Need to Know Microsoft 365 Webinar January 2024

@directorcia

http://about.me/ciaops

Web cast has started

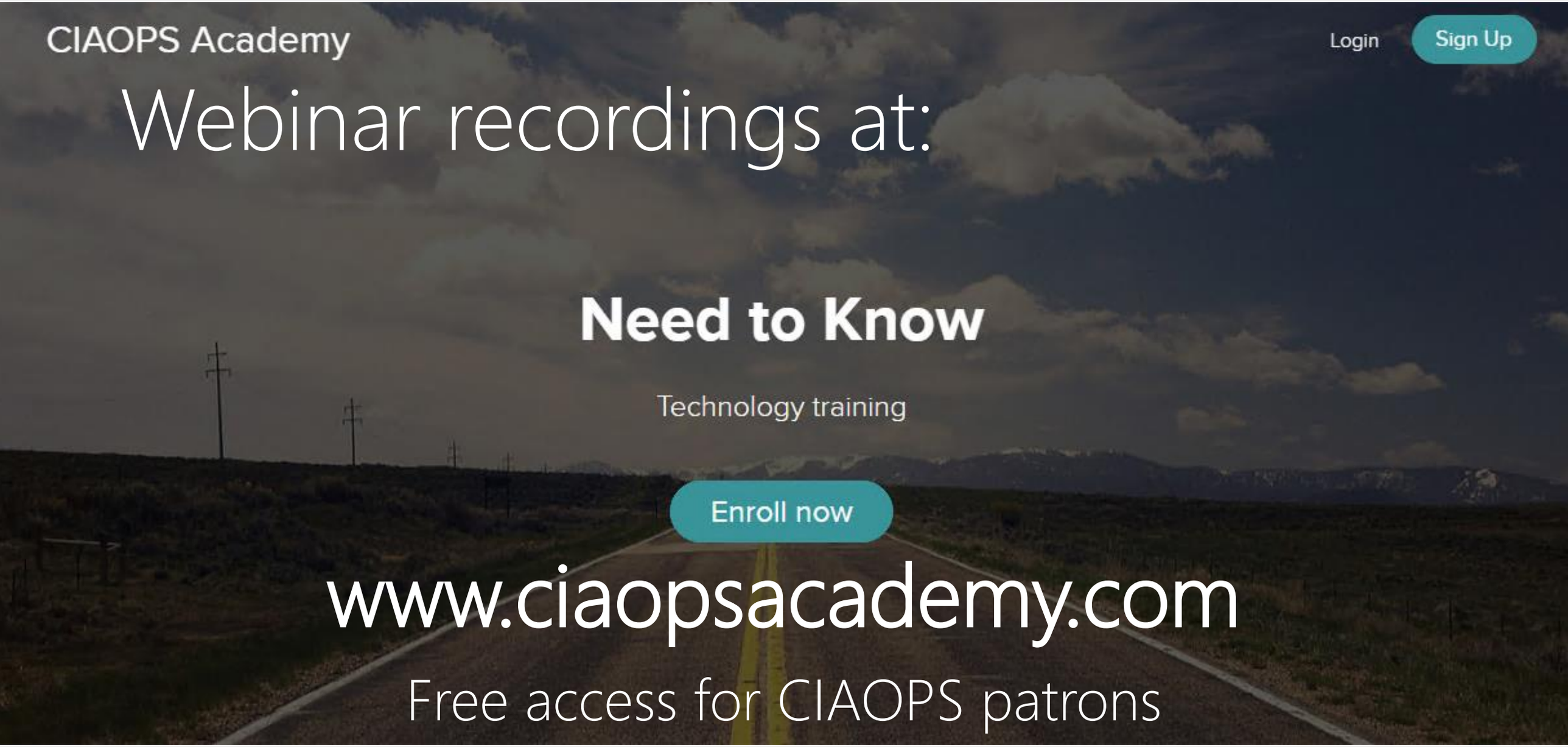
Web cast is being recorded

If you can’t hear anything check your speaker settings

For questions after the event:

Email : director@ciaops.com

X : @directorcia



Webinar recordings at:

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

Office 365 | Outlook

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

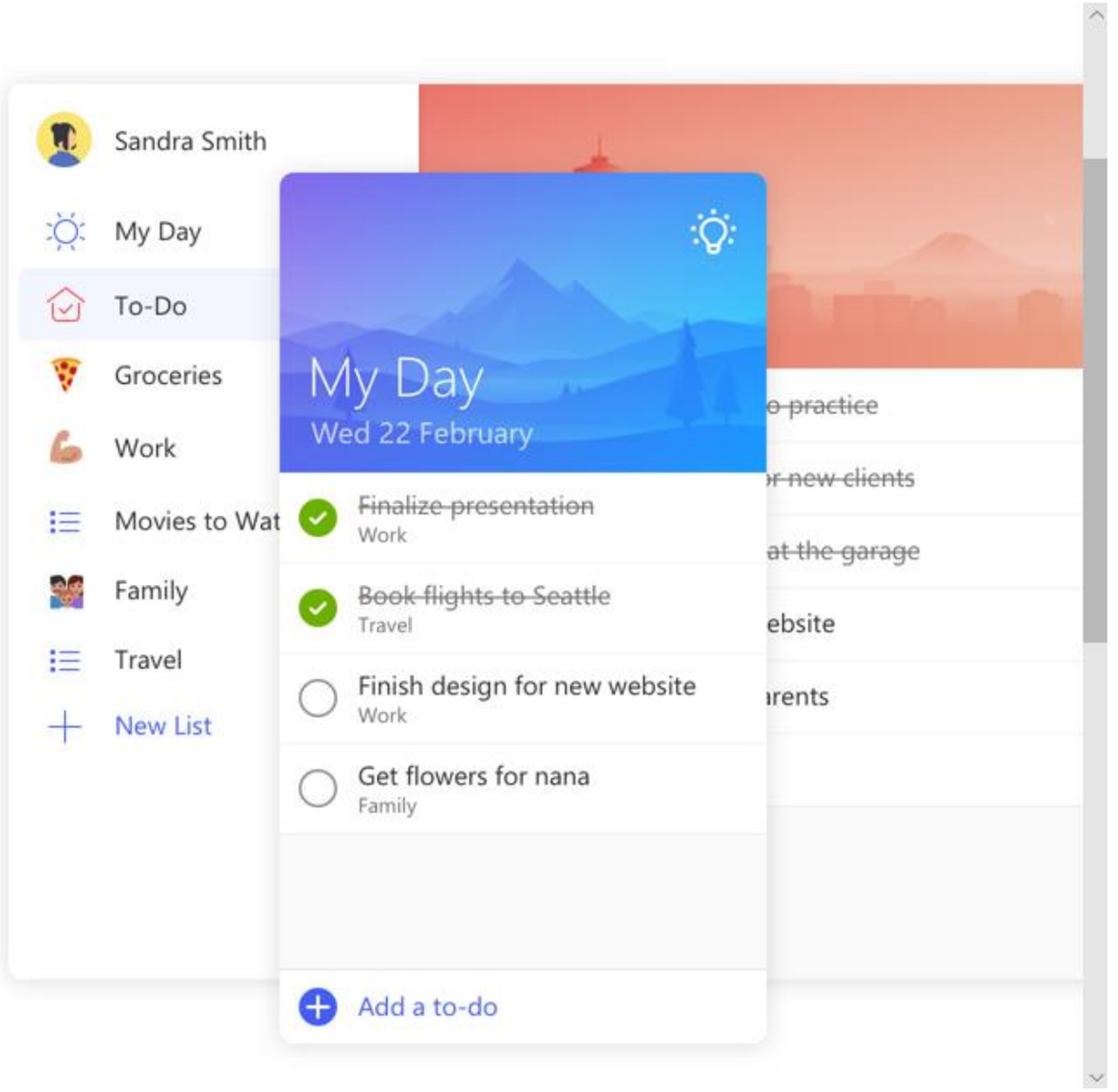
From work to play, To-Do is the easiest way to get stuff done, every day.

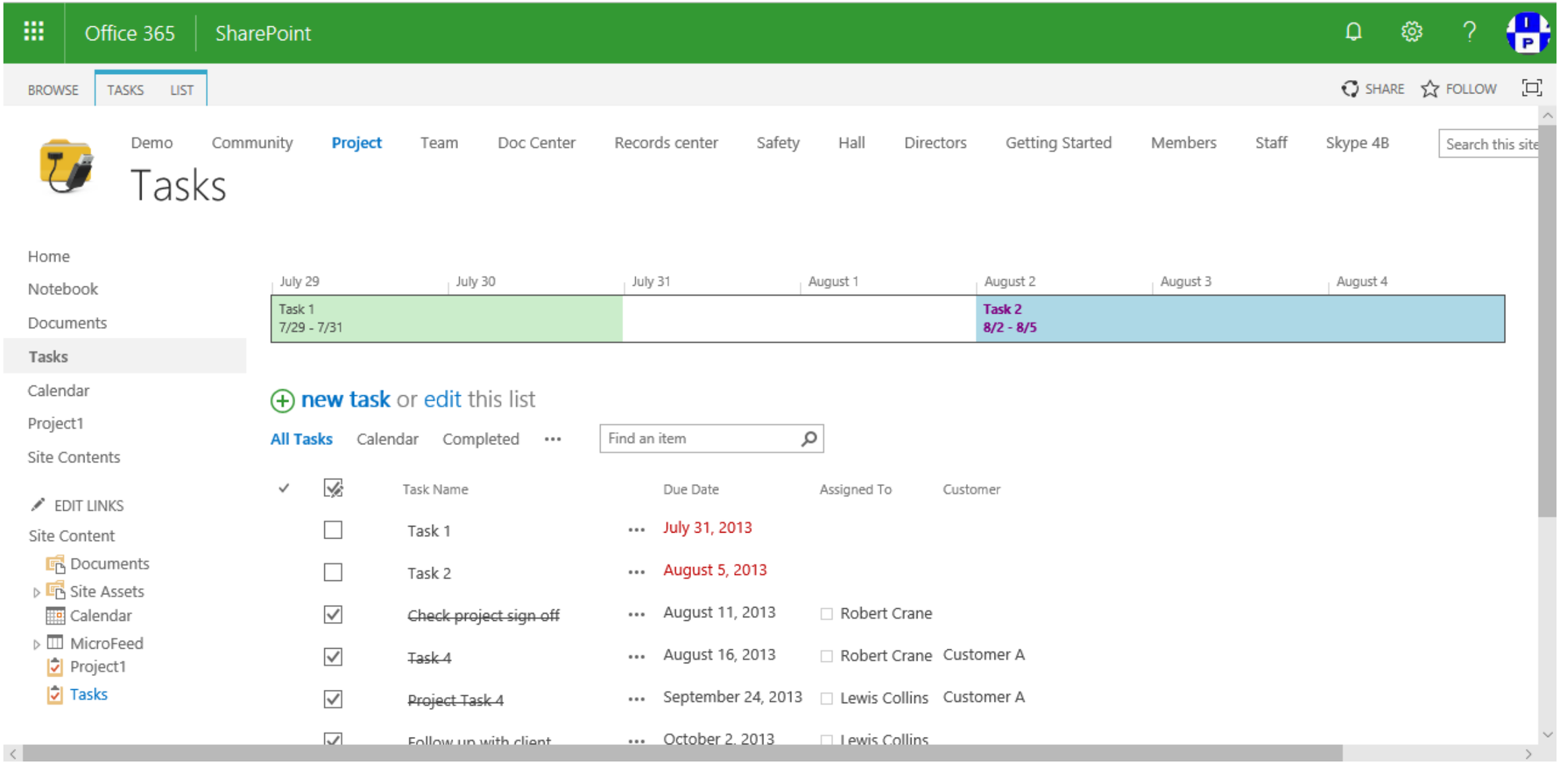
Sign in

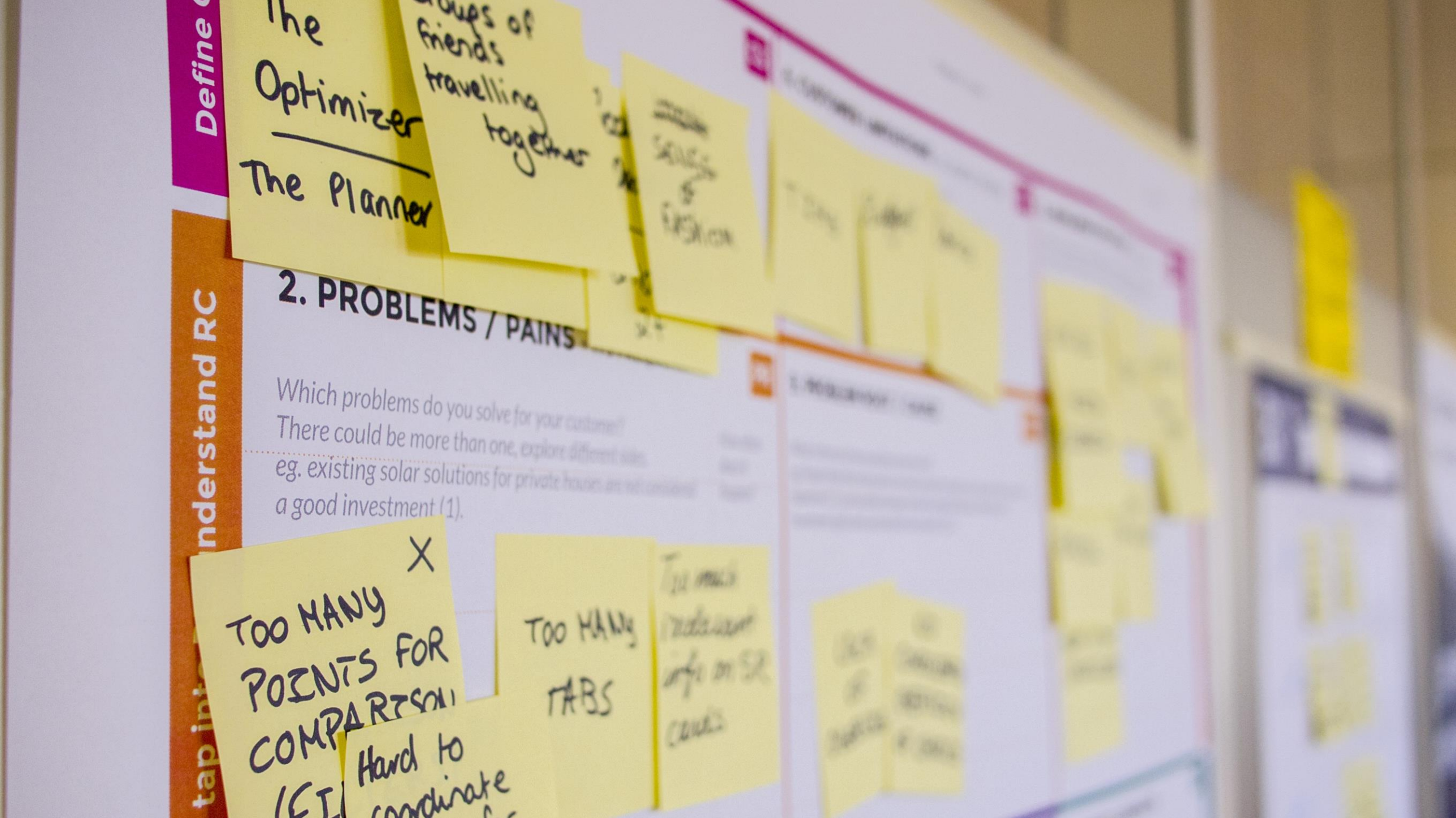
No account? Sign up for free

Get the app.

Terms of use for Microsoft To-Do




Office 365
SharePoint
BROWSE
TASKS
LIST
SHARE
FOLLOW
Demo
Community
Project
Team
Doc Center
Records center
Safety
Hall
Directors
Getting Started
Members
Staff
Skype 4B
Search this site
Tasks
Home
Notebook
Documents
Tasks
Calendar
Project1
Site Contents
EDIT LINKS
Site Content
Documents
Site Assets
Calendar
MicroFeed
Project1
Tasks
July 29
July 30
July 31
August 1
August 2
August 3
August 4
Task 1
7/29 - 7/31
Task 2
8/2 - 8/5
new task or edit this list
All Tasks
Calendar
Completed
Find an item
Task Name
Due Date
Assigned To
Customer
Task 1
July 31, 2013
Task 2
August 5, 2013
Check project sign off
August 11, 2013
Robert Crane
Task 4
August 16, 2013
Robert Crane
Customer A
Project Task 4
September 24, 2013
Lewis Collins
Customer A
Follow up with client
October 2, 2013
Lewis Collins

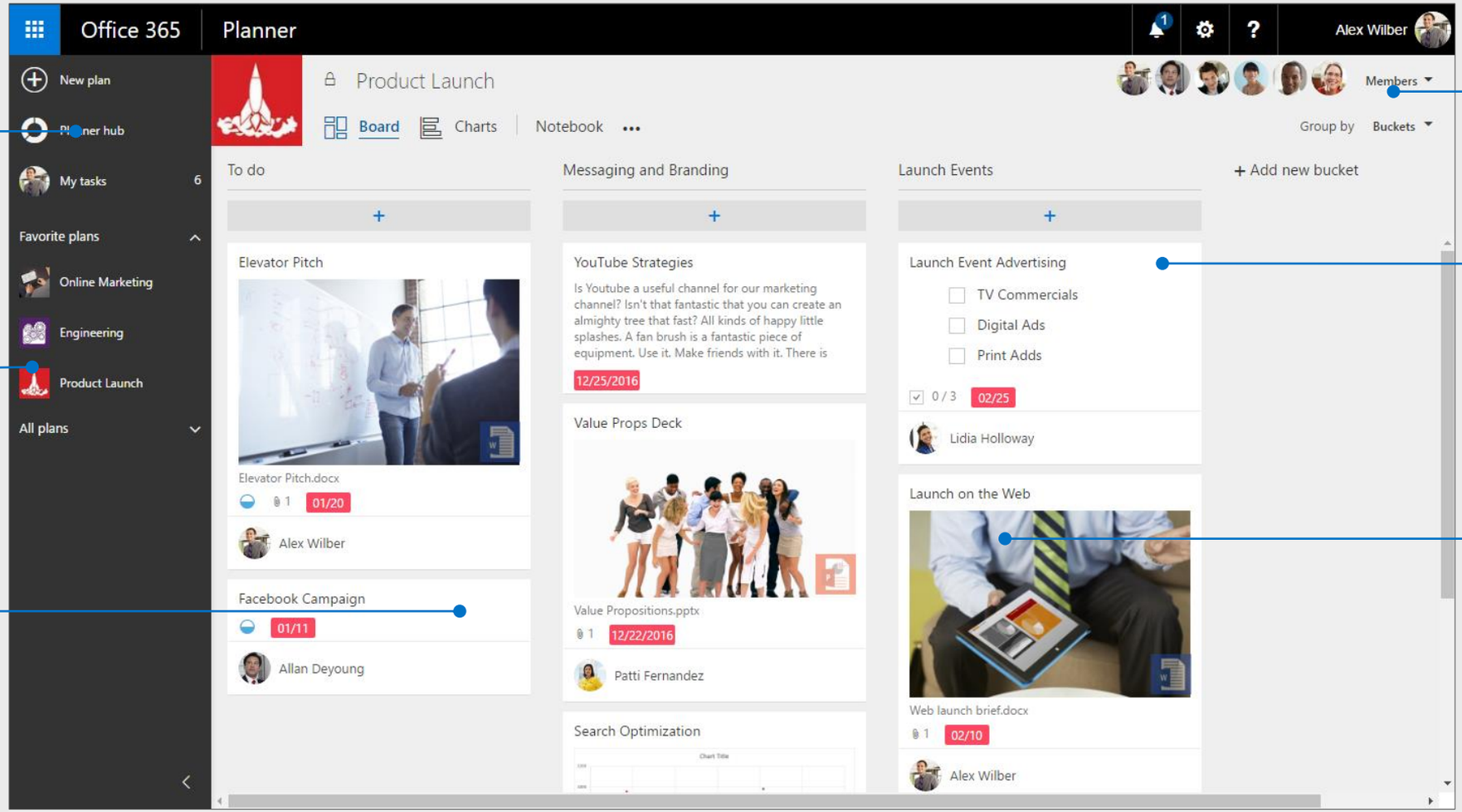

Define
The Optimizer
The Planner
groups of friends travelling together
2. PROBLEMS / PAINS
Which problems do you solve for your customer?
There could be more than one, explore different sides.
eg. existing solar solutions for private houses are not considered a good investment (1).
X
TOO MANY POINTS FOR COMPARISON
Hard to coordinate
TOO MANY TABS

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



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

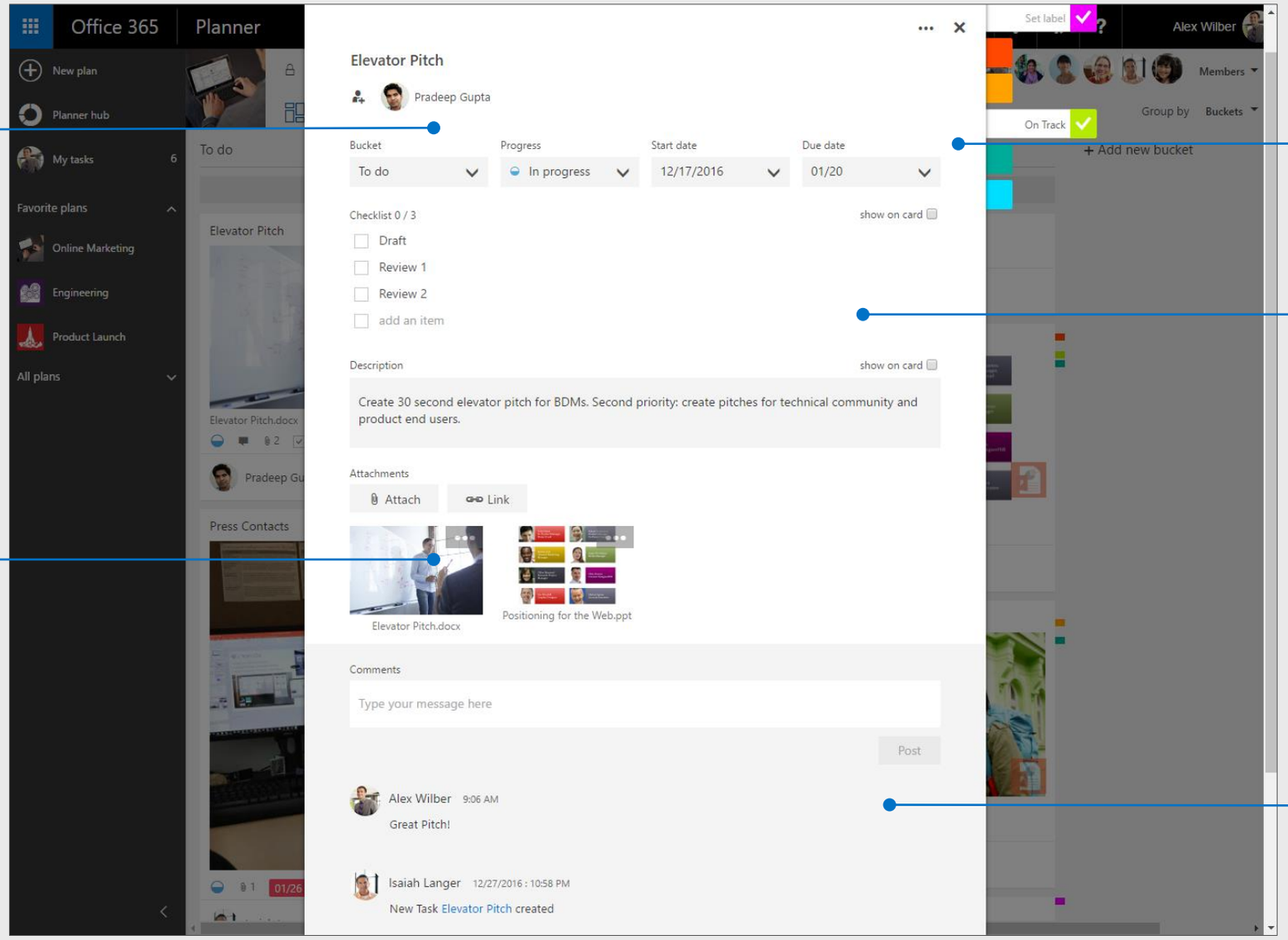
Customizable columns
Customize each board to the exact needs of your team, process, and content.

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

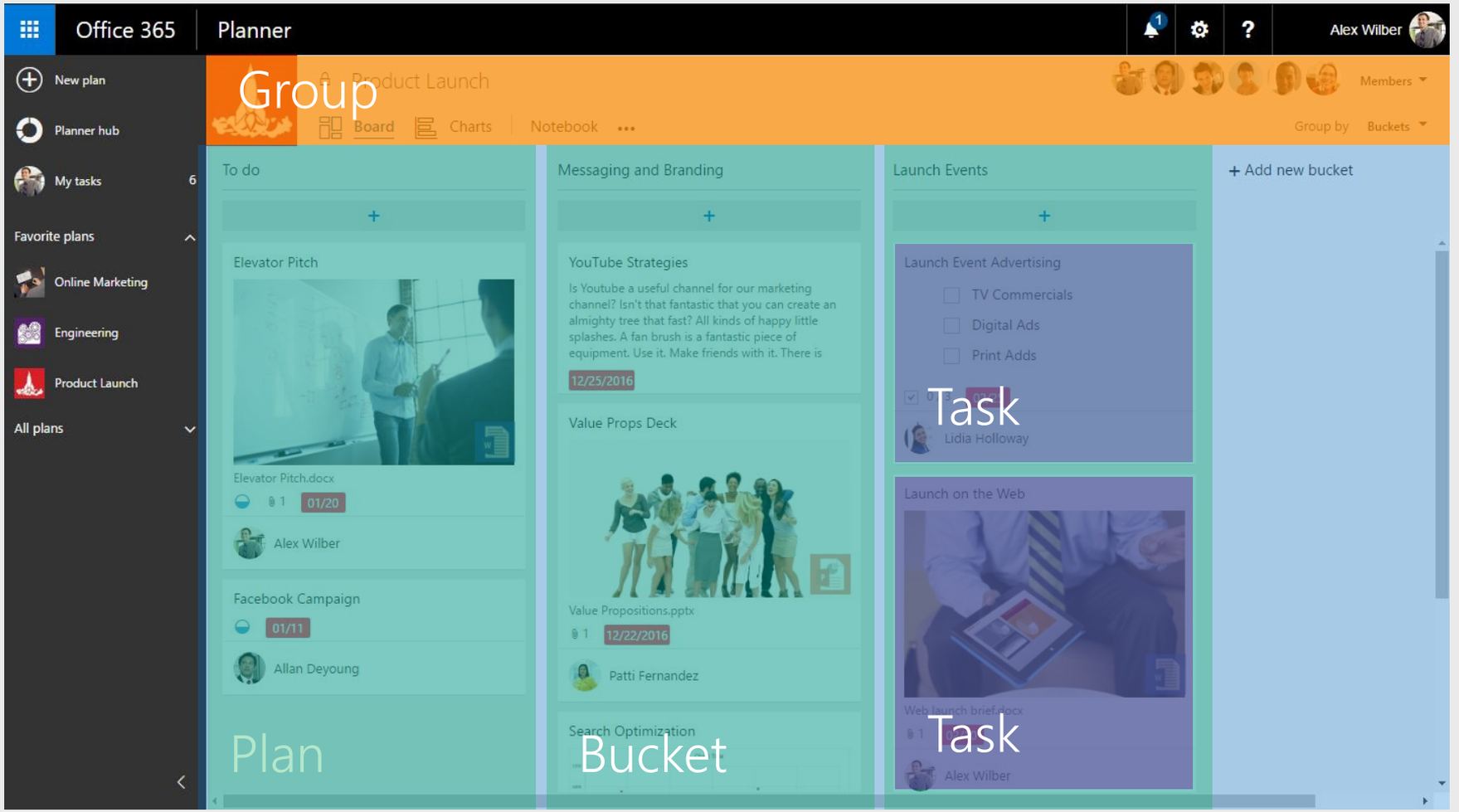


Custom labels
Highlight key tasks with colorful customizable labels.

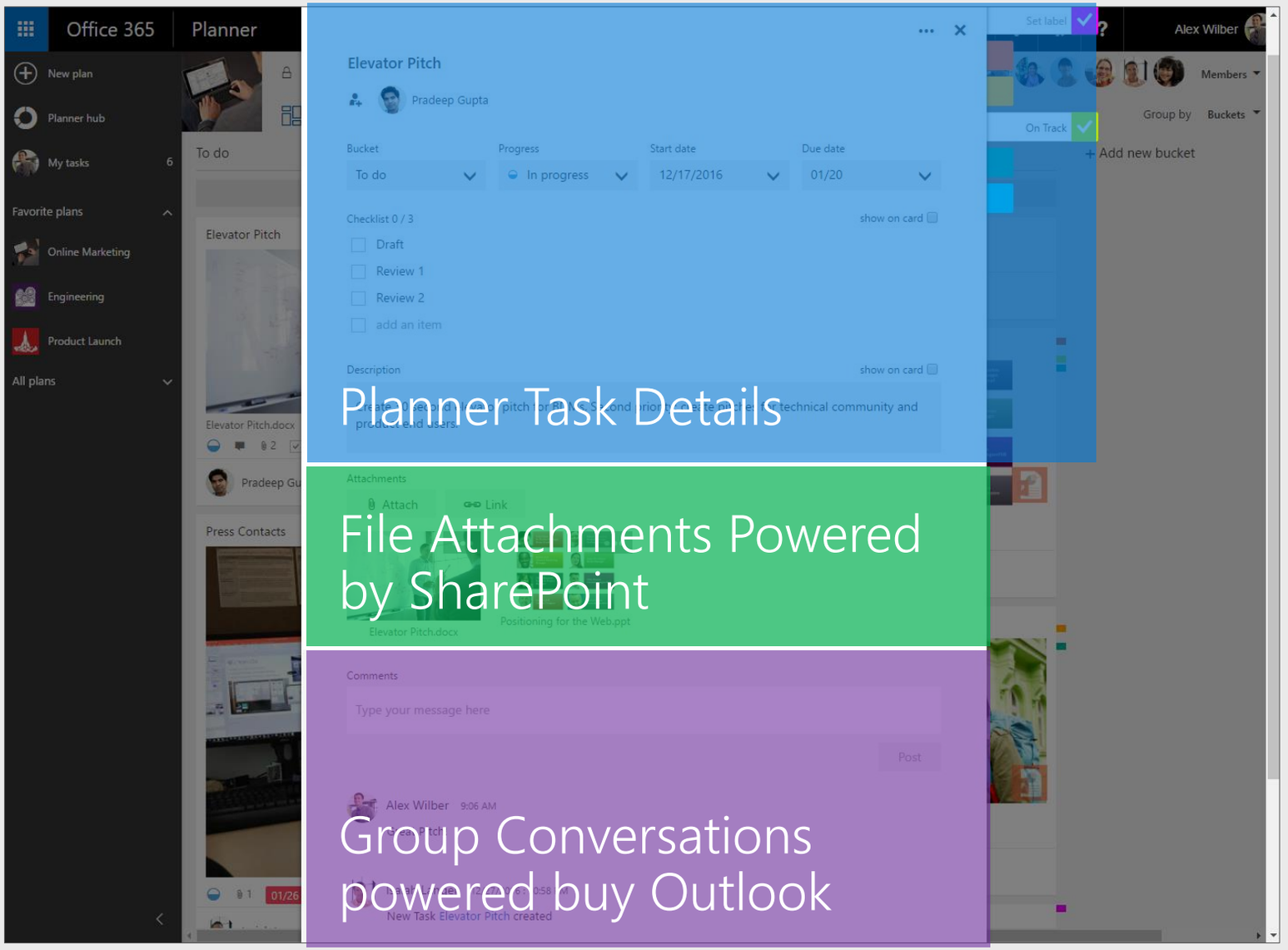
Checklists
Breakdown complex items into manageable steps. Jot down ideas to make progress.

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

Groups, Plans, Buckets, and Tasks



Task Details, Attachments, Conversations



Planner

Office 365 MESSAGE OPS

Quick Start Guide

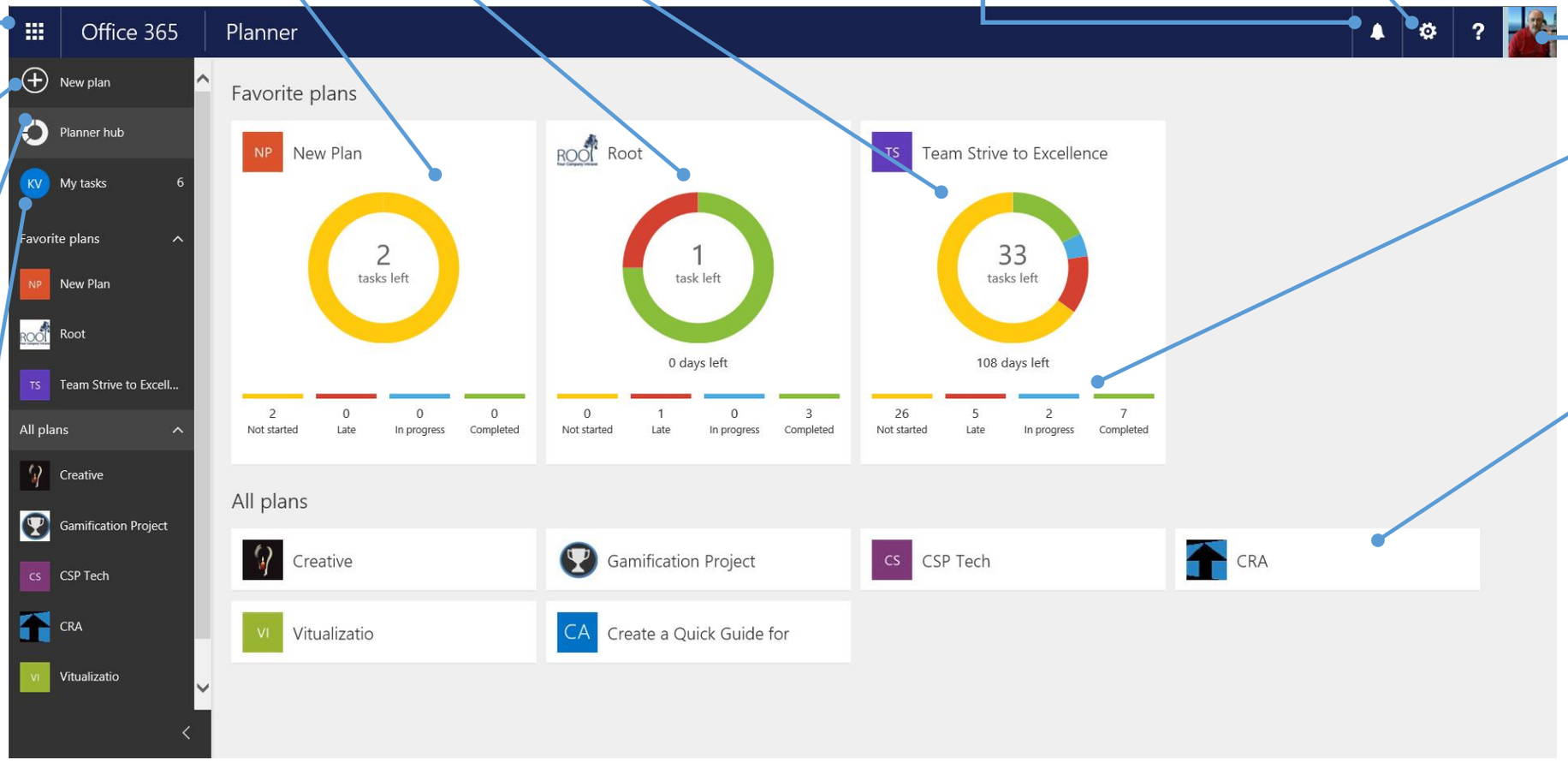
Access all Office 365 applications

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 your 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

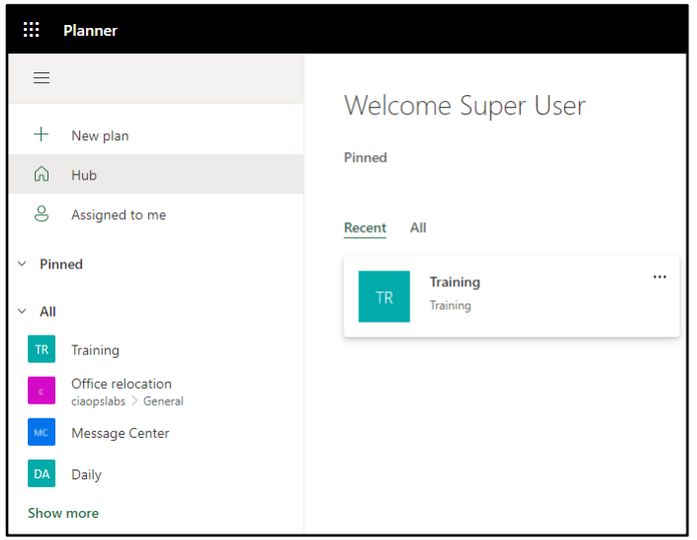
Create a Plan in Planner

To get started, you can:

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

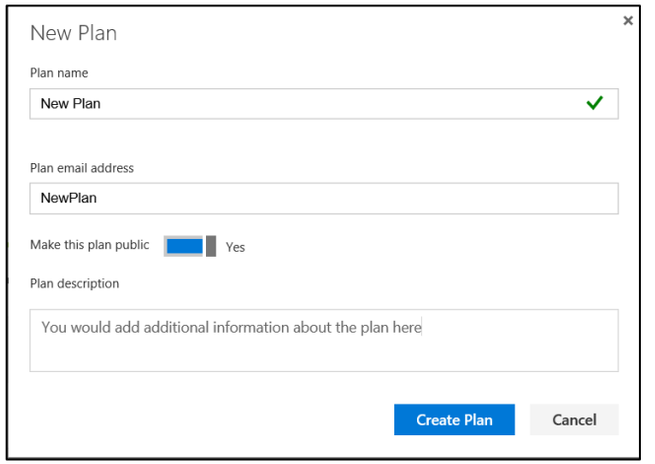
   OR

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**.



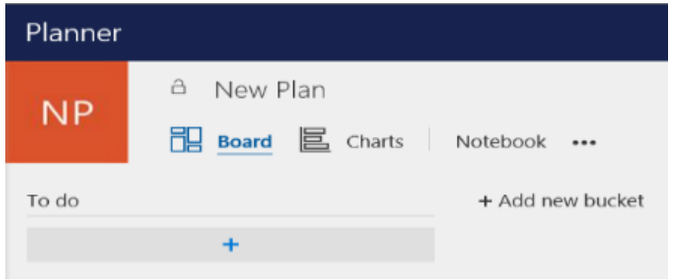
Creating a plan also creates a new Office 365 Group, making it easy for you and the people you're working with to collaborate not only in Planner, but also in OneNote, Outlook, OneDrive, and more.

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**.

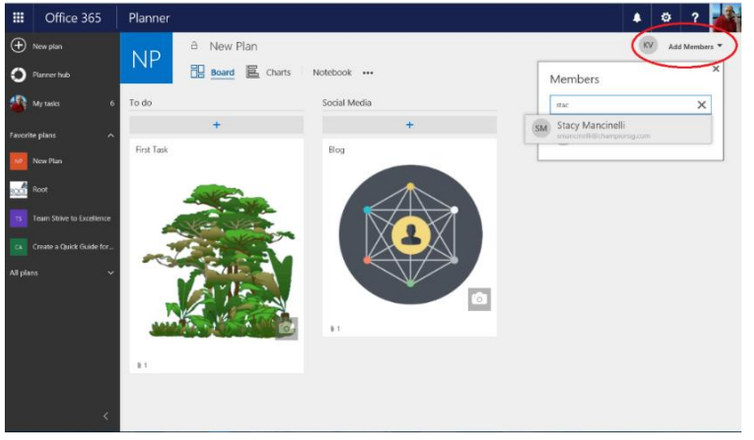
Tip: To list several tasks quickly, type a task name in the box under **to do**, press **Enter**, and then keep typing to add the next task.



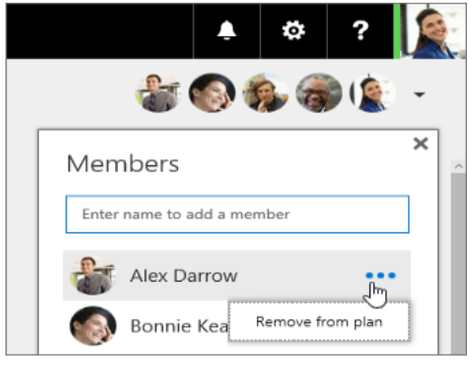
Don't see a box? Click the plus sign (+) to show the box and add a task.

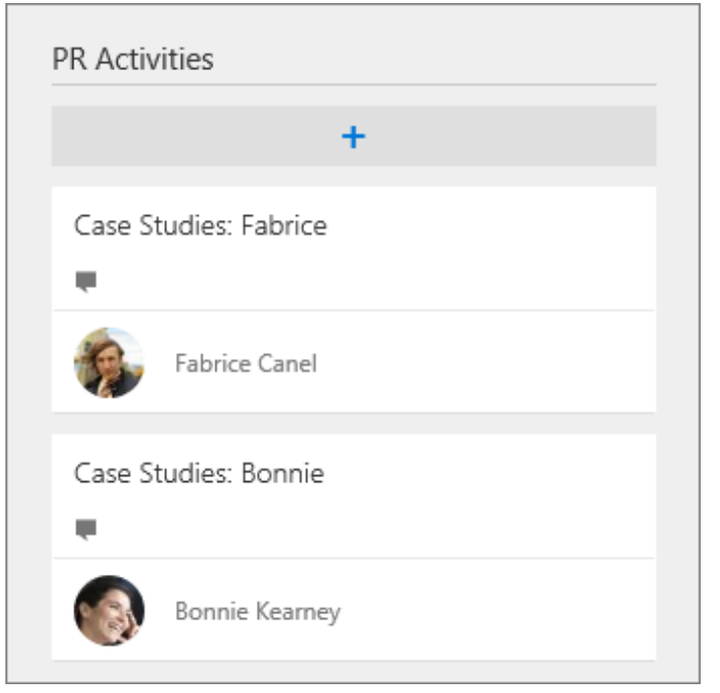
Add People to the Plan

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

Microsoft Planner

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
- 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
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Questions

That’s all folks!

Thanks for attending