

Viva Glint: Ask the Expert series

April 9, 2024

Agenda

- Welcome & Introductions
- Getting Started with Viva Glint
 - Practitioner perspective
 - Platform perspective
- · Q&A

Today's hosts:



Jason Thomas
Senior People Scientist
Nebraska, USA



Adam Landerfield
Sr. Customer Experience
Program Manager
Nebraska, USA



Mindy Heusinkvelt
Solutions Architect
Nebraska, USA

Question of the day

How can Viva Glint help support your key objectives this year?



Jason Thomas
Senior People Scientist
Nebraska, USA

Practitioner Perspective on Getting Started with Viva Glint

Clarify your priorities

Organizational Priorities



What are the top three strategic priorities for your organization today?

People Priorities



What are the top three talent priorities over the next six months?

Culture



What are the three words or phrases you would use to describe your culture?

Narrow your focus

- What organizational changes or initiatives have happened recently that may have impacted the employee experience?
- What is keeping people at your company?
 Why are they leaving?
- Is the current culture serving the organization's purpose and the employee experience? Is there a gap between actual culture and desired culture?

What is the most important information you need to learn from your listening programs to ensure you can achieve your organization's goals?

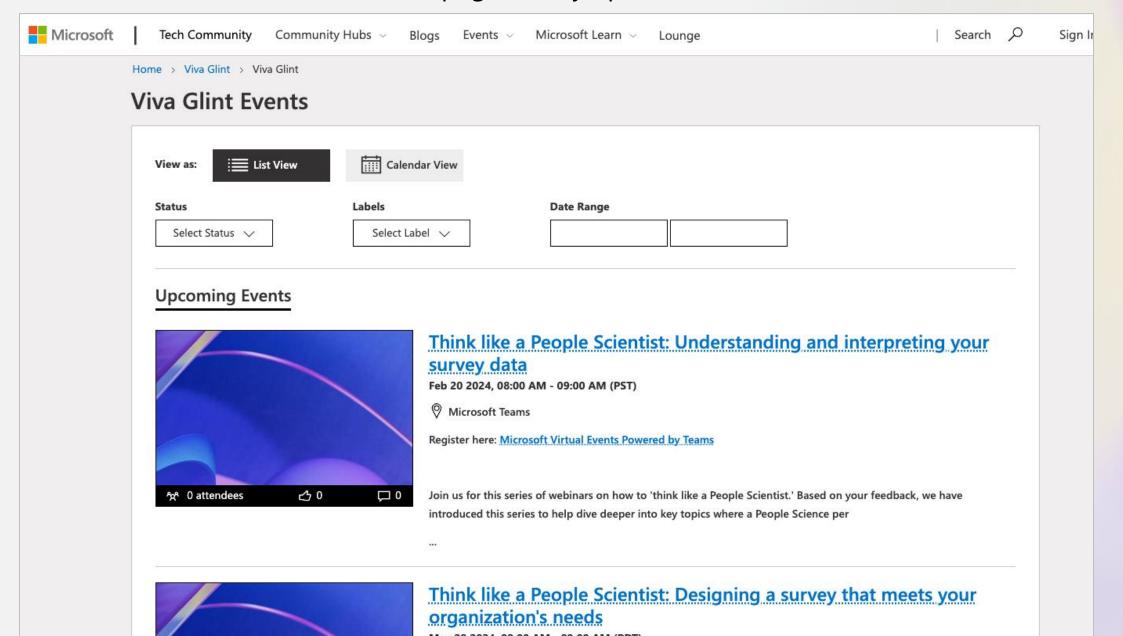


Listening methods

How do you collect feedback from employees today at your organization?

Level 1	Level 2	Level 3	Level 4
Survey once per year or less Items unlikely to vary based on shifting business needs Few other sources of feedback	Survey more than once per year Most items are consistent on every survey cycle but key topics are added as needed Other sources of feedback are gathered (e.g., Onboarding/Exit surveys), but feedback is not reviewed holistically	Survey 2x or more per year Survey items rotate depending on needs of the business Other sources of feedback gathered (e.g., Onboarding/Exit surveys, other key moments that matter) and looked at holistically to understand the full employee journey Starting to incorporate some forms of passive listening (e.g., Viva Insights) that may be disconnected from survey data	Continuous listening approach with multiple surveys and channels Listening topics flex depending on needs of the business Passive listening methods used (e.g., Viva Insights) and connected to tell a holistic story about the employee experience

Bookmark our <u>live events</u> page to stay updated on our events schedule.



Platform Perspective on Getting Started with Viva Glint



Adam Landerfield

Senior Customer Experience
Program Manager
Nebraska, USA



Mindy Heusinkvelt

Solutions Architect
Nebraska, USA

Getting Started with Viva Glint:

1. Introduction to Microsoft Viva Glint:

Use MS Learn to guide you through your Viva Glint Experience

2. <u>Viva Glint Site Provisioning</u> –

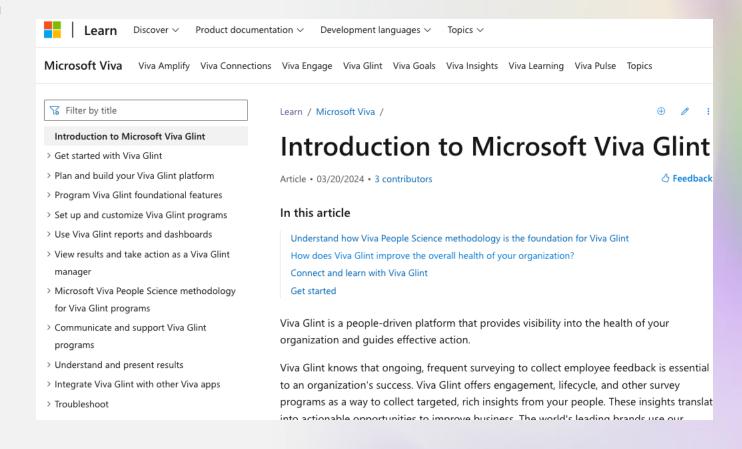
- > Set up your Microsoft Viva Glint Tenant
- Global Tenant Admin owns

3. Viva Glint User Setup (Entra ID) -

- Access Viva Glint with Microsoft Entra ID
- User email addresses must be unique and match between Microsoft Entra ID and Viva Glint

4. Technical Setup:

- Allowed List Review Allowed List and supported browser information for Viva Glint
- > SFTP Setup Create an SSH key pair
- Data Automation Understand Viva Glint SFTP and Data Automation



Viva Glint's Privacy and Confidentiality

- > Privacy and Confidentiality Microsoft Viva Glint adheres to all Microsoft Viva Privacy Safeguards
 - ✓ <u>Viva Glint Privacy</u> Privacy guide for data usage and survey item creation
 - ✓ Confidentiality in Viva Glint Why Viva Glint surveys are confidential, but not anonymous
 - ✓ Raw Data Exports Access Viva Glint raw survey responses directly from Viva Glint
- Works Council Setup a successful program with your Works Council
 - ✓ Get Microsoft's tips for partnering with your Works Council
- **Data Entity** The following illustration shows the central position of the data controller (your organization) between the data subject (left) and the data processor, Microsoft (on the right):



Viva Glint Provisioning

- Set up your Microsoft Viva Glint Tenant
 - Migrating Customers:
 - ✓ Existing Microsoft customers do not need to provision a new Viva Glint Tenant.
 - ✓ This step is completed as part of your technical migration to Microsoft Viva Glint
 - New Viva Glint Customers:
 - 1. Need access to Microsoft Entra ID tenant
 - ✓ Register and manager your Viva Glint apps, configure access to data
 - ✓ If you do not have a Microsoft Entra account, you can create one for free
 - 2. <u>Begin your Viva Glint Provisioning Experience</u>
 - ✓ Choose either the US or EU URL for Azure login to begin:
 - 1. US: http://app.us1.glint.cloud.Microsoft
 - 2. <u>EU: http://app.eu1.glint.cloud.microsoft</u>
 - 3. Site Provisioning Support:
 - ✓ Use Microsoft FastTrack to support your during this process

① Note

Tenant provisioning can only be initiated by the Tenant Global Administrator.

Manage Viva Glint Employee Data

IMPORTANT Reporting hierarchies, file format, and date attributes, can not be edited after initial setup is complete. Before beginning, confirm that the attribute selections in your Employee Attribute Template are final.

- Prepare and upload your employee "attribute" data to Viva Glint
- Attribute Fundamentals Understand and set up your attributes
 - ✓ <u>Hierarchies</u> Understand and set up your hierarchies
 - **Examples:** Manager, Location, Organizational
 - ✓ <u>Attribute Template</u> <u>— Create your Viva Glint Employee Attribute Template</u>
 - Employee Attributes Set up attributes in Viva Glint
 - ✓ <u>Employee Data Upload Method</u> Determine Data upload method
 - SFTP Understand Viva Glint SFTP and data automation
 - <u>People Import</u> Manually upload your employee attributes directly from Viva Glint
 - ✓ **Derivations:** Viva Glint calculates attributes based on data sent in your employee Attribute file.

Derived Field	Based On	Derived Values
Manager Hierarchy	Employee ID and Manager ID data relationship	Up to 25 manager levels, starting with the CEO/top- level leader
Tenure*	Hire Date	<1 Year, 1-2 Years, 2-4 Years, 4-6 Years, 6-10 Years, 10-15 Years, 15-20 Years, 20+ Years
Age Grouping	Birth Year	<25, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, 55- 59, 60-64, 65-69, 70+

Employee Attribute fundamentals

Attributes are data about the people in your organization. These are used to slice and dice the data to provide insights. Attributes can also be used to provide user access permissions as well as to create

distribution lists for surveys.

			C Expand table
Attribute	Description/Notes	Required for Engagement surveys	Required for Employee Lifecycle surveys
Status	Active Must always be fully capitalized ACTIVE or INACTIVE. An employee on temporary leave should have their status updated to INACTIVE and then returned to ACTIVE upon return.		Yes
First name	Appears in email invites and reminders (can be the legal first name, preferred first name, or whichever is in your HRIS).	Yes	Yes
Last name	Employee's legal last name field from your HRIS.	Yes	Yes
Employee ID	Each employee has a unique ID. Don't use blanks or spaces.	Yes	Yes
Email address	Each employee should have a unique email address. Don't include extra spaces. If an employee doesn't have an email address, copy the employee's unique ID into the email field.	Yes	Yes
Personal email address	Opt to include personal email address to contact exiting employees.	No	Recommended

Attribute	Description/Notes	Required for Engagement surveys	Required for Employee Lifecycle surveys
Time zone	See Time zones	No	No
Language	See Language	No	No
Manager ID	Providing the employee ID of the manager for each employee allows automatic build-out of a managerial hierarchy.	Highly recommended	Highly recommended
Hire date	Used to derive tenure buckets. Viva Glint standard values: <1 Year, 1-2 Years, 2-4 Years, 4-6 Years, 6-10 Years, 10-15 Years, 15-20 Years, 20+ Years.*		Yes, for Employee Lifecycle <i>Onboarding</i> surveys
Birth year	Used to derive age group buckets. Viva Glint standard values: <25, 25- 29, 30-34, 35-39, 40-44, 45-49, 50- 54, 55-59, 60-64, 65-69, and 70+	No	No
End date	Employee's termination date, off- boarding date, last day, and so on.	No	Yes, for Employee Lifecycle Exit survey

Employee Attribute fundamentals (continued)

- ➤ Up to 100 custom flat attributes
- Confidentiality thresholds are always upheld
- Derivations can be setup upon initial import or after
- Hierarchy Groups are locked after initial import
- ➤ Age Group can only use **Birth Year** to be derived
- ➤ Values sent for Attributes should remain the same over time to create trend (capitalizations and spaces matter)

Hierarchy Groups A hierarchy filters an employee's attributes into levels from highest to lowest, or largest to smallest, to provide precise insights into a survey. You can define a location hierarchy like Region > Country > City, or a department hierarchy like Business unit > Department > Team, or create a custom hierarchy. Hierarchy groups can be created only during initial schema setup. Organization Level 1 Department ~ Level 2 Group ~ Level 3 Team ~ Location Level 1 Region ~ Level 2 Country ~ Level 3 City ~

Employee Attribute Template

- > Accepted formats are comma delimited .csv (utf-8) or .xlsx
- > Date formats recommended as text, yyyy/mm/dd
- > No formulas will be accepted
- > If users Employee IDs are established with leading zeros, send future files the same way
- > Ensure Employee ID and Email are unique (Employee ID to remain the same)
- ➤ All users should have a Manager ID (except for the CEO)
- > Attribute Names/Headers need to remain the same
- > First row will contain all attributes that will be established/updated
- > Do not include derived attributes on data file

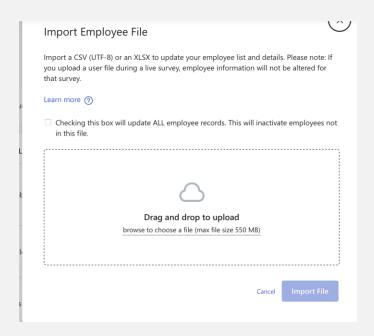
<u>Download Viva Glint Employee Attribute Template</u>

А	В	С	D	Е	F	G	Н
Status	Employee ID	Email	First Name	Last Name	Manager ID	Manager Email	Job Title
ACTIVE	0100000	jroe@example.com	Jane	Roe	700000	manager@example.com	Customer Success Manager
INACTIVE	0200000	jdoe@example.com	Johnathan	Doe	0 700000	manager@example.com	Customer Success Manager
ACTIVE	0300000	ssmith@example.com	Susie	Smith	0 700000	manager@example.com	Solutions Engineer
ACTIVE	0400000	jsmith@example.com	Jason	Smith	1 01200000	manager2@example.com	Solutions Engineer
INACTIVE	0500000	tlane@example.com	Tanya	Lane	1 01200001	manager2@example.com	Sales Representative
ACTIVE	0 600000	tolane@example.com	Anita	Kapoor	0 1200002	manager2@example.com	Office Mangaer

Data Upload Methods

People Page

- Configure>People > Import
- Check box inactivates users not included on data file
- Errors/Warnings displayed prior to confirming import
- Validate upload information, then confirm import



Secure File Transfer Protocol (SFTP)

- General Settings > SFTP Setup
- Create SSH Key Pair, use Public key to complete setup
- Define SFTP IP Addresses
 - ✓ Valid Public IPs that connect to the SFTP
- Notify People will send automated email displaying warnings and errors on data file
- > PGP Encryption option

SFTP Directories

/files/user_full

Full upload, inactivates users not included on file

/files/user_delta

Incremental upload, will only update users in file

Sample Credentials:

i. File Protocol: SFTP

ii. Port: Select 22 or 1122

iii. Host Name: Varies based on region (US or EU)

iv. Username: Company ID

v. Password: Use your private SSH key file

<u>Understand file upload errors and warnings in Viva Glint - Viva | Microsoft Learn</u>

Setup Data Attributes (initial upload)

Configure > People > Get Started Follow Prompts to upload Dataset

Import Employee Data into Viva Glint

Prepare and upload your employee dataset. Make sure it includes all the required employee attributes, and additional ones needed for your future surveys.

Employee Attribute Template Guide

Set up your employee attributes. Tell us which of your field names from the import corresponds to the Viva Glint requried and custom attributes.



Prepare for yo

Decide how you want to import your employee data. You can manually upload your employee file or import later via SFTP.

Get Started

Step 1: Upload Data Set

Step 2: Preview Data Fields

Step 3: Attribute Setup

Define required attributes

Define attributes derivations are based on

Create Hierarchy Groups and Levels

Level 1 (Largest Group) ex: Region

Level 2 (Subset Group) ex: Country

Step 4: Review All Attributes and Derivations

Step 5: Choose How you want to import data

External User Setup

Adding External Users

- Manage External Users in Viva Glint
 - ✓ Completed by your Global Tenant Admin
 - ✓ External Support/Partner users must be added to Microsoft Entra ID as "Member" users before you can add them to your Viva Glint HRIS
 - Must have a company email address for your organization
- Support Users Viva Glint People Scientist, CXPMs, and Partner users
 - Completed by Viva Glint Company Admin
 - Email address in Viva Glint must match the email address in Microsoft Entra ID

Guidelines

- As Data Controller your organization determines the level of access for support users (If any).
- Support Users will be unable to export data from Viva Glint.
 - If you wish to share data your organization is responsible to creating any shared sites (SharePoint).
- These users will not be counted against your total Active users in Viva Glint
 - They will not be part of the survey Distribution lists unless you desire

Q&A

Resources for Learning and Connection

- <u>Learning Paths & Modules</u> Online, self-paced training courses
- <u>Badging</u> Become a Viva Glint expert! Earn learning credentials and post to your social media
- <u>Documentation</u> Find technical documentation and guidance to help you through your Viva Glint journey
- <u>Viva Glint Community</u> A space to ask questions and share ideas with experts and peers
- Newsletter Sign up for this monthly email full of info to help you get the most from your Viva Glint programs
- <u>Viva Glint Blog</u> Blogs specific to Viva Glint research and platform updates
- <u>Live Events</u> -Think like a People Scientist, Ask the Experts

Customer Groups

- <u>Product Council</u> Be part of a community that provides Viva Glint teams with feedback on how we can improve our products and services
- <u>Learning Circles</u> Participate in collaborative time to share knowledge, experiences, and challenges with your peers and to grow your understanding and use of Viva Glint products and services.
- Cohorts Coming this quarter!

Resources for Deployment and Support

FastTrack

Audience: New Viva Glint customers

FastTrack can provide deployment help with Microsoft Viva foundational products and capabilities - at no extra cost for the life of your eligible subscription. See eligibility information.

If you've registered for FastTrack and need support: FastTrack for Microsoft Viva

CxPM/Hotline Team

Audience: Migrating Glint customers

Your Glint Customer Experience Program Manager (CxPM) or a dedicated member of the Hotline Support team will guide you through your technical migration to Microsoft Viva Glint. Contact your CxPM or reach out to Hotline Support:

VivaGlintMigration@microsoft.com

Support

Audience: All Viva Glint customers

Viva Glint admins:

- Microsoft Admin Center
- Support participants during a live
 Viva Glint survey

Viva Glint managers:

- Viva Glint Manager Quick Guides
- Address Viva Glint access issues as a manager

Viva Glint survey participants:

- How to take a Viva Glint survey
- Viva Glint FAQs for survey participants



Thanks for joining!

What topic would you like to see in a future Ask the Experts session?

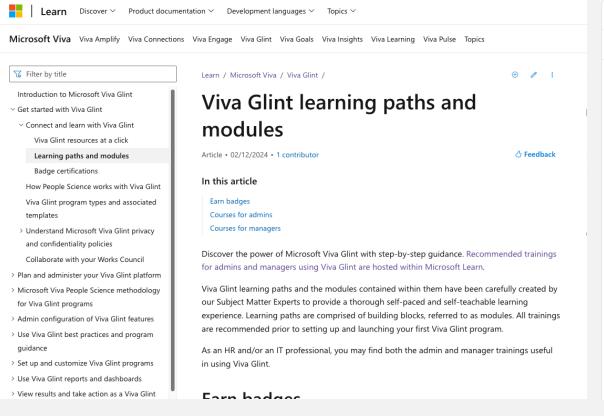
Scan this code to share your feedback about today's session.

Viva Glint: Ask the Experts feedback

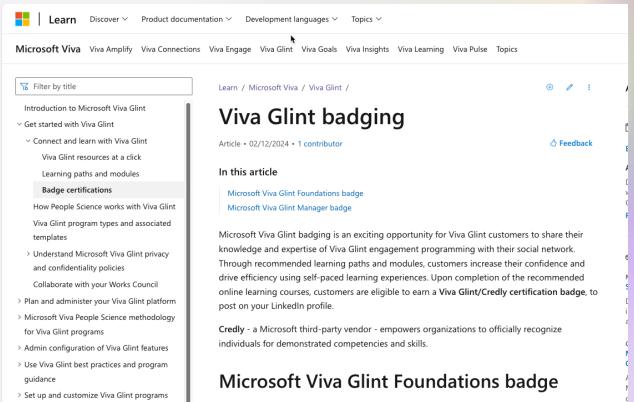


Appendix

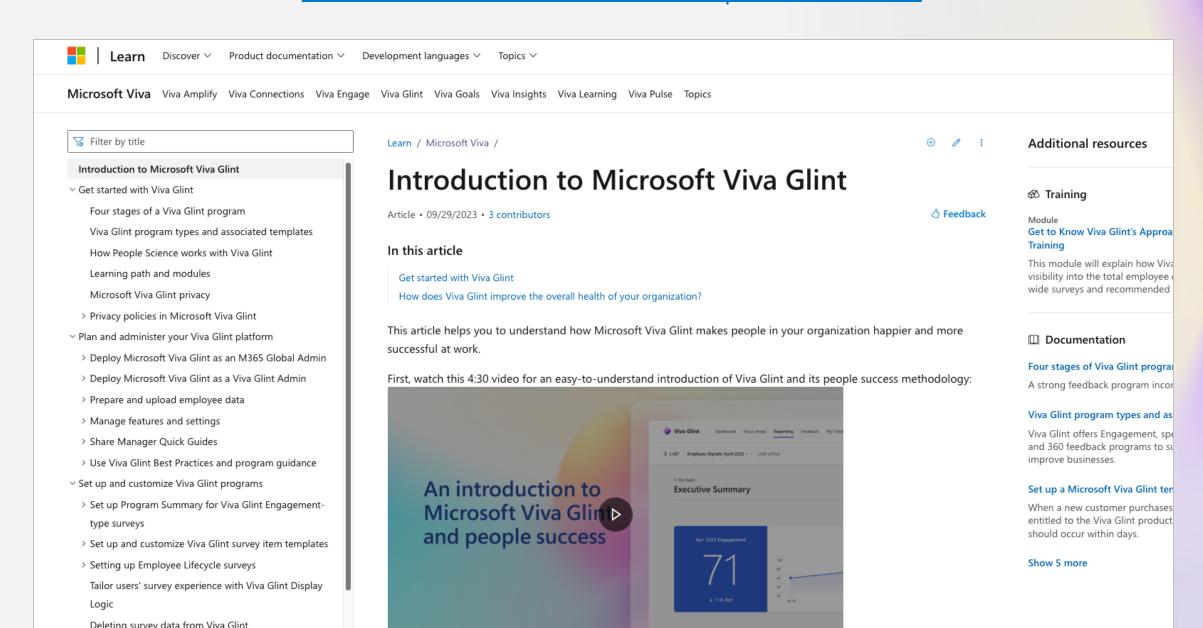
For a list of our training courses, see our Viva Glint Learning Paths and modules page.



For a list of our available badges, see our <u>Viva Glint Badging</u> page.



To access our full documentation library, see Introduction to Microsoft Viva Glint | Microsoft Learn.



Talk to fellow customers, Glint and other Viva app users within the <u>Viva Community</u>. We also have a specific <u>Viva Glint Community</u> just for us where we also post updates and announcements.



Home > Microsoft Viva Community > Workplace analytics & feedback > Viva Glint

Start your Viva Glint journey here



Get started with Viva Glint
Guidance and documentation library



People Success training path

Build your People Success expertise



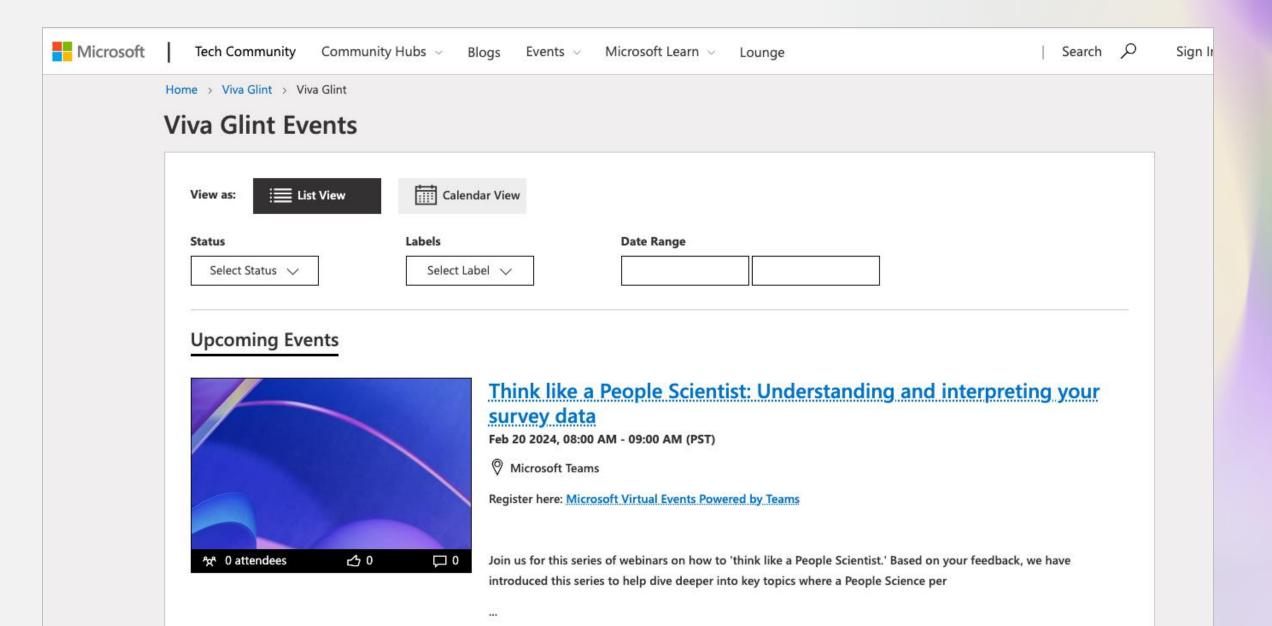
Design and set up training path
Learn about design and
implemention



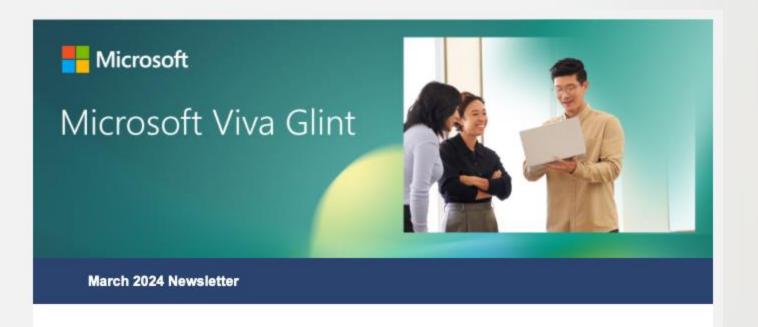
Want to know more about Viva Glint?

Visit the Viva Glint Adoption site

Bookmark our <u>live events</u> page to stay updated on our events schedule.



Register for our newsletter to stay up-to-date on releases, events, and anything new at Viva Glint!



Hi Kathryn,

Welcome to the March edition of our Viva Glint newsletter. Our recurring communications will help you get the most out of the Viva Glint product. You can always access the current edition and past editions of the newsletter on our <u>Viva Glint blog</u>.

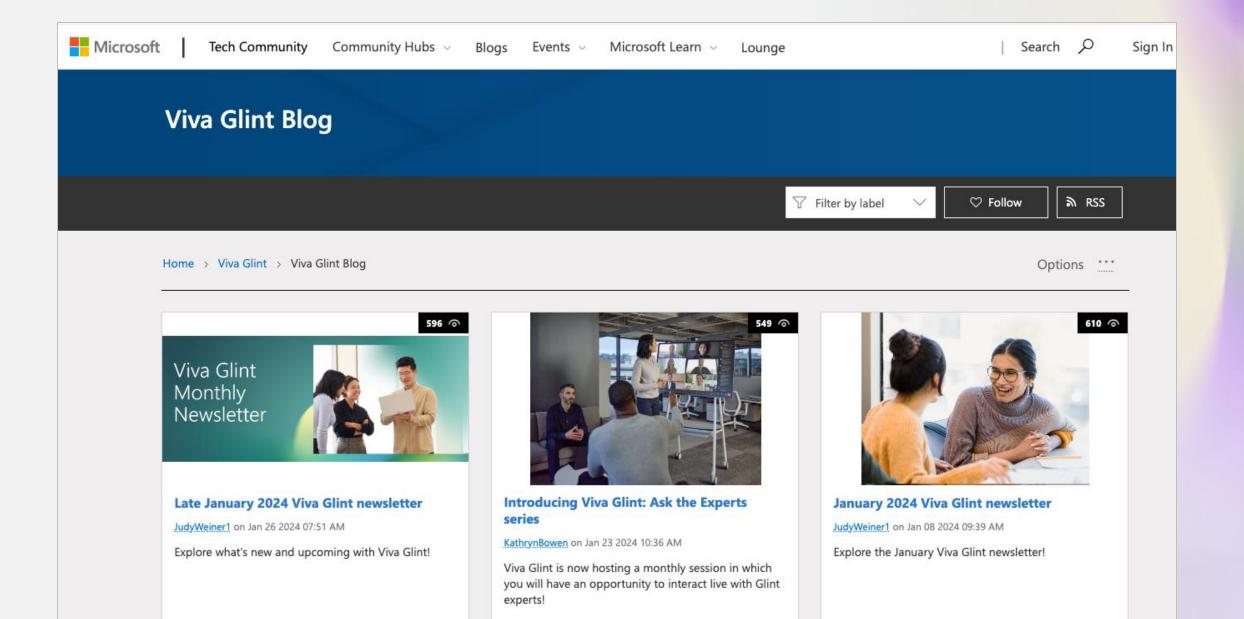
Our next features release date

Viva Glint's next feature release is scheduled for March 9, 2024*. Your dashboard will provide date and timing details two or three days before the release.

In your Viva Glint programs

The Microsoft Copilot Impact Survey template has premiered in the Viva Glint platform. Al tools are increasingly integrated into the workplace to enhance workforce productivity and the employee experience. This transformational shift in work means leaders need to understand their early investments in Microsoft Copilot and how it is being

Check out our Viva Glint blog for our monthly newsletters and other updates.



Join our customer groups to stay connected with fellow customers, our thought leadership experts, and our Product team

Learning Circles

The <u>Learning Circles</u> program offers the opportunity to join a diverse customer group where you can share knowledge, experiences, and challenges with other employee experience professionals and grow your understanding and utilization of Viva Glint. Managed entirely by customers, this is a flexible program to use in the way that works for you.

Product Council

Be part of a community that provides the Viva Glint team with feedback to help shape our product and influence the development of new products through our user experience. Join our Product Council today!

Cohorts

(coming soon!)

The purpose of our customer cohorts are to facilitate connections between customers grouped by shared background (e.g., industry), shared purpose (e.g., culture transformation) or shared interest (e.g., Al). Through cohorts, customers will have additional access to relevant content and events, discussion, and sharing and networking opportunities. Keep an eye out for its launch in our blog and newsletter.

...and more to come!