



CoreView Product Education *Training Outline*

COREVIEW IS THE GLOBAL LEADER IN OFFICE 365
MANAGEMENT AND REPORTING



OFFICE 365 ROLE-BASED
ADMIN RIGHTS



OFFICE 365 LICENSE
MANAGEMENT



OFFICE 365 ADVANCED
REPORTING



OFFICE 365 USAGE
TRACKING

For more information about the CoreView Management Center solution visit www.CoreView.com/features

Contact Us

E-Mail: sales@CoreView.com

Phone: +1 (908) 309-3997



TRAINING AGENDA

CoreView is dedicated to our customers continual improvement of management and administration for Office 365.

- **Training Kickoff**
 - *Introductions - CoreView Staff and Attendees*
 - *Housekeeping Items*
- **Overview of CoreView**
 - *Our Company*
 - *CoreView Product Suite*
- **CoreView Foundations**
 - *Foundations – Part 1 (10 Minutes)*
 - *Foundations – Part 2 (20 Minutes)*
- **Account & Group Management**
 - *Basic Account Management (30 Minutes)*
 - *Advanced Account Management (60 Minutes)*
- **CoreView Reporting**
 - *Basic Reporting (30 Minutes)*
 - ⊕ *Lunch Break (60 Minutes)*
 - *Advanced Reporting (60 Minutes)*
- **Virtual Tenants and License Management**
 - *Virtual Tenants (30 Minutes)*
 - *License Management (60 Minutes)*
- **CoreView Resources**
 - *Support Portal (30 Minutes)*
 - *LightUp 365 (15 Minutes)*
- **Wrap up / Q & A**

Footnotes

1. The times provided for each topic are estimates. The actual length of any topic may be different.

CORPORATE OVERVIEW



CoreView is dedicated to our customers continual improvement of management and administration for Office 365.

CoreView is the global leader in Office 365 management, reporting, monitoring and security auditing solutions. It provides enterprise organizations and Microsoft partners the ability to monitor, manage, report, and audit valuable information on all aspects of their Office 365 environment.

The comprehensive data and the advanced functionality built into CoreView allows organizations to improve security, streamline administration, achieve compliance, optimize licensing, and deliver operational improvements.

- We were founded in 2002 as 4ward.
- CoreView is available both in the Azure Commercial Community Cloud (CCC) and the Azure Government Community Cloud (GCC).
- We recently received \$20M in venture funding to help fuel our continued innovation and our rapidly growing customer-base.
- Collectively, CoreView customers rely on 1,200 Operators to manage slightly over 1,000 Office 365 Tenants and around 3M licensed users.
- Annually, our customers use CoreView to process approximately 183,000 management actions against Office 365.
- On a daily basis, CoreView tracks an average of 2M audit events.
- Named as a [Gartner Cool Vendor](#) for the Digital Dexterity and AI for the Digital Workplace for 2018
- Named as one of Microsoft's [Cloud Transformation Office 365 Partners](#) of the Year for 2017




FOUNDATIONS



CoreView is dedicated to our customers continual improvement of management and administration for Office 365.

CoreView Foundations – Part 1 (10 Minutes)

In CoreView Foundations, we'll review the product's keystone features discuss how these features allow you to do more with less, and achieve your return on investment (ROI).

- | | |
|---|---|
| Web-based¹ | → CoreView's Office 365 Management Center is fully web-enabled and is accessible from anywhere, including mobile devices. |
| Highly Secure | → CoreView leverages on Microsoft's sophisticated and heavily layered security in Azure's CCC and GCC. |
| Virtual Tenant Segmentation | → You are able to segment your individual departments into their own dedicated Virtual Tenants for ease of administration. |
| Admin Rights Delegation | → RBAC assignments allow you decide what actions your delegated admins can perform and what data they can access. |
| License Pools | → CoreView allows you to segment your License Pools so that each department can easily manage their entitlements. |
| Highly Adaptable | → CoreView offers a very rich and sophisticated set of capabilities and these allow our customers to easily meet emerging needs. |
| Always Evolving | → The CoreView application follows a path of continual improvement with feature releases on a bi-weekly basis. |
| Customer Feedback Matters | → Our product's roadmap is driven largely by the input and feedback from customers. <i>Never hesitate to ask for what you need.</i> |
| Empowers your Organization | → CoreView helps reduce an organization's dependency on the level of expertise needed to administer Microsoft products. |
| Coming Soon!  | → In the fall of 2018, CoreView will be announcing two major enhancements to our product: Hybrid and Workflow. |

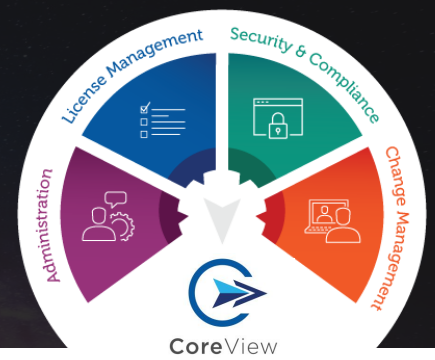
Footnotes

1. CoreView works best with Chrome and Edge and will not work with I.E., or Safari; FireFox or Mozilla may present some issues.

As with any tool, the best and most productive form of training is to spend time using the tool, both in real-world scenarios as well as your own test cases.






FOUNDATIONS



CoreView is dedicated to our customers continual improvement of management and administration for Office 365.

CoreView Foundations – Part 2 (20 Minutes)

In CoreView Essentials, we'll dig a bit deeper into the CoreView interface and review a number of key product functions.

The CoreView Interface	➔	Review the structure of CoreView's interface, basic navigation, and where to find the essentials.
The Management Menu 	➔	A tour of the Management Menu 's available features and functions as well as access to support resources.
My Profile 	➔	Review the information found under My Profile and when you may be able to make modifications (or not).
My Organization 	➔	Understand where to find the information for your organization and your global CoreView tenant settings.
CoreView Operators	➔	In CoreView, Operators are individuals to whom you assign RBAC permissions, either at the enterprise or as delegates.
Audit Logging	➔	We'll go back to the Management Menu to review that Audit Log and what data is present.
The Notifications Menu	➔	Review the information that you will find under the Notifications Menu (aka, "the Bell") and how to clear this information.
Enable Management Actions	➔	Review how to enable management actions and use of the default service account versus use of Global Admin credentials.
The Global Filter	➔	Walk through the use of Global Filters : Attribute Data, License Pools, V-Tenants and Permissions.
Data Refresh Rates	➔	Discuss how CoreView handles data using Microsoft API's and the refresh cadence for your Office 365 information.

Once you have completed this module, you will have a solid understanding of the CoreView User Interface, how to navigate, and the application's key landmarks.



ACCOUNT & GROUP MANAGEMENT

CoreView is dedicated to our customers continual improvement of management and administration for Office 365.

Basic Account & Group Management (30 Minutes)

Let's tackle how you can streamline the administration and management of account objects in Office 365 using **CoreView**.

- | | |
|--------------------------------------|---|
| Finding Users (Quick Search) | ➔ Review how easy it is to locate accounts using the “ Type a user ” search window as well as what information you won't see. |
| The User Card (Basic) | ➔ Take a tour of the User Card and the information that is available to you; and we'll touch on the impact of permissions on the card. |
| The User Card (Action Button) | ➔ Building on the tour of the User Card , we will review the various management actions you can perform. |
| User Reports (Basic) | ➔ We'll now turn our attention to the user-oriented reports available to you in CoreView |
| User Reports (Action Menus) | ➔ Let's take a deeper dive into our how CoreView reports allows you to perform common administrative actions against user accounts. |
| Add a User¹ | ➔ Shifting gears from User Reports , we'll take a few minutes to walk through how to add a user through CoreView. |
| Update / Modify a User | ➔ Now, let's look at how to make changes to an existing user account. <i>License management will be covered later.</i> |
| Add a Group² | ➔ CoreView also allows you to add various types of Groups (e.g., Security, Distribution Lists, etc.). Let's explore how this is done. |
| Update / Modify a Group | ➔ As we did with a user account, let's spend a few minutes reviewing the type of actions you can perform to modify a Group. |

Footnotes

1. Trainees will be asked to create, modify and eventually delete test accounts.
2. Trainees will be asked to create, modify and eventually delete test groups.

Once you have completed this module, you will have a solid understanding of how manage account objects and groups, as well as the role of reporting in account management.



ACCOUNT & GROUP MANAGEMENT

CoreView is dedicated to our customers continual improvement of management and administration for Office 365.

Advanced Account & Group Management (60 Minutes)

In this module, we will review CoreView's advanced Management Actions, a powerful set of capabilities that streamlines the effort and expertise needed to administer Office 365.

Custom Actions (2) 

➔ **Custom Actions** allows you to create, test, execute and share custom PowerShell scripts, all in the context of RBAC.

Mailbox Actions (33)

➔ Review the expansive set of management actions permitted against a mailbox.

User Actions (13)

➔ Building on our review of the **User Card**, we'll now dig into the various management actions you can perform against a user.

Mobile Actions (2)

➔ Many organizations support the management of mobile devices, both organization-owned and BYOD; Let's review **Mobile Actions**.

Distribution List Actions (6)

➔ Exchange admins are often called upon to manage an organization's **Distribution Lists**. Here is how CoreView can help.

Office 365 Group Actions (5)

➔ Let's explore how CoreView can help you manage **Office 365 Groups**.

Mail Contact Actions (3)

➔ From time to time, Exchange admins find themselves needing to create **Mail Contacts**. CoreView can help you with this process.

Security Group Actions (6)

➔ Like the other group-types, CoreView also help you manage **Security Groups**.

Skype for Business Actions (5)

➔ CoreView allows Skype Administrators to easily manage user settings, phone numbers, conference lines and more.

OneDrive Actions (4)

➔ Finally, let's look at how CoreView can help you better manage your organization's OneDrive environment.

Once you have completed this module, you will understand our advanced Management Actions.




BASIC REPORTING CONCEPTS



CoreView is dedicated to our customers continual improvement of management and administration for Office 365.

Basic Reporting Concepts (15 Minutes)

Let's explore the power of **CoreView's** reporting and analytics.

- | | | |
|--|---|---|
| Navigating the Reporting Menu | ➔ | Give you a Cliff Notes® overview of CoreView's large inventory of pre-built reports. <i>Approximately 110 reports and growing!</i> |
| Reporting Basic | ➔ | Review the basic functions common to most all reports in CoreView, such as searching, filtering, adding columns, and so on. |
| Advanced Reporting Techniques | ➔ | Now that we understand the basics of reporting, let's dig deeper to see how you can print, save, export, email and schedule a report. |
| Custom Report  | ➔ | The custom report lets you quickly and easily respond to emerging reporting needs, not yet provided in CoreView. |
| Custom Pivot | ➔ | If you're a fan of Excel Pivot tables, you'll love our Custom Pivot reports. Let's jump in and build some. |



The best way to understand and master the use of CoreView's superior reporting capabilities is simply to jump in and start to use it. You can't break anything.

Once you have completed this module, you will have a solid understanding of CoreView's reporting capabilities.



ADVANCED REPORTING CONCEPTS



CoreView is dedicated to our customers continual improvement of management and administration for Office 365.

Advanced Reporting Concepts (30 Minutes)

Let's look at CoreView's reporting and analytics with some specific use cases.

License Reports (12)	➔	<i>We'll cover License Reporting under the License Management module.</i>
Mail Traffic Reports (7)	➔	We'll now turn our attention to the reports available in CoreView to help you monitor and understand your mail traffic
Exchange Reports (17)	➔	Always a fan-favorite with Exchange administrators, CoreView can give you a deep dive into Exchange. Let's take a look.
Skype for Business (10)	➔	CoreView Reporting provides Skype administrators with reporting on ten aspects of Skype utilization.
Device Reports (8)	➔	Mobility is a business essential and CoreView reporting provides you a comprehensive look into who's running what.
Security Reports (5)	➔	CoreView provides Exchange administrators and data retention professionals with additional information on end-user activity.
SharePoint Reports (5)	➔	If you're looking to understand who is using SharePoint in your organization, we offer a number of ways to view usage.
OneDrive Reports (9)	➔	OneDrive utilization is fast becoming a key management activity for administrators. Let's dive into what CoreView offers.
Teams Reports (2)	➔	If you're looking to understand who is using Teams in your organization, we offer you several ways to view usage.
Aggregation Reports (2)	➔	Aggregation reports give you a visual way of looking at key utilization measures. This is perfect for IT executives.

Once you have completed this module, you'll understand our advanced reporting capabilities.



TENANT & LICENSE MANAGEMENT

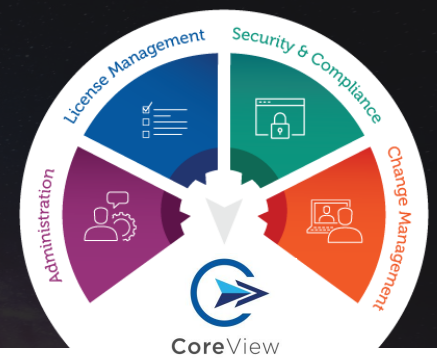
CoreView is dedicated to our customers continual improvement of management and administration for Office 365.

Tenant and License Management (60 Minutes)

Let's tackle how you can leverage CoreView's Virtual Tenant and License Management capabilities.

Overview of License Pools	➔	One of CoreView's most powerful features, License Pools , gives you a highly-flexible license management tool. Let's take a look.
Managing License Pools	➔	Now that you understand the basics of how License Pools operate, let's look at how you can manage them.
Creating Virtual Tenants	➔	CoreView allows our customer to separate various business units into separate logical tenants. Let's find out how.
Creating Virtual Sub-Tenants	➔	Now that you understand the basics of V-Tenants , let's see how we can divide a tenant into sub-tenants.
License Pool Chargeback	➔	Understanding the cost of an organization's licensing is of interest to many IT professionals. Let's dig in and discover more.
Understanding License Utilization	➔	From our module on reporting, you already understand how to harness the power of analytics, now let's apply that to licensing.
Assign / Recover Licenses	➔	CoreView allows you to easily assign or unassign end user licenses. Let's look at how to do that with an individual user.
Assign / Recover Licenses (Bulk)	➔	CoreView allows you to easily assign or unassign end user licenses. Let's look at how to do that with groups of users.
License Reporting	➔	Finally, let's recap the baseline set of reports that CoreView provides you to assist in license management.

Once you have completed this module, you'll understand license management in CoreView.




CUSTOMER RESOURCES

CoreView is dedicated to our customers continual improvement of management and administration for Office 365.

Customer Resources (30 Minutes)

In addition to this training, we also offer our customers with access to various support resources to further help you on our journey.

- [Light Up 365](#)  → You can offer your end-users with access to over 2,000 short videos that can help drive end-user empowerment.
- [Support Portal](#) → CoreView offers our customers with a dedicated Support Portal where you can submit support tickets and access resources.
- [Knowledgebase](#) → We provide our customers with access to a comprehensive product Knowledgebase. ***Please check here first!***
- [Online User Manual](#) → Our Support Team also maintains an up-to-date User Manual, that you can access at any time from the CoreView application.
- [Release Notes and News](#) → We have recently begun publishing **Release Notes** as part of our bi-weekly product updates.
- [CoreView YouTube Channel](#) → Our customers have access to a dedicated CoreView **YouTube Channel** where you'll find informative videos on our product.
- [CoreView Blogs](#) → The CoreView staff publish blogs on a regular basis. These blogs cover topics of interest as well as product announcements.
- The CoreView Team** → Each and every member of the CoreView family is dedicated to ensuring that you are deliriously happy with CoreView.

***Thank you for attending CoreView training.
We welcome your comments and feedback.***



Use Caution



Advanced Skills



Additional Offering



Tenant Admin Only