

# Need to Know Microsoft 365 Webinar January 2024

@directorcia

<http://about.me/ciaops>

Web cast has started

Web cast is being recorded

If you can't hear anything check  
your speaker settings

For questions after the event:

Email : [director@ciaops.com](mailto:director@ciaops.com)

X : [@directorcia](#)

CIAOPS Academy

Login

Sign Up

# Webinar recordings at:

## Need to Know

Technology training

Enroll now

# [www.ciaopsacademy.com](http://www.ciaopsacademy.com)

Free access for CIAOPS patrons

<https://blog.ciaops.com/2022/07/29/join-my-teams-shared-channel/>

Join my  
free  
shared  
Channel



# Agenda

- Microsoft 365 Update
- Planner
- Q & A





# Microsoft 365 Update

# News


- Bringing the full power of Copilot to more people and businesses
  - <https://blogs.microsoft.com/blog/2024/01/15/bringing-the-full-power-of-copilot-to-more-people-and-businesses/>
- Copilot for Microsoft 365 for Small and Medium Business
  - <https://adoption-dev.azurewebsites.net/en-us/copilot/smb/>
- Microsoft's new Copilot Pro brings AI-powered Office features to the rest of US
  - <https://www.theverge.com/2024/1/15/24038711/microsoft-copilot-pro-office-ai-apps>
- Adding Copilot button to desktop applications
  - <https://blog.ciaops.com/2024/01/17/adding-copilot-button-to-desktop-applications/>
- Set up Microsoft 365 Backup
  - <https://blog.ciaops.com/2024/01/19/set-up-microsoft-365-backup/>
- SharePoint Premium for Information workers
  - <https://www.youtube.com/watch?v=RfkGr7Pse3A>



# Planner





 New

^ My tasks

Flagged items and tasks

Tasks

Project: Tasks\_0

Project: Tasks

Other Tasks

Flagged items and tasks

Active 

Older

Upload the slides to the blog



Friday, 15 September 2017

Overdue

Re-record September webinar!!!



Monday, 18 September 2017

Overdue



# Microsoft To-Do

From work to play, To-Do is the easiest way to get stuff done, every day.

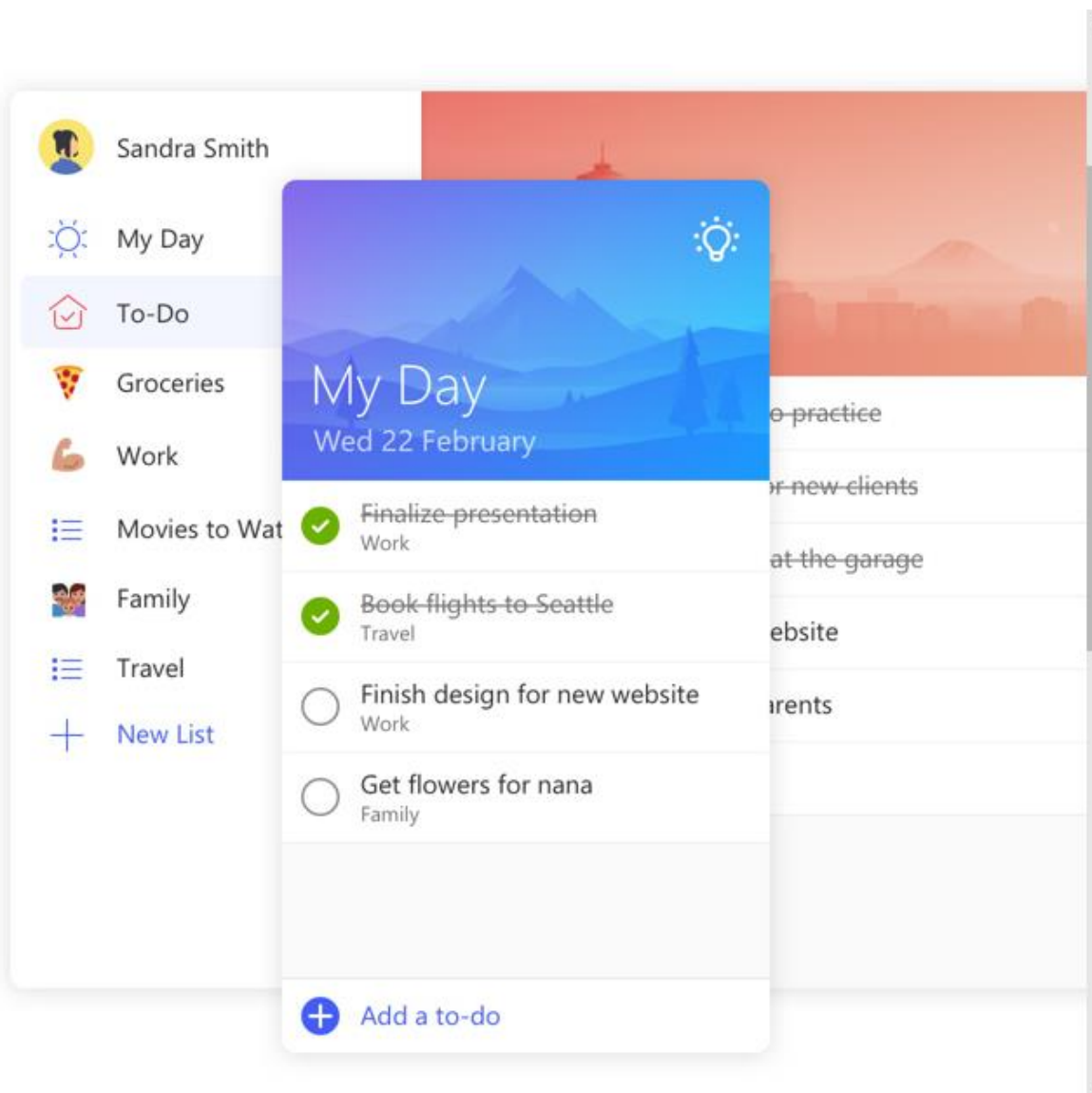
[Sign in](#)

[No account? Sign up for free](#)

Get the app.



[Terms of use for Microsoft To-Do](#)





# Tasks

Home

Notebook

Documents

Tasks

Calendar

Project1

Site Contents

EDIT LINKS

Site Content

- Documents
- Site Assets
- Calendar
- MicroFeed
- Project1
- Tasks**



+ new task or edit this list

All Tasks Calendar Completed ...

Find an item

✓	☑	Task Name	Due Date	Assigned To	Customer
	<input type="checkbox"/>	Task 1	... July 31, 2013		
	<input type="checkbox"/>	Task 2	... August 5, 2013		
	<input checked="" type="checkbox"/>	Check project sign-off	... August 11, 2013	<input type="checkbox"/> Robert Crane	
	<input checked="" type="checkbox"/>	Task 4	... August 16, 2013	<input type="checkbox"/> Robert Crane	Customer A
	<input checked="" type="checkbox"/>	Project Task 4	... September 24, 2013	<input type="checkbox"/> Lewis Collins	Customer A
	<input checked="" type="checkbox"/>	Follow up with client	... October 2, 2013	<input type="checkbox"/> Lewis Collins	



Define

The  
Optimizer

The Planner

Groups of  
friends  
travelling  
together

2  
3  
4  
5  
6  
7  
8  
9  
10  
11  
12  
13  
14  
15  
16  
17  
18  
19  
20  
21  
22  
23  
24  
25  
26  
27  
28  
29  
30  
31  
32  
33  
34  
35  
36  
37  
38  
39  
40  
41  
42  
43  
44  
45  
46  
47  
48  
49  
50  
51  
52  
53  
54  
55  
56  
57  
58  
59  
60  
61  
62  
63  
64  
65  
66  
67  
68  
69  
70  
71  
72  
73  
74  
75  
76  
77  
78  
79  
80  
81  
82  
83  
84  
85  
86  
87  
88  
89  
90  
91  
92  
93  
94  
95  
96  
97  
98  
99  
100

Understand RC

## 2. PROBLEMS / PAINS

Which problems do you solve for your customer?  
There could be more than one, explore different sides  
eg. existing solar solutions for private houses are not considered  
a good investment (1).

X  
TOO MANY  
POINTS FOR  
COMPARISON  
(ET)

Hard to  
coordinate

TOO MANY  
TABS

Too much  
irrelevant  
info on SR  
cards





# Planner – Work Management for Teams

**New Office 365 service**  
Fully integrated into the suite and Office 365 Groups

**My work organized**  
Access the Planner Hub, My Tasks, and all Plans ordered by activity

**Interactive Boards**  
Track and organize your team's work by moving cards between columns

The screenshot displays the Microsoft Planner application within the Office 365 suite. The interface is organized into several key sections:

- Left Sidebar:** Contains navigation options including 'New plan', 'Planner hub', 'My tasks', 'Favorite plans', and 'All plans'. It also lists specific plans like 'Online Marketing', 'Engineering', and 'Product Launch'.
- Top Bar:** Shows the 'Office 365' logo, the 'Planner' title, and the user's profile 'Alex Wilber'.
- Main Content Area:** Displays a 'Product Launch' plan with three columns: 'To do', 'Messaging and Branding', and 'Launch Events'. Each column contains task cards with titles, due dates, and assigned team members. For example, the 'To do' column has a card for 'Elevator Pitch' due 01/20, and the 'Launch Events' column has a card for 'Launch Event Advertising' due 02/25.
- Right Sidebar:** Features a 'Members' dropdown and a 'Group by Buckets' option.

**Build your team**  
Built in experience for adding members and assigning work

**Customizable columns**  
Customize each board to the exact needs of your team, process, and content.

**Visual and engaging**  
Document previews, images, and summary in stats make it easy to get an overview

# Planner – Task Details

## Focus on the details

Rich details experience include progress, start and due dates, assignments, and description.

## SharePoint Documents

Easily upload new files, attach links, or pick from existing Sharepoint content

## Custom labels

Highlight key tasks with colorful customizable labels.

## Checklists

Breakdown complex items into manageable steps. Jot down ideas to make progress.

## Outlook Conversations

Discuss each task to get things done. Conversations show up in Outlook clients and are powered by the Outlook services.

The screenshot displays the 'Task Details' view in Microsoft Planner. The left sidebar shows the 'Office 365 Planner' navigation pane with options like 'New plan', 'Planner hub', 'My tasks', and 'Favorite plans'. The main content area is for the task 'Elevator Pitch' assigned to 'Pradeep Gupta'. It includes a 'Bucket' (To do), 'Progress' (In progress), 'Start date' (12/17/2016), and 'Due date' (01/20). A checklist with items 'Draft', 'Review 1', 'Review 2', and 'add an item' is shown. The description reads: 'Create 30 second elevator pitch for BDMS. Second priority: create pitches for technical community and product end users.' Attachments include 'Elevator Pitch.docx' and 'Positioning for the Web.ppt'. A comments section at the bottom shows a conversation with 'Alex Wilber' (9:06 AM) saying 'Great Pitch!' and 'Isaiah Langer' (12/27/2016 : 10:58 PM) saying 'New Task Elevator Pitch created'. On the right, a 'Set label' dropdown is set to 'On Track' (green checkmark), and a 'Members' list is visible.

# Groups, Plans, Buckets, and Tasks

The screenshot displays the Microsoft Planner application interface. At the top, the 'Office 365' and 'Planner' tabs are visible. The user 'Alex Wilber' is logged in. The main view is for a 'Product Launch' group, which is currently in 'Board' view. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options: 'New plan', 'Planner hub', 'My tasks' (with a count of 6), 'Favorite plans', and 'All plans'. Under 'Favorite plans', there are icons for 'Online Marketing', 'Engineering', and 'Product Launch'.
- Top Bar:** Shows the group name 'Product Launch' and a 'Members' dropdown with several user avatars. Below this, there are tabs for 'Board', 'Charts', and 'Notebook'.
- Main Content Area:** This area is organized into columns representing different buckets or plans.
  - Column 1 (To do):** Labeled 'Plan' at the bottom. It contains a task 'Elevator Pitch' with a due date of 01/20, assigned to Alex Wilber, and a task 'Facebook Campaign' with a due date of 01/11, assigned to Allan Deyoung.
  - Column 2 (Messaging and Branding):** Labeled 'Bucket' at the bottom. It contains a task 'YouTube Strategies' with a due date of 12/25/2016, and a task 'Value Props Deck' with a due date of 12/22/2016, assigned to Patti Fernandez.
  - Column 3 (Launch Events):** Labeled 'Task' at the bottom. It contains a task 'Launch Event Advertising' with sub-items 'TV Commercials', 'Digital Ads', and 'Print Adds', and a task 'Launch on the Web' with a due date of 01/11, assigned to Alex Wilber.
  - Column 4:** Labeled 'Task' at the bottom. It contains a task 'Web launch brief.docx' with a due date of 01/11, assigned to Alex Wilber.
- Right Sidebar:** Contains a '+ Add new bucket' button.

# Task Details, Attachments, Conversations

The image is a screenshot of the Microsoft Planner application interface. On the left is a dark sidebar with navigation options: 'New plan', 'Planner hub', 'My tasks', 'Favorite plans' (including 'Online Marketing', 'Engineering', 'Product Launch'), and 'All plans'. The main area shows a task named 'Elevator Pitch' by 'Pradeep Gupta'. The task card displays its status as 'In progress', start date '12/17/2016', and due date '01/20'. Below the card is a checklist with items 'Draft', 'Review 1', 'Review 2', and 'add an item'. The description mentions creating a pitch for the 'Second prior... technical community and product end users'. The 'Attachments' section shows two files: 'Elevator Pitch.docx' and 'Positioning for the Web.ppt'. The 'Comments' section at the bottom shows a message from 'Alex Wilber' at 9:06 AM stating 'New Task Elevator Pitch created'. On the right side of the interface, there is a 'Members' list and a 'Buckets' section with an 'On Track' status and an 'Add new bucket' button.

Office 365 Planner

New plan  
Planner hub  
My tasks  
Favorite plans  
Online Marketing  
Engineering  
Product Launch  
All plans

To do

Elevator Pitch

Pradeep Gupta

Bucket: To do Progress: In progress Start date: 12/17/2016 Due date: 01/20

Checklist 0 / 3

- ☐ Draft
- ☐ Review 1
- ☐ Review 2
- ☐ add an item

Description

Created Elevator Pitch for the Second prior... technical community and product end users.

Attachments

- Attach Link
- Elevator Pitch.docx
- Positioning for the Web.ppt

Comments

Type your message here

Post

Alex Wilber 9:06 AM

New Task Elevator Pitch created

Members

Group by Buckets

On Track

Add new bucket



# Planner



## Quick Start Guide

Access all Office 365 applications

Get more detail on your Favorite Plans inside the Planner Hub

Keep up with changes to your plans with notifications

Change your settings in Office 365

Use Office 365 authentication to log in

Add a New Plan

Use the Planner Hub as your Default view

View Tasks that are assigned to you

Click on the Plan you want to Manage

To get more detail on a Plan make it a favorite

To add people to your plan click to open and add users

The screenshot displays the Microsoft Planner interface. At the top, a dark blue header bar contains the 'Office 365' and 'Planner' tabs, along with notification, settings, and help icons, and a user profile picture. On the left, a dark sidebar lists navigation options: 'New plan', 'Planner hub', 'My tasks' (with 6 tasks), 'Favorite plans', and 'All plans'. Under 'Favorite plans', three plans are listed: 'New Plan' (NP), 'Root', and 'Team Strive to Excellence' (TS). Under 'All plans', several other plans are visible: 'Creative', 'Gamification Project', 'CSP Tech', 'CRA', and 'Virtualization'. The main area shows three 'Favorite plans' as large cards. Each card features a donut chart representing task status: 'New Plan' has 2 tasks left (yellow), 'Root' has 1 task left (green), and 'Team Strive to Excellence' has 33 tasks left (yellow). Below each donut chart is a progress bar with four segments: 'Not started' (yellow), 'Late' (red), 'In progress' (blue), and 'Completed' (green). The 'All plans' section below shows smaller cards for 'Creative', 'Gamification Project', 'CSP Tech', 'CRA', and 'Virtualization'. Blue lines connect various callout boxes to specific UI elements: 'Access all Office 365 applications' points to the Office 365 tab; 'Add a New Plan' points to the '+' icon; 'Use the Planner Hub as your Default view' points to the 'Planner hub' option; 'View Tasks that are assigned to you' points to 'My tasks'; 'Get more detail on your Favorite Plans inside the Planner Hub' points to the 'Favorite plans' section; 'Keep up with changes to your plans with notifications' points to the notification bell; 'Change your settings in Office 365' points to the settings gear; 'Use Office 365 authentication to log in' points to the user profile; 'Click on the Plan you want to Manage' points to the 'Team Strive to Excellence' plan card; 'To get more detail on a Plan make it a favorite' points to the 'Team Strive to Excellence' plan card; and 'To add people to your plan click to open and add users' points to the 'CRA' plan card.

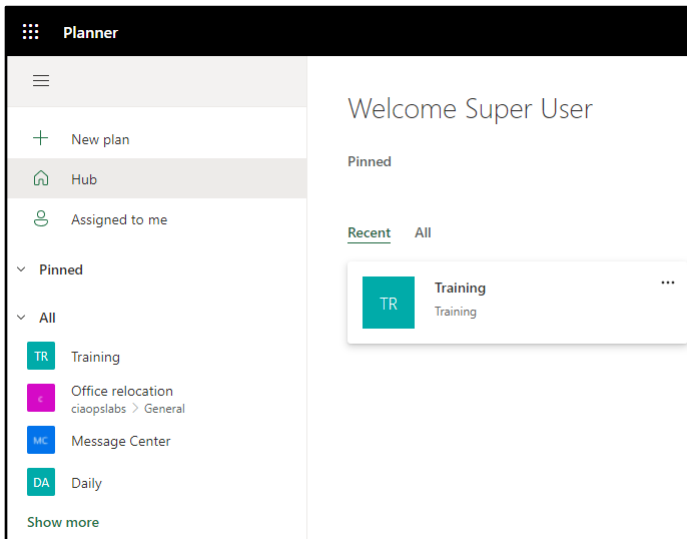
# Create a Plan in Planner

To get started, you can:

1. Select a plan under **Recent** or **All**.

OR

2. Start a new plan by choosing **Create a New plan**.



If you choose to start a new plan:

1. Name your plan.
2. Choose who can see it.
3. Add a description.
4. Select **Create Plan**.

A screenshot of the 'New Plan' dialog box. It has a title bar 'New Plan' with a close button. Inside, there are four fields: 'Plan name' with the text 'New Plan' and a green checkmark; 'Plan email address' with the text 'NewPlan'; 'Make this plan public' with a blue toggle switch and the text 'Yes'; and 'Plan description' with a text area containing the placeholder 'You would add additional information about the plan here'. At the bottom right are two buttons: 'Create Plan' (blue) and 'Cancel' (grey).

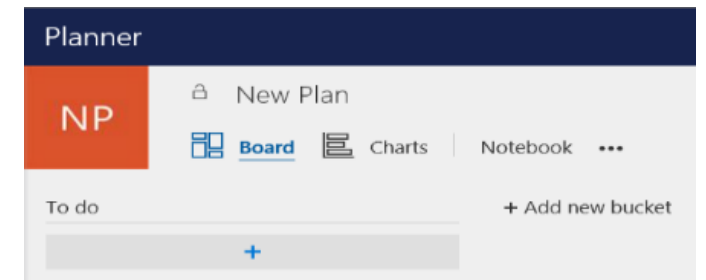
**Creating a plan also creates a new Office 365 Group, making it easy for you and the people you're working with to collaborate not only in Planner, but also in OneNote, Outlook, OneDrive, and more.**

# Add tasks to a plan

Once you've [started a plan](#), you can add tasks to list what needs to get done.

Enter a task name in the box under **to do**, and then choose **Add task**.

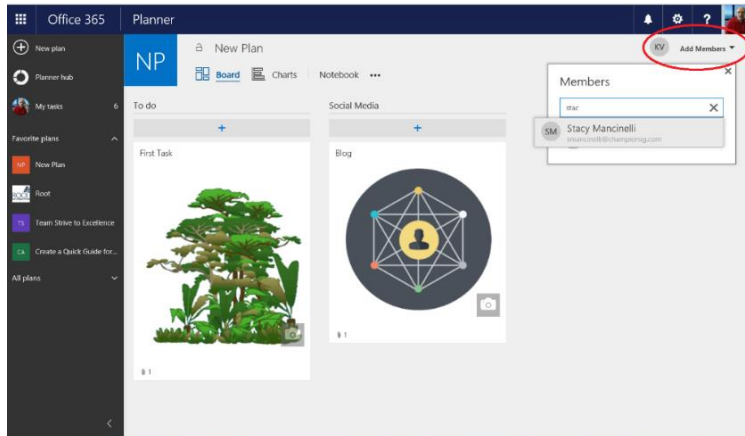
**Tip:** To list several tasks quickly, type a task name in the box under **to do**, press **Enter**, and then keep typing to add the next task.



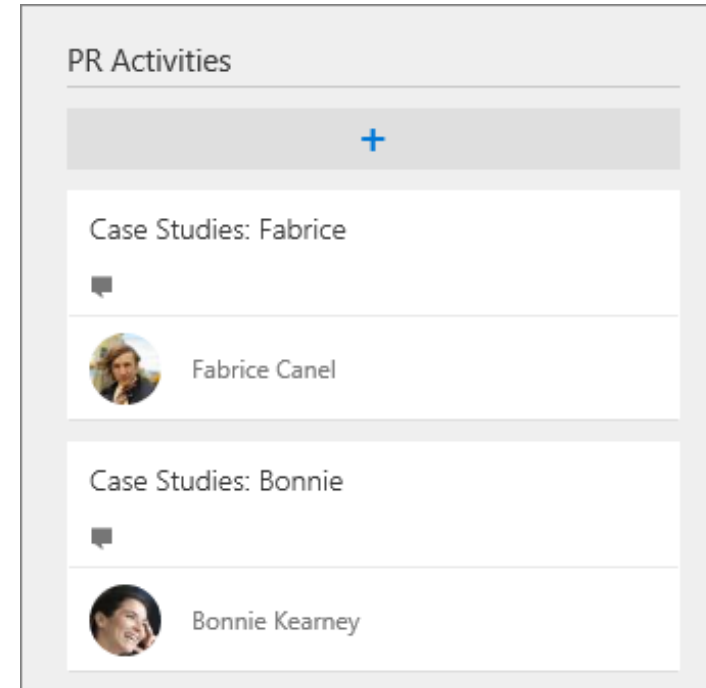
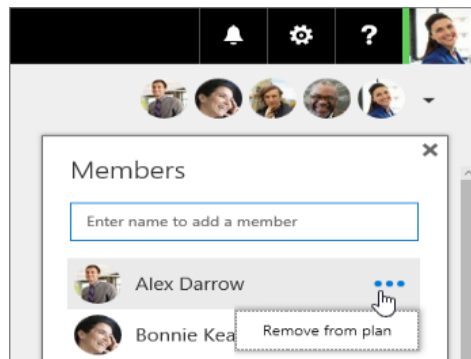
Don't see a box? Click the plus sign (+) to show the box and add a task.

# Add People to the Plan

In Planner, select **Add Members**, and then enter the name of the person you want to add.



## Need to Remove Someone



You can also assign someone when you create a task. Add a task name, and then select **Assign** to choose a plan member from the list. If the right person isn't listed, select **Add someone new**.

*Demo*

# Announcing the new Microsoft Planner



One simple, familiar experience for task  
and project management

*Learn more about the announcement: [aka.ms/thenewplanner](https://aka.ms/thenewplanner)*



# Microsoft Planner

**Now**

Tasks app  
by Planner → **Planner**  
and To Do

**Spring 2024**

**New Planner** experience  
in Microsoft Teams  
generally available

Project for  
the web → **Planner**

**Coming soon  
in 2024**

**New Planner** web  
experience generally  
available

<https://techcommunity.microsoft.com/t5/planner-blog/the-new-microsoft-planner-a-unified-experience-bringing-together/ba-p/3977998>

# Resources

- Sign in to Microsoft Planner- [https://support.microsoft.com/en-us/office/sign-in-to-microsoft-planner-fe43c972-5a95-4071-86d4-423a64a3b21e?wt.mc\\_id=aid573689\\_qsg\\_174542&ui=en-us&rs=en-us&ad=us](https://support.microsoft.com/en-us/office/sign-in-to-microsoft-planner-fe43c972-5a95-4071-86d4-423a64a3b21e?wt.mc_id=aid573689_qsg_174542&ui=en-us&rs=en-us&ad=us)
- The new Microsoft Planner: Bring together to-dos, plans and projects - <https://ignite.microsoft.com/en-US/sessions/d0822e59-dd3b-4b20-b7df-04e298a7509b?source=sessions>
- Planner video training - <https://support.office.com/en-us/article/planner-video-training-4d71390f-08d8-4db0-84ea-92fb078687c7>
- Using Planner to stay organized - <https://learn.microsoft.com/en-us/archive/blogs/skypehybridguy/microsoft-teams-using-planner-to-stay-organized>
- Task Management in Microsoft 365 - <https://www.microsoft.com/en-us/microsoft-365/task-management-in-microsoft-365>

# Take aways

- Unlikely Microsoft Copilot available for SMB until mid 2024
- Copilot relies on good data
- Other Copilots are available now
- Training will still be key
- Not for everyone in a business
- Start with search. Fully utilise.
- The number of Copilots will continue to grow

# CIAOPS Resources



- Blog – <http://blog.ciaops.com>
- Free Office 365, Azure video tutorials – <http://www.youtube.com/directorciaops>
- Free documents, presentations, eBooks – <http://slideshare.net/directorcia>
- Office 365, Azure, Cloud podcast – <http://ciaops.podbean.com>
- Office 365, Azure online training courses – <http://www.ciaopsacademy.com>
- Office 365 and Azure community – <http://www.ciaopspatron.com>
- CIAOPS Github – <https://github.com/directorcia>

[Twitter](#)  
[@directorcia](#)

[Facebook](#)  
<https://www.facebook.com/ciaops>

[Email](#)  
[director@ciaops.com](mailto:director@ciaops.com)

[Skype for Business](#)  
[admin@ciaops365.com](skype:admin@ciaops365.com)



Get access to the latest  
information by becoming a  
Patron

<http://www.ciaopspatron.com>





*Questions*



That's all folks!

Thanks for attending