

IT Office Hours

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#1 - OneDrive and Teams Files

Transcript

00:04:23.480 --> 00:04:25.020

Alex Gallegos: Good morning.

00:04:26.920 --> 00:04:30.169

Alex Gallegos: Can everybody see my screen and hear me? Okay.

00:04:36.940 --> 00:04:39.800

Angel Walker: Yup, I can thank you.

00:04:40.200 --> 00:04:41.529

Gail Miller: I can as well

00:04:42.430 --> 00:04:43.390

Alex Gallegos: perfect.

00:05:49.600 --> 00:05:53.839

Alex Gallegos: Give people a few more minutes to see who joins us, and then we'll get started

00:07:34.190 --> 00:07:41.590

right? Well, we're a couple of minutes past the top of the hour here, so I'm gonna go ahead and get this party started

00:07:41.600 --> 00:07:59.050

Alex Gallegos: and then for anybody else that joins later they can follow along with us. And of course we are recording this session, and it'll be available for anybody that wants to view it after the fact. So thank you for taking some time out of your day to

00:07:59.050 --> 00:08:16.359

Alex Gallegos: go through some training with us. The idea is kinda to run these on a fairly regular basis, maybe once a month or so, and just talk through some topics that might be of interest to people on help. People get used to

00:08:16.670 --> 00:08:28.290

Alex Gallegos: or get more use out of some of the tool sets that we all have available to us. But there's not really. There's not really a manual that comes from Microsoft with

00:08:28.360 --> 00:08:55.099

Alex Gallegos: your installation of some of their tool set. And so we wanna go through some of that functionality, and make sure everybody is getting the most out of the tools that we have available. I checked the form before we got started. I didn't see that. Anybody had submitted any questions at any point. But if you do have any during the presentation, please feel free to use the

00:08:55.100 --> 00:09:13.170

Alex Gallegos: QA. Feature. Go ahead and throw a question in there, and I'll circle around and answer those at the end of the presentation. But for the time being I just wanna go through a couple of quick demonstrations

00:09:15.470 --> 00:09:31.050

Alex Gallegos: of some of the features that are available in onedrive and team. Specifically, when it comes to file sharing. So let's take a look. I have a test machine out here. So I'm gonna go ahead and log in to this

00:09:36.600 --> 00:09:37.890

Alex Gallegos: and

00:09:40.640 --> 00:09:42.469

Alex Gallegos: start to look through

00:09:42.990 --> 00:09:44.760

sum of

00:09:45.640 --> 00:09:53.929

Alex Gallegos: some of these features. So first and foremost, we should have.

00:09:54.020 --> 00:10:13.489

Alex Gallegos: most everybody synchronizing files to onedrive by this point. If you look down in the tray. Icon probably have a little blue cloud by this point that says you're signed in. Your files are synchronized.

00:10:13.640 --> 00:10:35.269

Alex Gallegos: If that's not the case. For whatever reason, if this little cloud is, you know, Gray not filled in. Then you can go ahead and click on that. And it will ask you to put in your email address, and it will walk you through signing in. To make sure that you're actually synchronizing files out of onedrive into your machine.

00:10:36.110 --> 00:10:37.900

Alex Gallegos: You can also

00:10:37.950 --> 00:11:04.840

Alex Gallegos: double check the settings and just make sure that it is starting onedrive when you sign into windows and that it is set to back up your documents pictures and desktop. These settings should be managed by the it department but if, for whatever reason, you're not seeing the backups in place.

00:11:04.950 --> 00:11:11.909

Alex Gallegos: please feel free to reach out and let us know, so that we can get that taken care of for you.

00:11:13.140 --> 00:11:15.900

Alex Gallegos: see.

00:11:18.980 --> 00:11:29.710

Alex Gallegos: So one of the first benefits of having onedrive installed is that it synchronizes everything up to the cloud automatically.

00:11:29.810 --> 00:11:41.320

Alex Gallegos: So just as an example, if I right click here and I create a new word document. I'm just gonna call this new sample.

00:11:42.960 --> 00:11:44.810

Alex Gallegos: You can see that

00:11:45.090 --> 00:12:02.899

Alex Gallegos: pretty much right away. It notice that I made a new document on my desktop. It went ahead and uploaded that to the desktop folder in my backup and then made that

00:12:03.330 --> 00:12:09.729

Alex Gallegos: made that available out in teams, or out in onedrive.

00:12:11.900 --> 00:12:33.060

Alex Gallegos: so that I would be able to access it. And once I create a new document on my desktop in my documents directory or anything that's saved in my pictures Directory, it's

automatically backed up and saved out to onedrive.

00:12:33.570 --> 00:12:50.159

Alex Gallegos: which means I don't have to remember to back up the files on my laptop because they're continuously being saved out to the cloud and, in fact, if I open this new document that we just created.

00:12:50.500 --> 00:12:52.380

Alex Gallegos: you can also see.

00:12:57.210 --> 00:13:09.530

Alex Gallegos: But it's actually set to auto save again, because I have this document uploaded to onedrive. So anytime I make changes to this file.

00:13:10.630 --> 00:13:20.230

Alex Gallegos: This is a change. You can see right away, it says saving. And then in just a few moments it'll say that that change has been saved.

00:13:20.680 --> 00:13:40.510

Alex Gallegos: And so that happens automatically in the background pretty much with every keystroke that I make in this document. So I never have to worry about. You know. Have I saved this document? No, enough. Am I going to lose any information? That sort of thing.

00:13:43.000 --> 00:13:48.090

Alex Gallegos: So the space?

00:13:49.470 --> 00:13:54.570

Oh, now let me also show you. There are also locations on

00:13:55.010 --> 00:13:58.189

Alex Gallegos: your machine that are not covered by

00:13:58.260 --> 00:14:17.189

Alex Gallegos: by onedrive right, we said. The desktop was covered, the documents Directory was covered, the pictures Directory was covered. But, for example, a document here in downloads, I have this recommendation letter that. That I downloaded from an email that somebody sent.

00:14:17.710 --> 00:14:27.490

Alex Gallegos: and you can see that this one is not automatically saving this document. So any changes I make to this document here.

00:14:29.240 --> 00:14:37.679

Alex Gallegos: This is a change. If I go to close this document, it still comes up and says, Hey, you made changes to this document. If you click, don't save.

00:14:38.320 --> 00:14:50.849

Alex Gallegos: then you're going to lose those changes when you close the document. So I have a couple of options. If I wanted this document to be covered under onedrive.

00:14:51.380 --> 00:14:55.090

Alex Gallegos: one thing I could do is move it to the documents directory.

00:14:55.360 --> 00:15:07.080

Alex Gallegos: and then it would be automatically synchronized through the onedrive client, and then it would show up in my onedrive. Another thing I can do if I want

00:15:07.370 --> 00:15:11.199

Alex Gallegos: is just go to office.com.

00:15:16.860 --> 00:15:27.479

Alex Gallegos: and once I'm signed in here I can hit these little, these 3 dots in the upper left hand corner so that I can pick from my apps, and if I go to onedrive here

00:15:37.880 --> 00:15:40.459

Alex Gallegos: and click on my files over on the left.

00:15:42.250 --> 00:15:47.249

Alex Gallegos: So here are the folders that are being synchronized again. Pictures, documents, desktop.

00:15:47.370 --> 00:15:55.020

Alex Gallegos: But look in desktop. We can see that new document that I just created a couple of minutes ago is available

00:15:55.090 --> 00:15:58.020

Alex Gallegos: for me, and it's already been uploaded.

00:15:58.100 --> 00:16:12.199

Alex Gallegos: Any changes I make to it up here on the web will be synchronized back down to my machine, and will be reflected so I could if I wanted to. Just take this document

00:16:12.870 --> 00:16:15.890

Alex Gallegos: and go to the Documents Directory.

00:16:17.270 --> 00:16:30.140

Alex Gallegos: and I could just drag and drop this file across here, and you'll see that it will start uploading it. And then there we go now. I have

00:16:32.380 --> 00:16:46.820

Alex Gallegos: uploaded to documents, and there we go. There's my recommendation letter, and it's been uploaded now. The one thing to be aware of. If you choose to upload files directly through the web interface

00:16:47.350 --> 00:17:02.040

Alex Gallegos: is, I do still have this file in my downloads directory, and I would absolutely wanna make sure that I delete that there once I've moved the file up into onedrive, because otherwise it would be pretty easy

00:17:02.050 --> 00:17:16.209

Alex Gallegos: to mistakenly keep working on the one in the old Directory, and then these 2 files would get out of sync with each other. And so that's obviously not something that I would want to have happen.

00:17:16.869 --> 00:17:24.830

Alex Gallegos: Let's talk for a minute about some of the status symbols that you can see here.

00:17:25.130 --> 00:17:45.650

Alex Gallegos: So recommendation letter is a good example. So we just dragged that across and uploaded it. And you can see this little empty cloud symbol which is basically telling me that this document exists in onedrive. It's stored out in the cloud. That means I don't technically have a copy of it on the

00:17:45.700 --> 00:17:47.330

Alex Gallegos: this computer

00:17:47.410 --> 00:17:58.240

Alex Gallegos: sitting in front of me right now. Which means, if I didn't have an Internet connection, I wouldn't actually be able to interact with that document because it hasn't been downloaded locally.

00:18:00.670 --> 00:18:18.290

Alex Gallegos: Now, all these, with the little hollow green circle, have been downloaded locally and basically onedrive, will open files for you on demand. So, for example, this expense report that was created out directly in the cloud is a good example. If I double click on that.

00:18:18.690 --> 00:18:33.810

Alex Gallegos: it's going to take just a minute to download that from the Internet, make a local copy, and you can see the icon changes now to the little green circle with check mark, exactly the same as several of the others.

00:18:33.890 --> 00:18:42.730

Alex Gallegos: And now I can open this document. Even if I didn't have an Internet connection, I would have a copy here locally. Now.

00:18:43.030 --> 00:18:54.269

Alex Gallegos: onedrive is, tries to be smart about looking at files that you haven't accessed in a long time, or files that are a little larger, and tries to

00:18:54.300 --> 00:19:01.380

Alex Gallegos: optimize the amount of space that it takes up on your machine, the idea being that you can have

00:19:01.500 --> 00:19:22.590

Alex Gallegos: more data stored out in the cloud, then you might have capacity for directly on your local laptop. But if you do know that there's a file that you'll be interacting with all the time you might need to access with or without an Internet connection. You do have the option to right click

on the file

00:19:23.120 --> 00:19:39.539

Alex Gallegos: until it always keep on this device. And then that'll just turn that little check, Mark icon solid, and that tells you that this file is downloaded to the device and is not able to be removed unless

00:19:39.750 --> 00:19:50.659

Alex Gallegos: you then go back to the document and say, you know what? Actually free up space, and that'll actually pull it back out to the cloud.

00:19:50.780 --> 00:20:07.979

Alex Gallegos: Yeah, I know what I'm doing. Thank you. And in fact, we can even do this with some of the files that we pulled down on demand, too. If they're a little larger like this one same thing, I can do free up space and tell it. I don't need a copy stored locally on my machine

00:20:08.150 --> 00:20:26.100

Alex Gallegos: just needed out in the cloud. So it's easy to change how files are stored. And if you know, you're going to be traveling and need access to files while you're in the back of a car or on an airplane. That sort of thing.

00:20:26.110 --> 00:20:27.630

it's always

00:20:27.660 --> 00:20:34.770

Alex Gallegos: possible to synchronize files so that you can access them even if you don't have Internet connectivity.

00:20:35.060 --> 00:20:49.159

Alex Gallegos: And then the next time you do have an Internet connection, all of those changes that you made will be synchronized through the onedrive client, and it will upload all those changes so they're available. Everywhere that your files are.

00:20:54.610 --> 00:20:55.880

Alex Gallegos: So

00:20:56.420 --> 00:21:00.620

Alex Gallegos: let's look at one of these files in particular.

00:21:02.160 --> 00:21:07.710

Alex Gallegos: I'm going to make a quick change to this document.

00:21:19.330 --> 00:21:24.350

Alex Gallegos: Just leave a quick note for myself that says.

00:21:24.600 --> 00:21:32.019

Alex Gallegos: We need some new copy inserted in this location. And then if I

00:21:32.140 --> 00:21:49.049

Alex Gallegos: change my mind, or I realized that I made an error when I was editing a document. All is not lost. I can actually right click on the document. And if I go down to onedrive and check version history.

00:21:49.630 --> 00:22:01.980

Alex Gallegos: Then I can actually see pretty much all of the changes that I've made to this document. So as we saw it automatically saving with all the changes that we made, we can kind of step back

00:22:02.220 --> 00:22:25.200

Alex Gallegos: through that history of this document. And in this case, if I decide, you know that change I made 19 s ago. I don't really like that. I have a couple of options. One, I can view this version online to make sure that this really is the version that I want. And this is the way that I liked it. And yeah, sure enough,

00:22:25.330 --> 00:22:30.549

Alex Gallegos: now, that's actually not the version that I want. So let me

00:22:30.730 --> 00:22:35.540

Alex Gallegos: go back one more version and view this one online.

00:22:46.130 --> 00:22:52.829

Alex Gallegos: you showing me the current version. Think you are. Let's just see, because I want to restore this one.

00:22:59.480 --> 00:23:03.990

Alex Gallegos: Give me the files in use. Oh, aren't live demos fun.

00:23:18.110 --> 00:23:19.540

Alex Gallegos: Okay.

00:23:41.220 --> 00:23:48.809

Alex Gallegos: try this one more time, and if not, then we'll go to the web, and we'll do it through the web interface.

00:23:54.390 --> 00:23:58.639

Alex Gallegos: Alright. Well, there's always more than one way to skin a cat.

00:24:04.090 --> 00:24:05.680

Alex Gallegos: Now that you would want to

00:24:39.340 --> 00:24:40.670

Alex Gallegos: files

00:24:57.790 --> 00:24:58.670

Alex Gallegos: alright.

00:24:59.110 --> 00:25:01.840

Alex Gallegos: Version 5 store.

00:25:05.460 --> 00:25:13.259

Alex Gallegos: Alright. I don't know how I locked that document, but let's try a different document. So let's look at the version history of this expense report.

00:25:13.360 --> 00:25:39.810

Alex Gallegos: And so here we go. I've got 3 versions, and let's go back to version 2 point 0 of this document. So we'll go ahead and restore that. And there we go. So you can see it's basically taken version 2 point 0, and it's made it into a new version, which is now version 4 point 0, and it's the smaller file size document. So we can see that.

00:25:39.810 --> 00:25:47.070

Alex Gallegos: that, it's easy to kind of step back and go through and see what some of the changes are

00:25:47.840 --> 00:25:53.179

Alex Gallegos: to a document and restore previous versions as long as it's not locked for editing.

00:25:54.150 --> 00:25:58.699

Alex Gallegos: Another feature that onedrive gives us

00:25:58.800 --> 00:26:05.620

Alex Gallegos: is, let's just use this new sample document that we created. So if I delete this document.

00:26:11.280 --> 00:26:28.179

Alex Gallegos: so we get this notification that says. any file that we delete is removed everywhere, which is kind of what we would expect. So it's not just taken off of this machine. If we just wanted to take it off of this machine, we would right click it, and we would do free up space.

00:26:28.290 --> 00:26:38.180

Alex Gallegos: If we're deleting it, we're actually telling it. We don't want this file to exist anymore. But if that was an error, we can go to the onedrive recycle bin.

00:26:39.640 --> 00:26:56.910

Alex Gallegos: which is also out in the web interface, and just like the recycle bin on your PC. You can either empty the recycle bin if you're sure that that's a document that you wanna remove. Otherwise, if that was an error, you could just put a check mark there and say, Restore.

00:26:57.140 --> 00:27:02.290

Alex Gallegos: And that item should. There we go, show right back up.

00:27:07.510 --> 00:27:11.890

Alex Gallegos: Let's see. So let's talk about some of the

00:27:12.450 --> 00:27:15.130

Alex Gallegos: abilities that we get

00:27:15.740 --> 00:27:30.539

Alex Gallegos: when we store files in the cloud. Because we didn't necessarily it was much more difficult to do some of these tasks

00:27:30.650 --> 00:27:35.049

Alex Gallegos: before cloud files. So if I look.

00:27:36.430 --> 00:27:40.460

Alex Gallegos: for example at this spreadsheet.

00:27:53.120 --> 00:27:58.889

Alex Gallegos: So here we have just some revenue projections for some

00:27:58.990 --> 00:28:24.269

Alex Gallegos: for some products that were sold. And you notice, we have a few cells here where sales information is missing. So back in the bad old days, we used to have to take a document and either stick it on a file share somewhere, and only one person could open the file at a time, or we had to email it around and make sure that

00:28:24.330 --> 00:28:32.529

Alex Gallegos: one person made changes to the file, and then the next person made changes, and otherwise somebody had to merge all of their changes together. Right?

00:28:34.600 --> 00:28:51.970

Alex Gallegos: We don't necessarily have to do that anymore. Because now it's possible to collaborate on files. We can actually share files and then collaborate on them in real time. So let me show you how that works. So if I right click on this document.

00:28:52.620 --> 00:28:54.519

Alex Gallegos: I'm going to go down to Onedrive.

00:28:54.600 --> 00:28:59.159

Alex Gallegos: and I'm going to share this file with somebody.

00:29:03.810 --> 00:29:16.110

Alex Gallegos: and I'm going to share it with with my good colleague, Alex. I'm going to say, Hey, sales data is missing.

00:29:16.940 --> 00:29:19.749

Alex Gallegos: please add, if you

00:29:19.840 --> 00:29:31.309

Alex Gallegos: can. And I'm going to go ahead and send that link. And I can either just hit, send here, which will send kind of a generic templated email.

00:29:31.930 --> 00:29:35.050

Alex Gallegos: Or I can copy this link.

00:29:35.160 --> 00:29:40.419

And I could go ahead and send a team's message.

00:29:40.460 --> 00:29:42.949

Alex Gallegos: And have

00:29:43.010 --> 00:29:47.900

Alex Gallegos: have that document available. Say

00:29:51.960 --> 00:29:52.950

not.

00:29:55.150 --> 00:30:04.360

Alex Gallegos: And I paste that document, and you'll notice that it paste in the longer link. And then it notices that it's like, Oh, wait! This is a shared link

00:30:04.370 --> 00:30:10.189

Alex Gallegos: and kind of converts it into a into a document, preview.

00:30:14.100 --> 00:30:25.289

Alex Gallegos: And so I can share that directly with the person that I want to make changes to it. If I did go ahead and send that as an email.

00:30:25.300 --> 00:30:41.929

Alex Gallegos: This is kind of what those emails look like. the person receives it says, Hey, this person re shared a file with you. Whatever message they typed in would appear there tells you what kind of file it is, and then tells you

00:30:42.260 --> 00:30:52.210

Alex Gallegos: is the link only for you? Or is it a link that you can forward on to other people? And we'll talk about some of those security settings in a couple of minutes.

00:30:52.320 --> 00:30:53.230

Alex Gallegos: But

00:30:55.140 --> 00:30:57.990

Alex Gallegos: the nice thing here

00:30:59.870 --> 00:31:02.290

Alex Gallegos: is that I can actually open that document.

00:31:10.320 --> 00:31:13.499

Alex Gallegos: and this allows us to collaborate

00:31:13.620 --> 00:31:15.760

Alex Gallegos: with each other in

00:31:15.810 --> 00:31:23.310

Alex Gallegos: real time on documents. So multiple people can be in a document editing all at the same time.

00:31:23.850 --> 00:31:28.110

Alex Gallegos: which which can be really helpful. So

00:31:30.720 --> 00:31:34.210

Alex Gallegos: let me show you what that looks like. Just need to open this on my end.

00:31:56.290 --> 00:32:08.869

Alex Gallegos: so you can now see that a new person has joined the workbook. You can actually see what cell they've highlighted and where they are.

00:32:08.910 --> 00:32:11.230

Alex Gallegos: where they're making edits and changes.

00:32:11.280 --> 00:32:18.879

Alex Gallegos: And if that person comes in and makes change and says, Oh, yeah, we sold 2,000 of these units

00:32:18.960 --> 00:32:20.170

and

00:32:20.210 --> 00:32:23.420

Alex Gallegos: 1,500 of these and

00:32:24.860 --> 00:32:28.590

Alex Gallegos: 974 of these.

00:32:28.870 --> 00:32:35.080

Alex Gallegos: So now this guest has made changes to

00:32:36.050 --> 00:32:45.649

Alex Gallegos: to this document for me. Even though it's still stored within my my file store.

00:32:45.680 --> 00:32:56.050

Alex Gallegos: and I didn't have to. I didn't have to move it through email. I didn't have to stick it on another file. Share that sort of thing.

00:32:59.480 --> 00:33:00.630

Alex Gallegos: Now

00:33:04.950 --> 00:33:11.009

Alex Gallegos: let's talk through some of the some of the things that we do need to be considerate

of.

00:33:12.150 --> 00:33:15.750

Alex Gallegos: So you'll notice when I shared that file.

00:33:17.530 --> 00:33:25.560

Alex Gallegos: The default here is just to do that. Anyone that has

00:33:25.720 --> 00:33:35.890

Alex Gallegos: the anyone that has the link can make changes to the file. That's our default. I click on this, I actually get some more options

00:33:35.990 --> 00:33:39.280

for exactly how I want to share this file.

00:33:39.720 --> 00:33:58.909

Alex Gallegos: So like, I said, this is the default. Basically, this means that anybody that gets the link to this file, anyone on the whole wide planet will be able to log in and make changes to this file. So because that access is

00:33:59.100 --> 00:34:04.979

Alex Gallegos: so broad, we force you. If you do, sharing with anyone.

00:34:05.170 --> 00:34:07.420

we force you to expire that link.

00:34:07.820 --> 00:34:17.569

Alex Gallegos: and the default is that that expires in 90 days. So on day 91 come Valentine's day, if I try to click on this link

00:34:17.670 --> 00:34:23.329

Alex Gallegos: that's not gonna work anymore. And it'll just tell me I don't have access to this file.

00:34:23.670 --> 00:34:47.750

Alex Gallegos: but there are a couple of things that I can do differently. First of all I could just share it with people in my company. And I could say, You know, this link can be edited by anybody internal to the organization. But anybody external to the organization doesn't get access to it. If I do that, I don't have to have an expiry date on my link.

00:34:48.420 --> 00:35:00.229

Alex Gallegos: Otherwise I could also do specific people that I choose by name, and I could say that they're allowed to edit.

00:35:00.390 --> 00:35:17.220

Alex Gallegos: or I could say they're allowed only to view. I can do that with with any group. I can also block download, so I can say you can view this file, but you're not allowed to download a local copy of it. If I want to send

00:35:17.630 --> 00:35:33.389

Alex Gallegos: I don't know a confidential report that sort of thing. Then I can send somebody something that they can look at. But they don't get an option to save their own copy of, basically to prevent data from

00:35:33.420 --> 00:35:35.710

Alex Gallegos: spreading around from

00:35:35.730 --> 00:35:52.650

Alex Gallegos: one location to another by default. When I send a link to anyone you know, I send it to. I send a link to you, then you can forward it to somebody else, and they can forward it to somebody else and somebody else. There's really not any limit.

00:35:53.120 --> 00:36:05.720

Alex Gallegos: So the really the most secure option is to come down and choose this people you choose. And then, when we go back to say, You know, this file is only for

00:36:06.050 --> 00:36:12.349

Alex Gallegos: specifically 2 or 3 people and then send it to them. But

00:36:12.400 --> 00:36:25.620

Alex Gallegos: that is all up to you. And it depends on what type of data that you're sending across. I would just urge you to

00:36:25.700 --> 00:36:36.989

Alex Gallegos: use caution when you're sharing files, especially with somebody external to the organization and consider where data might end up.

00:36:39.760 --> 00:36:41.020

Alex Gallegos: Let's see.

00:36:42.780 --> 00:36:43.480

Okay.

00:36:43.690 --> 00:36:59.249

Alex Gallegos: so the other side. So I have the information that I need now in this file, what if I decide, I don't want to share it anymore. Right? So I can actually go down to onedrive here

00:36:59.280 --> 00:37:06.079

Alex Gallegos: and do manage access. So if I right click, go down to the onedrive icon and manage access.

00:37:07.000 --> 00:37:10.579

And I can actually see everybody that I've shared

00:37:10.590 --> 00:37:12.809

Alex Gallegos: this document with.

00:37:14.060 --> 00:37:19.949

Alex Gallegos: And I can actually go to the link that I shared, and I can remove it.

00:37:20.330 --> 00:37:33.070

Alex Gallegos: And that means that the link that I sent across across won't work for anyone anymore. As that's exactly what I want to achieve. So I'm gonna go ahead and remove that. And you can see now, I'm the only person

00:37:33.080 --> 00:37:43.070

Alex Gallegos: that has access to this document again. So once you share a file, it does not necessarily have to be shared forever, which

00:37:43.160 --> 00:37:45.860

is also useful.

00:37:47.530 --> 00:37:52.850

Alex Gallegos: You can also, if you have already sent a link to somebody.

00:37:52.920 --> 00:38:03.019

Alex Gallegos: Instead of generating a new one. you can always find those links again under manage access. and if we

00:38:03.460 --> 00:38:27.240

Alex Gallegos: look at the sharing links that we've already created. You can copy those. So if you've already shared a document with, you know, 5 people. And somebody says, Oh, I didn't get it. Can you send that again? You don't actually have to go through and share it a second time. You can just go copy the link and send that to them in an email or teams message so that they have access to it.

00:38:33.990 --> 00:38:37.360

Alex Gallegos: Another useful tool.

00:38:38.910 --> 00:38:52.750

Alex Gallegos: If I go out to onedrive on the web. I can actually see all the files that have been shared with me by somebody else, and I can also see all the files that I have shared with

00:38:52.850 --> 00:39:02.970

Alex Gallegos: anyone else, and I can also directly manage their access from here. So if I know I sent a document to somebody last week, but I can't remember

00:39:03.980 --> 00:39:12.469

Alex Gallegos: where exactly I stuck that document. I can easily go find all the files that I shared from here.

00:39:14.070 --> 00:39:22.109

Alex Gallegos: So everything we've talked about so far has been storing files in your

00:39:22.190 --> 00:39:34.390

Alex Gallegos: personal onedrive instead of storing them in teams. Right? And so when would you want to store things in teams versus in onedrive.

00:39:34.790 --> 00:39:50.400

Alex Gallegos: We've always kind of told people that the idea is that you get on drive for one person. So these are for your files that really you're the sole owner of, and you're the only person that needs to work on them.

00:39:50.480 --> 00:39:56.240

Alex Gallegos: When I'm deciding where to create a file. I tend to think of questions like.

00:39:56.670 --> 00:40:17.629

Alex Gallegos: if I was on vacation without cell coverage for a whole week would the other members of my department need access to this file. Does everyone on my team need access to this file, or only one other person? Maybe if the answer is that everyone needs access to it. I should probably

00:40:17.630 --> 00:40:29.540

Alex Gallegos: created in the team's file share if the whole department would need access to it. If I wasn't available. Same thing I should probably

00:40:29.570 --> 00:40:31.770

created in the team's file share.

00:40:35.370 --> 00:40:40.229

Alex Gallegos: and we can easily move files from one location

00:40:40.310 --> 00:40:41.490

Alex Gallegos: to another

00:40:41.560 --> 00:40:54.190

Alex Gallegos: cause. I realize it can be a little confusing to tell where some of these files are right. Cause teams shows us files a whole bunch of different places. It shows us files in chat with other people.

00:40:54.830 --> 00:41:21.150

Alex Gallegos: It shows us this files icon, which is actually just what's in my onedrive again. So I realize that can be a little confusing. And then, if you are a member of any teams, every channel in teams also has a section for files, and so that can be a little confusing. Basically, any files that are

00:41:21.250 --> 00:41:27.559

Alex Gallegos: in chat are basically files that are between you and the person that you're talking to

00:41:27.990 --> 00:41:36.969

Alex Gallegos: any files that are uploaded to a team channel everybody in the Channel automatically gains access

00:41:37.490 --> 00:41:39.800

Alex Gallegos: to those documents. So

00:41:40.890 --> 00:41:41.990

Alex Gallegos: it's

00:41:42.040 --> 00:41:50.099

Alex Gallegos: pretty easy to move a file. If you decide that really it belongs in

00:41:50.420 --> 00:41:51.580

Alex Gallegos: a team.

00:41:52.360 --> 00:41:56.589

Alex Gallegos: And let's go back to our documentation manual.

00:41:57.660 --> 00:42:04.490

Alex Gallegos: We'll use that as an example, and we'll say, you know what this really belongs in? In this

00:42:05.000 --> 00:42:15.109

Alex Gallegos: teams channel in the files section. So exactly the same as we talked about. When we were moving files up to onedrive.

00:42:15.230 --> 00:42:31.820

Alex Gallegos: We can just click and drag and drop and upload this file, or we can use the upload menu and go find a file to upload from our machine that will absolutely work. But if I do that

00:42:32.560 --> 00:42:38.799

Alex Gallegos: once again, you'll notice that when the file is created up here.

00:42:39.170 --> 00:42:49.919

Alex Gallegos: There's still one over here in my onedrive, but this can be even a little more confusing, because when I open this file up in word.

00:42:52.880 --> 00:42:57.069

Alex Gallegos: it's going to continue to tell me that it's automatically

00:42:57.080 --> 00:43:07.019

Alex Gallegos: saving the document in the upper left hand corner. And so it would be really easy to make a mistake between

00:43:07.050 --> 00:43:22.920

Alex Gallegos: the document in one location on the document in another location. So if you do that, you want to make absolutely certain that you delete the source file. Once you've moved the document up into teams.

00:43:23.550 --> 00:43:26.729

Alex Gallegos: One other option that we have

00:43:29.250 --> 00:43:35.130

Alex Gallegos: is to go to your files on the web portal. This does have to be done

00:43:35.210 --> 00:43:41.470

Alex Gallegos: through onedrive on the web. But if I go down to my documents here

00:43:41.970 --> 00:43:47.739

Alex Gallegos: and find exactly the same document, then the other thing I can do is click this little 3 dots menu.

00:43:47.780 --> 00:43:51.709

Alex Gallegos: And I can actually say, you know what I want to move this document.

00:43:53.610 --> 00:43:56.069

Alex Gallegos: I want to move it to

00:43:57.130 --> 00:43:58.920

Alex Gallegos: once. This loads

00:44:03.190 --> 00:44:12.759

Alex Gallegos: things a little sluggish today. Once I do move, I can say, you know what I don't wanna just move it to somewhere in my files. So I'm gonna do more places.

00:44:12.780 --> 00:44:23.230

Alex Gallegos: And this will show me all of the shared libraries I have access to, which is basically the teams that I'm a part of, I'm gonna say, yep, I want it to be part of this demonstration team.

00:44:24.020 --> 00:44:31.310

Alex Gallegos: and I want it to go into the Widget production channel, and I'm just gonna say, Move here.

00:44:33.520 --> 00:44:52.240

Alex Gallegos: And if I do that, then I don't have to think about deleting it from my onedrive, because that's actually going to happen automatically. You can see it disappears here, and in just a few moments we should see it show up in teams here as well.

00:44:53.390 --> 00:44:54.640

Alex Gallegos: So

00:44:55.640 --> 00:45:05.760

Alex Gallegos: sharing in in teams works exactly the same way as it did in onedrive

00:45:05.870 --> 00:45:11.139

Alex Gallegos: so I can look at files that have been

00:45:11.200 --> 00:45:23.820

Alex Gallegos: stored in teams. Now, like I said, these are already available to everybody. That is a member of the Channel in teams, but I can also share them with

00:45:23.920 --> 00:45:27.119

Alex Gallegos: other members of the organization.

00:45:27.190 --> 00:45:39.889

Alex Gallegos: The one difference in sharing files from inside teams is, I don't have the ability to share these documents with anyone and everyone. But I can do

00:45:40.130 --> 00:45:49.670

Alex Gallegos: anybody in the organization. So all I would have to do is copy a link and pass that on to them. Or, again, I can do specific people that I chose.

00:45:50.230 --> 00:46:05.300

Alex Gallegos: but exactly the same thing I can decide. Are they allowed to edit? Are they only allowed to review or are they only allowed to view the document? And are they allowed to download the document or not?

00:46:05.580 --> 00:46:06.690

Alex Gallegos: Hum!

00:46:08.470 --> 00:46:15.879

Alex Gallegos: You're coming to the close here, but there's one other piece that I wanted to show. You

00:46:17.010 --> 00:46:29.909

Alex Gallegos: see, if this document has appeared here yet it has. So this is a document that I used to have in my documentation folder before I moved it up to teams.

00:46:30.250 --> 00:46:51.009

Alex Gallegos: But I used this document quite a lot now, it didn't really belong in teams that wasn't a good place for it. Sorry it didn't really belong in my onedrive. That wasn't a good place for it. But I would still like to have access to it the same way I have before.

00:46:51.470 --> 00:46:55.630

Alex Gallegos: So one other thing I can do is I can hit this little sync button here.

00:46:56.490 --> 00:46:58.480

Alex Gallegos: and if I do that.

00:46:58.750 --> 00:47:01.559

Alex Gallegos: then it brings up this dialogue.

00:47:08.700 --> 00:47:10.300

Alex Gallegos: Now

00:47:12.080 --> 00:47:17.269

Alex Gallegos: you can see that I have a new section down here for my organization.

00:47:18.280 --> 00:47:34.460

Alex Gallegos: and says, Alright, well, here you go. Here's a folder. Here's the team that you're a part of, and then the name of the channel, and inside I can see all of the files that are a part of that channel, so I can access them exactly the same way

00:47:34.640 --> 00:47:49.619

Alex Gallegos: that I access my onedrive files, and I have exactly the same levels of control over them that I do over files in onedrive. So I can right, click them. And I can say, always keep on this device

00:47:50.130 --> 00:48:03.709

Alex Gallegos: so that I make sure that that file is always on my machine. Any changes that anybody makes to it. They're always synchronized, and I always have a local copy. No matter what.

00:48:04.170 --> 00:48:14.029

Alex Gallegos: Just a couple of other quick features. That might be useful. When we look at files that

00:48:14.320 --> 00:48:23.739

Alex Gallegos: are stored in a team's channel, just because these are available for several people. One thing we can do is we can PIN a file.

00:48:23.790 --> 00:48:27.830

Alex Gallegos: To the top of the list of files if

00:48:28.700 --> 00:48:34.770

Alex Gallegos: we know that a bunch of people are going to need access to it.

00:48:35.070 --> 00:48:39.279

Alex Gallegos: and so that makes it a lot easier for those to be found.

00:48:39.320 --> 00:48:52.709

Alex Gallegos: I can also favorite a file now that's just for me. But if I go look in my files and look at my favorites, I should be able to

00:48:54.200 --> 00:48:54.950

come on

00:49:02.220 --> 00:49:03.699

Alex Gallegos: making me look bad.

00:49:24.270 --> 00:49:46.360

Alex Gallegos: Taking a little time to synchronize here. But I think if we give this a couple of minutes, then that file should show up here. And I should be able to see any of the files that I've favorited. So same thing. If I work with a file on a fairly frequent basis, then that would be that would be a way for

00:49:46.550 --> 00:49:51.180

Alex Gallegos: for me to keep track of that file no matter

00:49:51.240 --> 00:49:53.579

Alex Gallegos: where I make use of it.

00:49:55.860 --> 00:50:08.809

Alex Gallegos: I think that's everything that I wanted to demonstrate this morning. Here. I don't see any questions that anybody's posted so far. Did anybody else have any?

00:50:08.970 --> 00:50:13.670

Alex Gallegos: Questions? That they wanted addressed

00:50:13.760 --> 00:50:17.529

Alex Gallegos: Feel free to come off mute and ask any, if you have any.

00:50:25.900 --> 00:50:29.669

Paul Nus: I had some that I forgot. So let me try to remember.

00:50:29.840 --> 00:50:30.830

Alex Gallegos: Okay.

00:50:36.750 --> 00:50:47.710

Thad Lux: I had a question for our team, really, but I think it would benefit everybody. Is there a way that we can make it, so that when we share a link the any one option isn't available.

00:50:48.440 --> 00:50:54.229

Alex Gallegos: Yes, that is an option that can be well removed from the tenant.

00:50:54.600 --> 00:50:55.350

Thad Lux: Okay.

00:50:56.270 --> 00:51:06.190

Thad Lux: might be something worth discussing that way. Only shares can be internal or with specific external emails that we provide. That'd be a nice touch.

00:51:06.610 --> 00:51:14.230

Thad Lux: That is something that can be done. But it's a it would be a tenant wide change. So it's not just per team.

00:51:14.310 --> 00:51:18.369

Alex Gallegos: so that would

00:51:18.700 --> 00:51:21.740

Alex Gallegos: basically prevent anybody from creating a public link.

00:51:24.570 --> 00:51:28.400

Paul Nus: Is there something? When you go back to your file explorer window

00:51:30.040 --> 00:51:35.240

Paul Nus: and the bottom left. You have full names there. Do you have to do anything? Or is that

00:51:35.420 --> 00:51:46.570

Alex Gallegos: that was a result of doing the sync button in one of the teams channels.

00:51:47.480 --> 00:51:51.590

Paul Nus: Yeah, as I thought I had something synced, and maybe I just didn't

00:51:51.850 --> 00:51:56.259

Paul Nus: do that. So maybe I'll try that again and make sure.

00:51:56.410 --> 00:52:03.600

Paul Nus: Do you have shared shared documents, I guess.

00:52:05.470 --> 00:52:12.180

Paul Nus: What says shared documents? Hyphen team, you know. Teams, technology on mine? Does yours also say shared documents. Hyphen.

00:52:12.330 --> 00:52:14.069

Paul Nus: Maybe just the way I did it.

00:52:14.110 --> 00:52:19.559

Paul Nus: Let me, I just wanna check our team cause I think

00:52:22.910 --> 00:52:27.040

Alex Gallegos: I think that is the name of the library in

00:52:28.930 --> 00:52:31.990

Alex Gallegos: in our team. But I have to double check. Yeah.

00:52:32.340 --> 00:52:35.050

Paul Nus: I noticed that I tried.

00:52:35.720 --> 00:52:54.350

Alex Gallegos: I tried to do that, and I already have a shortcut to one of the folders, and I don't think it'll let you sync and have shortcuts at the same time. And now I didn't mention that possibility. Just because the shortcut does

00:52:54.540 --> 00:53:13.370

Alex Gallegos: does stop the does stop some of that functionality that. We talked about like you just discovered prevents you from doing the synchronization. And at least the last time I looked at it the shortcuts.

00:53:13.680 --> 00:53:23.690

Alex Gallegos: All it would do would would bring you to the list of files. But it didn't allow you the option to synchronize the the files locally

00:53:24.400 --> 00:53:32.399

Alex Gallegos: as far as I know, the synchronize option kind of supplanted the add shortcut to onedrive about

00:53:32.560 --> 00:53:35.699

Alex Gallegos: a year and a half ago, as the

00:53:35.930 --> 00:53:42.940

Alex Gallegos: best way to do that, and I believe adding shortcuts was only kind of maintained is backwards compatibility.

00:53:43.230 --> 00:53:56.950

Paul Nus: Okay, mine were definitely shortcuts, because it says, remove shortcut option, and so I will. I will remove those and try that it does. Let me modify just like you would in a sync scenario. But

00:53:57.200 --> 00:54:04.279

Paul Nus: yeah, I I'd rather have that other, you know, library or not library with that fully. It's, you know.

00:54:04.600 --> 00:54:07.230

Paul Nus: delineation. Thank you

00:54:08.800 --> 00:54:11.510

Alex Gallegos: absolutely alright.

00:54:11.550 --> 00:54:17.799

Alex Gallegos: Any other questions from anyone otherwise. I'll give you some time back before lunch here.

00:54:22.500 --> 00:54:37.440

Alex Gallegos: Well, thank you, Alex, alright thanks. Everybody. Appreciate your time, and we'll schedule another one of these for sometime in December. And I'm not exactly sure what we'll be talking about. Possibly, AI. So we'll see

00:54:39.110 --> 00:54:40.539

Alex Gallegos: alright. Thanks, everyone.

#2 - Microsoft Planner

Transcript

00:00:03.070 --> 00:00:15.259

Alex Gallegos: Alright. Well, we're a few minutes past the top of the hour. So I'm gonna go ahead and start the recording. Thanks everybody for taking a little bit of time out of your day to review Microsoft Planner. I know

00:00:15.360 --> 00:00:27.310

Alex Gallegos: there's a bunch of changes coming as we move from Trello over to Planner. So if you do have any questions during the demonstration, please feel free to stop me at any point

00:00:27.720 --> 00:00:31.919

Alex Gallegos: and let me know, and we'll try to get those addressed, but otherwise

00:00:33.700 --> 00:00:37.330

Alex Gallegos: we'll go ahead and dive in to our agenda.

00:00:37.790 --> 00:00:44.520

Alex Gallegos: We're going to go through all the basic functions kind of from stem to stern for planner

00:00:44.820 --> 00:01:06.949

Alex Gallegos: from the very basics of how to create new tasks and buckets, how to assign tasks to people, and then some of the features that you can add to some of the cards, including assigning notes, attachments, putting some checklists on the cards, how you can tag and sort some of the cards in order to make your life just a little bit easier.

00:01:07.350 --> 00:01:37.069

Alex Gallegos: We'll talk about some of the scheduling that you can do within the tool how to move cards between buckets within a plan and how to move them to a different plan entirely if the need arises. And finally, we'll talk about some of the integration that we have with teams and outlook. It's all built in out of the box because it's all part of the Microsoft tool set. So there's very little, if anything, additional, that needs to be done in order to get

00:01:37.080 --> 00:01:38.420

Alex Gallegos: some of that working.

00:01:38.980 --> 00:01:44.159

Alex Gallegos: So I have a demonstration machine here. Let me switch over to that.

00:01:51.510 --> 00:01:55.220

Alex Gallegos: Let me know when you all can see our demo machine here.

00:02:04.270 --> 00:02:05.869

Alex Gallegos: Great, thank you.

00:02:06.040 --> 00:02:19.460

Alex Gallegos: So let me start with the easiest part, which is how we actually access planner. Now, there's a couple of ways. But let's start with just opening up a web browser. And we're just gonna go to Officecom.

00:02:19.740 --> 00:02:28.199

Alex Gallegos: This is the way we can access most of, if not all, of the Microsoft tool set out in office 3, 65.

00:02:28.260 --> 00:02:31.859

Alex Gallegos: But once I open up the office portal.

00:02:32.390 --> 00:02:42.209

Alex Gallegos: If I go to this little 3 dots menu on the left. This is my app launcher. It shows me all of the apps that I've used on a regular basis.

00:02:42.580 --> 00:02:56.700

Alex Gallegos: Planner might not show up here like it doesn't for my demonstration user. But if that's the case, it just means that I haven't used Planner very often. I can always go down here to explore all your apps.

00:02:56.780 --> 00:02:59.930

Alex Gallegos: and then from this list here.

00:03:01.880 --> 00:03:03.490

Alex Gallegos: once it pulls up.

00:03:09.480 --> 00:03:11.470

Alex Gallegos: then I can find

00:03:11.940 --> 00:03:15.960

Alex Gallegos: Planner on this list. The easiest thing to do is just go all apps

00:03:16.000 --> 00:03:19.980

Alex Gallegos: and show me planner. There we are

00:03:20.300 --> 00:03:24.229

Alex Gallegos: should also be able to. Yeah, there we go open in a new tab.

00:03:30.620 --> 00:03:35.250

Alex Gallegos: Another thing I can do if I want to. So I can just go directly to

00:03:35.650 --> 00:03:36.743

Alex Gallegos: tasks. Dot.

00:03:37.340 --> 00:03:38.560

Alex Gallegos: Thank you, chrome.

00:03:38.630 --> 00:03:39.789

Alex Gallegos: Appreciate you

00:03:40.470 --> 00:03:43.070

Alex Gallegos: tasks.office.com.

00:03:44.770 --> 00:03:54.219

Alex Gallegos: and that'll take me directly to the same place. So for the purposes of this demonstration, I've already got a plan

00:03:54.240 --> 00:03:55.380

Alex Gallegos: created

00:03:55.420 --> 00:04:01.820

Alex Gallegos: for one of our favorite employees here. Keana Reeves, and you can notice

00:04:01.970 --> 00:04:08.829

Alex Gallegos: right away when I log in. The first thing it does is it tells me that there were some changes that were made to the plan

00:04:08.890 --> 00:04:10.470

Alex Gallegos: while I was away.

00:04:10.710 --> 00:04:12.710

Alex Gallegos: which helps

00:04:12.810 --> 00:04:28.880

Alex Gallegos: get me caught up right away on any changes that somebody else might have made. So let's start to look at some of these features available. So just like the way Trello is set up. We have

00:04:29.700 --> 00:04:34.330

Alex Gallegos: buckets with individual tasks on individual cards

00:04:34.900 --> 00:04:36.419

Alex Gallegos: that should be

00:04:36.700 --> 00:04:39.540

Alex Gallegos: a paradigm that we're all pretty familiar with

00:04:39.550 --> 00:04:45.129

Alex Gallegos: just the same as in Trello. I can create a new bucket.

00:04:45.360 --> 00:04:48.490

Alex Gallegos: Let's go ahead and create one. Now

00:04:48.690 --> 00:04:56.839

Alex Gallegos: and then I can go ahead and add a new task to that. Let's say, oh, you know what I want to finalize

00:04:59.540 --> 00:05:09.410

Alex Gallegos: my strategic plan, and then I can either hit, enter, or just click on add task there. If I just want to add a whole bunch in a row, one right after another.

00:05:10.230 --> 00:05:36.494

Alex Gallegos: and then I can start to drill into the details on this card and add some more specific information. For example, I can assign this task to a specific user. So let me go ahead and assign this one to let's assign it to Alex and assign this one to Paul. They're actually gonna work together on this task.

00:05:37.673 --> 00:05:41.899

Alex Gallegos: And once I've done that pretty quickly.

00:05:42.650 --> 00:05:45.549

Alex Gallegos: me pull up my own inbox here

00:05:47.995 --> 00:05:53.695

Alex Gallegos: within just a couple of minutes, I'll have an email that comes through to my inbox, which I'll show you

00:05:54.020 --> 00:05:56.990

Alex Gallegos: that says that I have a

00:05:57.100 --> 00:06:00.739

Alex Gallegos: task available. It's been assigned to me

00:06:00.850 --> 00:06:02.060

Alex Gallegos: so

00:06:03.380 --> 00:06:06.470

Alex Gallegos: didn't want to do that. So oh, come on.

00:06:07.160 --> 00:06:09.260

Alex Gallegos: I'm on the wrong task. That's why

00:06:09.660 --> 00:06:11.840

Alex Gallegos: there we go. There's my strategic plan.

00:06:14.420 --> 00:06:16.350

Alex Gallegos: Let's see

00:06:16.440 --> 00:06:26.748

Alex Gallegos: one thing that we can do. We can add notes to the task so I could add a little description of what I need to do

00:06:27.300 --> 00:06:28.390

Alex Gallegos: right up

00:06:29.180 --> 00:06:32.271

Alex Gallegos: strategic plan for the business.

00:06:33.410 --> 00:06:38.249

Alex Gallegos: And I can make sure that that shows up on the card. Now.

00:06:38.380 --> 00:06:43.950

Alex Gallegos: typically, a lot of people will just leave additional notes in the Notes section.

00:06:44.120 --> 00:06:56.350

Alex Gallegos: But another thing that people can do is they can leave added comments on the card which just allows you to keep track of

00:06:57.210 --> 00:07:00.329

Alex Gallegos: who made what contribution and when.

00:07:00.880 --> 00:07:03.900

Alex Gallegos: so I can come in on my own machine

00:07:07.230 --> 00:07:14.849

Alex Gallegos: and leave a comment that says, oh, I can take care of this next week, and that will show up in just a moment.

00:07:21.560 --> 00:07:32.700

Alex Gallegos: There we go. So there's the comment that I just left shows who made it, and what time that comment was made makes it a little easier to keep track of

00:07:33.400 --> 00:07:37.669

Alex Gallegos: who's making a contribution, and exactly what they're saying.

00:07:39.720 --> 00:07:42.460

Alex Gallegos: I can also add

00:07:43.200 --> 00:07:46.280

Alex Gallegos: other items to the list. I can add attachments.

00:07:46.650 --> 00:07:55.910

Alex Gallegos: so I can either upload an attachment directly from my computer, or I can add a link to a file out on the Internet somewhere.

00:07:56.000 --> 00:08:11.179

Alex Gallegos: If I have a file already in teams or onedrive, then I can go ahead and attach that here, and in fact, it's already given me some recommended

00:08:11.220 --> 00:08:25.609

Alex Gallegos: documents that it's found that might be related. So, for example, this document from my onedrive, I can just go ahead and click. Add here if I want to, and that

00:08:25.710 --> 00:08:51.949

Alex Gallegos: attachment is automatically added to the card. It's shared automatically with everybody that needs access to it. And same thing. If I want, I can click show on card. And then anybody that comes into the plan can just click right here on the document, and it'll open up directly in word so they can view it. Edit it. Make changes to it. And they don't have to

00:08:52.430 --> 00:09:03.830

Alex Gallegos: download a copy from email or any other source. And this document can live in my onedrive. It can live in teams. It can live pretty much anywhere that I want it to.

00:09:07.310 --> 00:09:13.839

Alex Gallegos: Checklists are another piece that's pretty useful. So, for example, I have this

00:09:13.970 --> 00:09:17.509

Alex Gallegos: list of monthly car maintenance tasks that

00:09:17.560 --> 00:09:19.310

Alex Gallegos: Keanu has

00:09:19.380 --> 00:09:25.450

Alex Gallegos: that is not assigned to anybody right now, and so I could create

00:09:25.988 --> 00:09:27.899

Alex Gallegos: bunch of different cards

00:09:27.920 --> 00:09:31.520

Alex Gallegos: for all of these different tasks that I

00:09:32.090 --> 00:09:53.080

Alex Gallegos: need people to do. I could have one for checking the tire pressure and rotating tires, changing oil, etc. But it's a lot easier, especially if I'm gonna assign these to a single person to create one single task with sub items beneath it, and then that person can come through and say, Oh, you know what I've changed the T check the tire pressure. I've changed the oil.

00:09:53.380 --> 00:10:11.786

Alex Gallegos: I've washed it, and I've waxed it, but I haven't rotated tires or change the wiper blades yet, and so it'll keep track of everything that's been done. It'll tell us what the level of progress is on the task, so that we can keep track of all of those things.

00:10:12.530 --> 00:10:27.329

Alex Gallegos: Another thing that you might have noticed that we've already done on some of these tasks is to give them some tags. So, for example, this one is an errand that I need to run around town.

00:10:27.940 --> 00:10:39.319

Alex Gallegos: There are a couple of others that I could add some tags to, for example, by dog food. Now, that's that is an errand that's also

00:10:39.768 --> 00:10:44.550

Alex Gallegos: shopping task that needs to be done. And I could even

00:10:45.160 --> 00:10:47.870

Alex Gallegos: categorize these out in

00:10:48.150 --> 00:10:50.690

Alex Gallegos: more detail if I wanted to.

00:10:51.350 --> 00:11:00.979

Alex Gallegos: I can create any number of tags like I can apply this dark green tag, and if I want, I can just edit the label to be something else.

00:11:02.590 --> 00:11:03.600

Alex Gallegos: There we go.

00:11:03.760 --> 00:11:06.570

Alex Gallegos: all kinds of dog stuff perfect.

00:11:07.770 --> 00:11:12.029

Alex Gallegos: so it's pretty easy to

00:11:12.340 --> 00:11:17.169

Alex Gallegos: add different tags to a card

00:11:17.240 --> 00:11:18.370

Alex Gallegos: within the group.

00:11:18.550 --> 00:11:34.059

Alex Gallegos: And what that allows us to do is a couple of things. One right now, all of the tasks that we're showing are grouped by a bucket of whether they're dog care, carcare, part of an excellent adventure or business ideas.

00:11:34.570 --> 00:11:59.493

Alex Gallegos: But I can actually view these a lot of different ways I can view them by who they're assigned to, whether they're assigned to Paul myself. You notice this one is duplicated because it's applied to 2 separate people. I can group it by when it's due. Actually, if I've put any due dates into the task, I can group it by the priority. If I've specified whether it's

00:11:59.850 --> 00:12:15.826

Alex Gallegos: low priority, medium, high priority, etc. And I can even group it by those labels. So I can see whether it's an errand or a task, or related to dog stuff. I can also filter by all of these labels as well.

00:12:16.240 --> 00:12:41.480

Alex Gallegos: So what if I wanna say, what if I want to keep everything organized by bucket. I wanna see dog care and excellent venture all separately. But show me only the errands that I need to do. I can absolutely filter. By that I can filter only by tasks that are in progress, which right now there aren't any. I can even see everything that is completed, and

00:12:41.510 --> 00:12:45.699

Alex Gallegos: nothing that's not started or in progress.

00:12:46.260 --> 00:12:57.749

Alex Gallegos: So a lot of different ways, I can slice up the information in the plan and show either only what's relevant to me or only relevant to a certain

00:12:58.030 --> 00:13:25.099

Alex Gallegos: task category, etc. And that's all down to exactly how you and your team want to work together, and what schema you want to use to apply tags and filters, etc, so that'll be somewhat down to how your group works together. But there are several options available. So hopefully, that gives you a few ideas.

00:13:28.220 --> 00:13:31.489

Alex Gallegos: I'm going to clear this filter for now. So and I can see everything.

00:13:33.070 --> 00:13:37.709

Alex Gallegos: So let's talk a little bit more about task scheduling.

00:13:38.593 --> 00:13:55.766

Alex Gallegos: So you can see here I've been assigned a task to feed this dog that I have not done and then nobody's been assigned the task to give the dog water, and so that hasn't been done since the eighth of April. Poor dog.

00:13:56.220 --> 00:13:59.470

Alex Gallegos: So let's take care of a couple of those things.

00:13:59.990 --> 00:14:04.749

Alex Gallegos: First of all, I'm gonna say, this is an important priority.

00:14:05.170 --> 00:14:17.100

Alex Gallegos: You can see, I already have a start and end date on this of just one day. And that's because I've got recurrence on this task. So I have this one set to

00:14:17.190 --> 00:14:19.230

Alex Gallegos: happen every single day.

00:14:19.820 --> 00:14:29.489

Alex Gallegos: and you can actually see that if I check this off well, I watered the dog, and it immediately comes back and says, Oh, we also need to do this on the ninth.

00:14:29.560 --> 00:14:43.070

Alex Gallegos: And let's say we took care of that for the ninth, and then once again it shows up. And hey, now it needs to be done for the tenth as well, but it's no longer highlighting it as late because it is April tenth.

00:14:43.110 --> 00:14:56.147

Alex Gallegos: and so now we have until the end of the day to take care of this task, and then, once that's done, it'll show up again, ready for tomorrow for us to take care of that task.

00:14:56.560 --> 00:15:20.920

Alex Gallegos: I can also keep track of whether a task has been not started at all, whether it's totally complete, which, if it's totally complete. It's easier to just check the little tech box here, and then that puts it down in the complete category. But this one, for example, we've done 4 of the 6 items. So I can just say this task is in progress, and then, if I save that

00:15:21.360 --> 00:15:29.899

Alex Gallegos: we can see this little icon here that indicates that somebody started on this task. But they haven't finished it just yet.

00:15:30.040 --> 00:15:42.119

Alex Gallegos: So the nice thing about setting dates on some of these tasks is by default we get dropped into this board view, but there are other views available.

00:15:42.680 --> 00:16:02.860

Alex Gallegos: We can look at a chart that shows us here's all of our tasks. How many haven't even been started? How many are in progress currently, and how many are late or behind schedule, which the only one that's still late right now is this poor dog still hasn't been fed, so we'll take care of that in a minute.

00:16:03.250 --> 00:16:05.290

Alex Gallegos: and we can also see how many tasks

00:16:05.310 --> 00:16:13.370

Alex Gallegos: have been completed over time. One of my favorite views that gets a little underutilized is the schedule view.

00:16:13.860 --> 00:16:27.729

Alex Gallegos: especially if we look at it in week view. We can see. These are now kind of color coded by the tags that we put on them, and it'll show me. Oh, hey! What needs to be done each and every day, including the recurring tasks

00:16:27.770 --> 00:16:41.850

Alex Gallegos: that will need to be done on a recurring basis, so that we can keep track of all of those. I can also hide tasks that will recur in the future, so that I can only look at the

00:16:41.860 --> 00:16:57.010

Alex Gallegos: most recent instance of all of those, especially if there's tasks that are recurring, but are falling behind for some reason that makes it a little easier for me to see that information. And granted, this is probably not

00:16:57.040 --> 00:17:02.570

Alex Gallegos: very important for all of these recurring tasks, but if we go back to the board

00:17:02.990 --> 00:17:22.830

Alex Gallegos: and we start on a project that has a little longer timeframe, for example, this one that we can start on the tenth and say it's due on the thirtieth of April. Well, then, once we go into the schedule view. It's easier to see that we have

00:17:24.930 --> 00:17:44.309

Alex Gallegos: tasks that are proceeding for a longer amount of time, and we can kind of start to figure out how full, how stacked is any one given day? Is one person overloaded on one day and another person hardly has anything do and the same as before. I can always filter

00:17:44.450 --> 00:17:52.710

Alex Gallegos: this information the same as I could on all the other pages, so I can say, Oh, Alex doesn't really have a lot going on this week.

00:17:52.950 --> 00:17:55.300

Alex Gallegos: Paul doesn't have a lot going on this week

00:17:55.460 --> 00:17:57.660

Alex Gallegos: and try to

00:17:57.790 --> 00:18:02.590

Alex Gallegos: balance my assignments that way if I am so inclined.

00:18:04.090 --> 00:18:05.960

Alex Gallegos: Let's see

00:18:06.040 --> 00:18:15.069

Alex Gallegos: one of the last things for us to talk about. Unless anybody has any questions is how to

00:18:15.210 --> 00:18:28.523

Alex Gallegos: actually move items around in here. If you wanna move items in one plan from one bucket to another, that's pretty easy. You can just drag and drop them super easy.

00:18:29.760 --> 00:18:31.880

Alex Gallegos: You can also

00:18:32.470 --> 00:18:40.822

Alex Gallegos: click on the little 3 dots menu if you want, and you can either copy a task if you need to.

00:18:42.185 --> 00:18:44.840

Alex Gallegos: Duplicate one exactly.

00:18:45.370 --> 00:18:50.130

Alex Gallegos: and then we'll have 2 copies of exactly the same task.

00:18:50.410 --> 00:18:58.619

Alex Gallegos: or if we need to move a task, we can easily move it to a different bucket within the same board.

00:18:58.760 --> 00:19:08.109

Alex Gallegos: or if I have a second plan, this is kind of similar to the way some of the items were being moved

00:19:08.150 --> 00:19:28.204

Alex Gallegos: from one entire trello board to another Trello board. What I can say is, you know, this actually doesn't need to be a bucket on this board. This needs to be part of my business development plan. And I'm gonna say, this needs to be part of my strategic plan. And I'm going to move the entire task

00:19:28.600 --> 00:19:31.700

Alex Gallegos: over to this second plan.

00:19:32.260 --> 00:19:33.929

Alex Gallegos: and sure enough.

00:19:34.050 --> 00:19:47.700

Alex Gallegos: it now shows up here, along with the people that I assigned it to the attachment, the comments, everything moves along with the along with the card from one board to another.

00:19:48.790 --> 00:19:56.749

Alex Gallegos: The last thing I really want to talk about let me assign a few tasks directly to our demonstration user.

00:20:09.810 --> 00:20:16.449

Alex Gallegos: So these are a couple examples from my inbox, from the

00:20:17.490 --> 00:20:19.660

Alex Gallegos: tasks that were sent to me.

00:20:20.440 --> 00:20:41.558

Alex Gallegos: I received on Monday the eighth, a notification that I had a task due. So Planner is really good about making sure that it does its best to help you keep on track. It's like, hey, this is a reminder that you have a task that you need to accomplish by today. It's also really good.

00:20:42.300 --> 00:21:11.189

Alex Gallegos: so hopefully, this is a good feature. It's also really good about nagging you if you've forgotten to do something. So this is one I received today. April tenth, that says, Hey, you still haven't fed that dog from yesterday. It is one day late, and if I continue to not do that task I will continue to get reminders that will remind me how late this task is, so that I feel a little urgency in order to make sure that I get that done.

00:21:12.746 --> 00:21:13.919

Alex Gallegos: The last

00:21:14.020 --> 00:21:19.880

Alex Gallegos: integration that's also built in out of the box. You don't really need to do anything

00:21:19.900 --> 00:21:24.460

Alex Gallegos: is if we go back to Keana Reeves's outlook.

00:21:24.610 --> 00:21:27.459

Alex Gallegos: All those tasks that we assigned

00:21:27.490 --> 00:21:29.929

Alex Gallegos: in the plan.

00:21:30.540 --> 00:21:38.960

Alex Gallegos: If we go over to Task View here, and we look at any tasks that have been assigned to me.

00:21:42.200 --> 00:21:44.099

Alex Gallegos: and wait for them to refresh.

00:21:51.580 --> 00:21:53.630

Alex Gallegos: There we go. Took a minute.

00:21:54.950 --> 00:21:57.300

Alex Gallegos: so I can use this view.

00:21:57.420 --> 00:22:25.799

Alex Gallegos: and have several times in order to kind of start to plan out my day, especially if those tasks have a due date that's been assigned in the plan makes it a little easier to kind of figure out what the highest priority tasks are. The other nice thing is, once I've finished something I can check that off directly from task view here in outlook. Oh, yeah, we got gas it's been taken care of.

00:22:25.820 --> 00:22:28.750

Alex Gallegos: and once that's done.

00:22:29.680 --> 00:22:31.150

Alex Gallegos: then

00:22:32.070 --> 00:22:40.940

Alex Gallegos: again, have to wait just a minute for that information to get up to the cloud and synchronize. But that should get checked off

00:22:41.280 --> 00:22:42.410

Alex Gallegos: right away.

00:22:43.168 --> 00:22:54.879

Alex Gallegos: We also get email notifications. If there are multiple people assigned to a task. If somebody checks that task off, you get a notification that

00:22:55.000 --> 00:22:58.500

Alex Gallegos: the task has been completed and we don't have to worry about it anymore.

00:22:58.910 --> 00:23:02.750

Alex Gallegos: So a lot of integration built into outlook.

00:23:02.790 --> 00:23:07.230

Alex Gallegos: task view and email directly out of the box.

00:23:08.022 --> 00:23:10.019

Alex Gallegos: So that we don't have to think about it.

00:23:10.360 --> 00:23:16.919

Alex Gallegos: One other thing that's kind of neat. Oh, there we go! Got gas. There we go. Just finished.

00:23:18.290 --> 00:23:22.270

Alex Gallegos: One other thing that we can do if I open teams up here.

00:23:24.006 --> 00:23:51.300

Alex Gallegos: So there's one other way to access all of these plans. This is really down to the manager or owner of any of the teams channels to do. Because they're the only people that will have permission to do so. But I can go into teams, for example, in my general tab here, or any of the other channels that I have available.

00:23:51.900 --> 00:23:54.539

Alex Gallegos: and if I click on this little plus sign.

00:23:54.800 --> 00:23:56.000

Alex Gallegos: then

00:23:56.480 --> 00:23:59.660

Alex Gallegos: I can say you know, what I want to do is add

00:23:59.720 --> 00:24:01.060

Alex Gallegos: a

00:24:02.270 --> 00:24:03.929

Alex Gallegos: search for it.

00:24:07.970 --> 00:24:10.009

Alex Gallegos: That's fine. You take your time teams.

00:24:10.950 --> 00:24:13.439

Alex Gallegos: I wanna add a planner Tab.

00:24:17.360 --> 00:24:19.220

Alex Gallegos: And when I do that

00:24:20.540 --> 00:24:24.060

Alex Gallegos: I don't feel the need to post to the Channel about the tab.

00:24:35.140 --> 00:24:36.139

Alex Gallegos: There we are.

00:24:36.660 --> 00:24:41.050

Alex Gallegos: so I can say, you know what I want to use an existing plan that already exists.

00:24:41.070 --> 00:24:43.619

Alex Gallegos: I just want to use the demonstration plan.

00:24:44.720 --> 00:24:47.929

Alex Gallegos: and I'm going to go ahead and hit, save.

00:24:49.580 --> 00:24:51.590

Alex Gallegos: and it's going to go ahead and set that up.

00:24:51.630 --> 00:24:52.830

Alex Gallegos: And then

00:24:52.860 --> 00:25:04.804

Alex Gallegos: I can now access this directly from this tab in teams exactly the same view as if I opened up my browser and went out to task.office.com

00:25:05.190 --> 00:25:24.427

Alex Gallegos: exactly the same information. But I can just interact with this directly from teams without ever having to leave this application and go somewhere else. So now we can finally take care of making sure that that dog gets fed on the ninth. So we don't have to worry about that anymore.

00:25:24.870 --> 00:25:25.960

Alex Gallegos: And

00:25:27.680 --> 00:25:32.391

Alex Gallegos: I immediately get a notification can reuse marked my task complete.

00:25:33.040 --> 00:25:44.300

Alex Gallegos: So that's the end of what I wanted to demonstrate. Did anybody have any questions of any kind about

00:25:44.330 --> 00:25:46.550

Alex Gallegos: planner integrations.

00:25:46.730 --> 00:25:51.989

Alex Gallegos: any features that you see that might be missing, we might be able to find

00:25:52.440 --> 00:25:54.030

Alex Gallegos: a solution for.

00:26:14.120 --> 00:26:18.559

Zack Kucharski: Alex. I think this is a good start for us to to kind of get in and

00:26:20.649 --> 00:26:25.800

Zack Kucharski: make some of the adjustments. I I don't have a specific ask

00:26:25.960 --> 00:26:26.970

Zack Kucharski: now, right.

00:26:27.300 --> 00:26:28.988

Alex Gallegos: Great. Well, that's what we like to hear.

00:26:29.730 --> 00:26:52.639

Alex Gallegos: Alright! Well, if anybody else does come up with any questions at any time view, please feel free to send me an email, happy to help with anything that I can. As you continue to dive in and find any other features that might not quite have parity with Trello. Few feel free to let me know. Can't guarantee that there'll be a

00:26:53.250 --> 00:27:13.849

Alex Gallegos: comparative feature within Planner as there was in Trello, but always happy to take a look and see what we can do otherwise I'll give you 30 min back in your day and let you all go. Thank you so much again for your time. I appreciate y'all attending, and let me know if there's anything else I can help you with.

00:27:15.080 --> 00:27:16.040

Zack Kucharski: Thanks. Alex.

00:27:16.390 --> 00:27:16.943

Alex Gallegos: Thank you.

Quick Tip - Notifications for Shared Mailboxes