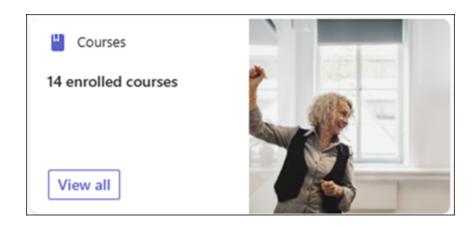


- 1. While in **edit** mode, select + **Add a card** from the dashboard.
- 2. Select **Assignments** from the web toolbox.



- 3. In the **property** pane on the right side of the page, select your options.
- 4. Select a size for the card from the Card size drop-down list.
- 5. Change the **title** if you want to rename the card.
- 6. If you want to add a custom image, you can under **Custom image**.
- 7. If you want to target your card to specific audiences (that is, only the audience you specify will see the card in the dashboard), select one or more groups to target. For more information on audience targeting, see Audience targeting.
- 8. When finished making your selections, close the property pane to apply your changes.

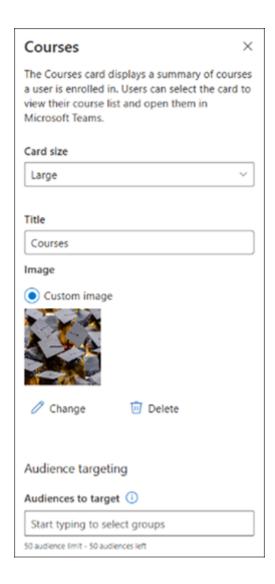




- 1. While in **edit** mode, select + **Add a card** from the dashboard.
- 2. Select Courses from the web toolbox.

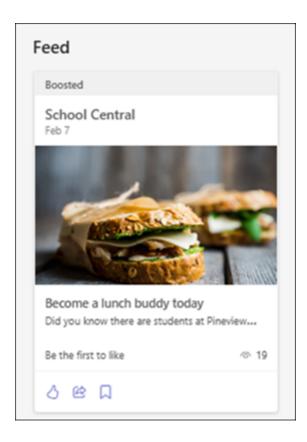


- 3. In the **property** pane on the right side of the page, select your options.
- 4. Select a size for the card from the Card size drop-down list.
- 5. Change the **title** if you want to rename the card.
- 6. If you want to add a custom image, you can under Custom image.
- 7. If you want to target your card to specific audiences (that is, only the audience you specify will see the card in the dashboard), select one or more groups to target. For more information on audience targeting, see Audience targeting.
- 8. When finished making your selections, close the property pane to apply your changes.



#### Viva Connections feed

In the Viva Connections app, users will see a personalized feed with relevant information from across their organization.



The feed automatically balances fresh and engaging content with organizational communications to keep users interested, while also ensuring that they see the most important messages. Individual messages can be promoted to raise greater awareness among users by using SharePoint's news boost feature and Viva Engage's (formerly called Yammer) "Featured" options. The feed requires usage of modern SharePoint or Viva Engage communities, but the best experience is delivered when both are used together.

#### Feed content sources

Individual content items in the Feed will be displayed for a 30-day period. Users will see content aggregated from the following sources, provided they have permissions to access the content from that source:

#### SharePoint news

- News posts from the SharePoint home site
- News posts from organization news sites
- News posts from communication and teams' sites

#### Viva Engage Community Posts

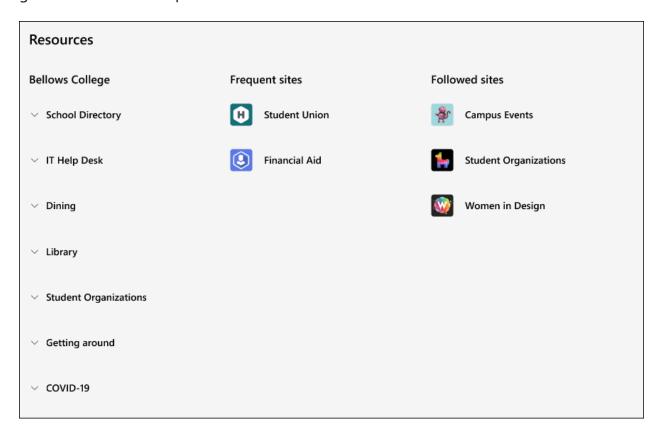
- Posts to the organization's community
- Featured posts.
- Posts to communities that the user follows.
- Stream (built on SharePoint)

- Video news links on organization news sites
- Video in a SharePoint news post

Learn more about using the Feed web part for Viva Connections on SharePoint sites. For information on prioritizing SharePoint news posts in the feed, see Using SharePoint news boost ...

#### **Viva Connections resources**

Resources are the navigational links that are set up and customized from the Teams app, or in the SharePoint global navigation for organizations with a SharePoint home site. These resources will be displayed on both the desktop and mobile instances of Viva Connections. Resources include customized navigational links and dynamically generated links to frequent and followed SharePoint sites.



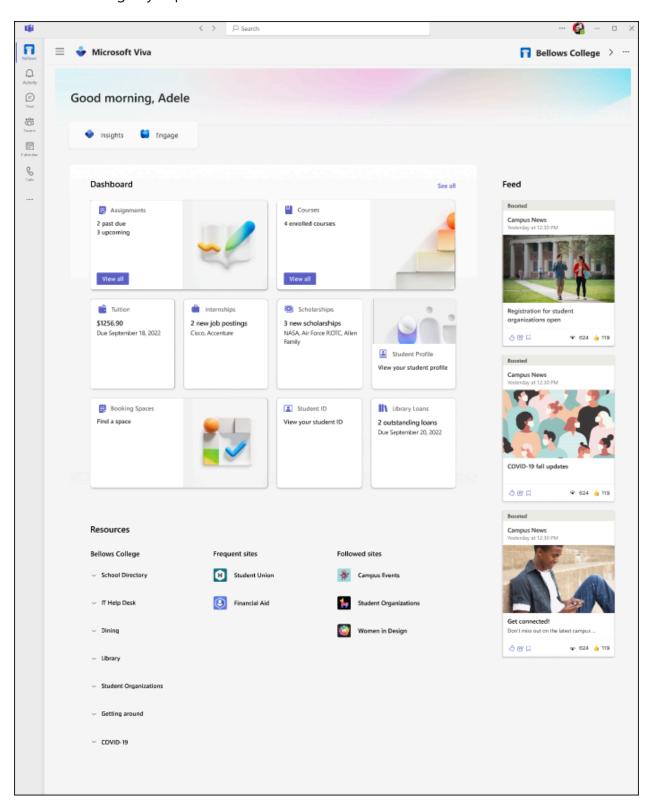
In the mobile app, users can view resources by selecting the **Resources** tab. This type of functioning provides users with a familiar navigation structure and allows them to open sites, pages, news, and more—right from their mobile devices.

# Viva Connections desktop and mobile experience

Both desktop and mobile experiences are centered around three main components: the dashboard, feed, and resources.

### The Viva Connections desktop experience

The desktop experience features the dashboard, feed, and resources at-a-glance, as well as the following key capabilities:

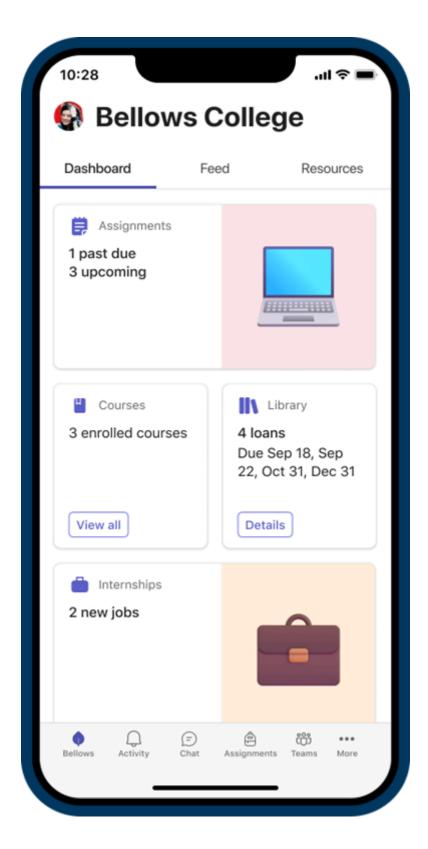


• **Desktop experience**: The new desktop experience of the Viva Connections app plays the role of the main landing page for the suite. It offers easy discovery and navigation to all the Viva modules that the user is licensed for, bringing together the connection, insight, growth, and purpose pillars of Microsoft Viva.

- Navigation between other Viva experiences: Navigational elements located in the top-right and top-left corners, navigational elements help viewers easily get to-and-from other landing pages and other Viva experiences ...
- Global navigation and way finding: The desktop experience provides users the
  ability to navigate to important resources using the global navigation curated by
  your organization, the important sites your organization frequently engages with,
  and with organizational news. This navigation panel appears when users select the
  branded app icon in Teams, and surfaces elements shared with the SharePoint
  global navigation.
- Access specific tools based on roles: Throughout the Viva Connections experience, content can be targeted to specific audiences to ensure they have the right tools at the right time.
- Stay updated on news personalized to the viewer: Users can stay up to date with news, conversations, and videos in a curated news stream based on the sites and communities that they follow.
- Easily share content: Content consumed within Teams can be easily shared into chats or channels, making collaboration easier.

#### The Viva Connections mobile experience

The mobile experience uses tabs for the dashboard, feed, and resources to make scrolling through content easier.



## **Curated and tailored experiences**

Viva Connections gives you and your content creators the tools for both curated and tailored experiences. A curated experience is one in which the user sees content chosen by a site owner or author. For example, a site owner controls the content used on the site and whether the content is audience targeted.

<u>Audience targeting</u> is accomplished using Microsoft Entra groups for card-level targeting in the dashboard and menu-item targeting in the global navigation.

A tailored experience is one in which content is automatically displayed according to what is most relevant to the users. This content might include content from the sites they follow, their Viva Engage group memberships, popular content, and more. An example of tailored content is the feed.

- SharePoint home site (curated [optional]): A SharePoint home site isn't required for Viva Connections, but can be used as a secondary landing destination for organizational content and news. A site owner controls the layout of the SharePoint home site, the elements used on that site, and targeting content to specific audiences.
- Dashboard (curated): A dashboard author controls the curation of the dashboard and can target each card on the dashboard to specific audiences using existing Microsoft Entra groups. These provisions allow dashboard authors to create different experiences for each group. And because Viva Connection uses Microsoft Entra groups, authors benefit from dynamic group memberships to reduce administrative overhead. Authors can easily preview what the dashboard will look like across devices and audiences.
- Feed (tailored): The Viva Connections feed uses its own heuristics to tailor the feed for a user by bringing in the most relevant content for that user. It utilizes signals in the content created across the organization. Some of the signals used are Viva Engage group memberships, sites where news is posted, content popularity, and the intended audiences for a post. The feed also supports promotional capabilities such as using SharePoint news boost ...
- Resources (curated): The list of sites on the resources experience in mobile
  includes the global navigation defined at the organization level. The global
  navigation supports Microsoft Entra groups for targeting so that users in different
  groups will see relevant navigation items.

**Expand table** 

Capability name	Curated vs. Mobile	Details
SharePoint home site (optional)	Curated	Organizations with SharePoint home sites can control the layout, web parts, and audience targeting of content.
Dashboard	Curated	Author selects cards to show and uses Microsoft Entra

Capability name	Curated vs. Mobile	Details
		groups to target content to specific audiences.
Feed	Tailored	Content is automatically prioritized and displayed based on signals associated with content from SharePoint and Viva Engage.
Resources	Curated	Target menu items in the global navigation to specific audiences by using Microsoft Entra groups.

## **Branding**

Matching your organizational brand is integral to your students, faculty, and staff's connection with your organization. The branding you apply in Teams to the Viva Connections app – including your logo and colors – is automatically applied to the mobile app. For information on how to apply your branding in an app, review how to customize apps in Microsoft Teams. The desktop app offers an opportunity for further branding by customizing the banner image.

#### Localization

Viva Connections is available in most major languages used in Microsoft 365. Learn more about how to set up the Viva Connections mobile experience in a specific language and how to create a dashboard in more than one language.

- Dashboard: Content can be set by dashboard authors to support multiple languages.
- Feed: The content will be available in the format in which it was authored, and SharePoint news posts will display author-translated posts in the user's preferred language.
- Resources: Are linked to the global navigation experience and follows the tenant's default language.

## Extensibility

Many components to the Viva Connections experience can be customized. The SharePoint Framework (SPFx) is the recommended SharePoint customization and extensibility model for developers because of the tight integration between SharePoint Online, Microsoft Teams, and Microsoft Viva Connections. The SPFx is the only

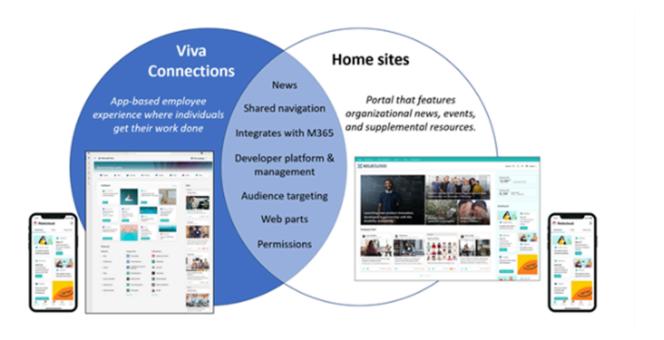
extensibility and customization option for Viva Connections. Learn more about Viva Connections extensibility.

# How SharePoint home sites and Viva Connections work together

Viva Connections and SharePoint home sites are two complementary methods to creating powerful student, faculty, and staff experiences that can be viewed on the web and in Teams. A SharePoint home site is a user experience that serves as a landing destination, news hub, and the main entry-point to your organization's intranet. Both Viva Connections and SharePoint home site experiences are designed to unite and empower your organization and automatically integrate with each other to form a cohesive and branded experience.

Use Viva Connections as the primary destination where your users access role-specific tools and news and SharePoint home sites as a secondary source of organizational news, events, and resources. Viva Connections is where individuals get access to curated content based on their role, and the SharePoint home site is where they can find more organizational-focused resources.

### **Shared functionality**



Viva Connections and SharePoint home sites share many common capabilities like news roll ups, navigation, and third-party extensibility to ensure these solutions work together. Both types of experiences share basic functionality, like the ability to use audience targeting, distribute organizational news, and share the same permissions model to make it easy for editors to access and manage.

## Viva Connections automatically detects SharePoint home sites

For organizations that already have a SharePoint home site, or know they want one in the future, the SharePoint home site is automatically detected by Viva Connections, and a prominent link will display at the top-right of the desktop experience. Users can easily navigate between both – so you don't have to choose one over the other.



### Choose the default landing experience

Unless specified, Viva Connections is the default experience for the desktop app in Teams. When Viva Connections is the default, a link to the SharePoint home site will display in the top-right corner to ensure easy navigation between the two experiences. We recognize that some organizations with a SharePoint home site want it to be the default experience. When the SharePoint home site is the default experience, a link to Viva Connections will display in the top-right corner. Learn more about choosing the default experience.

## Step-by-step guidance to provision Viva Connections

There are several options to learn more about how to get Viva Connections for your organization.

**Expand table** 

Option	Description	Time to complete
Quick guide	Use the quick guide to get a high-level overview of how to get Viva Connections	10 minutes
Plan, build, and launch guidance	Get more detailed guidance that focus on tasks in the plan, build, and launch phases.	30 minutes
Learning path	Get in-depth guidance that includes fictitious business stories and examples. Complete knowledge checks to confirm learnings.	Two hours

### More resources

Learn how to plan, build, and launch a SharePoint home site

Viva Connections guidance for end users 

□

Learn more about add, remove, and edit dashboard cards

Discover more card options from third-party services 

□

Frequently asked questions about the feed

Prioritize SharePoint news posts in the Feed by using SharePoint news boost ☑

Use the Feed web part for Viva Connections on SharePoint sites

## **Feedback**

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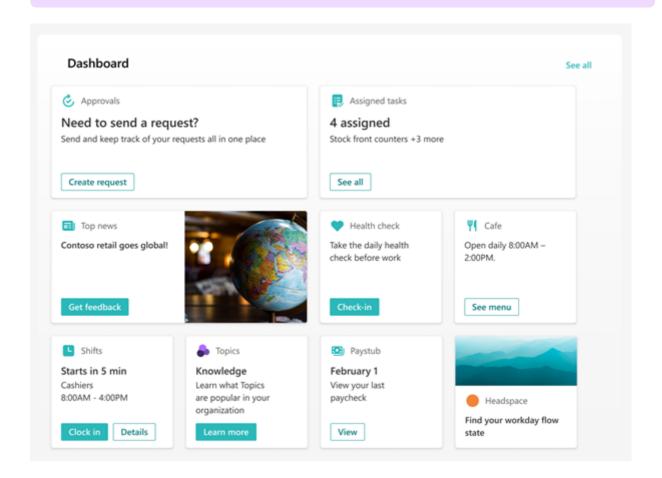
# Create a Viva Connections dashboard and add cards

Article • 02/02/2024

The Viva Connections dashboard provides fast and easy access to information and job-related tasks. Content on the dashboard can be targeted to users in specific roles, markets, and job functions. The dashboard consists of cards that engage viewers with existing Microsoft Teams apps, Viva apps and services, third-party apps, custom solutions using the SharePoint Framework (SPFx) framework, internal links, and external links.

#### ( Note

The Viva Connections desktop experience is unavailable in GCC, GCC High, and DoD environments. Please refer to the **list of service availability** for more information.



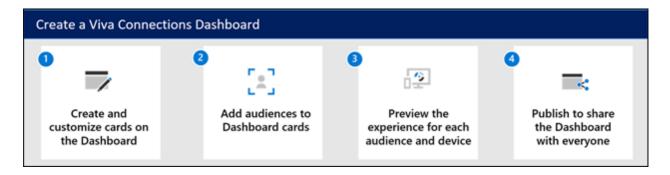
#### This article includes:

- Edit the dashboard and add cards.
- Add the Approvals card.

- Add an Assigned tasks card.
- Add a customized card using Card designer.
- Add a Teams app card.
- Add a third-party card or Microsoft app.
- Add the News card.
- Add the People card.
- Add the Events card.
- Add a Shifts card.
- Add a Viva Learning card.
- Add a Topics card.
- Add a Web link card.
- Apply audience targeting to cards.
- Preview your dashboard to see how it displays for different audiences and devices.
- Add the dashboard to your Viva Connections site using the Dashboard web part.
- Get more information about how links and Single sign-on works.

#### Edit the dashboard

The Viva Connections dashboard can be edited right from Microsoft Teams. You'll need member or owner level permissions to get started.



#### ① Note

- When setting up Viva Connections for the first time, you'll be asked to choose a set of default cards based on the intended audience.
- You can choose mobile and desktop views interchangeably as you're authoring.
- Image recommendations for cards in the dashboard: medium cards should be 300x150 to 400x200 with 2:1 aspect ratio and large cards 300x300 to 400x400 with 1:1 aspect ratio to prevent stretching in the mobile app.
- Image URLS in card properties must be an absolute URL for the link to work in the mobile app.

- It's recommended to limit the number of cards to about 20 on the dashboard for the best viewing experience.
- Users will be able to customize their dashboard on Viva Connections
   mobile 
   by reordering, hiding, and showing cards. These changes only affect
   the mobile experience for the user and will not affect their desktop or tablet
   experience.
- 1. Navigate to the Viva Connections app in Teams.
- 2. Next, select **Edit** in the dashboard section.
- 3. Select + Add a card.
- 4. Select **Edit** (pencil icon) for each card to edit properties like the label, icon, image, and audience targeting settings where applicable.
- 5. Select **Delete** (trash can icon) to remove cards.
- 6. Preview the experience on all devices to ensure usability before publishing or republishing.
- 7. **Publish** or **Republish** when you're done to share the edits with others.

# How to edit the dashboard from SharePoint when you have a home site

If your organization has a SharePoint home site, you'll be able to set up and edit the dashboard from the SharePoint home site or in Microsoft Teams. You'll need edit permissions for the SharePoint home site.

 $https://www.microsoft.com/en-us/videoplayer/embed/RE53Joj?postJsllMsg=true \ {}^{\square}$ 

#### ① Note

Images are an important aspect to making your cards rich and inviting. If you're a SharePoint admin, we recommend enabling a Content Delivery Network (CDN) to improve performance for getting images. Consider when storing images that /siteassets is by default a CDN source when Private CDN is enabled while /style library is the default source when the Public CDN is enabled. Learn more about CDNs.

1. From the SharePoint home site, select the **Settings** gear at the top-right of the page.

- 2. Select Manage Viva Connections.
- 3. Select the + Create dashboard or View dashboard button.
- 4. Select + Add a card.
- 5. Select the type of card you want to add from the dashboard card toolbox and then use the instructions later in this article to set up each type of card. As you're building the dashboard, you can preview its appearance in mobile and desktop for different audiences.
- 6. When you're done adding cards and applying targeting to specific audiences, **Preview** the experience to ensure an ideal viewing experience.
- 7. Once you're satisfied with how the dashboard looks in preview, select **Publish** or **Republish** at the top-right of your dashboard to make it available for use on your home site, in Teams, and in Teams mobile app.

#### Available dashboard cards

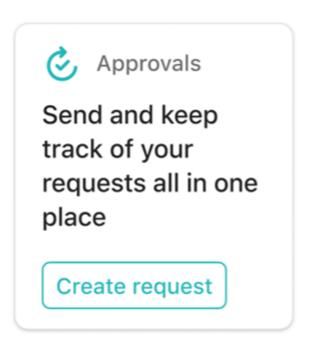
**Expand table** 

Card Name	Toolbox icon	Description
Approvals	E	Use Approvals for vacation requests, sign off on documents, and approve expense reports.
	Approvals	
Assigned Tasks		Use Tasks ☑ to manage your team's work, assign tasks, and track tasks.
	Assigned Tasks	
Card designer	\ <u>\``</u> .	Create your own cards and quick views using the adaptive cards framework.
	Card designer	
Shifts	L	Display information about the next or current shift from the Shifts app in Teams.
	Shifts	

Card Name	Toolbox icon	Description
Teams app card	B	Use to open a Teams personal app or bot specified by the dashboard author.
	Teams app	
Third-party cards	Varies	Use cards that integrate third-party services.   ☑
News card	News	Promote news from a variety of sources that you wish to prominently display, including boosted news from SharePoint. ☑
People card	Q People	Provide an option to look up contact information and directly chat, email, or call with others in your organization.
Events card	Георіе	View and join upcoming events within your organization.
	Events	
Viva Learning	<b>O</b> Viva Learning	Provide a link to the Viva Learning app that can be targeted to show to certain audiences.
Topics	Viva Topics - Viva Topics - Contribute Discover	Use Topics cards to encourage knowledge discoverability, engagement, and sharing.
Web link	$\ominus$	Access a site without leaving the Viva Connections app
	Web link	

## Add the Approvals card

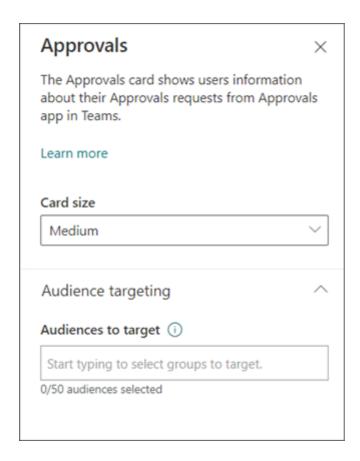
The Approvals card connects to Approvals in Microsoft Teams 2 and is a way to streamline all of your requests and processes with your team or partners. You can create new approvals, view the ones sent your way, and see all of your previous approvals in one place.



- 1. While in edit mode, select + Add a card from the dashboard.
- 2. Select **Approvals** from the dashboard toolbox.



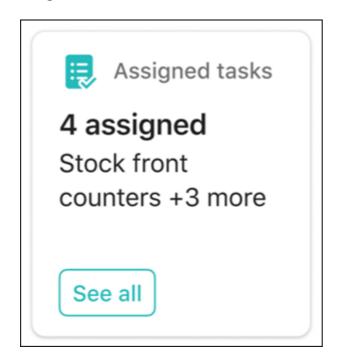
3. Select the pencil icon to **Edit** the card. In the property pane that opens on the right side of the screen, choose your card size from the **Card size** drop-down list.



4. Once you're satisfied with how the dashboard looks in preview, select **Publish** or **Republish** at the top-right of your dashboard to make it available for use on your SharePoint home site, in Teams, and in the Teams mobile app.

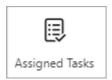
## Add the Assigned tasks card

The Assigned tasks card enables automatic display of information to users about their assigned tasks. This information is retrieved from the Tasks app in Teams ☑.

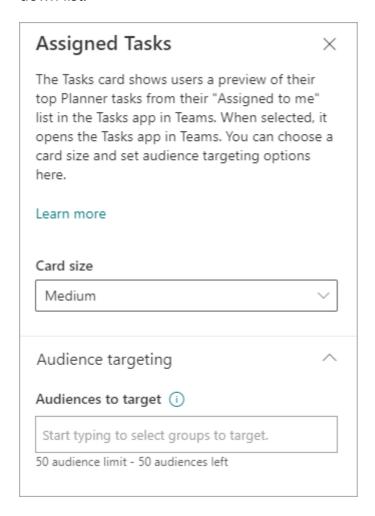


1. While in edit mode, select + Add a card from the dashboard.

2. Select Assigned Tasks from the dashboard toolbox.



3. In the property pane on the right, choose your card size from the **Card size** drop-down list.



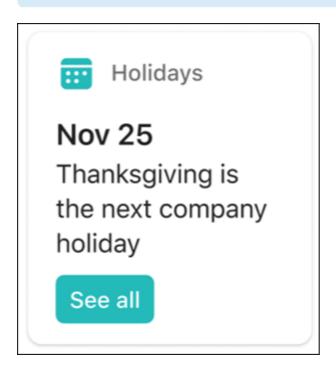
4. To target your card to specific audiences (that is, only the audience you specify will see the card in the dashboard), select one or more groups to target. For more information on audience targeting, see Audience targeting.

## Design your own card with a quick view

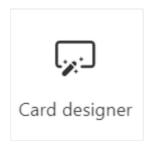
You can choose the **Card designer** option to design your own card that includes a quick view. To design your own cards, you should be familiar with JSON and Adaptive Card templates. For more information, see Adaptive Cards Templating.



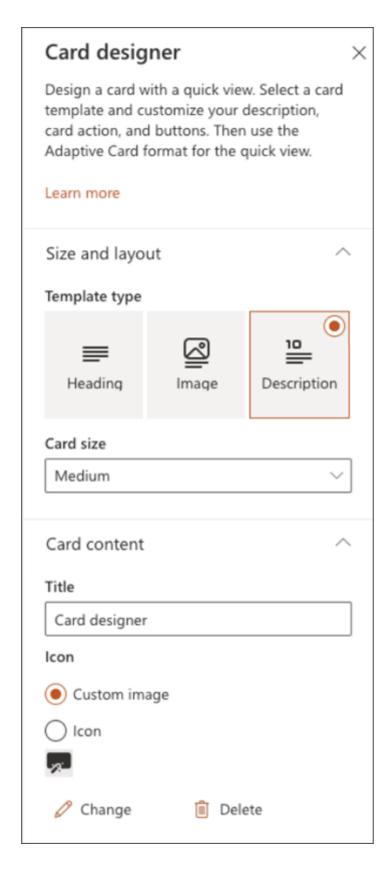
The quick view will need to be set up first (see the **Set up a quick view** section).



- 1. While in **edit** mode, select + **Add a card** from the dashboard.
- 2. Select Card designer.



3. In the **property** pane, select your card options.



- 4. From the **Card size** drop-down list, choose either **Medium** or **Large**. A mediumsized card allows you to add one button, while a large-sized card allows you to add two buttons.
- 5. Enter a title for your card in the **Title** text box.
- 6. Enter a URL in the Icon text box. This URL is the icon's location.

- 7. Select a template type from one of the following options in the **Template type** drop-down list:
  - Text: Provides you with the option to add only a heading.
  - **Text and image**: Provides you with the option to add a heading and an image.
  - **Text and description**: Provides you with the option to add your own heading and a description, but without an image option.

#### ① Note

You may provide alternative text (alt text) as descriptive text which conveys the meaning and context of a visual item in a digital setting, such as on an app or web page. Learn more about alt text ...

8. Depending on the template type you've chosen, enter values for the properties. For example, if you have chosen the **Text and description** template type, you have to enter values for the **Heading** and **Description** properties in their respective text boxes.

#### ① Note

If you want a specific property to display that allows users to enter a value, but that property is not displayed, choose a different template type.

- 9. Toggle **Enable card action** to **On** if you want the card to either go to a link or show a quick view when the user selects it.
- 10. Set the number of buttons to be displayed under **Number of buttons**. For a medium-sized card, you can show only one button. For a large-sized card, you can show one or two buttons.
- 11. Enter values for the following properties of the button:
  - Title: Title for the button.
  - Action: The result on clicking the button.
  - **Link**: The URL of the destination the user is directed to, on clicking the button.

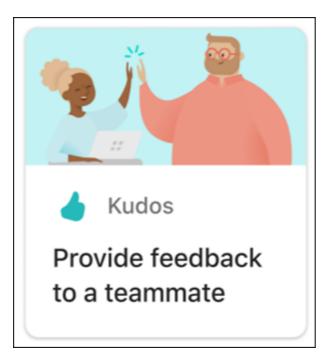
## Set up a quick view

Under **Quick view layout and data**, enter JSON template code for your quick view layout, and add the code for the data you want to use. For more information on templating and data with some examples, see Adaptive Cards Templating. You can find more examples at Adaptive Cards.

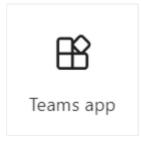
To target your card to specific audiences (that is, only audiences you specify will see the card in the dashboard), select one or more groups to target. For more information on audience targeting, see Audience targeting.

## Add a Teams app card

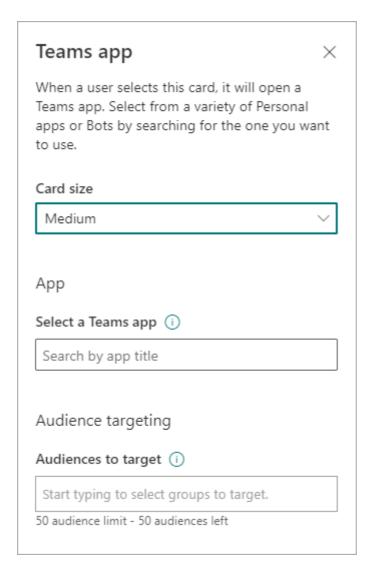
A Teams app card allows you to create a card for an existing Teams app.



- 1. While in **edit** mode, select + **Add a card** from the dashboard.
- 2. Select **Teams app** from the web toolbox.



3. In the **property** pane on the right side of the page, select your options.



- 4. Select a size for the card from the Card size drop-down list.
- 5. Search for the Teams app you want to use, and then select it from the list.
- 6. Set the card-display options:
  - Enter a title for the card in the **Card title** text box. (This title won't change your page title; it's the title that will be displayed on the top of the card.)
  - Enter a description for the card in the **Card description** text box. This description will be displayed in larger text under the title.
- 7. If you want to target your card to specific audiences (that is, only the audience you specify will see the card in the dashboard), select one or more groups to target. For more information on audience targeting, see Audience targeting.

## Add a third party card or Microsoft app

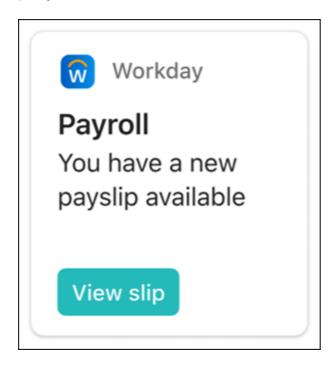
The Viva Connections dashboard and mobile experience can be extended and customized using cards, which are based on adaptive cards and the SharePoint Framework (SPFx). These adaptive cards are used to display data, complete tasks, and

connect to Teams Apps, Websites, and mobile apps on Viva Connections. They provide a low-code solution to bring your line-of-business apps into the dashboard.

To create custom experiences on Viva Connections dashboard and Viva Connections Mobile App, developers must use the SPFx to create custom ACEs. To learn more about creating ACEs, see the following tutorial: Build your first SharePoint Adaptive Card Extension. Learn more about Viva Connections extensibility.

#### Add a third party card

There are three ways to get third-party apps and solutions integrated with the Viva Connections dashboard. There are three ways to get third-party apps and solutions integrated with the Viva Connections dashboard. The following is an example of a third-party card.



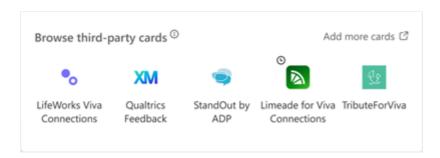
## Option 1: Discover and request apps from the Viva Connections card toolbox

Third-party cards and an entry point to browse more cards in the app store will automatically display in the card toolbox. Depending on your level of permissions, you may need to request the app before it can be used on the dashboard. Learn more about managing third-party apps.

#### ① Note

• This feature will become available to all customers by the end of January 2023.

- Site owners managing the Viva Connections dashboard will need to request third-party apps before they are available in the card toolbox.
- Some third-party apps require a service plan agreement with your organization.



- 1. While in edit-mode, select + Add card from the dashboard.
- 2. You'll see third-party options in the **Suggested cards** section. Select one of the cards that's displayed or browse more cards by selecting **Add more cards**.
- 3. Request the cards you'd like to add to the toolbox and the requests will be sent to the App Catalog Admin for their approval.
- 4. You'll receive an email to confirm if your request has been approved or denied.
- 5. Once your request has been approved, refresh the page, and you'll see the new card display in the toolbox.

## Option 2: Acquire the app from a Microsoft AppSource or the SharePoint store

- If you're building a dashboard, you can request the app directly \$\mathbb{C}\$, but you'll need approval from an admin of the tenant-level app catalog to continue with the installation
- If you're an **admin** of a tenant-level app catalog, you can deploy business apps directly. You can acquire apps from third- party developers by browsing the Microsoft AppSource ☑ or SharePoint store ☑ (recommended).

Get step-by-step guidance on how to request and deploy an app, and add an app to your site. For tenant admin, learn how to manage apps in the App Catalog.

#### Option 2: Acquire the app directly from the third-party developer

① Note

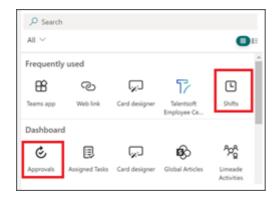
SharePoint administrative permissions are required to complete this task.

You can request apps directly from the Viva Connections third-party developers and partners. Admin permissions are required to add the app to tenant level app catalog.

#### Add a Microsoft app as a card on the dashboard

A Microsoft app card allows you to create a card that links to Microsoft apps (For example: Shifts, Approvals, Task, etc.). Microsoft apps cards are available out of the box when Viva Connections is enabled.

- 1. While in edit mode, select + Add a card from the dashboard.
- 2. Select the Microsoft App you want to add from the web toolbox.



- 3. Select your options in the property pane on the right side of the page.
- 4. When you **Republish**, the card will appear on your dashboard.

#### Add the News card

Add the News card to the Viva Connections Dashboard to promote news from a variety of sources that you wish to prominently display, including boosted news from SharePoint . If you choose any news posts that have been boosted, they will display in the News card for the duration of the boost period.

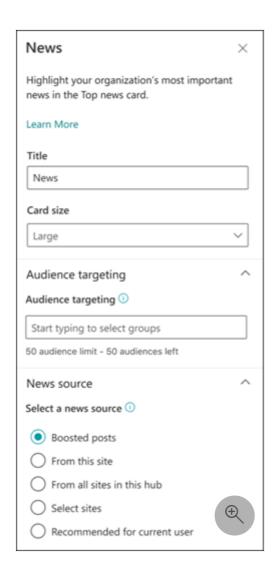


1. While in edit mode, select + Add a card from the dashboard.

2. Select News from the dashboard toolbox.

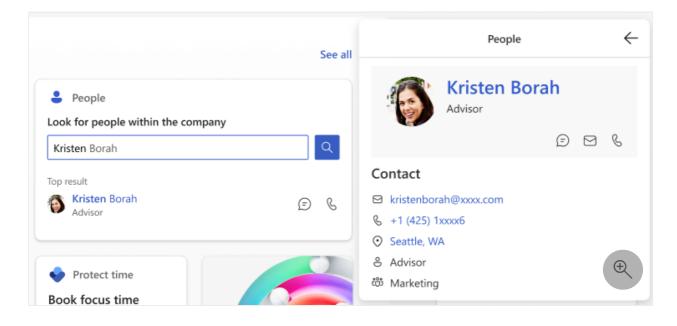


- 3. Select the **edit pencil** to the left of the card to open the properties pane for the News card.
- 4. Add a title and select a card size.
- 5. To target your card to specific audiences (that is, only audiences you specify will see the card in the dashboard), select one or more groups to target. Refer to this article for more information on Audience targeting.
- 6. For a news source, select one of the following options:
  - Boosted posts: Will display any SharePoint news post that has been boosted from the organization's news sites only. The word "Boosted" will display at the top of the card.
  - From this site: Pulls news from the hub site that the current site is a part of.
  - From all sites in this hub: Pulls news from all sites within your SharePoint hub.
  - **Select sites**: Pulls news from one or more individual sites (if selected, a list of sites associated with your SharePoint hub will display).
  - Recommended for current user: will display news posts for the current user from people the user works with; managers in the chain of people the user works with, mapped against the user's own chain of management and connections; the user's top 20 followed sites; and the user's frequently visited sites.

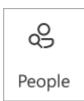


# Add the People card

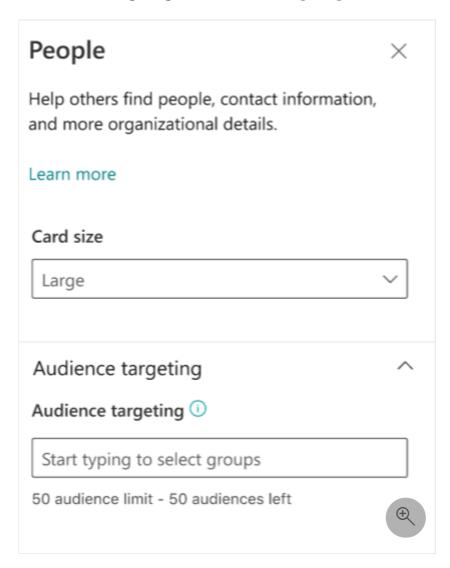
The People Search card will automatically retrieve contact information from members of your organization using Microsoft Entra ID (formerly Azure Active Directory). Users can access the People Search card to look up contact information and can jump into chat, email, or a call with the contact directly from the card view.



- 1. While in edit mode, select + Add a card from the dashboard.
- 2. Select **People** from the dashboard toolbox.



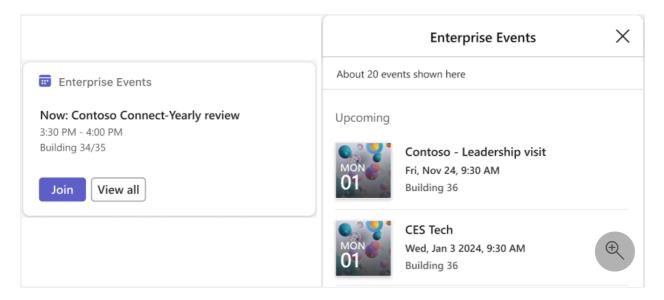
- 3. Select the **edit pencil** to the left of the card to open the properties pane for the People card.
- 4. In the property pane on the right, choose your card size from the **Card size** drop-down list.
- 5. To target your card to specific audiences (only audiences you specify will see the card in the dashboard), select one or more groups to target. For more information on audience targeting, see Audience targeting.



### Add the Events card

The events card can help your users stay informed and engaged with upcoming events in their organization, such as webinars, trainings, town halls, and celebrations. Users can view additional upcoming events or join via teams via the links on the Events card. The card can be customized and even targeted to specific audiences so only relevant events are displayed.

The Events card is tied to the SharePoint Events web part. Site owners and members will need to access their SharePoint site and use the SharePoint Events web part to add events to their site. For more information, see the article on using the Events web part ...



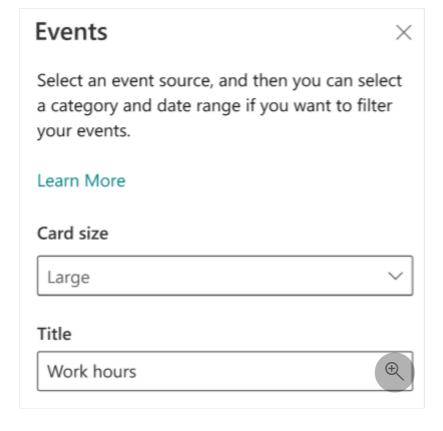
### ① Note

Recurring events are not supported, even if you manually set up a recurrence in the events list that you are using. You'll need to create a new event for each occurrence.

- 1. While in edit mode, select + Add a card from the dashboard.
- 2. Select Events from the dashboard toolbox.



- 3. Select the **edit pencil** to the left of the card to open the properties pane for the Event card.
- 4. In the property pane on the right, choose your card size from the **Card size** drop-down list.
- 5. Enter a **Title** for the event card.

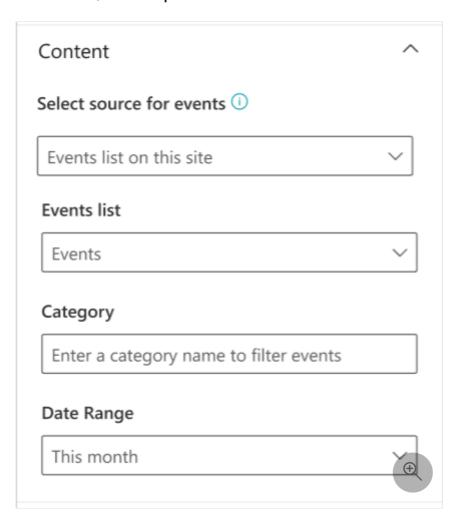


6. Under Content, select a **Source** for your events: **Events list on this site**, **This site**, **This site collection**, **Select sites**, or **All sites**. If your site is connected to a hub site, you will also have an option to select **All sites in the hub** or **Select sites from the hub**.

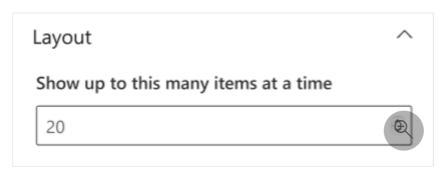
#### ① Note

- When you choose Select sites, you can search for the site you want to add, or select one or more sites from Frequent sites, or Recent sites. You can select up to 30 sites.
  - The Select sites option is not available in SharePoint Server, U.S.
     Government GCC High and DoD, and Office 365 operated by 21Vianet.
- If there is more than one **events list** on the site, you can select the one you want. If you don't have an existing list, the **Events** card creates an empty Events list for you, with the default settings of a Calendar list.
- If you choose to show events from multiple sites, and don't see all of your
  events displayed on the page, see How events from multiple sites are found
  and displayed ☑.
- 7. If your list has **categories**, you can select one by which to filter the events you show.

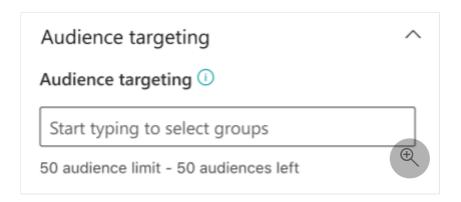
8. Select a date range by which to filter your events in the **Date range** drop-down list. You can choose **All upcoming events** (the default), **This week**, **Next two weeks**, **This month**, or **This quarter**.



9. Under the layout section, select how many events to be shown at once from the dropdown. Up to 30 events can be shown on one event card.



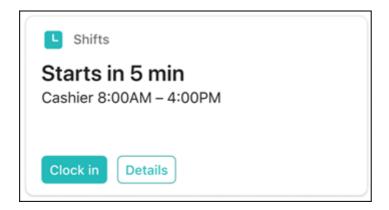
10. To target your card to specific audiences (only audiences you specify will see the card in the dashboard), **enable audience targeting**. For more information on audience targeting, see Audience targeting.



11. When finished with your selection, you can close the panel. Your settings will autosave.

### Add a Shifts card

The Shifts card shows users information about their next or current shift from the Shifts app in Teams. They can also clock in and out and track break time when Time clock is enabled in Teams.



- 1. While in edit mode, select + Add a card from the dashboard.
- 2. Select Shifts from the dashboard toolbox.



- 3. In the property pane on the right, choose your card size from the **Card size** drop-down list.
- 4. To target your card to specific audiences (only audiences you specify will see the card in the dashboard), select one or more groups to target. For more information on audience targeting, see Audience targeting.

# Add a Viva Learning card

The Viva Learning card provides users quick-links to recommended trainings, and can be set to target specific trainings to certain individuals. Users can easily access their required trainings by selecting the Viva Learning link.

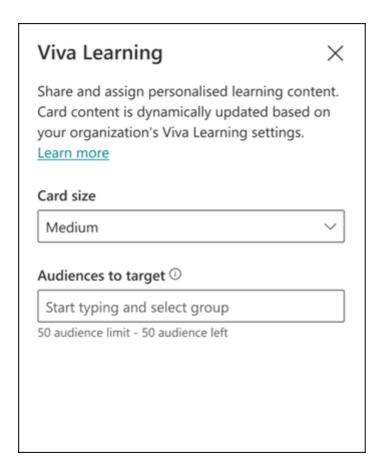
Content in the cards is dynamic and changes according to settings in Viva Learning. The following are three examples of Viva Learning card states that display different information depending on the viewer and Viva Learning settings.



- 1. While in edit mode, select + Add a card from the dashboard.
- 2. Select Viva Learning from the dashboard toolbox.



3. In the property pane on the right, choose your card size from the **Card size** drop-down list.

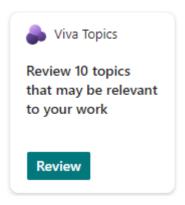


4. To target your card to specific audiences (that is, only audiences you specify will see the card in the dashboard), select one or more groups to target. For more information on audience targeting, see Audience targeting.

# Add a Topics card

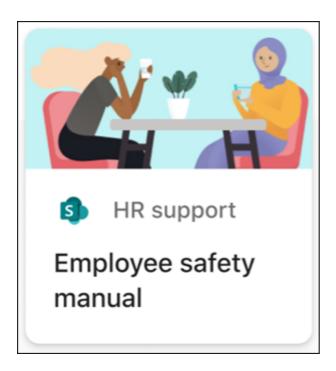
Topics has two different cards. The **Topics Contribute card** can be used to reach people who are known knowledge managers and are already engaged with topics and knowledge areas. Topics and knowledge areas are dynamically displayed in the card based on the viewers interests, current projects, and expertise. The **Topics Discover card** can be used to view topics and knowledge areas for people who could be interested in learning more or contributing to a topic.

Learn more about the two different cards.



### Add a Web link card

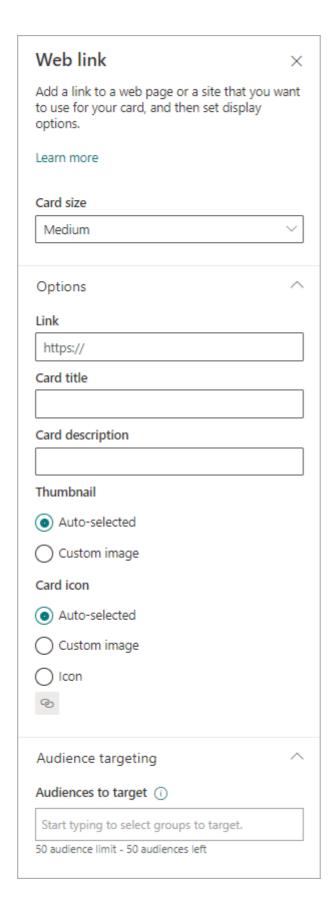
Add a web link card when you want your users to go to an internal or external link on a web site.



- 1. While in edit mode, select + Add a card from the dashboard.
- 2. Select Web link from the web toolbox.



3. In the property pane on the right side of the page, select your options.



- 4. Select a size for the card from the Card size drop-down list.
- 5. Enter the URL for your link in the **Link** text box.
- 6. Set the card-display options:
  - Enter a title for the card in the **Card title** text box. (This title won't change your page title; it's the title that is displayed on the top of the card.)

- Enter a description for the card in the **Card description** text box. This description is displayed in larger text under the title.
- 7. Under **Thumbnail**, select one of the following options:
  - Auto-selected: This option when chosen automatically displays an image at the top of your card that comes from your page.
  - **Custom image**: This option when chosen enables the **Change** button. You can select this button to choose an image you want to use.
- 8. Under **Card icon**, select one of the following options that enable the icon to be displayed on the left side of the card title:
  - Auto-selected: This option when chosen automatically displays a built-in icon associated with the page.
  - **Custom image**: This option when chosen enables the **Change** button. You can select this button to choose an image you want to use.
  - **Icon**: This option when chosen enables the **Change** button. You can select this button to choose from a set of stock icons.
- 9. To target your card to specific audiences (that is, only audiences you specify will see the card in the dashboard), select one or more groups to target. For more information on audience targeting, see Audience targeting.

# Apply audience targeting to cards

Audience targeting can be applied throughout the Viva Connections experience, including cards on the dashboard. Audience targeting creates a personalized viewing experience by filtering the most important content to specific groups. Use audience targeting to:

- Create custom views for distinct roles and regions.
- Generate as many different views as needed to create unique experiences.
- Ensure the intended audience sees the most important content.

### Set the target audiences for a card

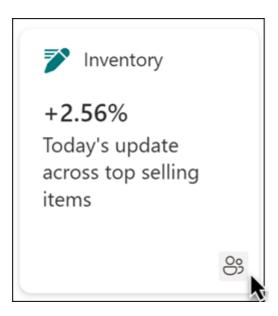
- 1. If your page isn't already in **edit** mode, select **Edit** at the top-right of the dashboard page.
- 2. Select the card you want to target to one or more audiences, and select the **Edit** card pencil from the toolbar on the left.

3. In the property pane on the right, under **Audiences to target**, type or search for the audience group(s) you want to target.

① Note

If you've selected an audience group that you recently created or changed, it may take some time to see targeting applied for that group.

4. When a card is successfully audience targeted, you'll see a **people** icon in the lower-left corner of the card.



# Preview your dashboard to see how it displays for different audiences

After creating or editing cards on the dashboard, make sure you preview the experience for each audience and on both desktop and mobile devices. What you see in *preview mode* approximates how the dashboard displays for certain audiences and devices. When you apply audience targeting to cards, you can preview how different people view the dashboard depending on the audience or device. While in preview-mode, make sure:

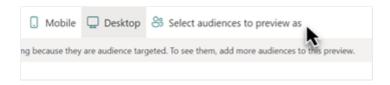
- There aren't any physical gaps between cards that may appear while previewing different audiences and devices. If you see gaps, rearrange cards so that every audience and device will have a high-quality viewing experience.
- Icons, graphics, and images are easy to identify and understand.
- Buttons and links are active and go to their intended destinations.
- Labels and description text are helpful, easy to read, and make sense for the intended audience.

### To preview different audiences

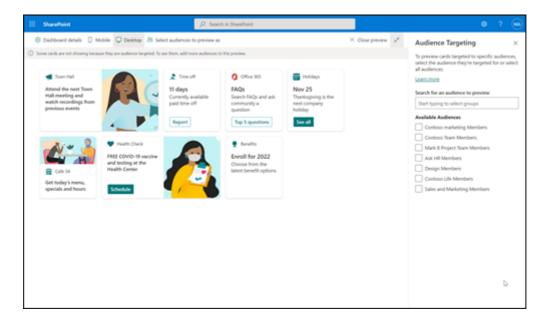
1. While in edit mode, select **Preview** on the top right.



2. Open the **Select audiences to preview as** drop-down list. (if no cards are audience targeted, you'll see a disabled **Audience targeting** label).



3. Search for and select a group. Once added, the group will be selected by default. You can select the group again in the **Select audiences to preview as** drop-down list to deselect it.

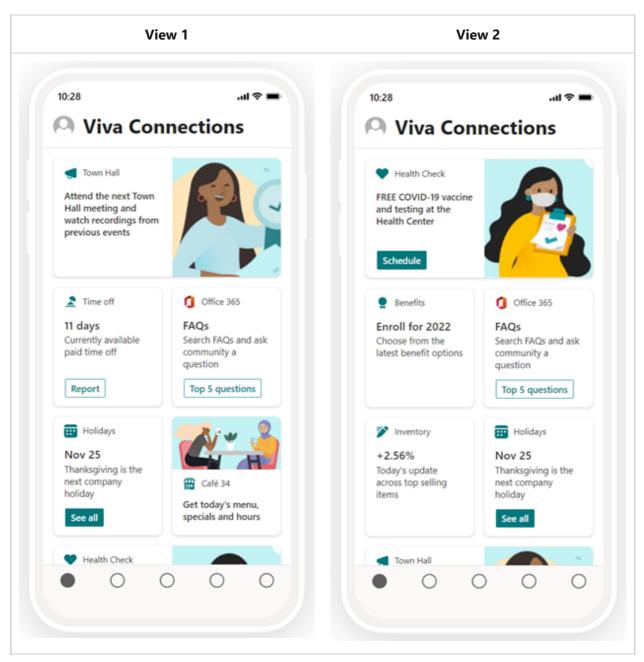


- Cards that targeted to a specific group will display.
- When one or more audiences are selected, cards that don't have audience targeting applied will also display.
- If no audiences are targeted, only cards that aren't audience targeted will display. If there aren't any cards with audience targeting applied, none will display.
- If you aren't part of one of the audiences you've selected, you'll only see cards that aren't audience targeted. If none of the cards are audience targeted, you won't see any cards.

### **Examples**

In the following example, the preview is set for mobile devices and highlights the different views that can be created from a single dashboard.

**Expand table** 

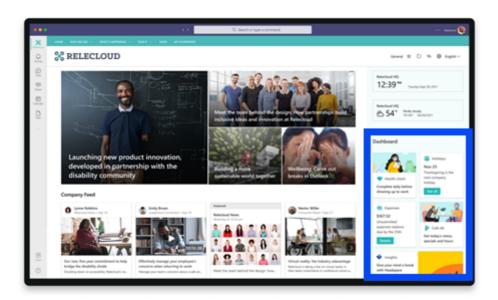


# Use the Dashboard web part for Viva Connections

### ! Note

 After editing content on the dashboard, it may take several minutes until the new content is available in the Dashboard web part.  For best results, we recommend placing the Dashboard web part in a right vertical section.

Once a dashboard is authored and published, you can use the Dashboard web part to display it on your Connections site. You can add the web part to any section on your page.



When added, it will automatically be populated with the cards from the existing dashboard on your site. You can set the maximum number of cards you want to display. Learn how to use the Dashboard web part.

# How URLs and single Sign-on works

For some cards, you'll use links to URLs. Depending on the location of the content, links to URLs may display content in Microsoft Teams or elsewhere and Single sign-on (SSO) behavior can differ. Get more information about how links to URLs and SSO behave depending on the location of the content you're linking to.

① Note

When SSO is not supported, users will be asked to enter their login credentials.

Expand table

Opens URL to	On Teams mobile	On Teams desktop
Teams App	Teams apps (like Shifts, Approvals, or Kudos) open within Teams and user doesn't need to authenticate again.	Teams apps (like Shifts, Approvals, or Kudos) open within Teams and user doesn't need to authenticate again.
Forms	Forms open within Teams, user is asked to sign-in on the first time, and user doesn't need to authenticate again if they stay signed in.	Forms open within Teams, user is asked to sign-in on the first time, and user doesn't need to authenticate again if they stay signed in.
Viva Engage	Viva Engage opens within Teams, user is asked to sign-in on the first time and user doesn't need to authenticate again if they stay signed in.	Opens a web browser session and the user might need to reauthenticate depending on browser and machine settings.
PowerApps	PowerApps opens within Teams, user is asked to sign-in on the first time and user doesn't need to authenticate again if they stay signed in.	Opens a web browser session and the user might need to reauthenticate depending on browser and machine settings.
Power Portals	Power portals open within Teams, user is asked to sign-in on the first time and user doesn't need to authenticate again if they stay signed in.	Opens a web browser session and the user might need to reauthenticate depending on browser and machine settings.
Stream	Stream opens within Teams, user is asked to sign-in on the first time and user doesn't need to authenticate again if they stay signed in.	Opens a web browser session and the user might need to reauthenticate depending on browser and machine settings.
External Links	Web view opens within Teams and the user might need to authenticate again (depending on the site.)	Opens a web browser session and the user might need to reauthenticate depending on browser and machine settings.

### More resources

Step-by-step guide to setting up Viva Connections

Learn more about how to plan a dashboard

### **Feedback**

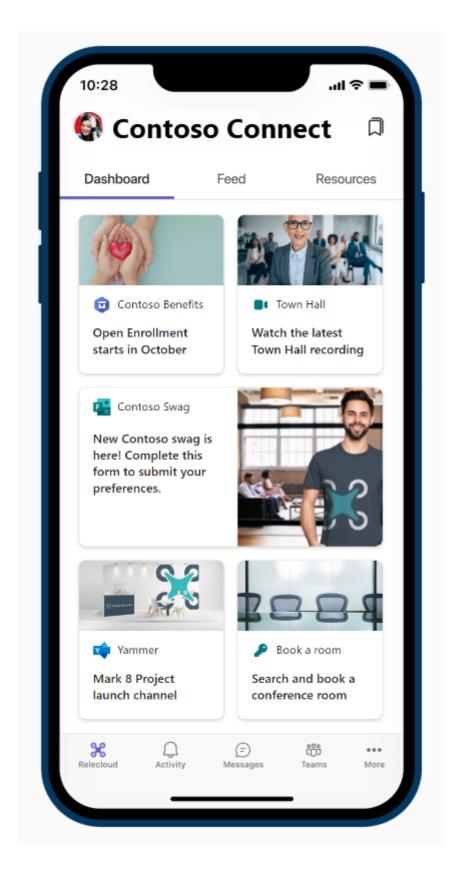
Provide product feedback ☑

# Use the Web link card to integrate existing content into the Viva Connections dashboard

Article • 09/28/2023

The Viva Connection's dashboard is where people in your organization get easy access to popular tools and resources that are relevant to their everyday work. The Web link card is a simple yet powerful option to incorporate existing content from across your Microsoft 365 environment and elsewhere into Viva Connections to offer a seamless employee experience.

Learn more about how you can use the Web link card to integrate SharePoint content, PowerApps, Microsoft Forms, Viva Engage, or Stream into the Viva Connections dashboard. The Web link card can also be used to link to experiences outside of your M365 environment.



#### This article includes:

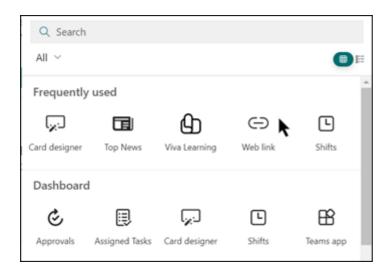
- Link to a SharePoint page
- Link to PowerApps
- Link to a Form
- Link to a Viva Engage community
- Link to Stream content
- Considerations for the navigation experience

# How to access the Viva Connection's dashboard and the Web link card

Learn more about how to add the Web link card and access the settings panel where you can customize the card's design and content.

### ① Note

You must be a site owner (or higher) to the SharePoint home site to edit dashboard content.



- 1. Start by navigating to your organization's SharePoint home site.
- 2. Select the **Settings** panel and then **Manage Viva Connections**.
- 3. Select Create dashboard or Edit dashboard and then select Edit in the top-right.
- 4. Select + Add card and then select the Web link card.
- 5. Select the **Edit** (pencil icon) to open the settings panel where you can edit the card size, web link, thumb nail, icon, and content.
- 6. Apply audience targeting to personalize and preview the experience for mobile and desktop devices before sharing it with others.

### Link to a SharePoint page

SharePoint sites and pages of can be accessed on the Viva Connection's Dashboard by using the Web link card. Use audience targeting to ensure this card is surfaced to people who have access to the SharePoint site or page. Consider testing the viewing experience on a mobile device for SharePoint sites and pages before linking to the Viva Connections Dashboard.

In this example, Contoso links to an open enrollment page:

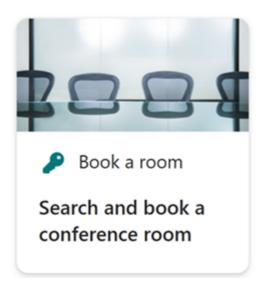


- 1. Add a Web link card and select **Edit** (pencil icon).
- 2. In the **Settings** panel, paste the site or page URL into the Link field. This URL can be copied from the top of the site or page web browser.
- 3. Specify other details like the card's content, imagery, and icon (all of these can be customized).
- 4. Apply **Audience targeting** so that people with access to the site or page will see this card on their dashboard.
- 5. **Preview** the experience before **Republishing** to share with others.

### Link to PowerApps

Power Apps is a suite of apps, services, and connectors, as well as a data platform, that provides a rapid development environment to build custom apps for your business needs. Link to PowerApps using the Web link card to create a custom experience. Use audience targeting to ensure this card is surfaced to people who have access to PowerApps.

In this example, Contoso links to a PowerApps that books conference rooms:

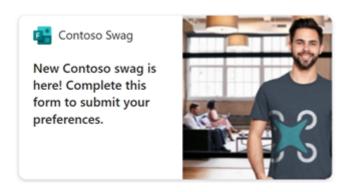


- 1. Add a Web link card and select Edit (pencil icon).
- 2. In the **Settings** panel, paste the PowerApps URL into the Link field. This URL can be copied from the PowerApps details page.
- 3. Specify other details like the card's content and imagery.
- 4. Apply **Audience targeting** so that people with access to the site or page see this card on their dashboard.
- 5. **Preview** the experience before **Republishing** to share with others.

### Link to a Form

Microsoft Forms 2 can be used to create surveys, polls, knowledge checks, and easily see results as they come in. Link to a form to collect responses or generate feedback. Use audience targeting to ensure this card surfaces to the groups of people who should respond to the form.

In this example, Contoso links to a Form to collect clothing sizes:



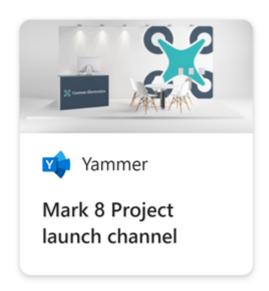
- 1. Add a Web link card and select Edit (pencil icon).
- 2. In the Settings panel, paste the Viva Engage community URL into the Link field. This URL can be copied from the Form's sharing link.
- 3. Specify other details like the card's content and imagery. Use the Forms icon by selecting Card icon > Custom image > Change > Web search and search for "Microsoft Forms logo."
- 4. Apply **Audience targeting** so that people with access to the community see this card on their dashboard.
- 5. **Preview** the experience before **Republishing** to share with others.

### Link to a Viva Engage community

Viva Engage is a social and engagement experience that connects leaders, communicators, and employees to build communities, share knowledge, and engage everyone. Link to Viva Engage community using the Web link card. Use audience

targeting to ensure this card is surfaced to people who have access to the Viva Engage community.

In this example, Contoso links to a Viva Engage community for a specific project:



- 1. Add a Web link card and select Edit (pencil icon).
- 2. In the **Settings** panel, paste the Viva Engage community URL into the Link field. This URL can be copied from the top of the web browser.
- 3. Specify other details like the card's content and imagery. Use the Viva Engage icon by selecting Card icon > Custom image > Change > Web search and search for "Microsoft Viva Engage logo."
- 4. Apply **Audience targeting** so that people with access to the community see this card on their dashboard.
- 5. **Preview** the experience before **Republishing** to share with others.

### Link to Stream content

Microsoft Stream is video service where people in your organization can upload, view, and share videos securely. Link to videos in Stream to highlight important meetings, news, and announcements in the Viva Connections dashboard. Use audience targeting to ensure this card is surfaced to the appropriate group.

In this example, Contoso links to a meeting recording from the last Town Hall:



- 1. Add a Web link card and select Edit (pencil icon).
- 2. In the **Settings** panel, paste the Stream video sharing link into the Link field. This URL can be copied from the sharing link.
- 3. Specify other details like the card's content and imagery.
- 4. Apply **Audience targeting** so that people with access to the community see this card on their dashboard.
- 5. **Preview** the experience before **Republishing** to share with others.

## Considerations for the navigation experience

When the user selects the link from the link card to navigate to the content, depending on the target URL and the device (Viva Connections on Teams mobile vs. Viva Connections on Teams desktop), the behavior might be different as described in the following table.

The best experiences will be achieved if the service doesn't require authentication and is anonymously accessible. For content that is stored in M365, authentication is automatically handled. For third-party services requiring authentication, the recommendation is to use a dashboard card built by a third-party to will handle authentication.

Opens URL to	On Teams mobile	On Teams desktop
SharePoint Link	Page opens within Teams and user doesn't need to authenticate again.	Page opens within Teams and user doesn't need to authenticate again.
Teams App	Teams apps (like Shifts, Approvals, or Kudos) opens within Teams and user doesn't need to authenticate again.	Teams apps (like Shifts, Approvals, or Kudos) opens within Teams and user doesn't need to authenticate again.

Opens URL to	On Teams mobile	On Teams desktop
Forms	Forms open within Teams, the user is asked to sign-in the first time, and won't need to authenticate again if they stay signed in.	Form opens within Teams, user is asked to sign-in on the first time, and user doesn't need to authenticate again if they stay signed in.
Viva Engage	Viva Engage opens within Teams, user is asked to sign-in on the first time and user doesn't need to authenticate again if they stay signed in.	Opens a web browser session and the user might need to reauthenticate depending on browser and machine settings.
PowerApps	PowerApps opens within Teams, user is asked to sign-in on the first time and user doesn't need to authenticate again if they stay signed in.	Opens a web browser session and the user might need to reauthenticate depending on browser and machine settings.
Power Portals	Power portals opens within Teams, user is asked to sign-in on the first time and user doesn't need to authenticate again if they stay signed in.	Opens a web browser session and the user might need to reauthenticate depending on browser and machine settings.
Stream	Stream opens within Teams, user is asked to sign-in on the first time and user doesn't need to authenticate again if they stay signed in.	Opens a web browser session and the user might need to reauthenticate depending on browser and machine settings.
External Links	Web view opens within Teams and the user might need to authenticate again (depending on the site.)	Opens a web browser session and the user might need to reauthenticate depending on browser and machine settings.

### Learn more

Create the Viva Connections dashboard

Use audience targeting in Viva Connections to personalize the experience

# Create a Viva Connections dashboard in more than one language

Article • 09/22/2023

Create a Viva Connections dashboard that can be viewed in multiple languages. Start by enabling the multilingual experience, select languages, and then assign translators.

① Note

You must have member level permissions or higher to edit multilingual settings.

# Step 1: Navigate to the Viva Connections dashboard

Depending on whether your organization has a SharePoint home site or not will determine where you go to access the multilingual settings.

#### If your organization has a home site:

1. Navigate to your organization's home site in SharePoint.

#### If your organization doesn't have a home site:

- 1. Navigate to the Viva Connections app in Teams.
- 2. Select **Edit** in the dashboard section.
- 3. Then select Dashboard details.
- 4. Copy the link to the dashboard under **Properties > Name**.
- 5. Paste the link in a browser and then go to **Settings** in the top-right corner.

# Step 2: Enable the multilingual experience and choose languages in Site settings

- 1. Select **Settings** from the top right, and then select **Site information**.
- 2. At the bottom of the site information pane, select View all site settings.
- 3. Under Site Administration, select Language settings.



4. Under Enable pages and news to be translated into multiple languages, slide the toggle to On.

# Step 3: Select languages and assign translators

- 1. Under Add or remove site languages, start typing a language name in Select or type a language, or choose a language from the dropdown. You can repeat this step to add multiple languages. You can add or remove languages from your site at any time by going back to this page.
- 2. In the **Translator** column, start typing the name of a person you want to be a translator ☑, and then select the name from the list.

# Site Settings

Users and Permissions
People and groups
Site permissions
Site collection administrato
Site app permissions

Web Designer Galleries Site columns Site content types

Site Administration
Regional settings
Language settings
Export Translations
Import Translations
User alerts
RSS
Workflow settings
Term store management

#### 3. Select Save.

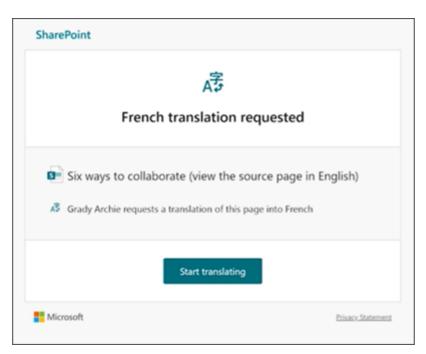
#### ① Note

- Anyone in your organization's Active Directory can be assigned as a
  translator. People assigned as translators will not automatically be given
  appropriate permissions. When someone without edit permissions to the
  dashboard tries to access the site, they will be directed to a web page where
  they can request access.
- You can add or remove languages from your dashboard at any time by going back to this settings page.
- The default language of a dashboard is set to the language chosen when the
  dashboard is created. However, when English is among the supported
  languages, English is treated as the preferred language if the user's preferred
  language is not supported by the dashboard. This is a known issue.

## Step 4: Create dashboards in specific languages

Translators manually translate copies of the dashboard into the language(s) specified. When you select a language and assign a translator, a copy of the dashboard is created, and translators are notified in an email that a translation is requested. The email includes a link to a copy of the dashboard. An email notification will be sent to the person who requested the translation when it's done. The translator will:

1. Select the **Start translating** button in the email.



- 2. Select **Edit** on the top right of the dashboard and translate the content.
- 3. When the translation is done, select **Save as draft** (if you're not ready to make it visible to readers) or, if the dashboard is ready to be visible to everyone who is using that language on the site, select **Publish**.

① Note

Some components of 2nd and 3rd party Dashboard cards (for example, the card name) may not be translatable.

# Step 5: Add a translated dashboard name and description

- 1. To edit the description, from the dashboard, select **Dashboard settings** in the command bar.
- 2. **Edit** the dashboard description.
- 3. To edit the name of the dashboard, navigate to **Settings**, and then **Site contents**, and then find the translated dashboard in **Site pages**. Hover over the dashboard

### **Email notifications**

Learn more about when and why the default dashboard owner and assigned translators will receive emails when content is edited.

Email notifications are batched in 30-minute increments as needed. For example, when the first email related to a page is sent, and an update is made to the default language page, the next notification email or any others that need to be sent, will be batched, and sent after 30 minutes.

- When a translation dashboard is created, an email is sent to the assigned translator(s) to request a translation. The email includes a Start translating button.
- When a translation dashboard is published by a translator, an email is sent to the person who requested the translation.
- When an update is made to the default language dashboard and saved as a draft or is published, an email is sent to the translator to notify them that an update to the translation dashboard may be required.

# More tasks for your multilingual dashboard

After you've created dashboards in additional languages, learn more about how to confirm which languages are available, update translated versions, and delete translations that are no longer needed.

### Confirm the languages the dashboard can be viewed in

The status of the translation of the dashboard (draft saved, published, and so on) is shown in the Translation pane next to each language. To see the status:

- 1. Go to the default dashboard.
- 2. Select **Translation** at the top of the page.
- 3. In the Translation pane on the right, the status of each language is shown, and a link to view the dashboard in that specific language.

### Find a translated dashboard

You can use the language dropdown at the top of the page, the translation panel, or find the dashboard in the Pages library.

To find it in the Pages library, follow these steps:

- 1. Go to the Pages library for the home site.
- 2. Find the dashboard you want to delete in the language folder next to the default language page. The folder can be identified by its two or four letter language code. For example, the French folder is identified as "fr."

### Delete a version of the dashboard for a specific language

To delete a translated dashboard, you must perform a few extra steps to break the association between the default language dashboard and the deleted dashboard.

- 1. Go to the Pages library for the dashboard.
- 2. Find the version of the dashboard you want to delete in the language folder next to the default language page. The folder can be identified by its two or four letter language code. For example, the French folder is identified as "fr."
- 3. Select the dashboard you want within the folder, and then select the ellipsis (...) to the right of the selected page.
- 4. Select Delete.
- 5. After you've deleted the version of the dashboard that's no longer needed, go to the default language dashboard, and select **Edit** at the top right. If you aren't in edit mode, the rest of the steps won't work.
- 6. Select **Translation** at the top of the page.
- 7. In the Translation panel, you should see a message indicating that an association with the page has been removed.
- 8. **Republish** the default language dashboard.

### Update the dashboard with new changes or edits

Make changes as needed over time to the dashboard and select **Save as draft** or **Republish**. Then, the translator(s) for the translated dashboard are notified in email that an update has been made so updates can be made to the individual translation pages as well.

### Update the default language page

When the default language dashboard is updated, it must be republished. Then, the translator(s) for the translated dashboard are notified in email that an update has been made so updates can be made to the individual translation pages. Translators will need to view the version history of the default dashboard to see what content has changed.

# Translated dashboards in the Dashboard web part

The Dashboard web part can be used once the dashboard has been published. The Dashboard web part will display in the users preferred language (if different from the default language) if a translated dashboard has been provided.

### ① Note

- Translation dashboards must be approved and published before they'll appear.
- Some components of the second party and third party dashboard cards (like the card name) may not be translatable.

### More resources

Set up the Viva Connections experience in a specific language

Edit the Viva Connections dashboard

Create multilingual communication sites, pages, and news ☑

# Embed Video news links in the Viva Connections Feed

Article • 03/02/2023

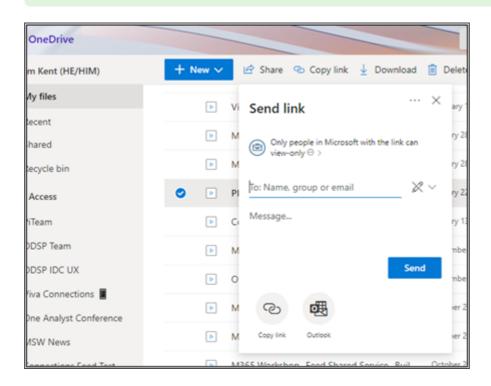
Learn how to communicate with your organization by embedding videos in the Viva Connections Feed. Videos are an engaging way to reach users in your organization. They provide endless opportunities to communicate with your organization. Share an update, rebroadcast an all-hands meeting, or provide reusable training materials. Learn more about how videos are stored in Microsoft 365 ...

# How to publish a Video news link

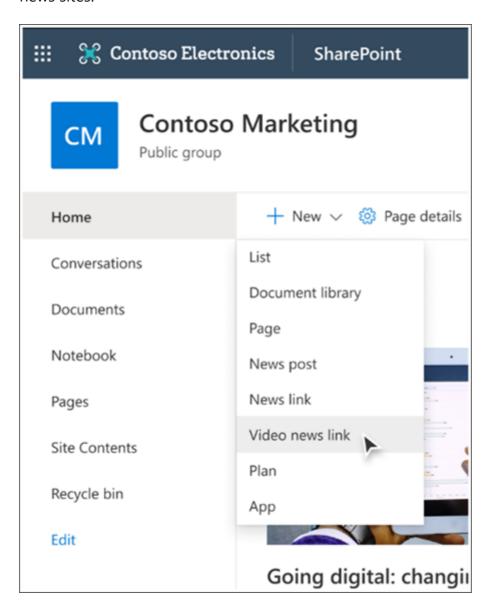
You can publish videos hosted on SharePoint sites as news posts in the Viva Connections Feed from the + **New** menu on any SharePoint organizational news site.

- 1. Select the video in OneDrive or SharePoint that you want to publish.
- 2. Create a sharing link with the appropriate permissions for the intended viewing audience.

Create a sharing link that includes members of your organization that already have access to the video so they can play it.

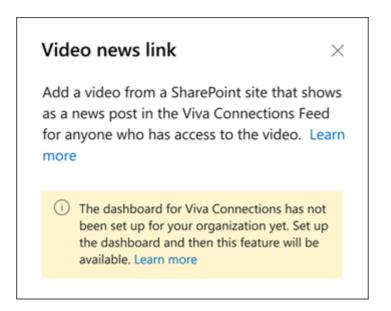


3. Navigate to a SharePoint organizational site and select **Video** from the + **New** menu. Currently, videos can only be published as news items from organizational news sites.

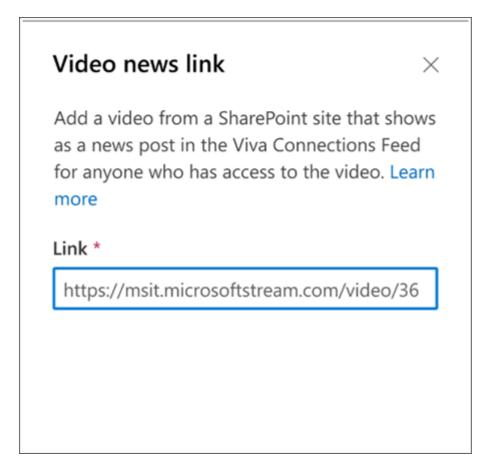


#### ① Note

If Viva Connections hasn't been configured for your organization, you'll see the following error. Learn more about how to set up Viva Connections.



4. Paste the sharing link into the **Link** field.



5. Update the **Title** and **Description** fields. A title and description will be automatically populated from the video. You can use the default information, or update it to say something different.



6. Select **Post** to publish to the video news link to the Feed.

#### Options for publishing Video news links:

- Schedule the video to publish at a future date and time. Videos without a schedule date will be published immediately.
- Target the video to a specific audience so it's only shown to those certain people.

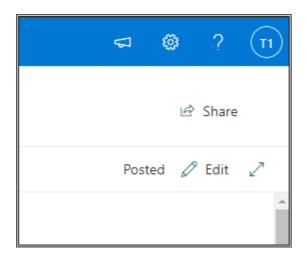
  Or, leave the Audience target field blank to make it available to all users who have access to the site you're publishing from.
- Boost the video to promote it within the Viva Connections feed.

#### ( Note

Scheduling and audience targeting is available from the **Page details** option at the top of the page when the page is in edit mode.

### How to edit active Video news links

- 1. Open the Site content of the site you published the video from.
- 2. Find the page in the list of published pages and open it.
- 3. Select **Edit** on the top-right of the page.



4. Edit content on the page, and then select **Update post** to republish.

### **FAQs**

**Q**: What types of videos are supported?

A: Stream videos built on SharePoint or OneDrive can be published as a video news link in the Viva Connections feed. Videos uploaded to Stream (classic) are not supported.

Q: Can I post external videos from YouTube, Vimeo, etc.?

A: No, only Stream videos hosted by SharePoint or OneDrive are supported.

Q: Where will Video news links display?

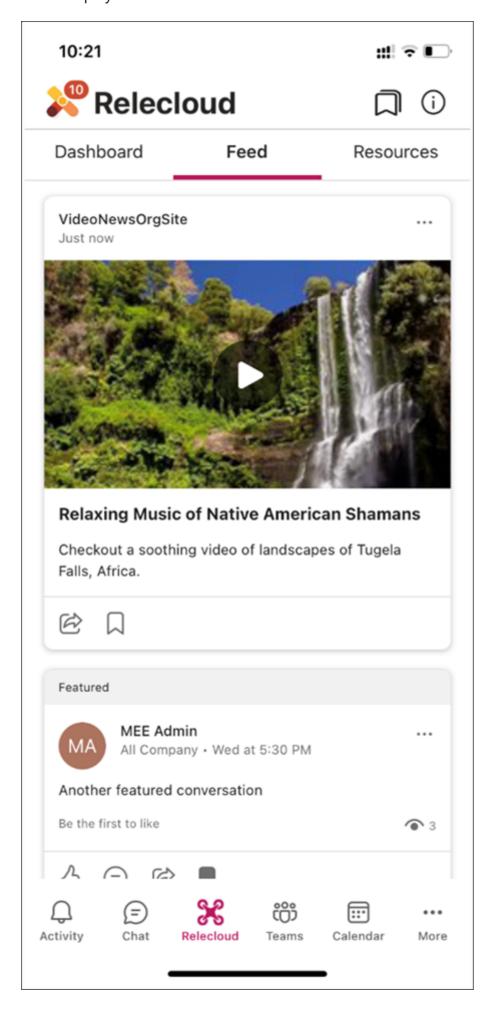
A: Videos published as Video news links will only appear in the Viva Connections feed.

Q: Can I schedule a video to be published at a future date?

**A:** Yes, use the **Scheduling** options in the publishing flow to select a date and time in the future to delay when the video is published.

Q: What will the video look like when published to the Viva Connections feed?

**A:** Video news links will appear as a card in the Viva Connections feed. Tapping on the card will play the video full screen.



# More resources

**Overview of Viva Connections** 

Set up and launch Viva Connections

# Viva Connections mobile News notifications

Article • 07/17/2023

The Viva Connections mobile app delivers News notifications via Teams mobile and will link users to the Viva Connections app through the notification. This document describes when notifications are sent, and the conditions that need to be met for receiving notifications.

#### When notifications are sent via Teams

News notifications are delivered via Teams mobile in the following scenarios:

- News is published to a SharePoint Team or Communication site a user follows or by someone a user works closely with.
- Someone comments on a new News post.
- Someone 'Likes' a News post.
- Someone is @mentioned in a comment on a news post.

#### ① Note

- Notifications are pulled from the top 100 collaborators that an author works with. If an author works with more than 100 collaborators, the most relevant notifications will be pulled.
- Authors can set an audience on their news posts and notifications will honor
  the audience that is set. Only users part of the selected Microsoft 365
  audience(s) specified will receive notifications. Learn more about <u>audience</u>
  targeting ☑ in SharePoint.
- At this time, news notifications will only appear in Viva Connections via the Teams mobile app.

Learn more about Microsoft Viva 

and Viva licensing 

.

## Who receives notifications and when

End-users only receive notifications when the following conditions are met:

1. The Viva Connections app is installed in Teams.

- 2. Notifications are enabled in the Teams mobile app.
- 3. The notification is outside of the user's configured Teams quiet hours.
- 4. The user has access to the news post.
- 5. If audience targeting is enabled for the news post, the user must be a part of the selected Microsoft 365 audience.

Once these conditions are met, end-users will receive a notification when news is published by someone they work closely with, or a site they follow. Authors will also receive notifications when posts they publish are liked or commented on.

#### End-users receive notifications when

- A SharePoint news page is published by someone you work closely with.
- You're '@mentioned' in a comment left on a SharePoint news page.

Authors can receive additional notifications when posts they publish are liked or commented on.

#### Authors receive notifications when

- A user 'likes' a SharePoint news page the author created.
- A user comments on a SharePoint news page the author created.

After receiving a notification of either of these type, Viva Connections will batch additional notifications of the same type. After the first comment notification to a user, Comments are batched in 20-min intervals. After the first like to a user, likes are batched in 60-min intervals.

## **Frequently Asked Questions**

What controls are there for notifications from Viva Connections?

Viva Connections notifications follow Teams notification settings, including Quiet Hours settings and are only sent if users have the Viva Connections app installed.

#### Can I selectively enable or disable some of these notifications?

Notifications can't be selectively enabled or disabled, but users can toggle push notifications in Teams mobile for all apps (including Viva Connections) under **Settings** > **Notifications** > **General Activity** > **Apps on Teams**. Notifications will still be visible under the Teams Activity Feed.

#### What defines 'people I work with'?

You can read more about how this list of people is determined and how to disable it in this documentation.

#### How often are like and comment notifications batched?

After the first comment notification to a user, Comments are batched in 20-min intervals. After the first like to a user, likes are batched in 60-min intervals.

#### How do notifications work?

Selecting a notification from your mobile home screen within Teams, or from the Teams activity feed, will take users directly to the source news post within Viva Connections.

Will Viva Connections users be notified every time a user reacts to a news post?

No. Only authors who created the news post receive notifications when someone likes or comments on a post.

## **Feedback**

Provide product feedback ☑

# Get answers to common questions about the Viva Connections Feed

Article • 07/12/2023

# What can I expect to see in the Feed?

The Feed gives content publishers a reliable means of distributing important news and information that their users need within their organizations. End-users will also see engaging content from sites they're a member of, sites they follow, and Viva Engage communities they follow. Get more information about the content that displays in the Feed and the factors that impact the content's ranking in the Feed.

#### Where does content in the Feed come from?

Content that is displayed in the Feed comes from three primary sources: organizational news published in SharePoint, posts in Viva Engage communities, and videos in Stream that are shared with the entire organization or targeted to user groups. Individual content items in the Feed will display for a 30-day period.

#### 1. News published on organizational news sites in SharePoint

SharePoint news that's published from organizational news sites will display in the Feed. Organizational news sites are communication sites that have been designated as a source of authoritative news in the SharePoint admin center. In addition to organizational news posts, the following news will also be displayed in the Feed:

- SharePoint news from sites you follow and sites you frequently visit ☑
- Boosted news in SharePoint ☑ from organizational news sites
- News that has audience targeting applied 

  from organizational news site or sites you follow
- SharePoint news from sites that are relevant to your interests

#### 2. Posts in Viva Engage communities

Certain posts in various Viva Engage communities will appear in the Feed. These Viva Engage posts will come from Viva Engage communities that are authorized to post to "All Company" or the entire organization. Posts that are All Company are intended to be viewed by everyone.

In addition to All Company Viva Engage posts, you'll also see the following activity from Viva Engage in the Feed:

- Viva Engage All Company Featured Posts
- Viva Engage All Company Announcements
- Viva Engage All Company Posts
- Viva Engage Followed Community Featured Posts
- Viva Engage Followed Community Announcements
- Viva Engage Followed Community Posts
- Viva Engage Followed Community Q&A posts
- Viva Engage Followed Community Praise posts
- Viva Engage Storyline posts

#### 3. Videos in SharePoint hosted by Stream

Stream videos built on SharePoint or OneDrive that are shared with your entire organization will appear in the Feed. Depending on how your organization stores and shares videos in Stream will impact the viewing experience for videos in the Feed.

Not all of the three sources of content will be given equal weight in the ranking. Learn more about how content is ranked.

#### How often is Feed content refreshed?

For mobile, the Feed refreshes each time the application is selected. Users can also manually refresh the Feed through the pull-down action. On the web, the Feed automatically refreshes each time the web page is refreshed. Individual content items in the Feed will display for a 30-day period. SharePoint news posts that have been boosted will display prominently for up to four days. Learn more about the news boost feature 2.

# When can we expect to see a newly created post in the Feed?

Posts will typically take up to 1 hour to appear in a user's Feed. Content from a newly created home site is sometimes delayed for up to seven days after the site is initially created. After that initial 7-day period has passed, it will take the up to 1 hour to appear.

# How is the Feed personalized and how is content ranked?

There are several factors such as the content's age, whether it's been "boosted" by the organization, the publishing source, and the author's relationship to the reader to determine the content ranking. This is to users can discover new content each time they open the Feed so it never gets boring or predictable. However, engaging content in the Feed relies on how often content is created on the SharePoint sites and Viva Engage communities.

We're experimenting and rapidly iterating on the logic used:

- **Chronology** Content is sorted into 3 buckets.
- **Promotion** Boost and Featured news is surfaced highly in each bucket.
- **Source Priority** Messaging from organizational news sites is ranked slightly higher than organic content from people around you.
- Engagement Ensure dynamic mix of content types within each bucket.

One of the primary goals of the Feed is to give content publishers a reliable means of distributing important news and information. To keep them interested and coming back regularly we're working to strike a balance between the engaging content they want (like from sites they're a member of, or communities they follow) and the information they need (like SharePoint organizational news site and Viva Engage All Company posts). To achieve this, we don't rely on a pure chronological ranking.

Over time, we plan on continuing to experiment with our ranking and to add new factors to the algorithm we use. We'll be moving over to a machine learning model that is optimized for user engagement while preserving the ability for organizations to lift important content that is recent to the top of users Feeds. Learn more about the different controls that can be used to influence the rank of content.

The content in the Feed is personalized for each user based on their memberships and permissions. We always restrict what content the user sees to content they have permissions to view. In addition to any org-wide memberships, we'll include content from SharePoint sites and Viva Engage communities the user is optionally a member of. The goal of having a fresh, dynamic, and engaging Feed to keep them coming back.

# Why don't I see any content in the Feed?

If you're not seeing any content in your feed, it could be because of a few reasons:

- 1. There needs to be some content published to a SharePoint site or Viva Engage community that you're a member of.
- 2. Viva Engage Posts that aren't Featured or to **All Company** communities or **Announcements** may be removed and replaced in subsequent feed views to give

users more dynamic content.

3. The SharePoint site you're publishing from (home site or organizational news site) is less than seven days old. This issue will resolve itself and content will appear normally after the initial seven days after site creation.

# What are the available controls to influence content in the Feed?

There's no configuration required to get the Feed working. For the current release, customers have the ability to impact content placement in the Feed by targeting content, or by promoting it.

- **Promote important 'official' communications** Use News boost ☑ to raise the visibility of crucial news posts.
- **Highlight community discussions** Feature posts in public Viva Engage communities that you'd like seen by the entire organization.
- Publish from official news sources Like organizational news sites or home sites. Where content is from, impacts the ranking.

For SharePoint news, more filtering is available through audience targeting 2, which allows publishers to designate content relevant to specific groups of people. Examples might be employees in a specific department, region, building, or title. This is done by enabling audience targeting on the site where content is being published, then using Azure Active Directory groups to define the target audience. However, if audience targeting isn't applied, users will still get the SharePoint News on their feed. Publishers also have the ability to promote critical messages in the Feed. News published from Org News sites has a Boost feature that explicitly tells the feed 'this content is important'. As a result, that content is artificially pushed to the top of the feed. Learn more about audience targeting in Viva Connections.

In Viva Engage, moderators of the All-Company community can Feature a post to indicate it's significant and increase visibility within the organization. Featured posts from Viva Engage are treated as important by our ranking algorithm. For communities that you're a member of, communication managers can also create Announcements within those communities , which will also be treated as important by our ranking algorithm.

For SharePoint news, more filtering is available through audience targeting 2, which allows publishers to designate content relevant to specific groups of people. Examples might be employees in a specific department, region, building, or title. This is done by enabling audience targeting on the site where content is being published, then using

Azure Active Directory groups to define the target audience. However, if audience targeting isn't applied, users will still get the SharePoint News on their feed. Publishers also have the ability to promote critical messages in the Feed. News published from Org News sites has a Boost feature that explicitly tells the feed 'this content is important'. As a result, that content is artificially pushed to the top of the feed. Learn more about audience targeting in Viva Connections.

#### What actions can viewers take on the Feed?

For the current release, users on the Feed can do the following actions on posts:

- 1. Comment on a post
- 2. Reply to a comment on a post
- 3. Social Reactions React to a post and comment
- 4. Share a post
- 5. Save a post for later

# What can I do to save content in the Feed after I have viewed it?

Users can bookmark content that they would like to view later by selecting the **Save for Later**. Content can then be accessed through the save for later feature in the Viva Connections mobile app in Teams.

# Why isn't boosted news displaying in the Feed for Viva Connections web part?

In the Feed for Viva Connections web part, news posts from organizational news sites up to 7 days from the post date will take precedence over older boosted News that hasn't yet reached the expiration. This can prevent boosted news from displaying prominently to end-users if the boosted news publishing date is older than the organizational news.

#### More resources

**Overview of Viva Connections** 

Set up and launch Viva Connections

Use the Viva Connections Feed web part ☑

Create an organizational news site in SharePoint

# Plan, build, and launch a SharePoint home site for your organization

Article • 11/30/2023

A SharePoint home site provides a customized landing experience that reflects the organization's brand, voice, and priorities. A SharePoint home site also serves as the gateway to other portals in your organization's intranet. Learn more about how Viva Connections and SharePoint home sites work together to create employee experiences.

#### (!) Note

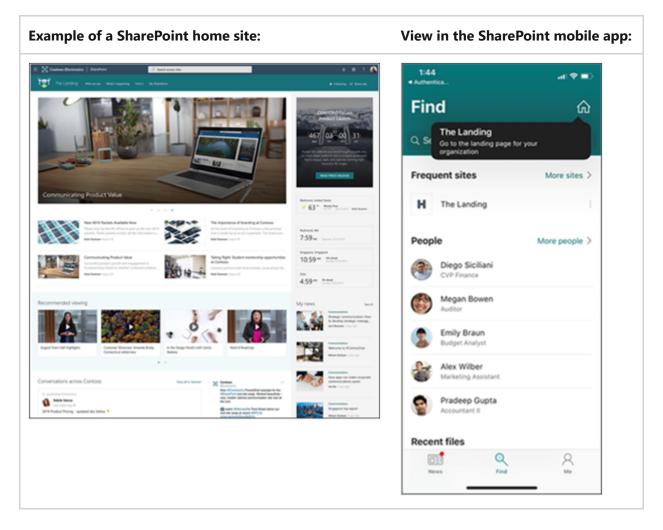
- A SharePoint home site is not required for the latest release of the Viva Connections desktop, mobile, or tablet experience. <u>Learn more about the new experience</u>, <u>how to customize it</u>, how to choose the default landing experience, and <u>how to onboard new users</u> □.
- In the latest release, the ability to set a home site will move from the SharePoint Admin Center (SPAC) to the Viva Connections admin center.
- You must have an Enterprise (E) or Frontline (F) license type to create a Viva Connections experience. Users with a basic Microsoft 365 subscription (E license) are limited to creating one experience. Users are required to have a Microsoft Viva suite or Viva Communications and Communities license in order to create two or more experiences (up to 50). See <a href="Microsoft Viva plans">Microsoft Viva plans</a> and <a href="mailto:pricing">pricing</a> for more info.
- Viva Connections does not have any requirements to get started.
- You must have Global Admin or SharePoint admin permissions to access the
  Microsoft 365 admin center. If you've already created the communication site
  and are ready to specify it as your home site now, learn how to set up Viva
   Connections in the Microsoft 365 admin center.
- Centralized Viva Connections administration in the Microsoft 365 Admin center is unavailable in GCC, GCC High, and DoD environments. Please refer to the <u>list of service availability</u> for more information.

#### Use a SharePoint home site to:

- Provide a gateway to other high-traffic portals.
- Connect people with an intranet-wide search experience.

- Showcase targeted news and content.
- Take advantage of the new people engagement tool, Viva Connections.

**Expand table** 



#### What is a SharePoint home site?

Users are able to create multiple SharePoint home sites tied to multiple Viva Connection experiences that can take advantage of home site features. SharePoint home sites don't replace communication or team sites, but instead provide a landing place for your organization. Think of SharePoint home sites as an *add-on* to your intranet design. SharePoint home sites are communication sites that have special capabilities such as being marked as an official source of news in the organization. Consider making your tenant's root site the SharePoint home site. Next, review key differences between standard SharePoint communication sites and SharePoint home sites.

Creating a SharePoint home site so your organization can use Viva Connections? Consider following this design guidance.

SharePoint home site features explained:

SharePoint home sites are unlike any other site in SharePoint. When you set a SharePoint communication site as a home site, you'll automatically apply special capabilities that make the SharePoint home site an ideal landing destination for your intelligent intranet.

# Use Viva Connections to integrate your intranet into Microsoft Teams

Viva Connections is designed to drive engagement, build community, and enable your organization to stay connected. You can create a Viva Connections experience as a standalone experience or take advantage of your intranet home site to provide a more holistic experience that uses existing content. Learn more about Creating a new Viva Connections experience.

#### Search for content across the entire intranet

SharePoint home sites allow users to search for content (such as sites, news, and files) across the entire intranet rather than searching just the site like typical SharePoint sites. This becomes possible because the search scope for the SharePoint home site searches the entire intranet instead of just the site collection like a typical site.

#### Official source of organizational news

By default, a SharePoint home site is set as the organizational news source. News posts that are created from the SharePoint home site automatically become official organizational news and take priority on the SharePoint start page 2 and in the home section of the SharePoint mobile app. Administrators can set sites as official organizations news sources in the admin center.

# Enable and customize global navigation in the SharePoint app bar

The SharePoint app bar features a global navigation option that displays intranet navigational nodes and resources no matter where users are in SharePoint. To take full advantage of this feature, you must have a SharePoint home site. Learn more about how to enable and customize global navigation in the SharePoint app bar.

## Before getting started

Before you get started planning and building your SharePoint home site, review best practices and considerations.

#### Best practices for creating SharePoint home sites

- Because a SharePoint home site is used by the entire organization, the site needs to be inclusive and easily accessible on all devices ☑.
- Because the site needs to be inclusive and easily accessible on all devices, consider other languages that might be needed ☑.
- The SharePoint home site will be viewed by a high volume of users. Make sure you manage site performance through the planning and building phases.
- Links in the SharePoint home site's navigation can direct users to content in addition to global navigation, which can be used to lead users to universally used resources and portals.
- Make sure the SharePoint home site is discoverable by adding an entry point to the Microsoft 365 app launcher and a featured link on the SharePoint start page.

#### **Considerations**

- Align the branding on the SharePoint home site to the overall intranet brand where possible.
- For organizations with many portals and resources, consider making your SharePoint home site a hub site to expand navigational options and easily sync permissions and branding across many sites.

# Summary of how to get a SharePoint home site for your organization

Since SharePoint home sites are the gateway to your intranet, you'll want to prioritize content and resources that are relevant to most employees. Work with business owners and stakeholders to organize and align the flow of information and the navigational design. Then, use the Page diagnostics for SharePoint tool to ensure to best viewing experience. Next, set your SharePoint communication site as a home site in the SharePoint admin center. Finally, use the Portal launch scheduler to plan the launch of your new site and make the site discoverable by adding links to key entry-points in the Microsoft 365 experience.

Before you get started planning your SharePoint home site, hear from the Microsoft product team on how to think 2 about and approach the design of your organization's SharePoint home site.

**Expand table** 

Plan	Build	Launch and manage
<ul> <li>Align objectives with partners and business owners</li> <li>Organize priority content</li> <li>Design way finding for the SharePoint home site and global navigation</li> <li>Think about branding</li> <li>Use audience targeting on navigational links, news, and web parts</li> </ul>	<ul> <li>Upload and organize site assets and content like files and logos (64x64px).</li> <li>Customize the site to align with the rest of the intranet</li> <li>Apply audience targeting</li> <li>Turn on a content approval flow</li> <li>Use PowerShell to turn the SharePoint comm site into a home site</li> <li>Swap the root site location with the SharePoint home site</li> <li>Measure site health and performance</li> <li>Test on all devices</li> </ul>	<ul> <li>Share the site with your organization</li> <li>Use the Portal launch scheduler to release the new site in phases</li> <li>Make the SharePoint home site discoverable</li> <li>Announce the launch of the SharePoint home site using various communication channels</li> <li>Monitor site usage and analytics</li> </ul>

### Plan your SharePoint home site

A great SharePoint home site starts with a plan. Because your SharePoint home site is essentially the gateway to your intranet, you'll want to collaborate with other business owners such as human resources, leadership teams, and even your legal team to ensure the most important and universal resources are accessible for everyone in the organization.

**Expand table** 

lcon	Action	Get started
#	Get organized	Start by aligning objectives with stakeholders and organizing priority content and resources. Consider details specific to your organization like if the SharePoint home page needs to be available in more than one language. Use modern SharePoint sites for the home site. Learn more about how modern SharePoint sites $\[mathbb{C}\]$ and how to create a multi-lingual site and pages $\[mathbb{C}\]$ .

lcon	Action	Get started
	Plan navigation	Then, organize the navigational structure for the SharePoint home site itself and global navigation. Consider making the SharePoint home site a hub site if you need to add an extra layer of navigation and make it easier to sync associated site permissions and branding. Learn more about planning site navigation and how to make your SharePoint home site a hub site. Then, review guidance on how to set up global navigation on the SharePoint home site.
	Personalize content	Next, think about the different audiences that your organization serves. Consider how elements on your SharePoint home site like navigational links and certain web parts could benefit from audience targeting to specific audiences. Learn more about audience targeting 2.
	Gather branding assets	Finally, start gathering assets needed to apply custom branding and other details to your SharePoint home site, like logo files (64x64px recommended), color themes, and any custom solutions. Learn more about how to change the look of your site 2.
	Consider site performance	Even before you build your site, understand the main elements that will make sure your SharePoint home site is healthy. A healthy SharePoint home site optimizes performance to ensure the best possible viewing experience. Use the Page diagnostics for SharePoint tool to make sure the SharePoint home page is healthy before sharing with end users. Learn more about healthy portals and using the Page diagnostics tool for SharePoint.

## **Build your SharePoint home site**

When you've prepared a plan, you're ready to start creating the home site in SharePoint. Start with a communication site, and after you have the general layout finalized, create a Viva Connections experience from your existing SharePoint home site in the Viva Connections admin center.

**Expand table** 

lcon	Action	Get started
	Create a modern communication site	Start by creating a SharePoint communication site and build out the site by using sections, web parts, and pages. Consider using a mega menu and footer to enhance way finding. Web parts that are useful for a SharePoint home site include: News web part, My feed web part, Viva Engage web parts, Quick link web part, and the Highlighted content web part. Learn how to create a communication site \$\mathbb{Z}\$, use modern web parts \$\mathbb{Z}\$, and customize your site \$\mathbb{Z}\$.

lcon	Action	Get started
o	Apply audience targeting	Next, turn on audience targeting on for the SharePoint home site. By enabling audience targeting, specific content will be prioritized to specific audiences in navigational links, news, and certain web parts. Learn more about how audience targeting works and how to apply it to navigational links, news, and web parts.
<b>✓</b>	Set up a page approval flow	Then, make sure the SharePoint home site is set up for regular content updates. Turn on content approval to ensure only high-quality content is published on the SharePoint home site. Learn how to turn on a page approval flow 2.
<u>-</u>	Swap the root site location with the SharePoint home site	Before you set a communication site as the SharePoint home site, swap the communication site in place of the root site of your tenant as a best practice. The root site for your organization is one of the sites that's provisioned automatically when you purchase and set up a Microsoft 365 plan. If you set up a SharePoint home site first, and then swap locations with your root site, you may lose SharePoint home site settings and need to reapply them. Learn how to swap the root site with the SharePoint home site.
	Set the SharePoint home site	Next, build a Viva Connections experience from an existing intranet portal.
1	Set up global navigation	Then, enable global navigation to allow users to easily navigate to important intranet resources anywhere in SharePoint. Global navigation can only be customized from the SharePoint home site's home page. Learn how to enable and customize global navigation.
•	Test site health and the viewing experience	Finally, review portal launch guidance and understand the main elements that will make sure your SharePoint home site is healthy. A healthy SharePoint home site optimizes performance to ensure the best possible viewing experience. Use the Page diagnostics for SharePoint tool to make sure the SharePoint home page is healthy before sharing with end users. Learn more about healthy portals and using the Page diagnostics tool for SharePoint.

# Launch your SharePoint home site

After you've set your SharePoint home site, it's time to plan the launch and make sure the rest of the organization can find and use the SharePoint home site.



lcon	Action	Get started
<u>;2</u> +	Share the site and schedule the portal launch	Start by ensuring your SharePoint home site is healthy, and then its time to share the site with the rest of the organization and schedule the launch. Use the Portal launch scheduler tool to gradually roll out the SharePoint home site to batches of end users. Using a phased approach is ideal to manage any performance issues that may arise and to ensure a positive viewing experience. Learn how about how to use the Portal launch scheduler tool.
O	Improve discoverability	Next, make sure people in your organization can easily find the SharePoint home site through a few different entry points in the Microsoft 365 experience. Add a link to the SharePoint home site in the Microsoft app launcher (sometimes called the waffle) and on the SharePoint start page. Learn more about how to add a custom tile to the app launcher and how to add a featured link to the SharePoint start page.
7	Engage your audience	Then, let your organization know about the new SharePoint homes site resource, and other new elements like global navigation. Consider multiple communication options like a SharePoint news post that can also be shared in email and in Microsoft Teams. Learn more about how to create and post SharePoint news and share it in an email
C	Manage and maintain your SharePoint home site	Finally, when the site is healthy, launched, and being used by the organization, monitor site usage and maintain the site. Site maintenance should include making sure site content is relevant, there aren't any broken links, and that the site stays healthy and performant. Learn how to view usage data and analytics of for your site and how to maintain your site over time of the site.
4	Integrate the SharePoint home site into Microsoft Teams using Viva Connections	Expand the reach of the SharePoint home site and help meet users where they're already working by making it easy to access and share content all in one place. After you have a SharePoint home site and the global navigation enabled and customized in the SharePoint app bar, you've met the requirements to integrate the SharePoint home site into Microsoft Teams using Viva Connections. Learn more about the Viva Connections end-user experience

# SharePoint home site FAQs

**Q**: Are SharePoint home sites now set in the Microsoft admin center? Starting in June 2023, use the Microsoft admin center to set a SharePoint home site when you create a Viva Connections experience.

Q: What's the difference between a SharePoint home site and the SharePoint start page? The content on the SharePoint start page is driven and managed by Microsoft Graph. Content is personalized to the individual users' recent activity, followed sites, and content that is saved for later. The SharePoint home site is a landing experience for your entire organization. It displays universally relevant content and directs users to other important portals like Human Resources and company directories.

Q: Can I integrate the SharePoint start page with my SharePoint home site? Integration between the SharePoint home site and SharePoint start page ☑ (where the branding, theming, header, navigation, and footer elements from the SharePoint home site are applied to the start page and users can easily navigate between the pages) isn't available at this time. However you can add a featured link to the SharePoint start page to increase SharePoint home site discovery.

#### Resources

Watch: Build and launch a SharePoint Home Site: Tips and Tricks From The Product Team ☑

Planning your SharePoint hub sites

Creating and launching a healthy SharePoint portal

Use and customize the The Landing template 

from the SharePoint look book

Design a SharePoint home site for Viva Connections

#### **Feedback**

Provide product feedback ☑

# Create a SharePoint home site for Viva Connections

Article • 09/28/2023

Use this guided walkthrough if you're creating a SharePoint home site so your organization can use Viva Connections. Get guidance on how to create a cohesive experience between the desktop and mobile apps. Before you start, learn more about planning SharePoint home site content and how to launch a healthy portal.

Don't have time to create a SharePoint home site from scratch? Consider using the Landing site template from the SharePoint look book and then add the Dashboard web part and the Feed web part.

Learn more about how Viva Connections and SharePoint home sites work together to create employee experiences.

#### ① Note

SharePoint home sites can now only be created and managed in your Microsoft 365 admin center. You'll need to be a global admin to create a home site. A home site is not required for the latest release of the Viva Connections desktop experience . Learn more about the new experience . how to customize it, how to choose the default landing experience, and how to onboard new users . Centralized Viva Connections administration in the Microsoft 365 Admin center and multiple Viva Connections experiences are unavailable in GCC, GCC High, and DoD environments. Please refer to the list of service availability for more information.

# How to use this guide

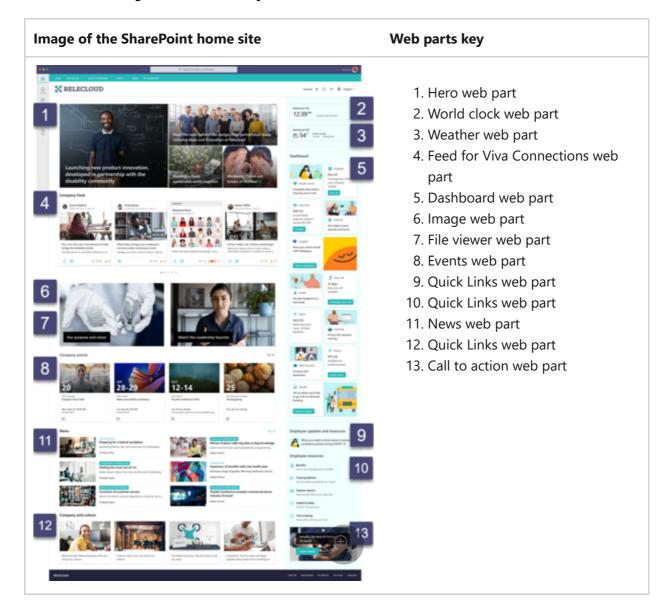
The web parts used here pair well with SharePoint home sites, however web parts can be swapped or left out. Decide what is best for your organization and adjust the layout as needed.

The guidance here will help you design the SharePoint home site and customize web parts, but you'll need to provide your own content.

A SharePoint home site needs site navigation that is organized well, highlights popular resources and portals, and is relevant to the entire organization. This design guidance

doesn't specifically talk about how to design site navigation. Get more guidance on how to think about links in SharePoint home site navigation and in the global navigation.

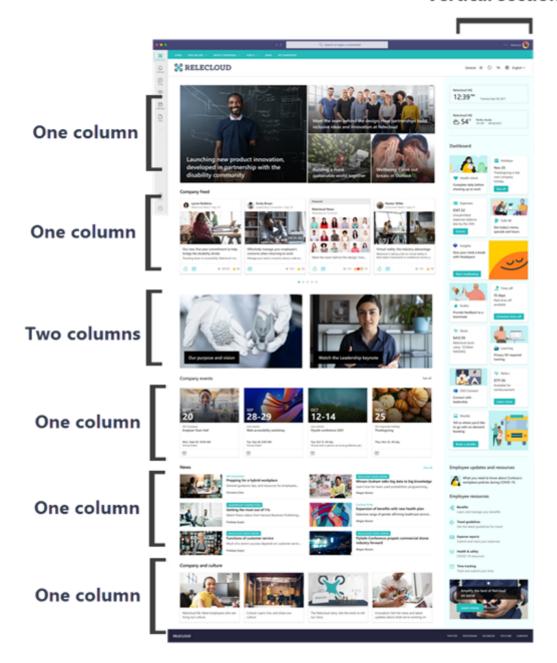
# Summary of web parts



## Summary of the site structure

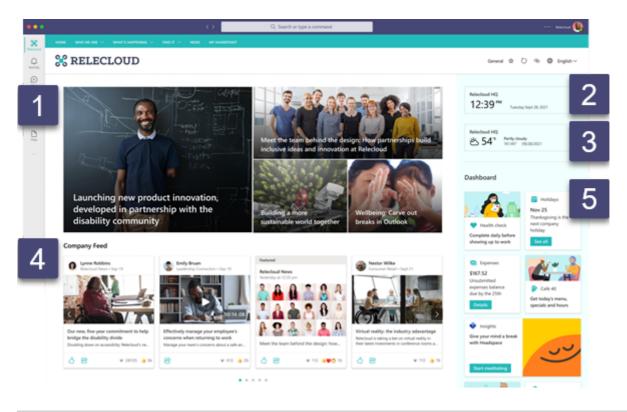
This SharePoint home site design uses a vertical section and a combination of one and two column sections. After creating your communication site  $\[ \]$ , start by laying out the sections  $\[ \]$  before adding web parts.

#### **Vertical section**

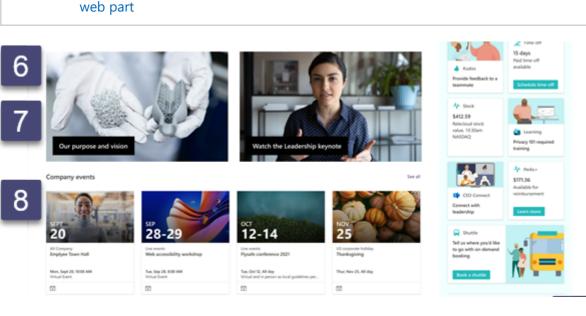


## **Build the site**

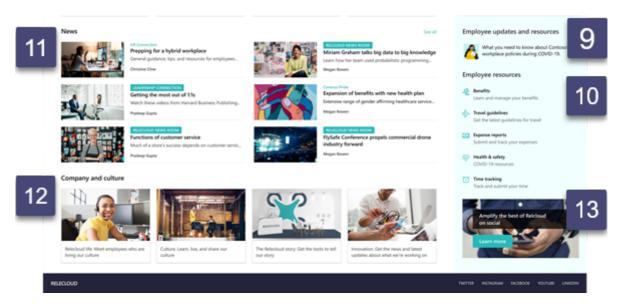
Start with a modern SharePoint communication site 2. Next, start adding sections 2 following the diagram in the site sections summary. Then, add and edit web parts. The guidance for customizing web parts can be applied when you are in edit mode for each web part.



Number	Web part	Customization guidance
1	Hero web part <u>ď</u>	Select Tiles layout and then Four tiles.
2	World clock web part ♂	Toggle the Show days of the week to On.
3	Weather web part	Decide which temperate measurement system makes the most sense for your audience between <b>Fahrenheit</b> and <b>Celsius</b> .
4	The Feed for Viva Connections	No settings needed. The Feed content is personalized for each user and comes from SharePoint News and Viva Engage communities that they follow.
5	The Dashboard web part	Set the Maximum number of cards to show to 9.



Number	Web part	Customization guidance
6	Image web part	Toggle Add text over image to On.
7	File viewer web	No settings guidance.
8	Events web part	Select the <b>Filmstrip</b> layout and toggle <b>Show event images</b> to <b>On</b> .



Number	Web part	Customization guidance
9	Quick Links web part	Select the <b>Compact</b> layout and then toggle <b>Show image in layout</b> to <b>Yes</b> .
10	Quick Links web part	Select the <b>List</b> layout and toggle <b>Show descriptions</b> and <b>Show icons</b> to <b>Yes</b> .
11	News web part	Select the Side-by-side layout, set the Number of news posts to show to 4. Then toggle Show number of views, Show author, and Show publish date to On.
12	Quick Links web part	Select the <b>Grid</b> layout.
13	Call to action web part	No settings guidance.

## Customize site details

After the site is built, edit site details to create a customized design that aligns with your organization's brand and identity. These site details can be managed from Settings > Change the look.

- Theme Select a theme that is ideal for the entire organization. If you make your SharePoint home site a hub site, this theme will get passed down to sites that associate with the hub.
- **Header** Use the Compact header layout to reproduce the same look as your SharePoint home site.
- Logo Select a logo that is recognizable to the entire organization.
- Footer Footer navigation is optional and can be used to highlight popular portals and resources.

# **Extensibility**

Use the SharePoint Framework (SPFx) to create customized components like web parts and Viva Connections Dashboard cards that can be surfaced on a SharePoint home site and throughout the Viva Connections experience. The SPFx is the only extensibility and customization option for Viva Connections. Learn more about Viva Connections extensibility.

# Best practices before launching your new SharePoint home site

- A SharePoint home site is used by the entire organization, so the site needs to be inclusive and easily accessible on all devices ☑ and potentially needs to be viewed in other languages ☑.
- The SharePoint home site will be viewed by a high volume of users. Make sure you manage site performance through the planning and building phases.
- Before launching the SharePoint home site broadly, test the site with a handful of users to make sure key tasks and resources are readily accessible and fully functioning.
- Consider using the Portal launch scheduler to help you follow a phased roll-out approach by batching viewers in waves and managing the URL redirects for the new portal.

## Next: Enable and set up global navigation

Once you've set a communication site as a SharePoint home site, you'll be able to enable and set up global navigation in the SharePoint app bar. Global navigation can be set up while you're designing your SharePoint home site and is a requirement for Viva

Connections. Resources highlighted in the global navigation will appear in the "Resources" tab in the Viva Connections mobile app.

## Learn more

Plan, build, and launch a SharePoint home site for your organization

Creating and launching a healthy SharePoint portal

Plan, build, and launch Microsoft Viva Connections for your organization

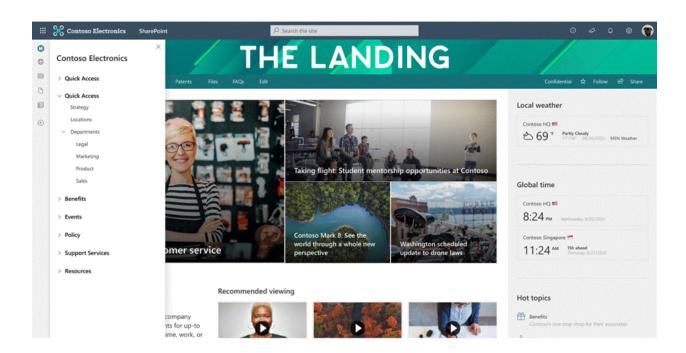
# Introduction to the SharePoint app bar

Article • 09/28/2023

Help users find important content and resources no matter where they are in SharePoint. The SharePoint app bar improves the global way-finding and creation experiences while dynamically displaying personalized sites, news, files, and lists. The app bar is on the left-hand side anywhere in modern sites.

#### ① Note

Only Viva Connections customers who are using SharePoint home sites need to enable and customize SharePoint global navigation. Learn more about <u>How Viva</u> <u>Connections and SharePoint home sites work together to create employee experiences</u>.

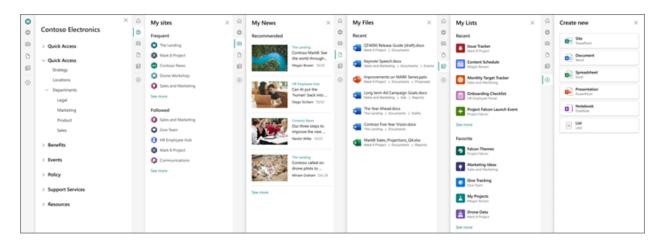


The SharePoint app bar:



## The SharePoint app bar experience

The SharePoint app bar brings together intranet resources and personalized content like sites, news, files, and lists. Enable global navigation to allow users to easily navigate to important intranet resources anywhere in SharePoint. Customize global navigation details and the rest of the content will dynamically display and update personalized content for sites, news, and files. Create sites, files, and lists easily from anywhere in SharePoint.



#### ① Note

• Global navigation is the only app bar tab that can be customized.

- When global navigation is disabled or not configured, the home icon links to the SharePoint start page.
- Specific SharePoint app bar tabs cannot be disabled.
- The SharePoint app bar cannot be disabled on specific sites.
- The SharePoint app bar is not available on classic SharePoint sites.
- The SharePoint app bar may impact current page customizations, specifically those that appear on the left side.
- The SharePoint app bar will not display in SharePoint for external or guest users outside of your organization.
- In GCC High and DoD environments users may experience a degraded experience for the My sites panel in the app bar.
- Some additional restrictions may apply to tenants within the GCC High and DoD environments when using My News in the SharePoint app bar.
- The SharePoint app bar can be temporarily disabled between today and when
  it becomes available to all customers to give customers more time to prepare
  for this change. Temporarily disabling the app bar will delay the rollout of this
  feature in your organization until March 31, 2023.
- Global navigation in the SharePoint app bar must be enabled in order for SharePoint resources to display in the <u>Microsoft Teams app bar for Viva</u> <u>Connections</u>.

The SharePoint app bar is a significant change to the user experience and your organization's intranet information architecture. To ensure a seamless experience, we've created specific guidance on how to design current navigation to compliment the new global navigation feature. We have also created end-user guidance to help onboard the rest of your organization.

# Customize global navigation in the app bar

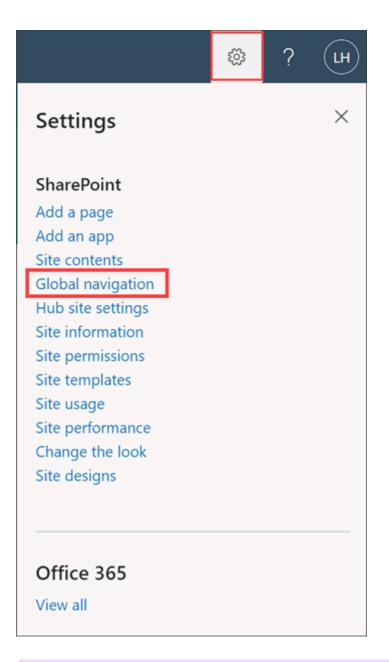
Global navigation can be enabled and customized in the SharePoint app bar. Customize the global navigation logo, title, and source depending on your users' and organization's needs. If you choose to keep global navigation disabled, the home icon will link to the SharePoint start page.



- When global navigation is disabled, the home icon will link to the SharePoint start page.
- Customizing global navigation requires a **SharePoint home site**.
- Site owner permissions (or higher) to the SharePoint home site are required to enable global navigation.
- Users need read access (or higher) to the SharePoint home site to view the global navigation links.
- <u>Audience targeting</u> □ can be applied to menu links in global navigation.
- If you get an error after editing links to sites, try deleting the link and adding it again.
- Implementing global navigation may take up to 24 hours for the changes to take effect for users.

#### Get started customizing the global navigation tab

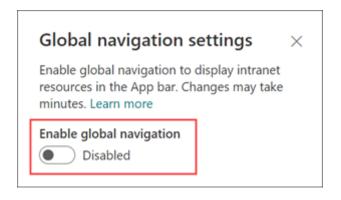
- 1. Set up a SharePoint home site if your organization doesn't already have one and make sure to share the SharePoint home site with everyone in your tenant to ensure all users can access the global navigation links.
- 2. Navigate to your organization's SharePoint home site.
- 3. Select **Settings** and then select **Global navigation** settings.



#### ① Note

If you do not see **Global navigation** in the **Settings** pane on the SharePoint home site, you may not have site owner permissions (or higher) to the SharePoint home site.

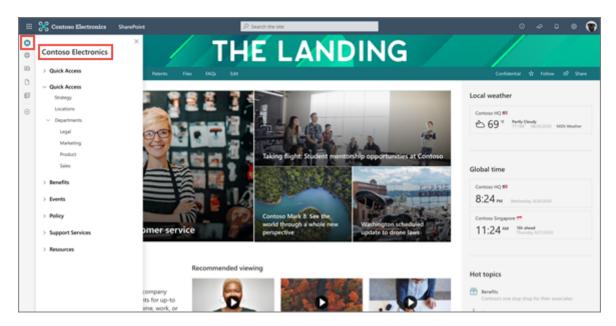
4. Switch the **Enable global navigation** toggle to **On**.



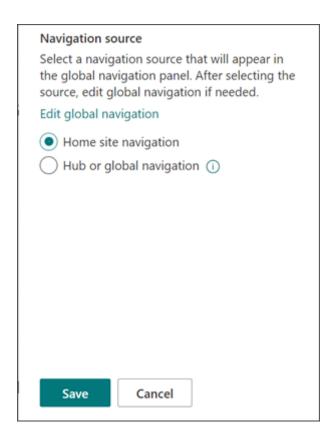
5. Next, add the **Logo** for global navigation that will be recognizable to users to replace the home icon in the app bar. No action is needed if you choose to keep the default home icon.

Global navigation logo specifications:

- The logo size should be 20x20 pixels
- PNG file type
- Transparent background recommended
- 6. Then, enter a **Title** that will be displayed at the top of the global navigation pane.



- 7. Finally, determine the **Navigation source**. Learn more about selecting a source in the next step.
- 8. Make edits to the selected global navigation source if needed by selecting **Edit global navigation**. Select **Save** when you are done. Updates to global navigation may take several minutes before they appear.



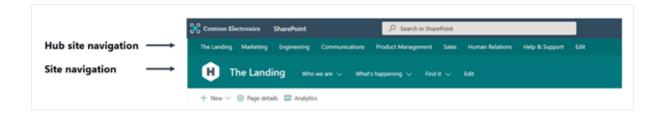
#### ① Note

- The global navigation source can be edited at any time by site owners or admins of the SharePoint home site.
- The site and global navigation <u>links and labels</u> □ can be edited at any time by editors of the SharePoint home site.
- Implementing global navigation may take up to 24 hours for the changes to take effect.
- If you get an error after editing links to sites, try deleting the link and adding it again.

# Determine the global navigation source depending on your SharePoint home site's configuration

If you haven't set up your SharePoint home site, do that first and if you are setting up a SharePoint home site specifically to implement global navigation, review this guidance.

For SharePoint home sites that are a hub, you have two source options



- Select the site navigation source to display the SharePoint home site's navigation.
- Select the Hub or global navigation source to display the SharePoint home site's hub navigation.

#### ① Note

When you apply the extended header layout to the site, you will no longer see the site navigation.

# For SharePoint home sites that are not a hub, you have two source options



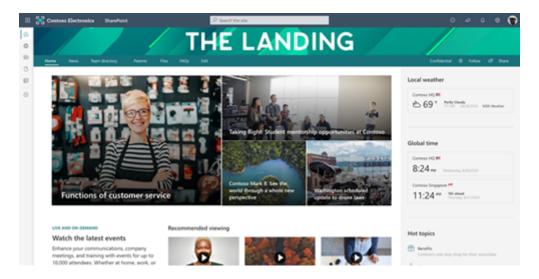
- Select the site navigation source to display the SharePoint home site navigation.
- Create a secondary set of navigation nodes specifically for the global navigation panel by selecting **Hub or global navigation**. Then, select **Edit global navigation** to create the new global navigation menu. Select **Save** when you are done.

#### ① Note

For SharePoint home sites that are not a <u>hub site</u>  $\square$  and choose to create a secondary set of navigational nodes for the global navigation pane - if you decide to make your SharePoint home site a hub in the future, the new hub site navigation will inherit the current navigational nodes for global navigation and can be <u>edited at any time</u>  $\square$ .

# See all the different ways you can set up global navigation

Depending on the content you want to make available in the global navigation, you can configure your SharePoint home site navigation and global navigation in three different ways.



## Display the SharePoint home site's navigation in global navigation

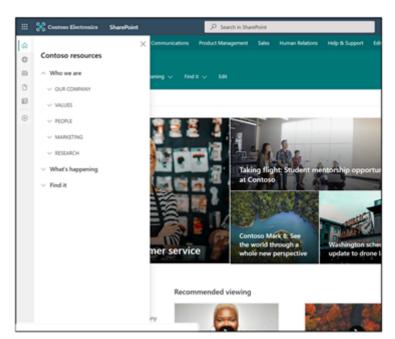
Display hub and site navigation on the SharePoint home page, and the home site navigation in the global navigation panel.

- 1. Navigate to the SharePoint home site's **Settings** and then **Global navigation**.
- 2. **Enable** global navigation, enter a **Title**, and then select **Home site navigation** as the source.
- 3. Select Save. Changes may take a few minutes to reflect.

#### Global navigation settings pane



#### Global navigation displays the site navigation



## Display the SharePoint home site's hub navigation in global navigation

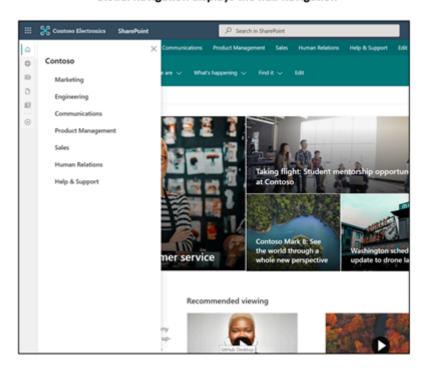
Display hub and site navigation on the SharePoint home page, and the hub navigation in the global navigation panel.

- 1. Navigate to the SharePoint home site's **Settings** and then **Global navigation**.
- 2. **Enable** global navigation, enter a **Title**, and then select **Hub or global navigation** as the source.
- 3. Select Save. Changes may take a few minutes to reflect.





Global navigation displays the hub navigation



## Hide the site navigation and display it in the global navigation

Display just the hub navigation on the SharePoint home page, and the site navigation in the global navigation panel.

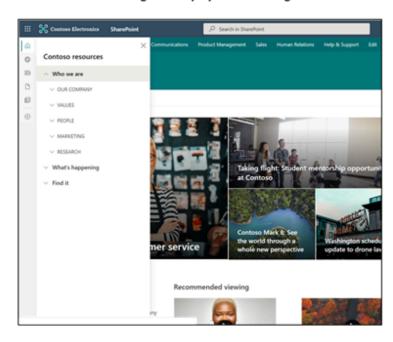
- 1. Start by hiding the site navigation using one of two methods:
  - Go to Settings, then Change the look, then Navigation and toggle the Display site navigation to Hide.
  - Go to **Settings**, then **Change the look**, then **Header** and choose **Extended** layout.
- 2. Then, navigate to the SharePoint home site's **Settings** and then **Global navigation**.

- 3. **Enable** global navigation, enter a **Title**, and then select **Home site navigation** as the source.
- 4. Select Save. Changes may take a few minutes to reflect.

#### Global navigation settings pane



#### Global navigation displays the site navigation



### Set up a SharePoint home site for the first time

A SharePoint home site is a SharePoint communication site that you create and set as the top landing page for all users in your intranet. It brings together news, events, embedded video and conversations, and other resources to deliver an engaging experience that reflects your organization's voice, priorities, and brand. It is recommended that you set up a SharePoint home site for your organization to take full advantage of SharePoint's communication and collaboration features and is required to enable and customize global navigation in the SharePoint app bar.

### Set up a SharePoint home site just for global navigation

If you are creating a SharePoint home site for the main purpose of setting up global navigation, you can simplify the steps recommended to plan and launch a SharePoint home site. Learn more about planning navigation in SharePoint and apply information architecture principles to your new SharePoint home site's navigational design.

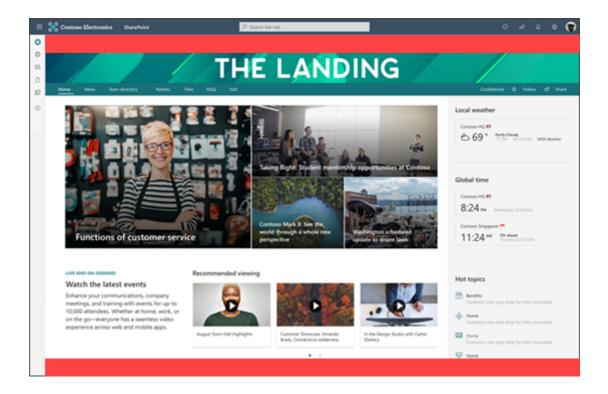
#### ① Note

Only one communication site can be set as the SharePoint home site.

- The first time you set up a SharePoint home site, it might take up to several minutes for the changes to take effect.
- Global admin credentials are required to use the SharePoint Online
   Management Shell tool that is required to transform a communication site into a SharePoint home site.
- 1. Start by creating a SharePoint communication site ☑.
- 2. Customize the communication site navigation ☑ to reflect the view you'd like to see in the global navigation pane. You can make edits to the navigation source and individual labels and links at any time.
- 3. Set this communication site as a SharePoint home site using the SharePoint Online Management Shell tool.
- 4. Share the SharePoint home site with users ☑ so they can access the global navigation links.
- 5. On the SharePoint home site, select **Settings** and then **Global navigation** to **enable** and customize.
- 6. For the global navigation source, select **Home site navigation** to display the SharePoint home site navigation that you created in the global navigation panel, then select **Save**.

## Understand how the app bar may impact page customizations

The SharePoint app bar may impact current page customizations, specifically those positioned to the left of your page. For organizations using page placeholders, the SharePoint app bar will cover parts of both the header and footer page placeholder. In the following image, the placeholder footprint is in red:



# Modernize classic SharePoint sites to display the SharePoint app bar

The SharePoint app bar will only appear in modern SharePoint sites and pages.

We highly recommend modernizing classic sites not only to display the SharePoint app bar but for a more consistent user experience. Learn more about how to modernize classic SharePoint sites and pages using the open-source SharePoint PnP Page Transformation solution.

More guidance on how to display the SharePoint app bar on a classic site will be available soon.

### Teach end users about this feature

Help end users understand how the new SharePoint app bar works ♂.

### Temporarily disable the SharePoint app bar

You can temporarily disable the SharePoint app bar in your tenant to prepare for this change or control its rollout to users. The tool that disables the app bar will be available until March 31, 2023. Updates and more information about temporarily disabling the SharePoint app bar will be shared in future Message Center posts.

Temporarily disable the SharePoint app bar:

1. Download the latest SharePoint Online Management Shell ☑.

#### ① Note

If you installed a previous version of the SharePoint Online Management Shell, go to Add or remove programs and uninstall "SharePoint Online Management Shell."

- 2. Connect to SharePoint as a global admin or SharePoint admin in Microsoft 365. To learn how, see Getting started with SharePoint Online Management Shell.
- 3. Run the following command:

**PowerShell** 

Set-SPOTemporarilyDisableAppBar \$true

4. If you need to confirm if the app bar has been disabled or enabled, check the app bar status by running the following command:

**PowerShell** 

Get-SPOTemporarilyDisableAppBar

#### ① Note

- It can take up to an hour for the app bar to be removed on a tenant where the app bar is already showing up.
- Running the command without the \$false or \$true value will cause it to fail.
- If you are using previous versions, uninstall the previous version and then install the most up to date version. Previous versions of PowerShell can't coexist with the most up-to-date version of PowerShell.

### **Enable the SharePoint app bar**

1. Once you're ready to display the SharePoint app bar, run the following command:

**PowerShell** 

Set-SPOTemporarilyDisableAppBar \$false



It can take up to an hour for the app bar to show up on a tenant where the app bar was disabled previously.

2. If you need to confirm if the app bar has been disabled or enabled, check the app bar status by running the following command:

PowerShell

Get-SPOTemporarilyDisableAppBar

### Resources

- Learn more about SharePoint home sites
- Learn more about planning and creating hub sites
- Learn more about navigation and information architecture in SharePoint
- Learn more about sharing and permissions in SharePoint

### **Feedback**

Provide product feedback ☑

# The Viva Connections Dashboard web part

Article • 09/28/2023

Viva Connections ☑ is an integrated experience designed to drive employee engagement. When deploying Viva Connections, you'll set up a Dashboard and use cards to bring together resources for different audiences to provide a comprehensive view of everything they need to complete common tasks. For example, the Dashboard could include a card that allows users to access cafeteria menus, schedules, reports, shift schedules, HR policies, and more.

Once a Dashboard is published, you can use the Dashboard web part to display it on your SharePoint home site. If you want to add, remove, or reorder cards, the existing Dashboard on your site must be edited. To learn how to create or edit a Dashboard, see Create a Viva Connections Dashboard.

### Add the Dashboard web part

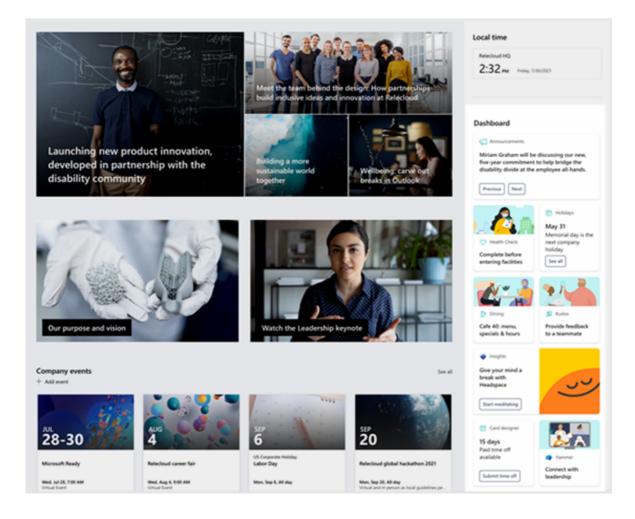
To add a Dashboard web part, firstly ensure that you are in the **edit** mode. To do this, select **Edit** at the top-right of the SharePoint home site page.

Once in **edit** mode, perform the following steps:

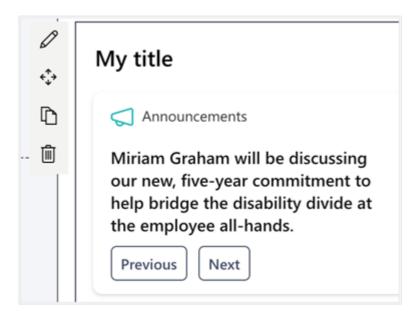
- 1. Hover your mouse around the section within which you want to place the web part, and select the **circled** +.
- 2. In the web part search box, enter **Dashboard** to quickly find and select the **Dashboard for Viva Connections** web part.



The web part will be added to your page where it's populated with the cards from the existing Dashboard on your site, as in this example where the Dashboard is placed in a vertical column on the right:



3. Optionally, you can change the title of the Dashboard by selecting it in the web part and typing over it with your own title.



- 4. To move the web part, select the **Move web part** icon and drag the web part to a different section or column on the page.
- 5. To set the value for maximum number of cards to display on the web part, select the **Edit web part** pencil icon.
- 6. Use the slider to indicate the maximum number of cards to display.

### Dashboard for Viva Connecti... ×

The Viva Connections Dashboard uses cards to provide quick access to content, data, and tasks. The Dashboard must be created on your home site before you can use this web part.

Learn More

Maximum number of cards to show

) 8

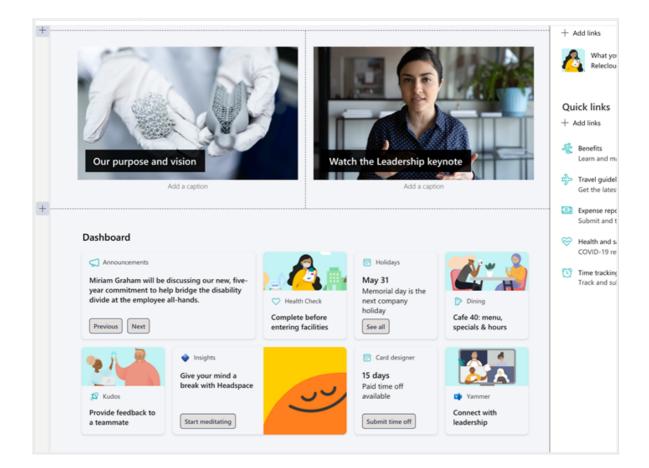
① Note

When there are more cards available than the maximum number set for the web part, users can select **See all** to see the rest of them.

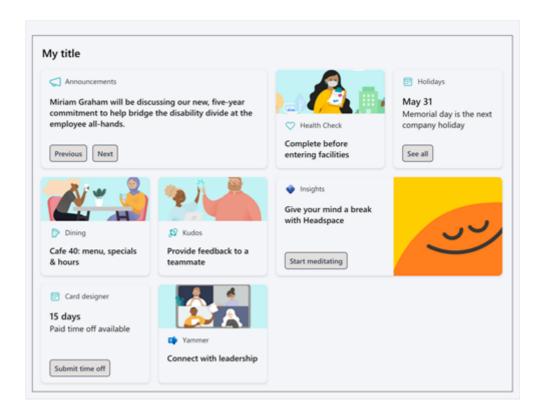
7. Once the card-count threshold is set, select **Publish** or **Republish** to make the page available with your newly placed Dashboard web part.

### Additional information

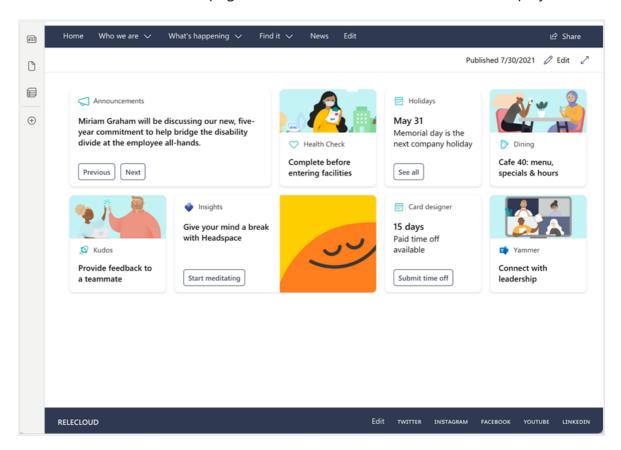
- The Dashboard web part is hidden when there are no cards to show: There may be no cards to show when the Dashboard author has targeted cards for specific audiences, and people outside of those audiences are viewing the page. For example, if all cards are targeted to your development group, only people in the development group will see the Dashboard.
- We recommend you use the Dashboard web part in a vertical section: Although a
  vertical section is recommended, the web part can be used in any section in one,
  two, or three column layouts. Here's an example of a Dashboard web part in a
  horizontal section:



- The Dashboard web part can be added to any page on your SharePoint home site: The Dashboard is most useful on your SharePoint home page, but it's possible to add it to any page on your SharePoint home site. One practical use for doing this is to experiment with your page layout to see where you think the Dashboard will fit best. To do this, just create a copy of your SharePoint home page and start experimenting.
- The Dashboard web part can be used in sections with a colored background: When editing a section, you can change the background of the section and the cards of the Dashboard will have a different color from that background.



• "See all" appears on the top-right of the Dashboard web part when there are more Dashboard cards available than can be displayed in the Dashboard web part. When See all is selected, a page that shows the entire Dashboard is displayed.



### More resources

Set up and launch Viva Connections

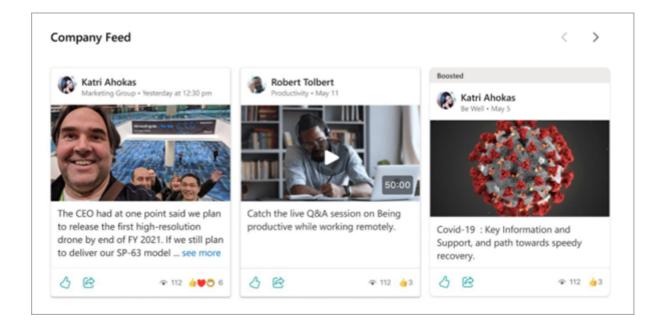
# Use the Feed web part for Viva Connections

Article • 07/12/2023

The Feed web part is designed to collect and display content from sources across SharePoint, Viva Engage, and Stream (on SharePoint) into a single viewing experience. Each users' Feed will look different because content displayed in the web part is personalized to the viewer based on the SharePoint sites and Viva Engage communities that they follow. Learn more about where content in the Feed comes from.

#### ① Note

- The Feed web part is not supported in IE11.
- Individual content items in the Feed will display for a 30-day period.
- Boosted news will display for up to 4 days in the feed.

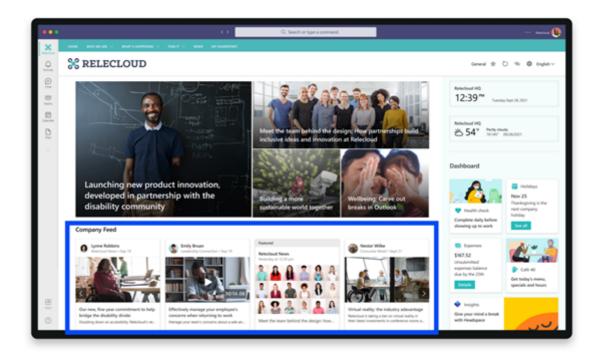


### What is Viva Connections?

Viva Connections combines the power of your intelligent SharePoint intranet with chat and collaboration tools in Microsoft Teams to create a powerful employee experience. Viva Connections enables users to complete popular tasks, catch up on news, and discover relevant content from across the organization right from Teams. Learn more about Viva Connections.

# What is the Feed for Viva Connections web part?

If you're using Viva Connections, the Feed web part brings organizational communication content from SharePoint, Viva Engage, Stream, Teams, and more into a single feed that can be added to the home site. The Feed displays personalized content that will look different for each viewer. The hierarchy of content in the Feed can be influenced using tools like News Boost 2. Learn more about content in the Feed.



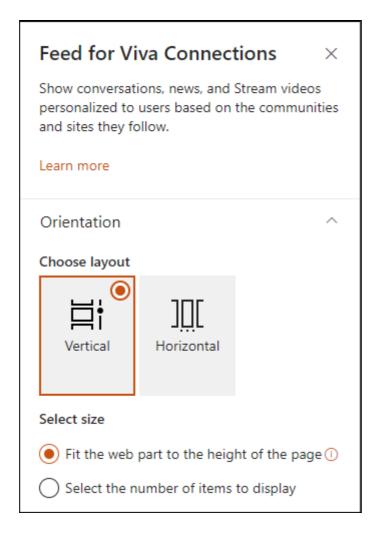
### Benefits of the web part include:

- Users can view content from SharePoint, Stream, and Viva Engage in one place
- For each piece of content, users can view the author and time it was posted
- Users can react to and see the total number of reactions, user views, and comments on a content card
- Users can share and navigate to find more content within the web part

# Add the Viva Connections Feed web part to a site

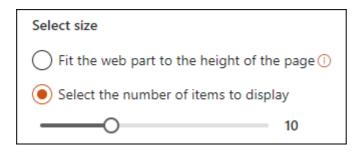
You'll need site member permissions (or higher) to add and edit web parts to a SharePoint site.

- 1. If you're not in edit mode already, select **Edit** at the top right of the page.
- 2. Go to the section where you want to add the web part, hover your mouse near the top, and then select the icon that appears.
- 3. In the web part toolbox that appears, search for and then select the **Feed for Viva Connections** web part.
- 4. Next, select either a vertical or horizontal orientation.



#### ① Note

- The vertical layout option will become available to all customers by the end of November 2022.
- 5. Then, select the web part size.



When vertical: Select **Fit web part to height of page** to automatically fit the web part to the height of the page. Or, **Select the number of items to display** to determine the height of the web part.

6. Select **Save** when you are done.

The feed will automatically populate with SharePoint news, Viva Engage community content, and Stream videos tailored to users based on the communities and sites they follow.

### Related articles

Frequently asked questions about the Feed for Viva Connections

Guide to setting up Viva Connections

Boost news from organizational news sites ☑

# Can't find Viva Connections app in Teams mobile

Article • 11/21/2022

Your organization has added the custom line of business Viva Connections desktop app. Users can see the app in Microsoft Teams on their desktop but can't find the app in Teams on their mobile devices. This is because the custom line of business Viva Connections app is available only for Teams on the desktop.

You can check the details of the installed app in the Microsoft Teams admin center:

- Select Teams Apps > Manage Apps ☑.
- Search for the app, and then select it.

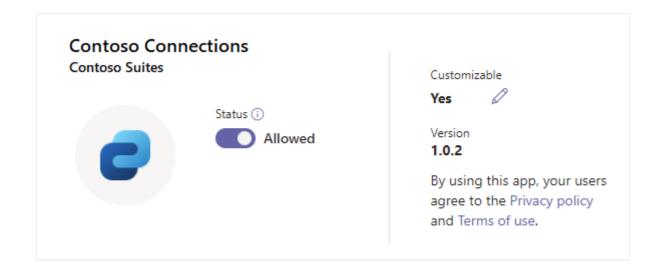
You should see information that resembles the following screenshot:



If your organization wants to use a Viva Connections app that is available for both the desktop and mobile environments for Teams, you can enable the first-party Viva Connections app in the Microsoft Teams admin center:

- 1. Use the steps in this guide to set up the first-party Viva Connections app.
- 2. By default, the first-party Viva Connections app is blocked. Leave it set to **Blocked** and complete all the other requirements.
- 3. Toggle the **Status** option for the first-party Viva Connections app from **Blocked** to **Allowed**.
- 4. Delete and uninstall the custom line of business Viva Connections desktop app.

In the Microsoft Teams admin center, the details of the first-party Viva Connections app should resemble the following screenshot:



### **Feedback**

# You can't find the Viva Connections app in the Teams admin center

Article • 11/30/2022

### **Symptoms**

Your organization tries to set up and launch Viva Connections on desktop and mobile devices. However, Teams administrators can't find the Viva Connections app by using the following steps:

- 1. Sign in to the Microsoft Teams admin center ☑.
- 2. Select **Teams apps** > **Manage apps**.
- 3. Search for Viva Connections.

### Cause

This issue may occur in the following situations:

- The display name (short name) of the Viva Connections app was changed by using the **Customize** option.
- There's an app provisioning issue that causes the app not to be found when searching.

### Resolution

To fix this issue, follow these steps as a Global Admin:

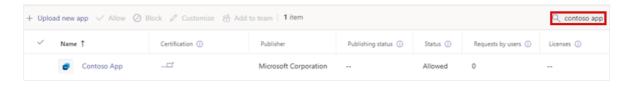
- 1. Open a new browser tab or window.
- 2. Browse to the following URL: https://admin.teams.microsoft.com/policies/manage-apps/d2c6f111-ffad-42a0-b65e-ee00425598aa ☑.
- 3. Verify that this URL takes you to the Viva Connections app overview page. If not, check whether Viva Connections is included in your Microsoft subscription. For more information, see the full subscription comparison table ...

**Note:** A SharePoint license is required.

- 4. On the Viva Connections app overview page, check the following settings in the **Details** section:
  - **Short name**: This is the display name of the Viva Connections app in your tenant. In the following example, it's **Contoso App**.



- Short name from publisher: This value should be Viva Connections.
- Publisher: This value should be Microsoft Corporation.
- 5. In the Teams admin center, return to **Teams apps** > **Manage apps**.
- 6. Search for the Viva Connections app by using the short name that's identified in step 4.



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# Can't update details for Viva Connections desktop app

Article • 11/21/2022

If your organization is using the custom line of business Viva Connections desktop app, you can't update the following app details in the Microsoft Teams admin center:

- Short name
- Short description
- Full description
- Privacy statement URL
- Organization's website URL
- Terms of use URL
- Icons for the app

You must use one of two methods every time that you want to update the details of the custom line of business Viva Connections desktop app. Choose the method that works best for you.

## Method 1: Update the manifest and upload it to the Microsoft Teams admin center

Use this method only if you have access to the Viva Connections desktop package that was used to build the app. The package is a .zip file that contains the Teams app manifest. You must have Teams administrator permissions to use this method.

- 1. In the .zip file, edit the manifest.json file to update details such as name, description, URL, and file details for the app icons.
- 2. If you have to update the icons for the app, delete the two .png files in the .zip file, and then upload new files for the icons.
- 3. In the Microsoft Teams admin center, in the left navigation pane, select **Teams**Apps > Manage Apps ☑.
- 4. Use the **Search** field to find your custom line of business Viva Connections desktop app.
- 5. Select the app and then select **Upload file**.
- 6. In the **Update app** dialog box, select **Select a file**.
- 7. Navigate to the .zip file that you updated in steps 1 and 2, and then select **Open**.
- 8. After the file is uploaded, verify that the updated app details appear in the Microsoft Teams admin center.

## Method 2: Create a new package and upload it to the Microsoft Teams admin center

Use this method if you don't have access to the Viva Connections desktop package that was used to build the app or if you don't want to update the manifest directly. To use this method, you must have both SharePoint administrator and Teams administrator permissions.

- 1. Create a new Viva Connections desktop package by following the instructions in this guide. Provide the updated app details to create a .zip file for the package.
- 2. Upload the package to the Microsoft Teams admin center:
  - a. In the Teams admin center, select **Teams Apps** > **Manage Apps** ✓ in the left navigation pane.
  - b. Use the **Search** field to locate your new Viva Connections desktop app.
  - c. Select the app and then select **Upload file**.
  - d. In the **Update app** dialog box, select **Select a file**.
  - e. Navigate to the .zip file that you updated in steps 1 and 2, and then select **Open**.
- 3. After the file is uploaded, toggle the **Status** option from **Blocked** to **Allowed** to make the new Viva Connections desktop app available to users within your organization.
- 4. Use the **Search** field to find your old Viva Connections desktop app, and select it.
- 5. Toggle the **Status** option for this old app from **Allowed** to **Blocked** to make it unavailable to users within your organization. Alternatively, you can delete the old app.
- 6. Verify that the details for the new Viva Connections desktop app in the Teams admin center are correct.

### More information

The custom line of business Viva Connections app is available only for the desktop version of Microsoft Teams. If your organization wants to use the Viva Connections app for both the Teams desktop and Teams mobile environments, you can enable the Viva Connections first-party app from the Microsoft Teams admin center by using the following steps. Updates to this app can be made directly from the Teams admin center.

1. Use the steps in this guide to set up the first-party Viva Connections app.

- 2. By default, the first-party Viva Connections app is blocked. Leave it set to **Blocked** and complete all the other requirements.
- 3. Toggle the **Status** option for the first-party Viva Connections app from **Blocked** to **Allowed**.
- 4. Delete and uninstall the custom line of business Viva Connections desktop app.

### **Feedback**

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# Error when uploading Viva Connections desktop package

Article • 11/21/2022

Your organization has decided to use the custom line of business Viva Connections desktop app. After the Viva Connections desktop package is created as a .zip file, you try to upload the package to the Microsoft Teams admin. However, you receive one of the following error messages:

We can't read the manifest file. Try again later.

Or

We can't upload the app. Try again.

### Check the manifest file

To troubleshoot this issue, check the manifest file that's included in the .zip file. The information in the manifest must follow specific schema requirements. These requirements include character limits on the information that you provide when you build the package. The PowerShell cmdlet that you use to build the package specifies these character limits, but for only some of the information.

Verify that the following character limits are met in the manifest file:

- Name of the app as it should appear in Teams: <=30 characters
- Short description of the app: <=80 characters
- Long description of the app: <=4000 characters
- Your organization's name: <=30 characters

Additionally, the package must follow these guidelines:

- All site URLs must start as "https://". For example:
  - https://<contoso>.sharepoint.com for the SharePoint home site
  - https://<www.contoso.com> for the organization's public website
- The files for the app icons must be in .PNG format and meet these specific sizing requirements:
  - 192x192 pixels for the colored icon
  - 32x32 pixels for the outline (monochrome) icon

After you check the information in the manifest file for these character limits and conditions, and update the information as necessary to meet the requirements, try to upload the .zip file again.

### **Feedback**

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# Error accessing Viva Connections app from Teams desktop client

Article • 10/24/2023

### **Symptoms**

Your organization has followed the steps to set up and start Viva Connections. However, when you try to access the Viva Connections app from the Microsoft Teams desktop client, you receive the following error message:

Something went wrong. We couldn't sign you in. If the error persists, contact your system administrator and provide error code CAA20004.

When you select Additional problem information in the error message, you see the following details:

AADSTS650057: Invalid resource. The client has requested access to a resource which is not listed in the requested permissions in the client's application registration.

### Something went wrong

We couldn't sign you in. If this error persists, contact your system administrator and provide the error code CAA20004.

Additional problem information

Error code: CAA20004 Correlation ID: 5a3c408a-

Timestamp: 2022-02-09T22:32:40Z

More information: https://www.microsoft.com/wamerrors

Server message: AADSTS650057: Invalid resource. The client has requested access to a resource which is not listed in the requested permissions in the client's applicatic registration. Client app ID: 1fec8e78-bce4-4aaf-ab1b-5451cc387264(Microsoft Teams). Resource value from request: 234b6ba5-

ID: 234b6ba5- List of valid resources from app registration: . Trace ID: 0ce4203f- Correlation ID: 5a3c408a- Timestamp: 2022-02-09 22:32:40Z

**Note:** This issue occurs only when you access the Viva Connections app from the Teams desktop client. You won't see this error if you access the Viva Connections app from the Teams web client.

### Cause

This error occurs if a SharePoint Framework (SPFx) web part is added to Viva Connections. Because of the web part addition, the **SharePoint Online Client Extensibility Web Application Principal** object that's available under **Microsoft Entra ID**> **App Registrations** isn't configured correctly to trust the Teams desktop client.

### Resolution

To resolve this issue, navigate to the API Access page from the SharePoint admin center:

- 1. Sign in to the **SharePoint admin center** by using Global admin credentials.
- 2. Select Advanced > API access.

If you don't see the API acess option, use the following steps:

1. Sign in to the **SharePoint admin center** by using Global admin credentials.

- 2. Select More features.
- 3. Select the **Open** button under **Apps**.
- 4. Select API access.

## **Feedback**

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