FastTrack User Guide- Microsoft & Partners

This guide contains step by step instructions to help Microsoft and Microsoft partner users understand the new FastTrack site. This guide covers site registration, navigation, using the Field dashboard, finding customers, redeeming offers, and creating success plans and plan snapshots.

Contents

Things You Should Know

1. FastTrack can now only be accessed using a working **Organizational ID**. This means that all partners and customers will need company tenant to access the site. Any partners or customers without an Org ID can sign-up for a trial tenant using the normal process.
2. **Test success plans should only be created in test customer and partner accounts**. Any test success plan created in a real customer account will be viewable by that customer upon login.
3. Certain **offers** will require customer log-in and validation for redemption in the new site.
4. **Updates to company logos and masthead images are publicly viewable** to all users of your company account. This feature has been locked down for Microsoft users.
5. **Getting Started** no longer loads content into a live customer tenant, but now uses a temporary test tenant.

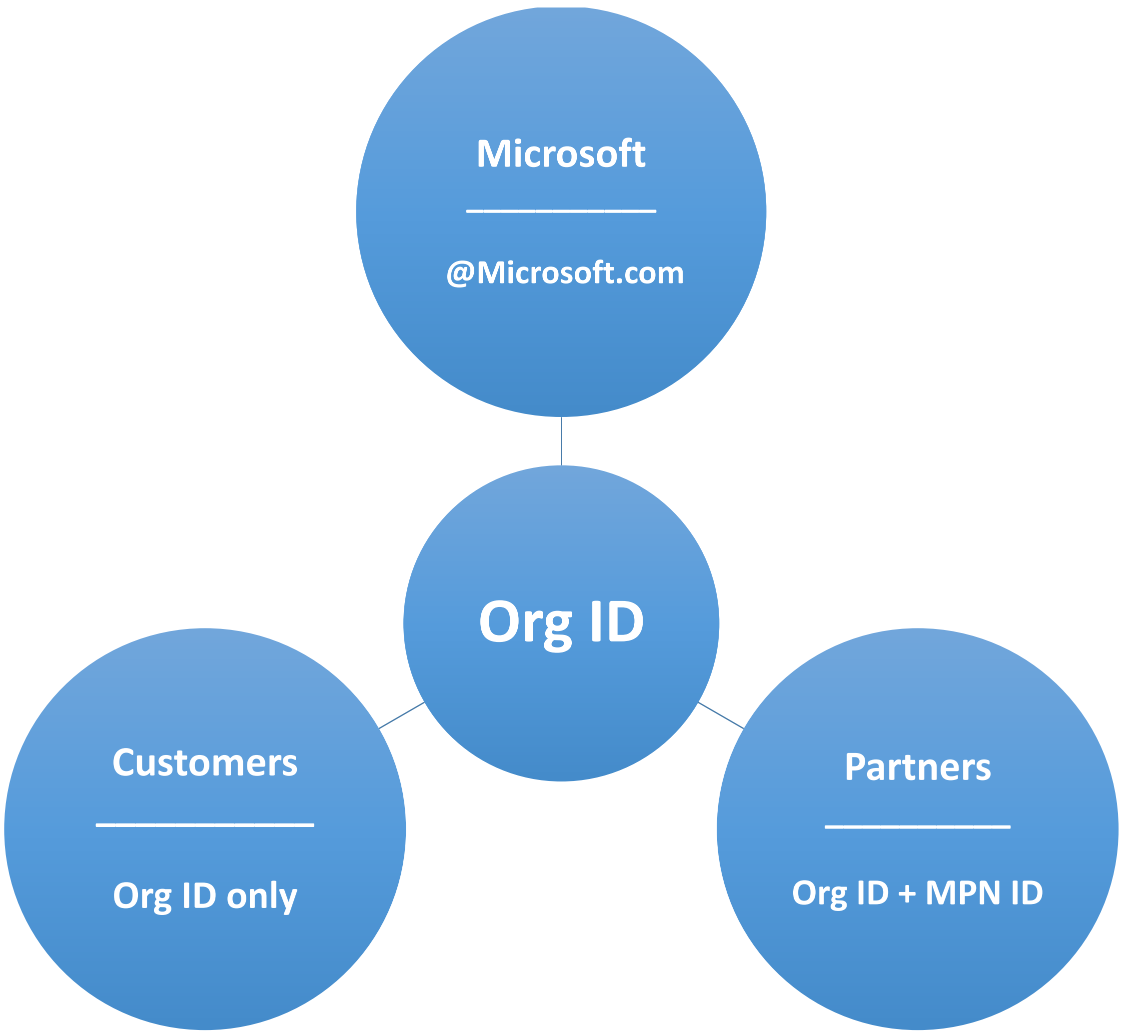
Data Migration Overview

All previous FastTrack customers with active usage in the last 12 months will be migrated to the preview site. They will appear as an unverified customer record until someone from the company completes first-time login using an Org ID. After first-time login, the customer record is verified. The following criteria was used to determine which FastTrack accounts were migrated from the previous environment:

- Customers with “Test” in their name were not migrated.
- Customers were migrated if they showed active usage, those without active usage were not.
- Active usage was determined by the following criteria:
    - Customer showed at least one question was modified after August 31, 2014 in one of the following plan types; Deployment Plan, Adoption Plan, EMS Deployment Plan, CRM Plan or the Azure Consumption Plan. –and/or-
    - Customer showed some offer status for any of the following plans; FY15 Office Adoption Offer, Skype for Business Kit, Excitement Kit, Office 365 DPS Offer, Office 365 “Buy E4 Now” Offer, FY16 Office 365 Adoption Offer, FY16 EMS Adoption Offer.

FastTrack Audiences

The FastTrack preview site allows Microsoft, partner and customer teams to drive adoption in a shared environment, while protecting user privacy with audience-level permissions. There are three distinct site profiles that FastTrack assigns at the org-level based on user Org ID– customer, partner or Microsoft. FastTrack breaks out audiences using the following Org ID logic:



New FastTrack preview audience specific updates:

- Microsoft users can view all customer records, but need customer consent to be visibly added to a team
- Partners need customer consent to view anything more than offer availability within a customer
- Customers must sign-in and approve a success plan for it to be marked final
- All cross-customer search features are unique to Microsoft and partner user dashboards

Logging In

Navigate to http://fasttrack.microsoft.com

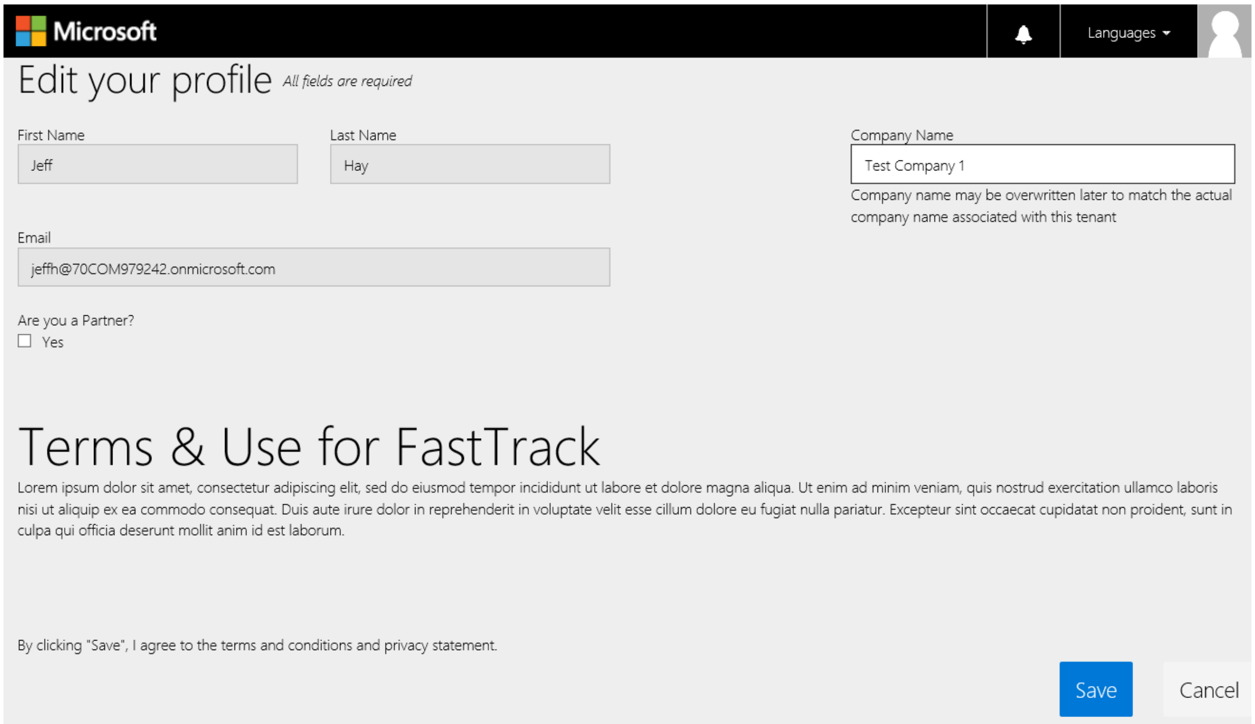
Click **Sign In**

Enter your work account credentials.

Click **Sign In**

Note: FastTrack can now only be accessed using a working **Organizational ID**. This means that all partners and customers will need company tenant to access the site. Any partners or customers without an Org ID can sign-up for a trial tenant using the normal process.

Check **Yes** and enter your MPN ID if you are a Microsoft Partner.



Note: Once users are matched to an Organizational record, the temporary company name will be overwritten with the actual name used on the company tenant.

Click **Save** to continue to the site

Navigation

Microsoft and Partner Accounts

The following features are shared by both Microsoft and partner users

Office 365 | EMS| Success Plan

| Dashboard| Support | Resources

Success Plan (Welcome Screen):
Introduces FastTrack to new users, showcases important announcements and features recommended actions.

Office 365:
Provides tools and resources to help you drive usage of Office 365.

EMS:
Overview of the EMS FastTrack and onboarding program.

Dashboard:
Search for customers, view organizational stats, access your success plans and begin stand-alone success plans.

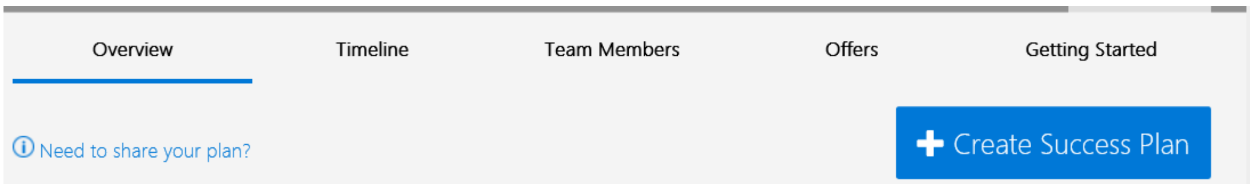
Support:
Launch FastTrack customer support tickets and reference Knowledge Base materials for learning and troubleshooting.

Resources:
Documents & videos to help you get the most out of your Microsoft FastTrack experience.

Navigating within a Customer Record

Overview | Timeline| Team Members | Offers | Getting Started

Opening a customer record, presents the user with a secondary navigation at the customer level.



Note: Top-level navigation (the black bar at the top of the screen) relates to the user's organization, not the companies you work with. If you press one of the top tabs within a customer record, you will exit the customer and go back to your site.

Overview:
The company Overview screen lists all of the success plans started at the company level. Partners can only see success plans they have been invited to or success plans they initiated. Field and customers can see all success plans for that customer.

Timeline:
The customer timeline shows FastTrack milestones and events visually over time. Timelines can be focused on specific success plans or look across an entire customer.

Team Members:
View customer, partner and Microsoft FastTrack users that have been invited to participate in the customer team. Microsoft users must request access to be visible in this section.

Offers:
Check available offer status and redeem offers for your customers.

Getting started:
Customers and partners can spin up an Office 365 test tenant loaded with resources end users can touch and feel to help drive adoption activities.

Quick Start Activities

Explore your Dashboard

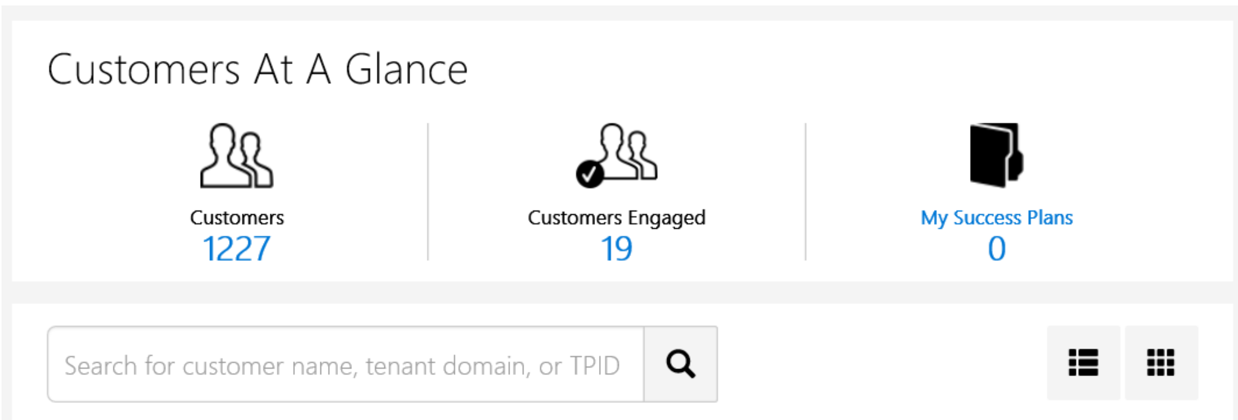
After Login, you will land on the **Success Plan (Home)** screen. Click **Dashboard** to view information on your customers.

Customers at a Glance

Customers – The total number of customers associated with your organization.

Customers Engaged – Number of customers your company has been invited to that show recent success plan or offer activity.

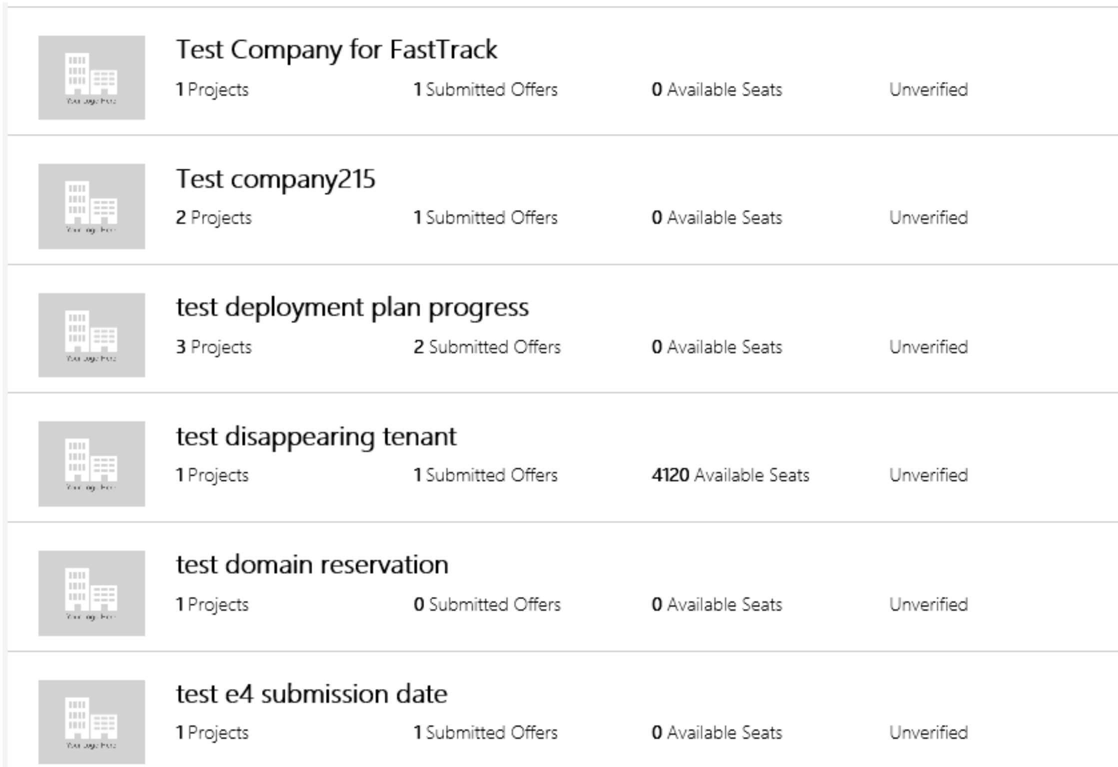
My Success Plans – Represents the total number of success plans you have created or have been invited to and links to those plans for easy access.



Using Your Customer List

From your **Dashboard**, scroll down to see a full list of customers your organization has worked with since Sept 1, 2014. Customers without activity after that date were not migrated to the new system. (See Data Migration Overview above for details).

> Note: You may experience up to a 15 second delay loading your customer list during the preview dependent on the number of customers associated to your organization.



Customer Search

From your dashboard, click in the Search new customers by name, TPID, or tenant box and conduct a customer search using one of those criteria. All previous FastTrack customers that met the migration criteria are available via search. Refer to the Migration Criteria section above to understand the logic used in that process.

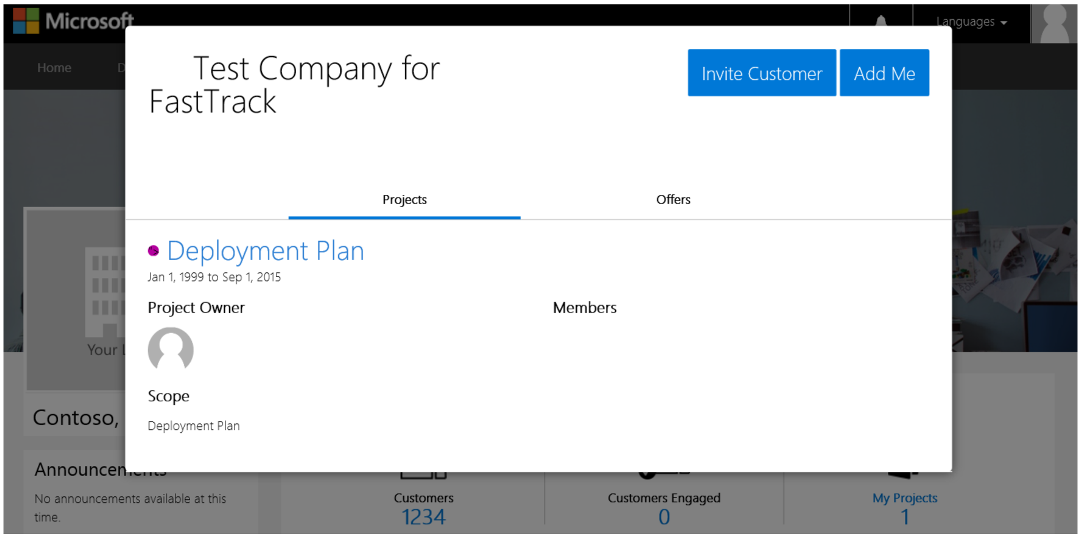
> Please note: Microsoft users can see all customer data, however, partners are limited to viewing available offers and must request access from the customer to see additional customer data.

Type a customer name into the search box, if the customer is not in the system you are prompted to invite them to FastTrack.

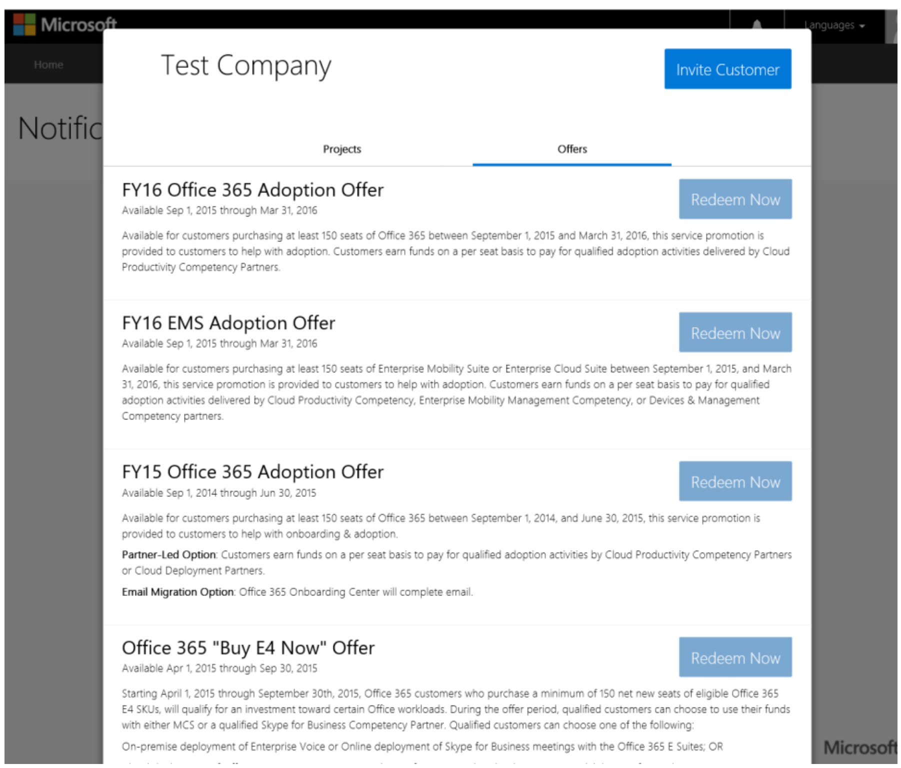
If search returns the customer you are looking for, click on the customer you choose.

You will land on a **Customer Preview Screen** where you can preview company details including a direct view into all success plans to which the customer has granted you access. (Microsoft user permissions allow them to see all success plans for the company by default.)

The company preview screen also allows you to open the customer record by clicking on the company name, invite customers to work on new success plans or ask to be added to their company team.



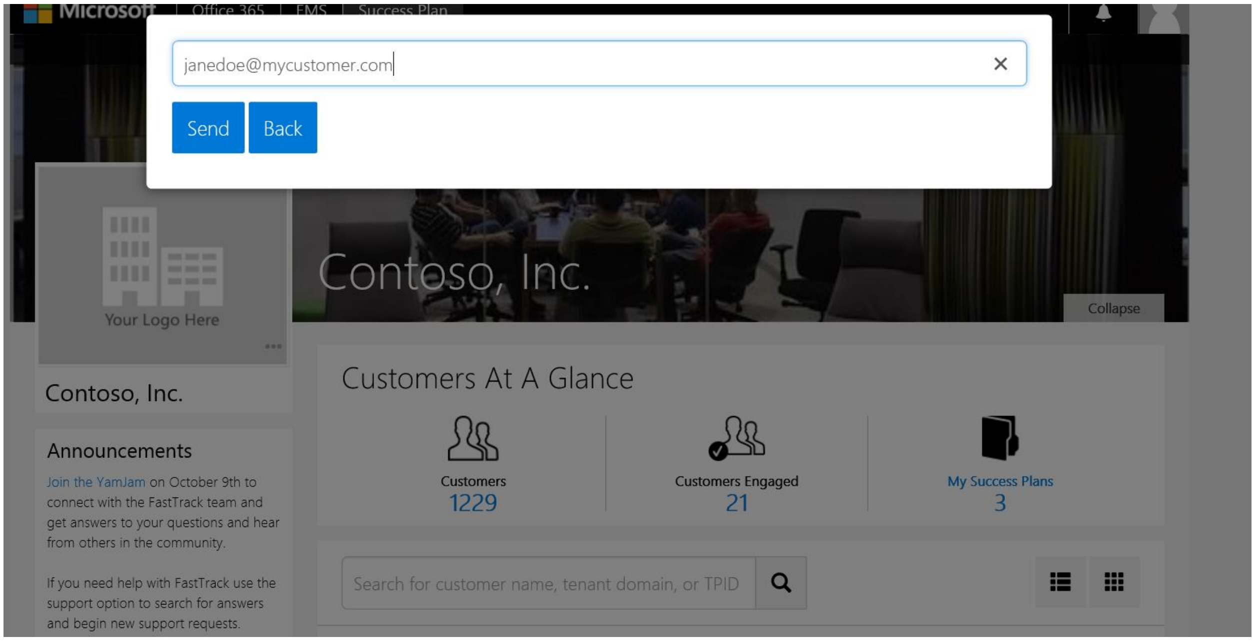
Click the **Offers** tab on the preview screen to view the available offers for that company and see offer status information and begin the redemption process.



Invite a Customer and Verify Their FastTrack Account

From the customer **Overview** screen, choose **Invite Customer** to invite customers who have never participated in FastTrack. Inviting a customer sends a mail to the email address you choose, instructing them how to login to the site.

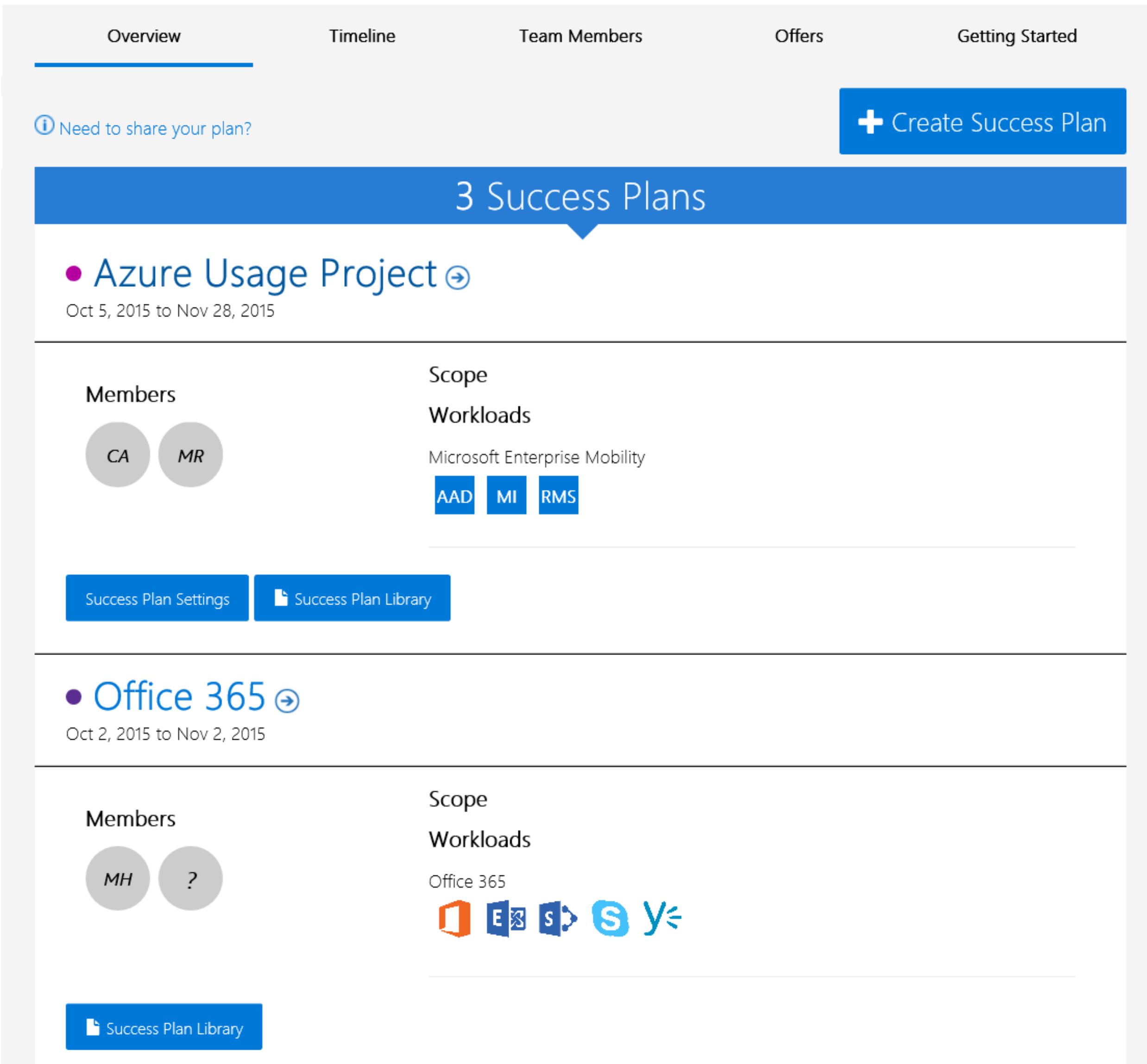
> Note: Because all past FastTrack customers will need to login to the site to verify their customer record, this is an easy way to help with that process.



Open a Customer Record

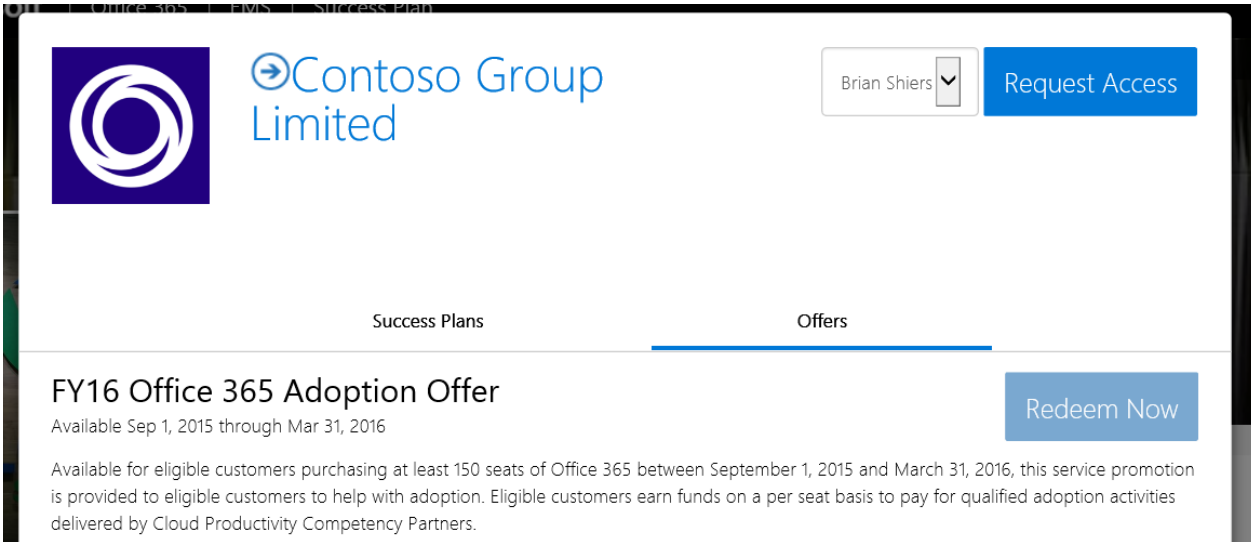
Choose one of the companies already associated with your organization and click on the company name to view the customer **Overview** screen.

This Overview screen shows a list of customer success plans and key highlights from the Insight and Guidance data (Microsoft users only). This screen also presents tabs to drill into for more customer details, including; Timelines, Team Members and Offers.



Request Access to a Customer

From the customer **Overview** screen, choose **Request Access** to an existing FastTrack customer record to which you do not have access. An email invite request will be auto-generated to the customer site manager. Upon acceptance you will appear in the Team Members tab for that customer and you will be able to assist them with success plans.

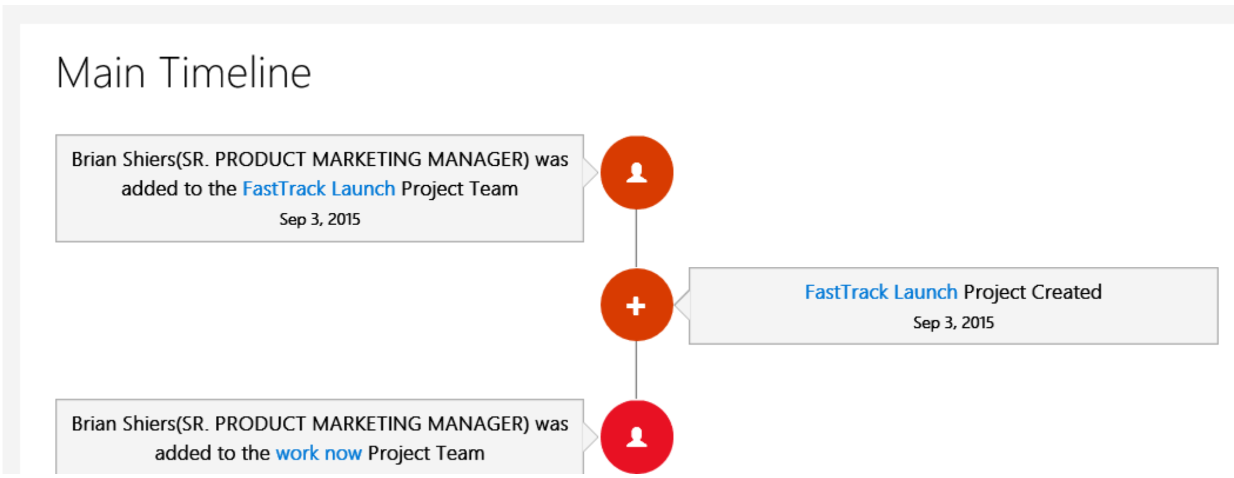


AddMe to a Customer

From the customer **Overview** screen, choose **Request Access** to an existing customer in cases where someone in your partner organization has worked with the customer, but you personally haven't accessed their customer record. When you add yourself, you will appear in the Team Members tab for that customer and you will be able to assist them with success plans.

Customer Timeline

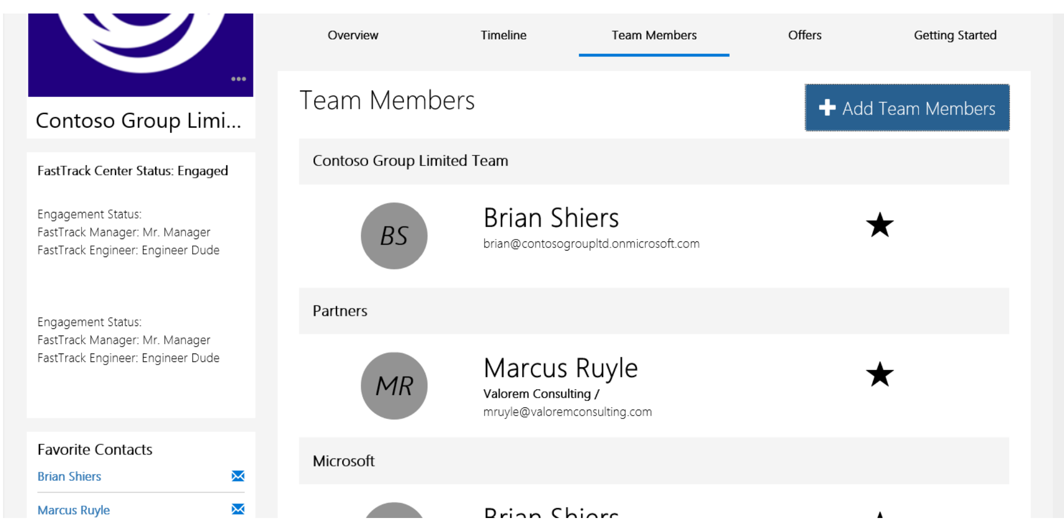
From the Customer Overview screen, click the **Timeline** tab. This will display the Main Timeline which rolls up all milestone events for all success plans you have access to for that company. Use the left Timeline navigation bar to filter milestone events to specific success plans.



Team Members

Click the **Team Members** tab from the Customer Overview Screen to view a list of all customer team members and any Microsoft or partner team members who have been added to the site by a company user.

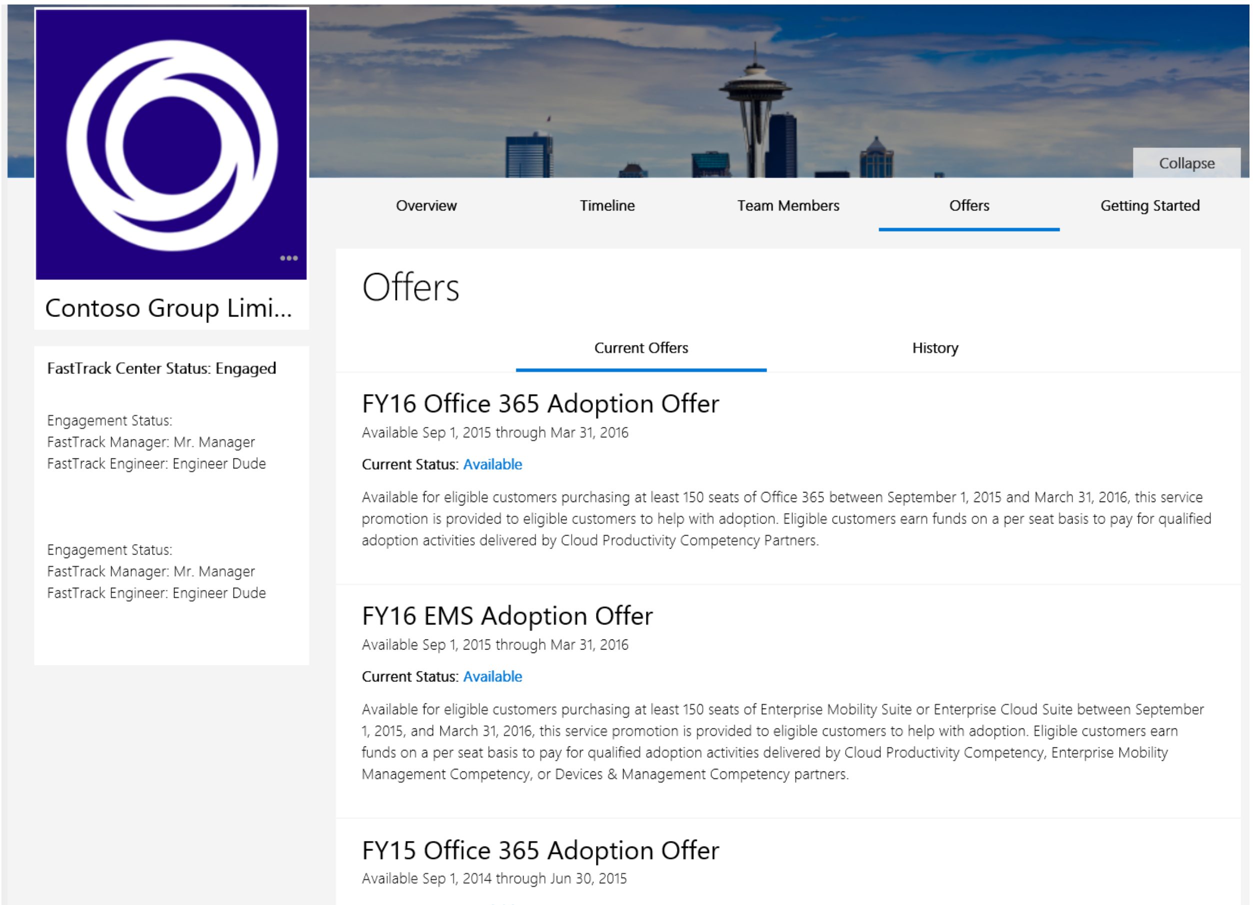
Click **+Add Team Members** to invite new members to join the company team. Click the "star" and favorite team members to make them appear under **Favorite Contacts** on the left hand nav bar to make it easier to contact them.



Offers

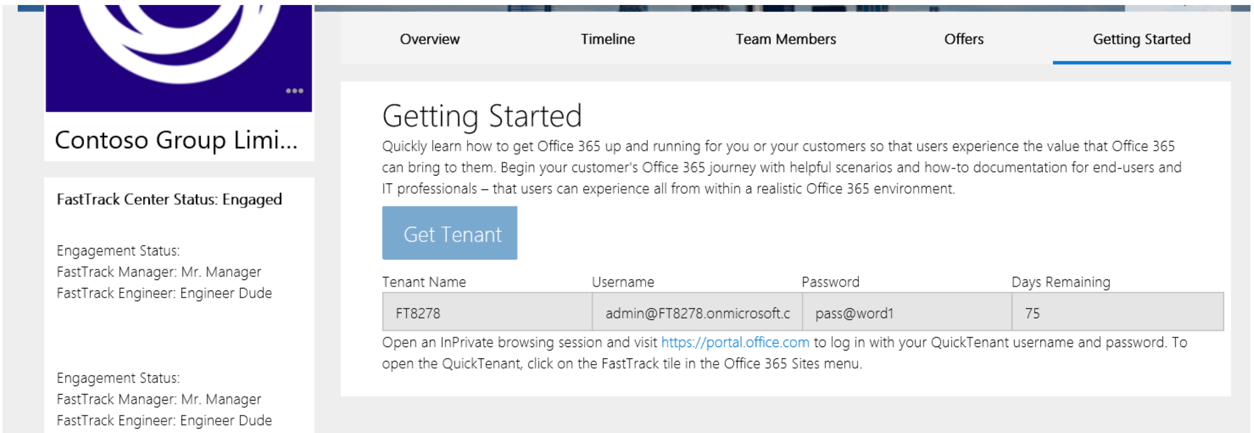
Click **Offers** from the Customer Overview Screen. Here you can see all available offers for this customer and also see the redemption status of each offer. You may also initiate the redemption process for a specific offer from this screen.

Note: More detail around this process will be provided in the "Fill Out an Offer Form" validation scenario below.



Getting Started

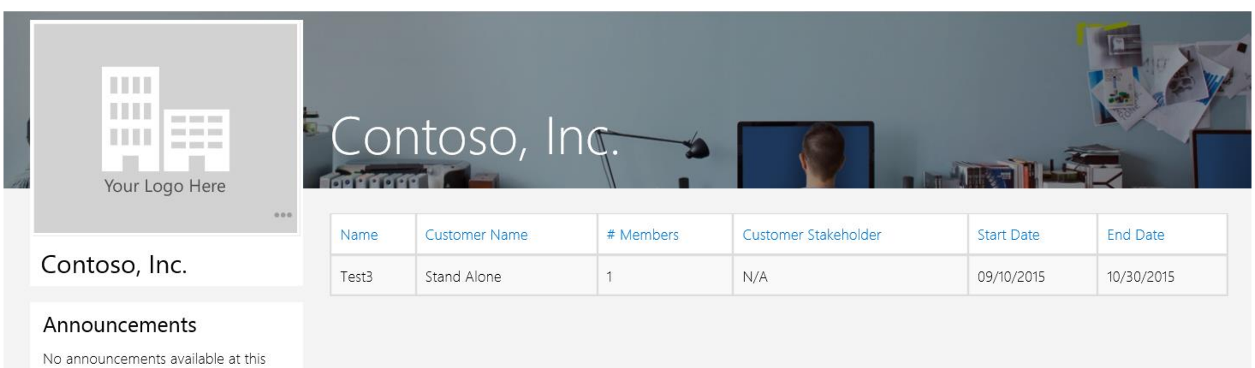
Quickly learn how to get Office 365 up and running for you or your customers so that users experience the value that Office 365 can bring to them. Begin your customer's Office 365 journey with helpful scenarios and how-to documentation for end-users and IT professionals – that users can experience all from within a realistic Office 365 environment.



View Your Success Plans

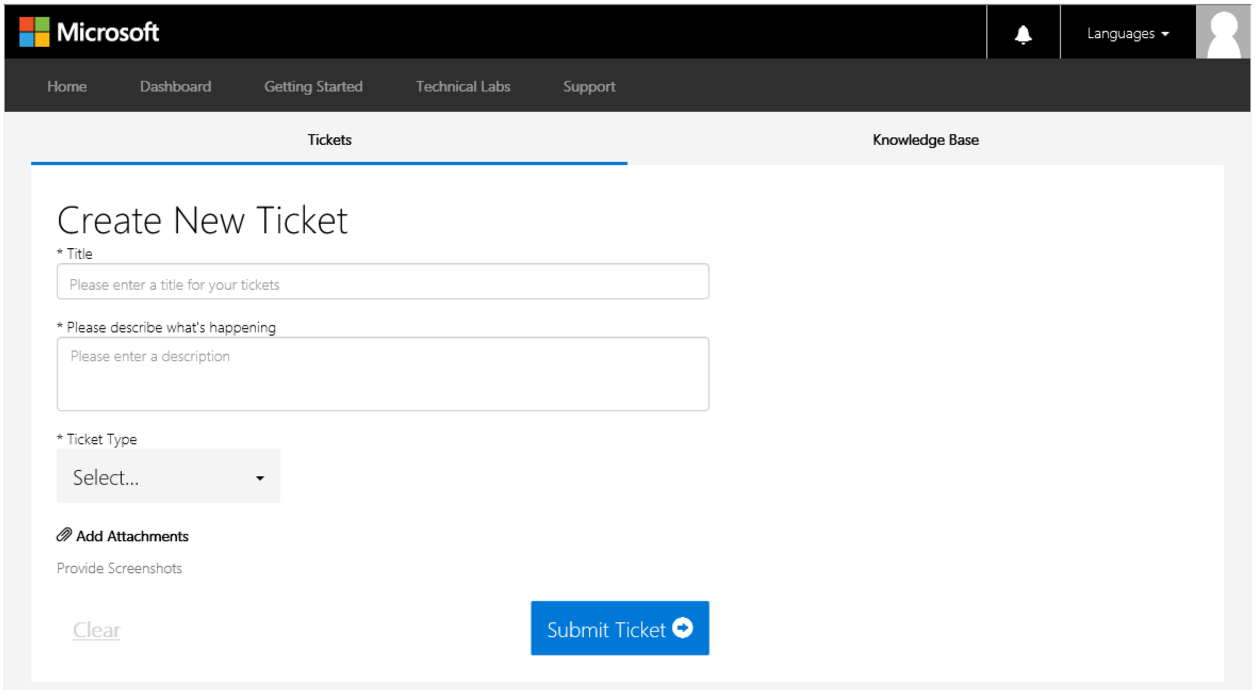
From your Dashboard, click the My Success Plans link to see a list of your success plans. If you don't have any success plans, complete the Create a Success Plan Exercise below and you will see it show up in this view.

Click on the row to open the success plan.



FastTrack Support

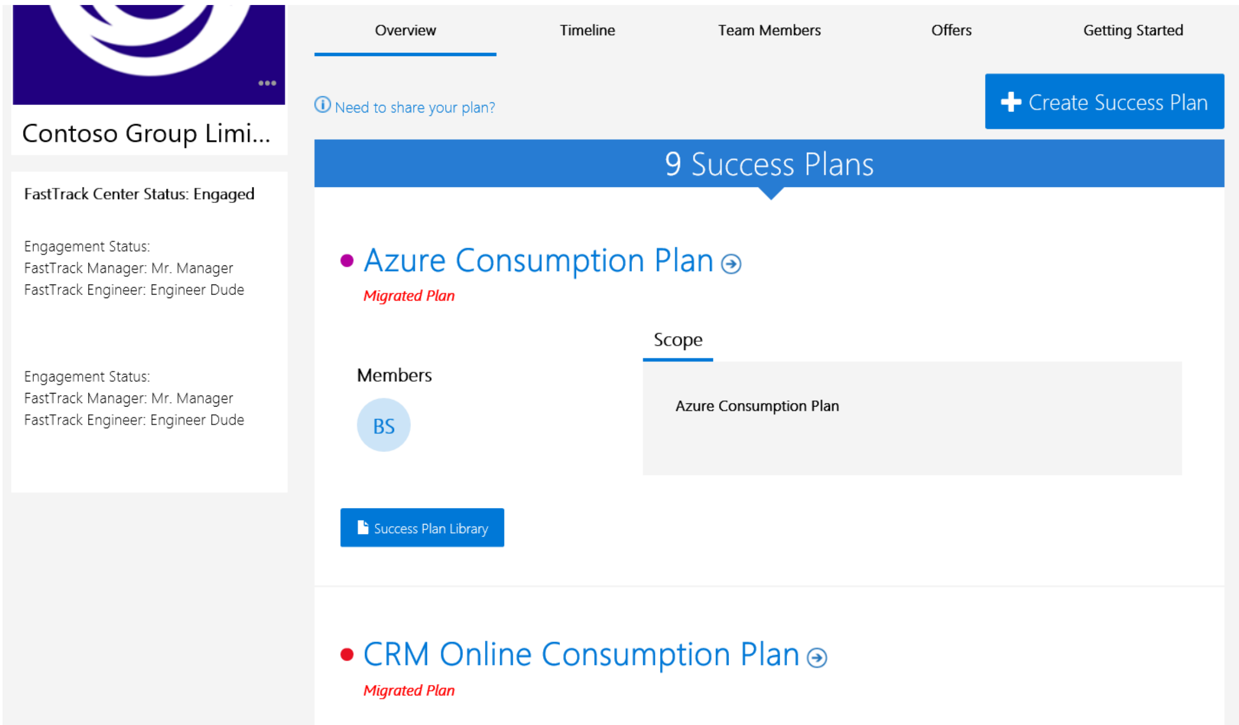
Click **Support** in the top navigation bar, fill out details about your issue, attach screenshots and Submit Ticket. A customer support representative will get back to you soon.



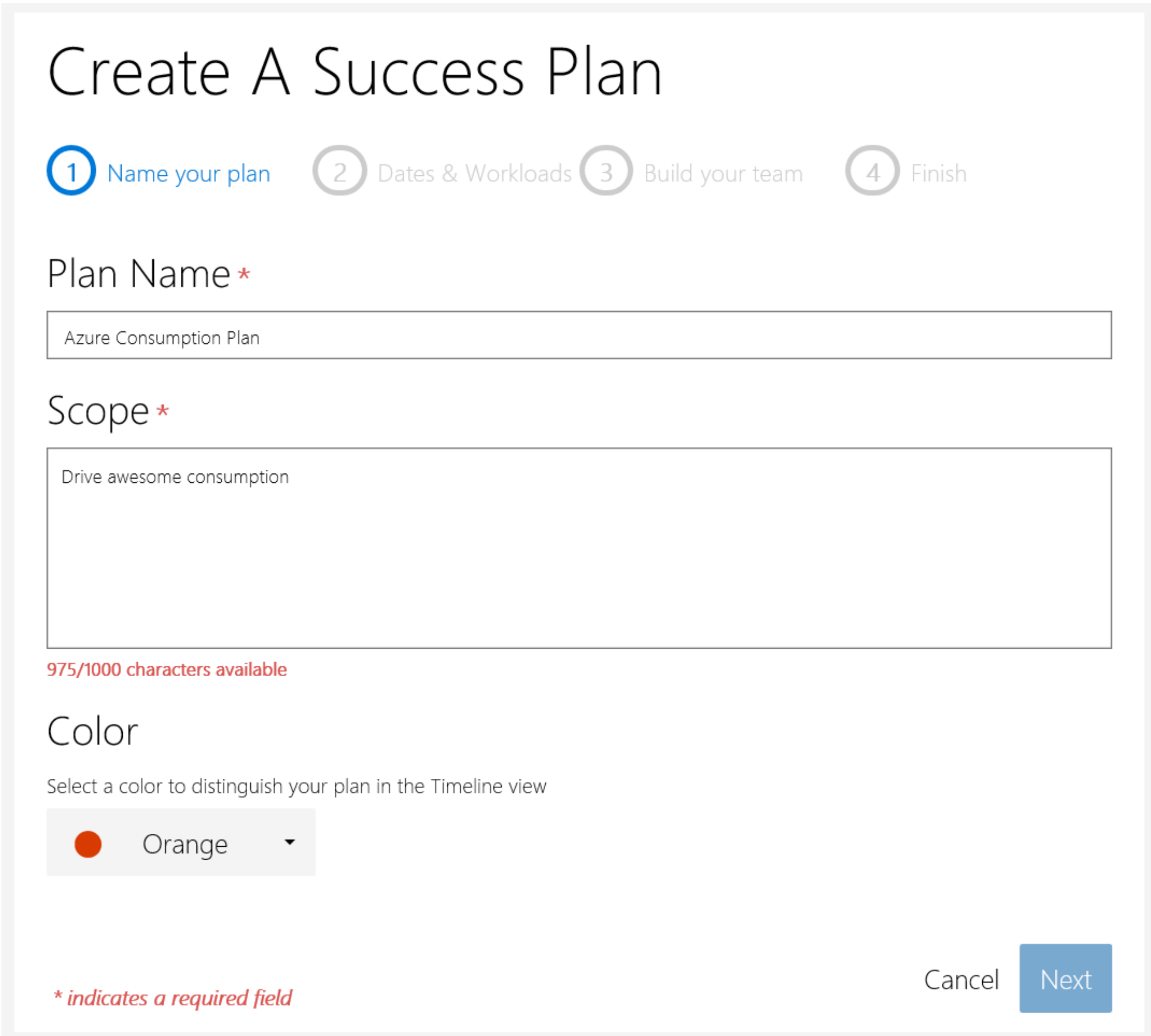
Activity Scenario: Set Up a New Success Plan

Setting up a success plan is the foundation for completing your success plan. To create a new success plan, open a customer from your Dashboard customer list and choose an existing success plan.

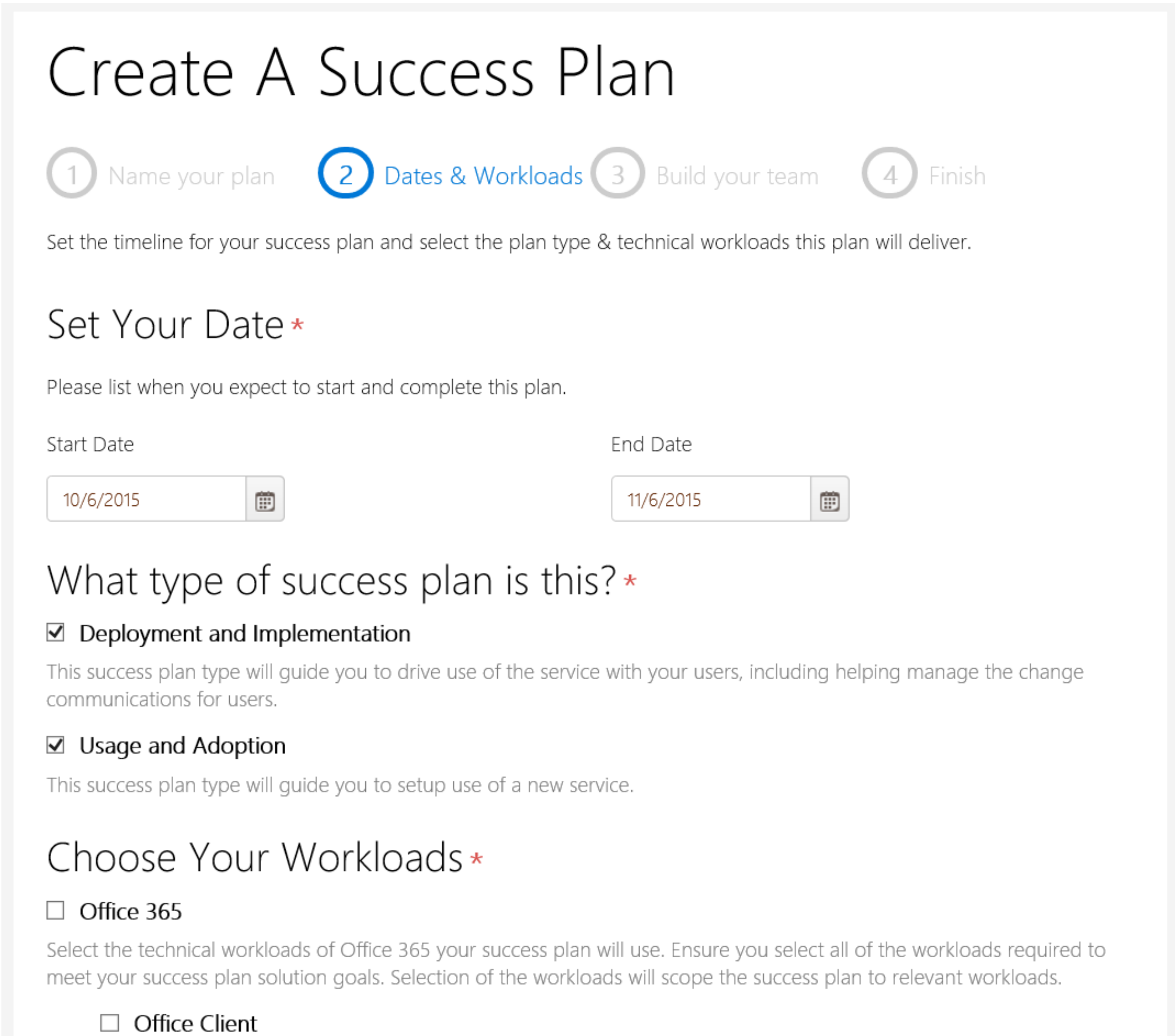
This will land you on the **Success Plan Overview** page. Select + Create New Success Plan which opens the New Success Plan Wizard.



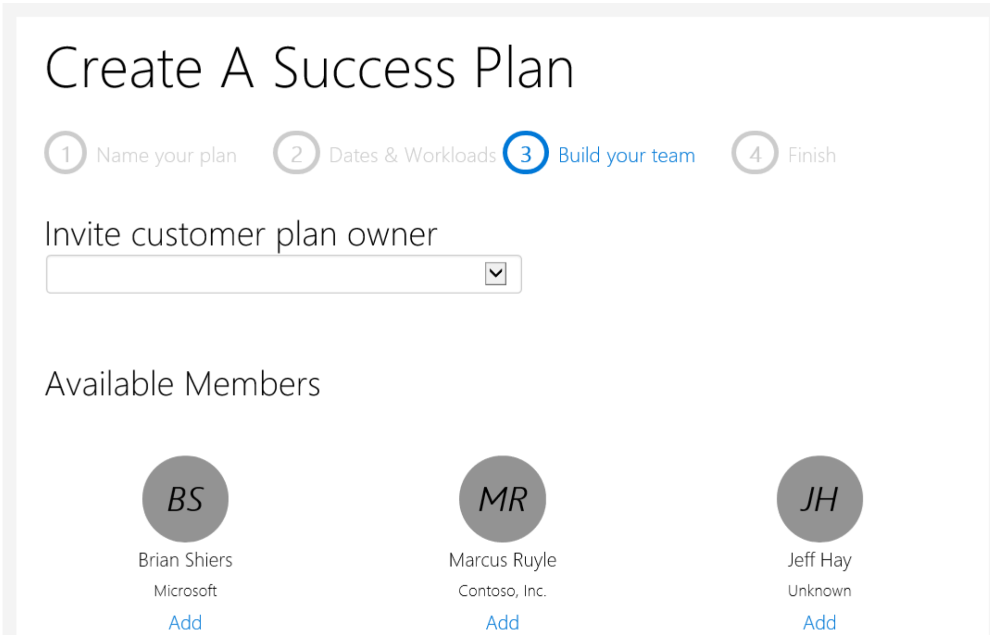
From the Create New Success Plan Wizard, enter a success plan name, scope and select a color (colors help you organize multiple success plans), click **Next** to complete section 1.



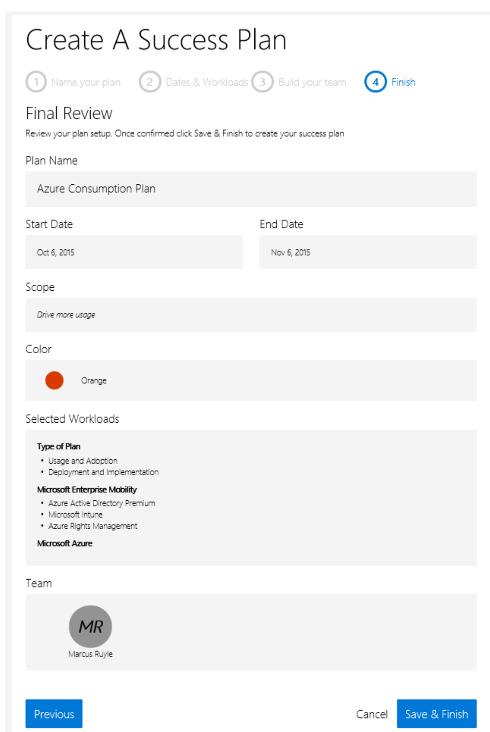
On section 2 you will set milestone dates, success plan type and check any workloads your Success Plan will cover, click **Next** to proceed.



To invite a "Test" customer owner enter a test email address to review the invite process. If you are not ready to invite a Customer Owner at this time, leave the box blank and click **Next** to continue.



Review all of the success plan details you have just entered. Click **Previous** to make changes or if everything looks good hit **Save and Finish**. Your success plan will now be visible in your **My Success Plans** list from the dashboard.



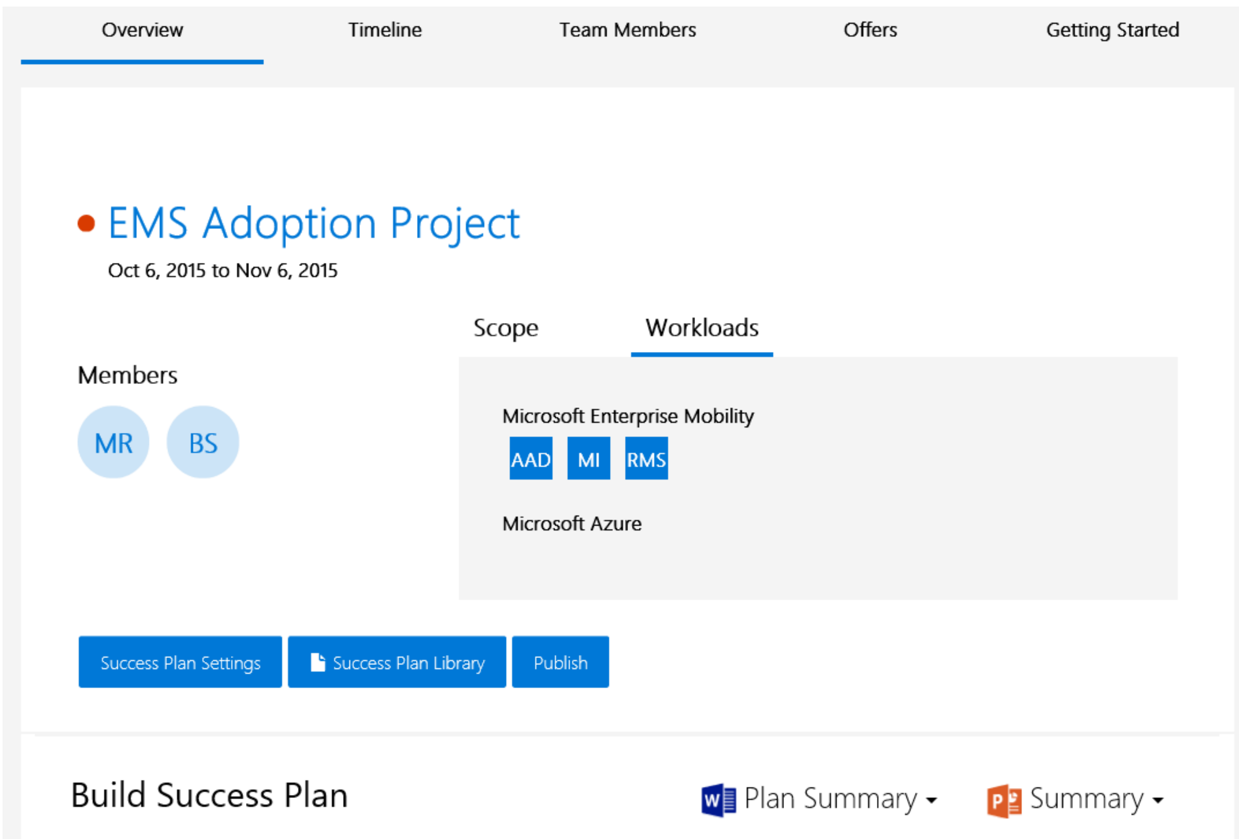
Activity Scenario: Complete a Success Plan & Output Document

Open a customer from your Dashboard customer list and choose an existing success plan. This will land you on the **Success Plan Overview** page.

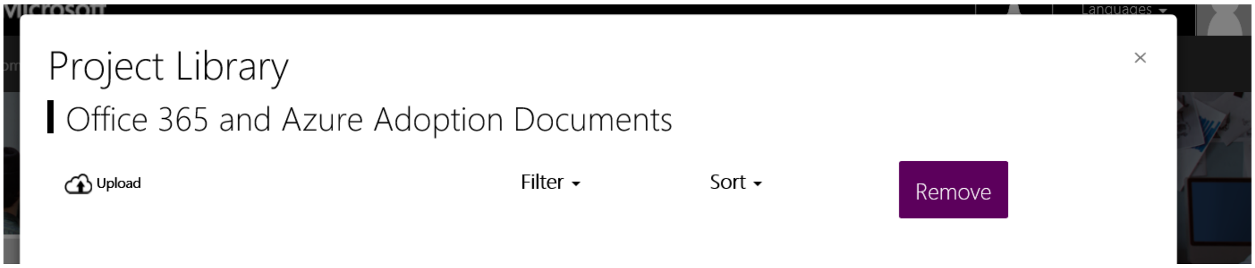
The top of the Success Plan Overview page shows details about the success plan; Name, Milestones, Success Plan Owner, Success Plan Members and scope.

Success Plan Overview is also where you can take actions at the success plan level like; edit success plan, add members, view Project Library and publish the success plan.

> Note: A Customer Success Plan Owner must be assigned in order to publish a success plan. Go into Edit Project to assign customer owner before attempting to publish.



When outside documentation is needed to assist with success plan creation, you can upload and download documents from the Success Plan Library. Access this feature from the Success Plan Overview screen by clicking on the **Success Plan Library** and opening or uploading a document.



From the Success Plan Overview screen, scroll down to see all of the success plan sections. The product sections only show up if you selected a workload from that product family. All other sections are required for every success plan. The section descriptions are as follows:

Overview
In this section you will name your success plan to make it discoverable for the team, define realistic timelines and milestones, choose between adoption activities and workloads, establish the stakeholder team and layout your success plan vision. This section is worth some extra thought because these questions lay down the foundation for the rest of the success plan.

Current Environment
Define your current environment by entering by defining existing workloads, user groups, domains, Active Directory forests, security, firewall and VPN access information. These details are required for a successful implementation so please make sure you track down all the correct information.

Adoption Activities
In this section you will define adoption activities across pre-launch, launch and post launch as well as establish the team members who will own them. Even if you are focused on implementation at this stage, it is critical to begin planning user adoption now to ensure your users hit the ground running and to maximize return on your investment.

Office 365
Office 365 success plan sections are driven by the workloads selected upon success plan creation. Remember, to adjust success plan workloads you must go back and edit the success plan.

Dynamics CRM
The Dynamics CRM section consists of a technical overview, change management planning questions and usage planning questions.

Azure
In this section you will determine size and scope of your implementation and then go into details around Security and Compliance, Identity, Cloud Experience and Network/Applications.

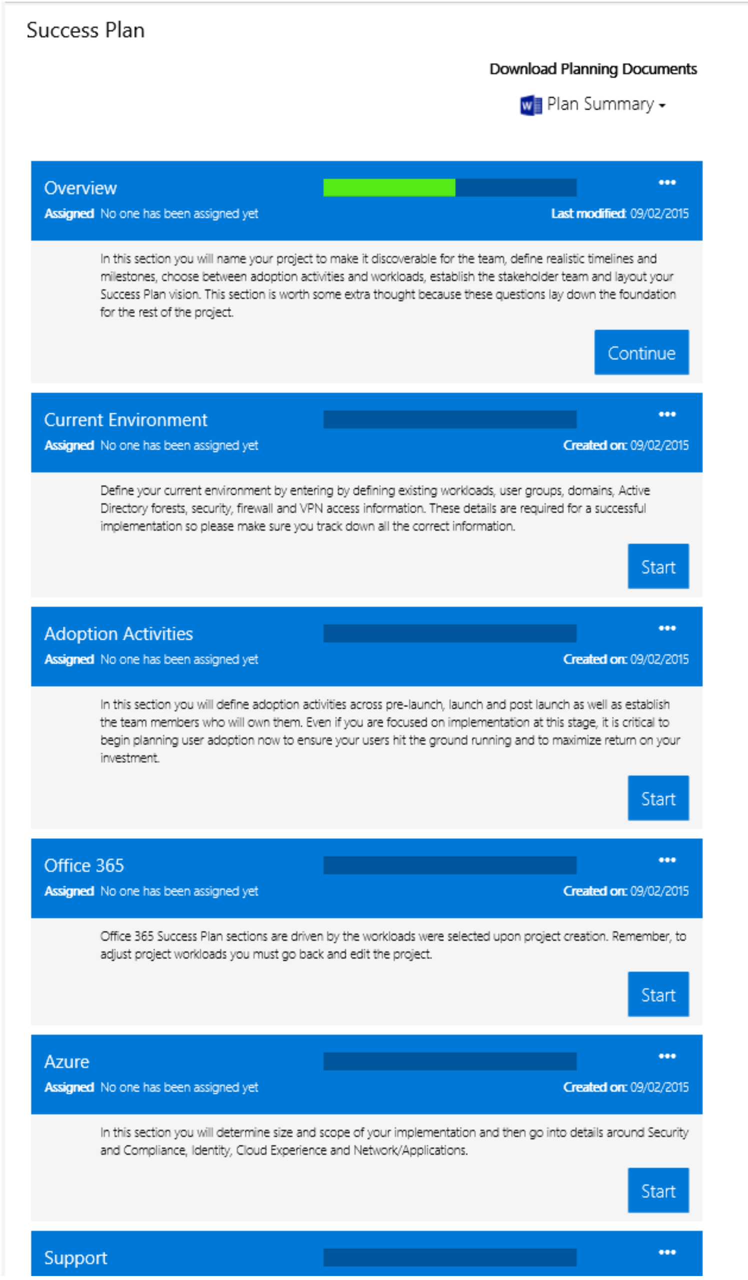
EMS

The Enterprise Mobility Suite section walks you through domains in scope, implementation questions around Microsoft Intune and Configuration Manager and lays out Microsoft Azure AD Premium configuration details.

Support

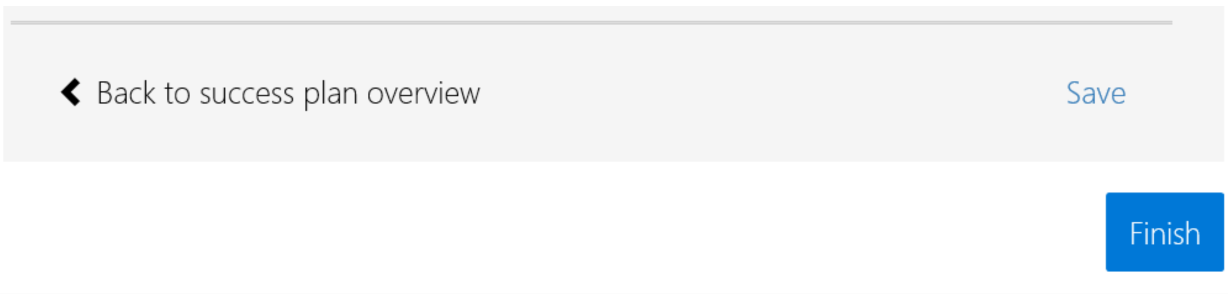
The Support section covers basic questions around any Microsoft Premier Support contracts and how this implementation will be supported.

Note: If you are missing workloads you can edit the success plan to add/remove workloads.

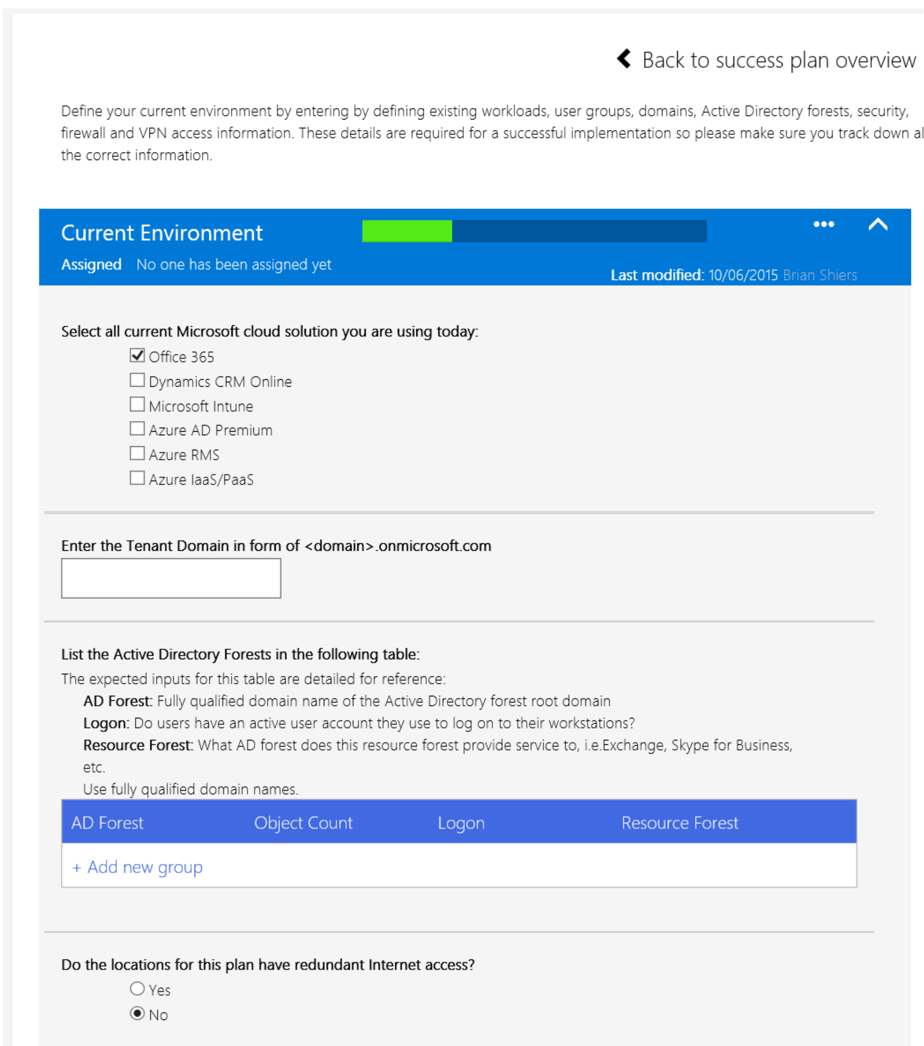

Success Plan
Download Planning Documents
Plan Summary
Overview
Assigned No one has been assigned yet
Last modified: 09/02/2015
In this section you will name your project to make it discoverable for the team, define realistic timelines and milestones, choose between adoption activities and workloads, establish the stakeholder team and layout your Success Plan vision. This section is worth some extra thought because these questions lay down the foundation for the rest of the project.
Continue
Current Environment
Assigned No one has been assigned yet
Created on: 09/02/2015
Define your current environment by entering by defining existing workloads, user groups, domains, Active Directory forests, security, firewall and VPN access information. These details are required for a successful implementation so please make sure you track down all the correct information.
Start
Adoption Activities
Assigned No one has been assigned yet
Created on: 09/02/2015
In this section you will define adoption activities across pre-launch, launch and post launch as well as establish the team members who will own them. Even if you are focused on implementation at this stage, it is critical to begin planning user adoption now to ensure your users hit the ground running and to maximize return on your investment.
Start
Office 365
Assigned No one has been assigned yet
Created on: 09/02/2015
Office 365 Success Plan sections are driven by the workloads were selected upon project creation. Remember, to adjust project workloads you must go back and edit the project.
Start
Azure
Assigned No one has been assigned yet
Created on: 09/02/2015
In this section you will determine size and scope of your implementation and then go into details around Security and Compliance, Identity, Cloud Experience and Network/Applications.
Start
Support

Once you are ready to move on from a plan section, click **Finish** to save your work and go back to the Success Plan Overview screen and start on the next one. Click **Save** to save your work without leaving the section and click **Back to success plan overview** to leave the section without saving your work.

You can always come back and edit/complete a section later.

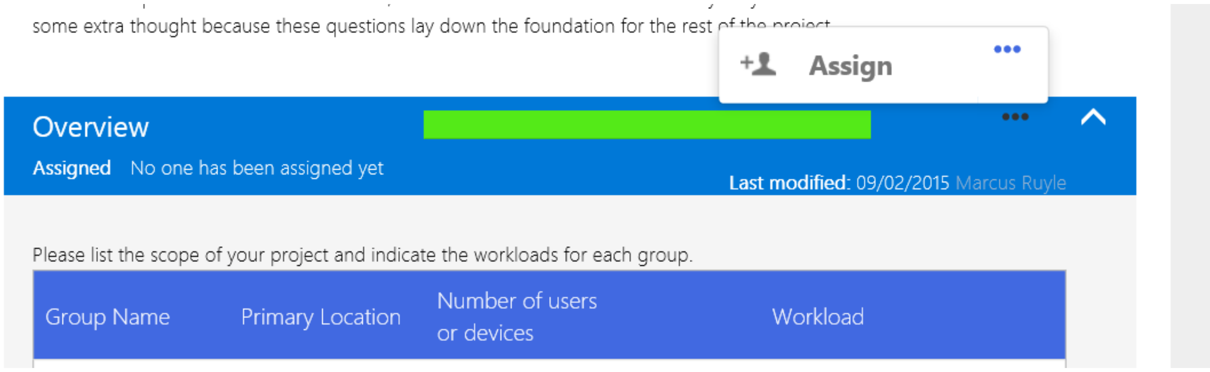


Click on a Success Plan section to get started answering questions.



You can also assign sections to other success plan team members, but you will have to make sure they are added via the Success Plan Overview screen first.

Note: Only a Success Plan Owner can add/delete team members.

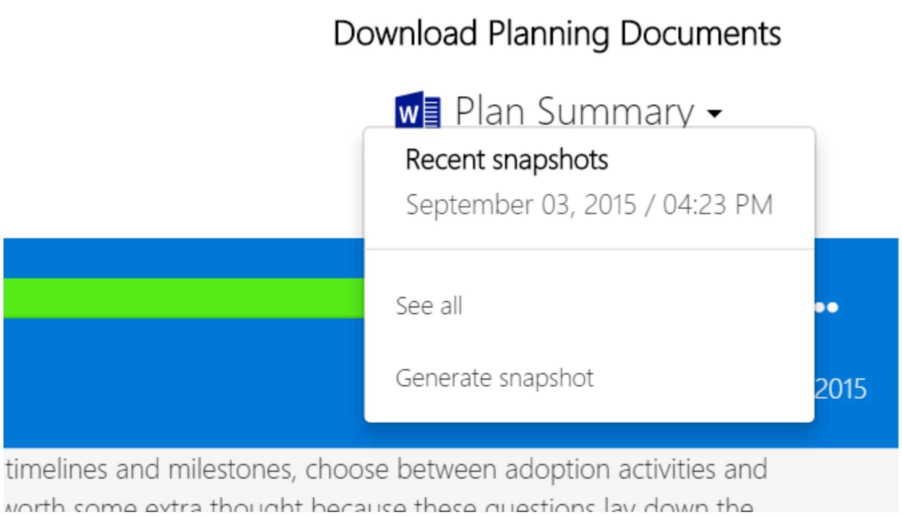


At any time in the process you may choose to view an existing plan snapshot or generate a new one. Snapshots allow you to document where you are in the plan as of that moment. Plan snapshots can be downloaded at your convenience or used in the redemption of Offers as required.

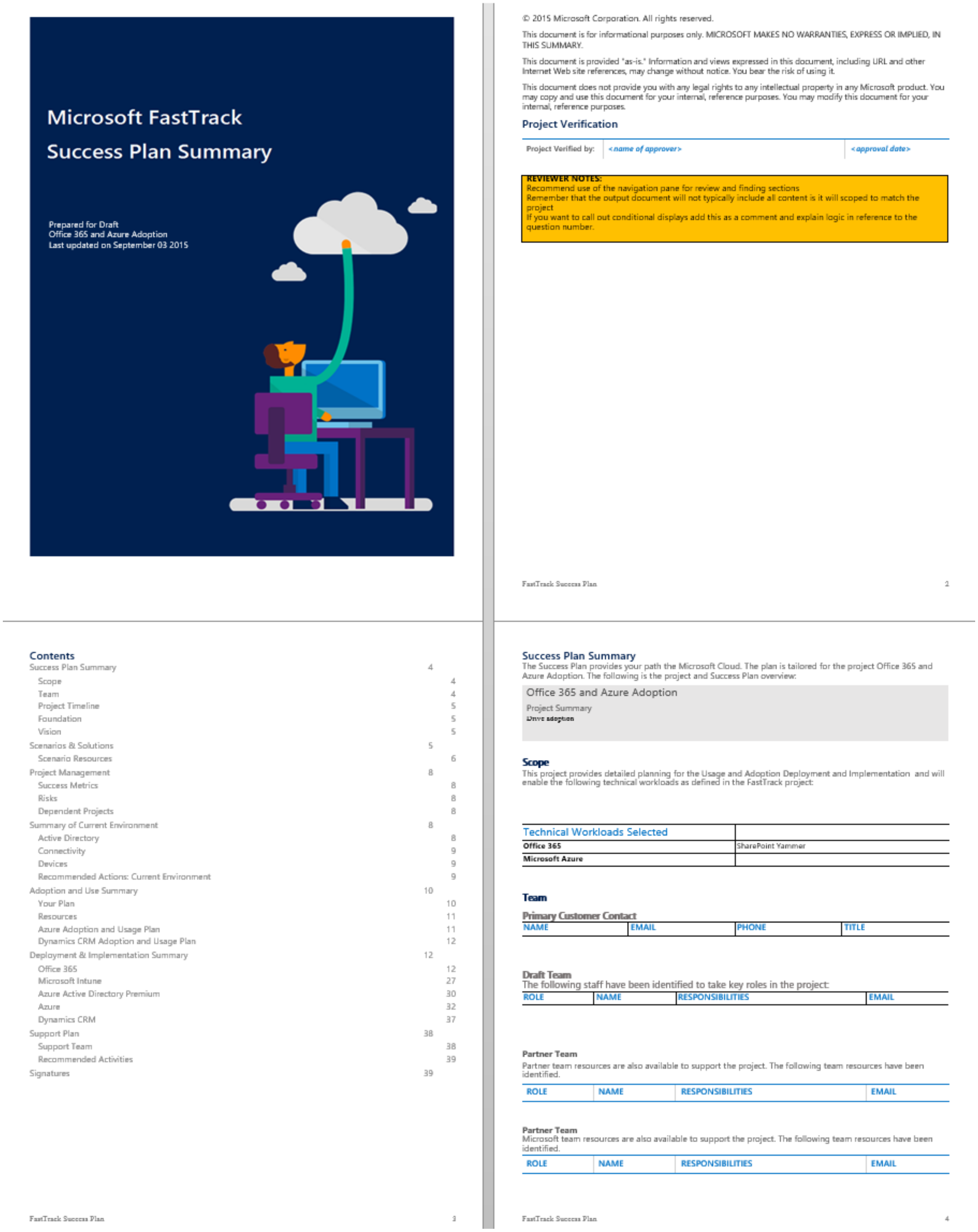
To output success plan documents at any time in the process go to the Success Plan Overview screen and click the **Plan Summary** drop down.

You will see options to open **Recent Snapshots, See All** or **Generate Snapshot**.

Note: Allow up to 1 minute for a new plan snapshot to generate.



Download and open a snapshot to see or share your entire success plan via a single Microsoft Word document.



Microsoft FastTrack

Success Plan Summary

Prepared for Draft
Office 365 and Azure Adoption
Last updated on September 03 2015

Project Verification

Project Verified by:	<name of approver>	<approval date>

REVIEWER NOTES:
Recommend use of the navigation pane for review and finding sections
Remember that the output document will not typically include all content is it will scoped to match the project
If you want to call out conditional displays add this as a comment and explain logic in reference to the question number.

Contents

Success Plan Summary

The Success Plan provides your path the Microsoft Cloud. The plan is tailored for the project Office 365 and Azure Adoption. The following is the project and Success Plan overview:

Office 365 and Azure Adoption

Project Summary
Drive adoption

Scope

This project provides detailed planning for the Usage and Adoption Deployment and Implementation and will enable the following technical workloads as defined in the FastTrack project:

Technical Workloads Selected	
Office 365	SharePoint Yammer
Microsoft Azure	

Team

Primary Customer Contact

NAME	EMAIL	PHONE	TITLE

Draft Team

The following staff have been identified to take key roles in the project:

ROLE	NAME	RESPONSIBILITIES	EMAIL

Partner Team

Partner team resources are also available to support the project. The following team resources have been identified.

ROLE	NAME	RESPONSIBILITIES	EMAIL

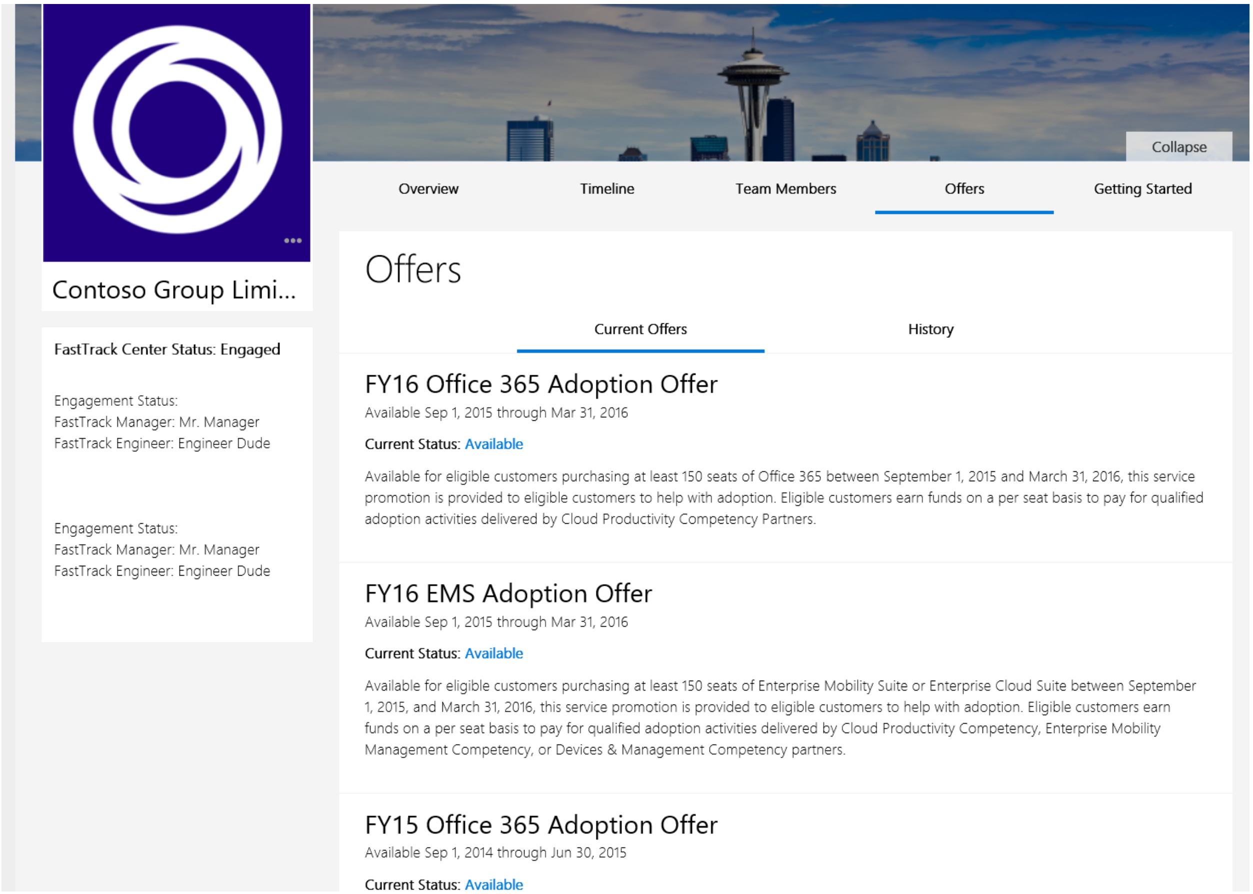
Partner Team

Microsoft team resources are also available to support the project. The following team resources have been identified.

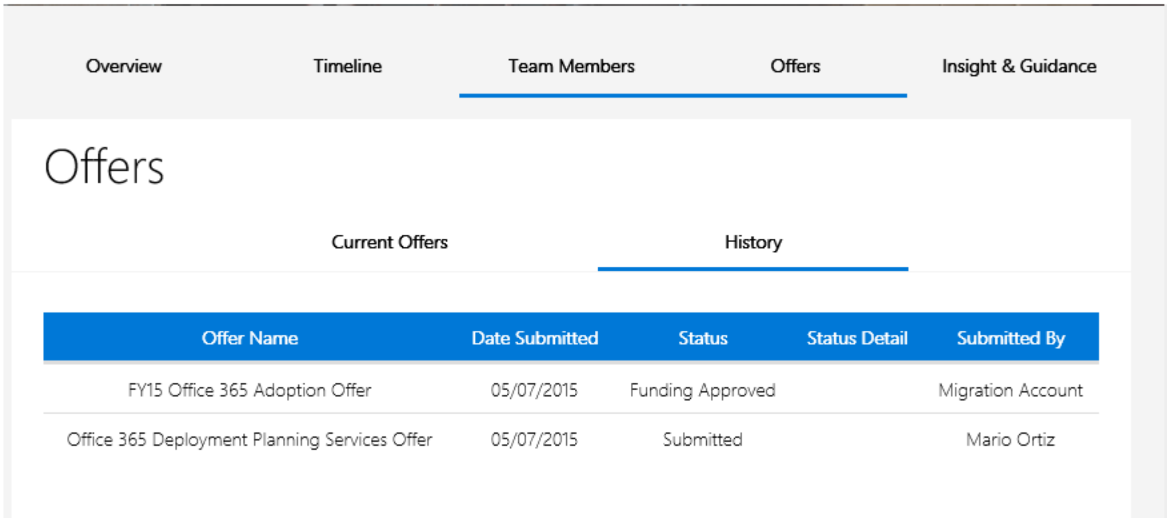
ROLE	NAME	RESPONSIBILITIES	EMAIL

Activity Scenario: Complete an Offer Form

From your dashboard, open a customer record and click the **Offers** tab on the Customer Overview screen. This will show a list of all the **Current Offers** available to that customer.



From the Offer page, click the **History** tab to view past offer history.



Click back to the Current Offers tab to begin the redemption process.

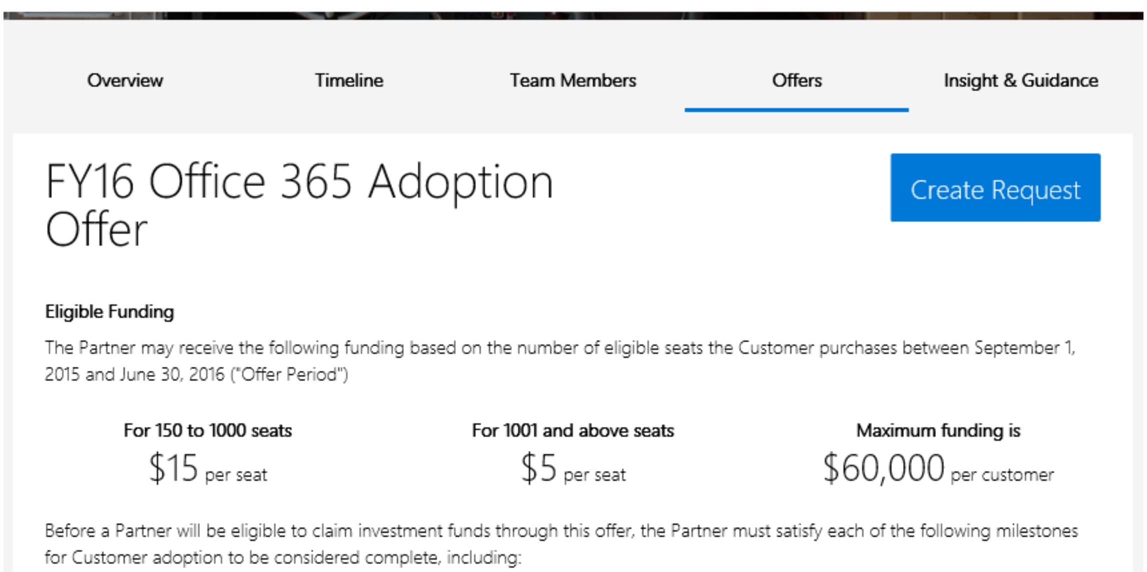
When an offer is available for redemption, the large blue **Redeem Now** button will light up.

Current Status will show “Available” in blue type.

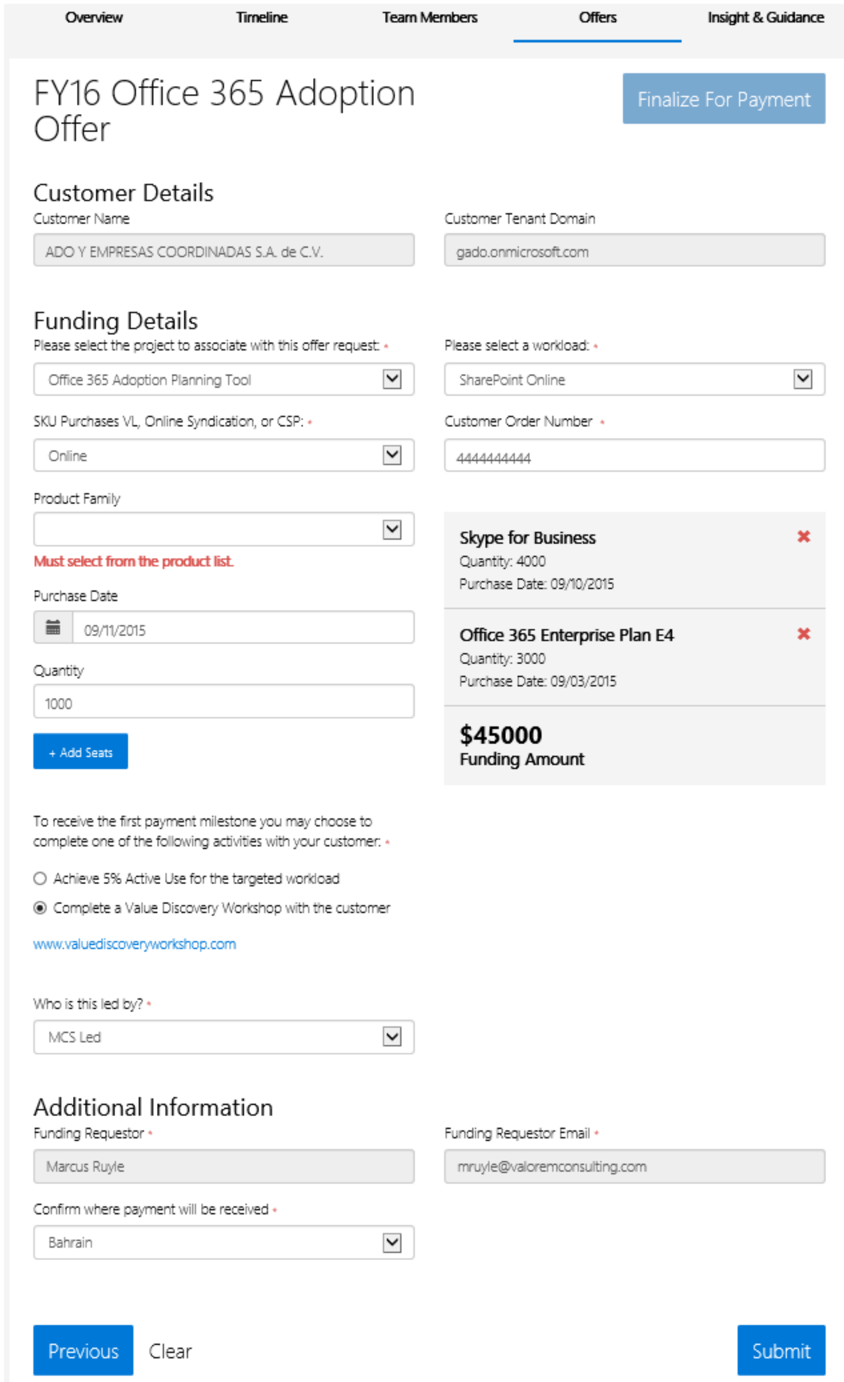
When an offer has been submitted, you will see a small grey **Submitted** button.

Current Status indicates where the pending request is in the redemption process. When Current Status reads “Funding Approved”, this offer has been redeemed and is no longer available.

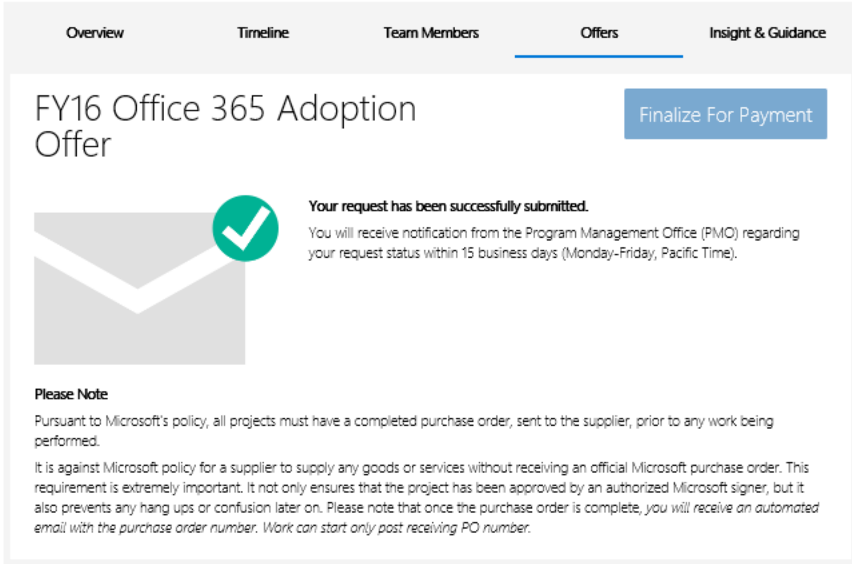
Find an available offer and click the **Redeem Now** button on the offer of your choice to view the Offer Overview screen. Select **Create Request** to proceed to the Finalize for Payment form.



On the **Finalize for Payment** form, fill in the required information and click **Submit**.



Once an offer has successfully been submitted you will land on the confirmation screen.


Overview
Timeline
Team Members
Offers
Insight & Guidance
FY16 Office 365 Adoption Offer
Finalize For Payment
Your request has been successfully submitted.
You will receive notification from the Program Management Office (PMO) regarding your request status within 15 business days (Monday-Friday, Pacific Time).
Please Note
Pursuant to Microsoft's policy, all projects must have a completed purchase order, sent to the supplier, prior to any work being performed.
It is against Microsoft policy for a supplier to supply any goods or services without receiving an official Microsoft purchase order. This requirement is extremely important. It not only ensures that the project has been approved by an authorized Microsoft signer, but it also prevents any hang ups or confusion later on. Please note that once the purchase order is complete, *you will receive an automated email with the purchase order number. Work can start only post receiving PO number.*