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Microsoft



AUBURN

# Microsoft Starter Kit

**"A Day-in-the-Life" Guide for  
Auburn Professionals**

July 2024

# Microsoft Starter Kit

“A Day-in-the-Life” Guide for AU Professionals

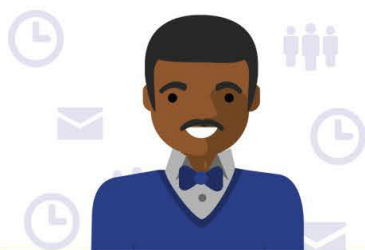
## What’s Inside?

Inside this Microsoft Starter Kit, you’ll find Day-in-the-Life scenarios showcasing how you can use Microsoft tools for collaboration, productivity, and self-care.

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## Continuous Learning

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## Microsoft 365 Day in the life—Mental Health

Meet Justin, a Program Manager within the US Air Force IT PMO. Justin is a GS-13 civil service employee who is the Service Owner of both Microsoft Teams and SharePoint Online. He also has anxiety.

### 6:00 AM

Quiet time: Breakfast and the financial news, which he reads using **Dark Mode in Edge**. His teammates in another time zone are already chatting, so he turns on **Quiet Hours in Teams** to suppress messages until 8 a.m.



### 8:00 AM

To stay in **control of his time**, he uses the Insights app in Teams to **block focus time** throughout the day. He also preemptively sets focus time for Monday.



### 8:30 AM

Justin opens Teams and Outlook to catch up on missed messages. He uses **Dark mode and Night mode**, which are easier on his eyes in the morning.



### 9:00 AM

His teammates are flying in next week. He books multiple meetings to collaborate in person. **Outlook suggests blocking focus time** on his calendar as well.

### 11:00 AM

Joins a meeting via Teams. He turns on **Together mode** so he can see everyone's faces in the same digital room. This makes it easier for him to understand facial expressions and body language, easing the mental load.



### 12:30 PM

Justin wants to find employees like himself to connect and raise awareness. He uses Yammer to find the organization's Mental Health Employee Resource Group.



### 2:00 PM

Justin takes mid-day walks to help maintain his well-being. Before grabbing his keys, he **sets his presence status in Teams** to let his colleagues know he'll be away.



### 4:00 PM

Opens **MyAnalytics** to check on a personal goal: 7 Quiet Days per month in which he doesn't engage with work. He's already logged 4 quiet days in the first two weeks. Things are looking great!

### 4:45 PM

Almost done! He reviews an email for a coworker. It's after 5 p.m. in her time zone, so he uses the **Delay Delivery** feature in Outlook to send it Monday.



### 5:00 PM

It's Friday, and he's ready to spend some time with family. Justin sets his **Quiet Days** as Saturday and Sunday, so he can step away undisturbed by work notifications on his mobile device. He'll see notifications from his colleagues again on Monday morning!



## Microsoft Teams

# Day in the life - Human Resources

Meet Allan, an HR professional who uses Microsoft Teams to collaborate, and communicate all day long.



**7:45 AM**

Starts the day at home by checking the Activity Feed for notifications from channels he follows and where he's been @mentioned.



@Allan

**8:30 AM**

While commuting, uses the Microsoft Teams smartphone app to join the daily status meeting for the Event Planning Team.



**9:30 AM**

Allan accesses the recruiting events spreadsheet in the Files tab and works with other team members to co-edit in Excel.



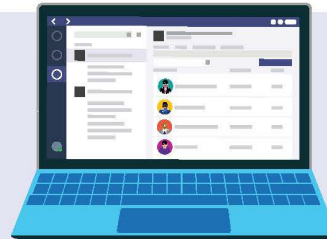
**10:30 AM**

He saves the executive coach CV and presentation into the Leadership Retreat Planning channel for review by the broader team.



**11:45 AM**

Creates a new College Recruiting channel within the HR team. Posts link to the draft schedule and invites key team members to provide feedback.



**12:00 PM**

Adds event management guests to the team.

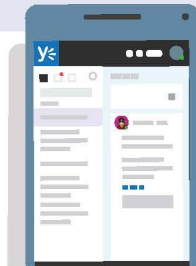
**1:00 PM**

Double booked, so he uses Teams to review meeting notes in OneNote and watches the latest executive townhall.



**1:45 PM**

Reads the latest Yammer news about employee engagement via the Teams connector. Pops over to Yammer to participate in the conversation.



**3:00 PM**

Checks the planner tab to ensure assigned tasks and due dates are completed for key milestones for the upcoming event.



**4:00 PM**

Uses the Stream tab to share event-location video shot by interns. Adds video topic to the team conversation in the Leadership Retreat Planning channel.

**4:30 PM**

Uses the Hootsuite link on the Social Media channel to review new content and checks the latest industry specific news.



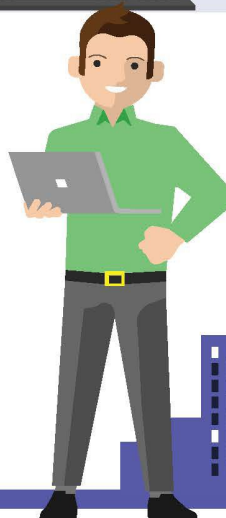
**7:30 PM**

After dinner, Allan searches Teams to locate all conversations and files related to the event in preparation for tomorrow's Leadership Retreat planning meeting.



**5:15 PM**

To coordinate arrival and departure times for the event, Allan adds Kayak bot to Teams to help team members search for flights and hotels, then heads home.







## Microsoft Planner

Day in the life

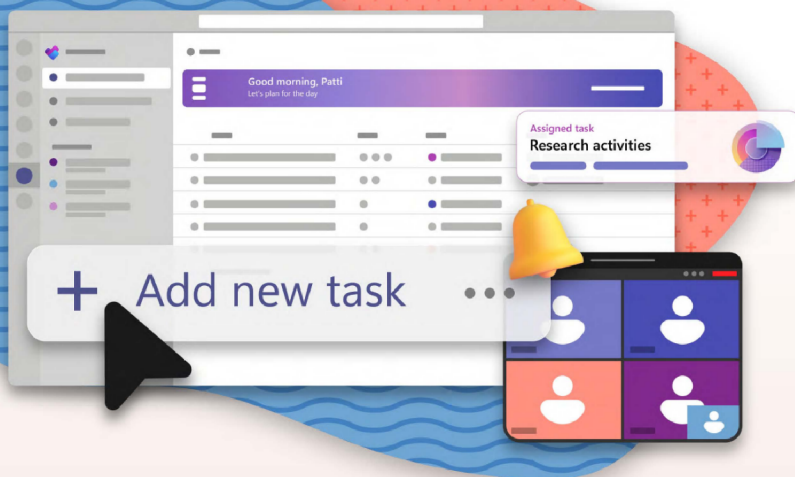
# Managing projects for your team

Meet Patti, a Marketing Manager who uses Microsoft Planner and Microsoft Copilot to help her hybrid team get organized and stay on task.

### 8:30 AM

Patti starts her day as the host of her division's weekly meeting on Microsoft Teams. She's excited to kick off a strategic market analysis.

During the meeting, the team suggests several research activities that Patti will lead. From the **My Day** view in Planner, she clicks **Add new task** to track and manage the research.

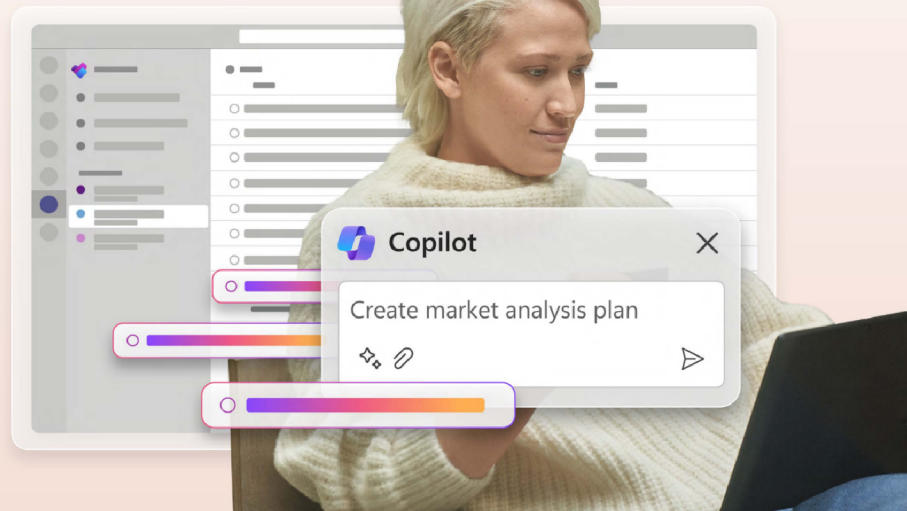


### 10:30 AM

It's time for Patti to create a plan to help her and her team complete the market analysis.

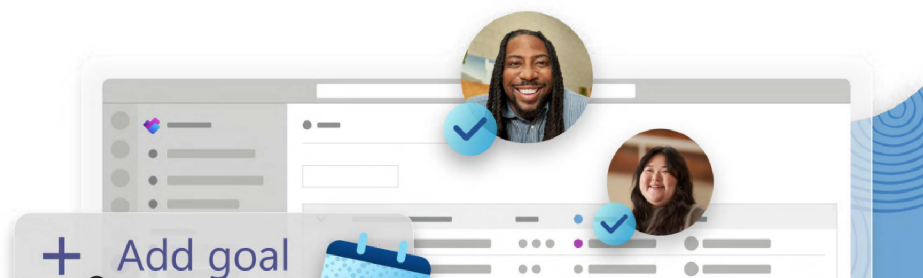
Rather than start from scratch, Patti asks **Copilot in Planner\*** to create a plan. She uses the plan, tasks, and goals that Copilot delivers as starting points.

With Copilot, Patti is always in control. She likes the plan Copilot has created, but she knows she can always tweak if she wants. Patti quickly adds the Copilot-generated **subtasks\*** and **task dependencies\*** to refine the plan.



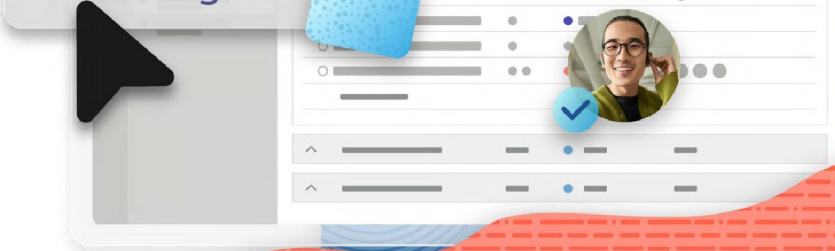
### 11:45 AM

Patti is ready to share her plan. She **invites project members** by selecting an existing **Microsoft 365 group** that already includes everyone on her project team. After sharing the plan, Patti assigns work across the team, so everyone can quickly get started on their tasks.



## 1:00 PM

Patti adds end dates to project goals using the **Goals view\*** in Planner.

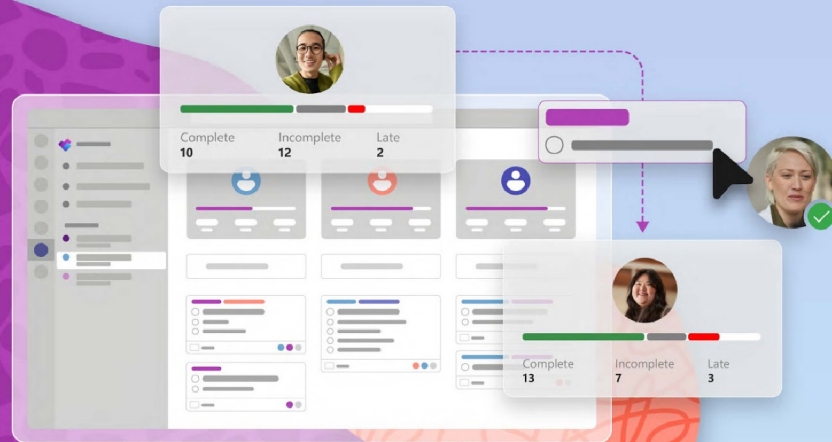


## 1:45 PM

Next, she adds the plan to a dedicated **Teams channel**, so it lives where the team already collaborates.

With **People view\***, each member's tasks and progress are visible channel wide. People view not only helps managers balance team workloads, but also it helps people determine whom to contact for questions or updates.

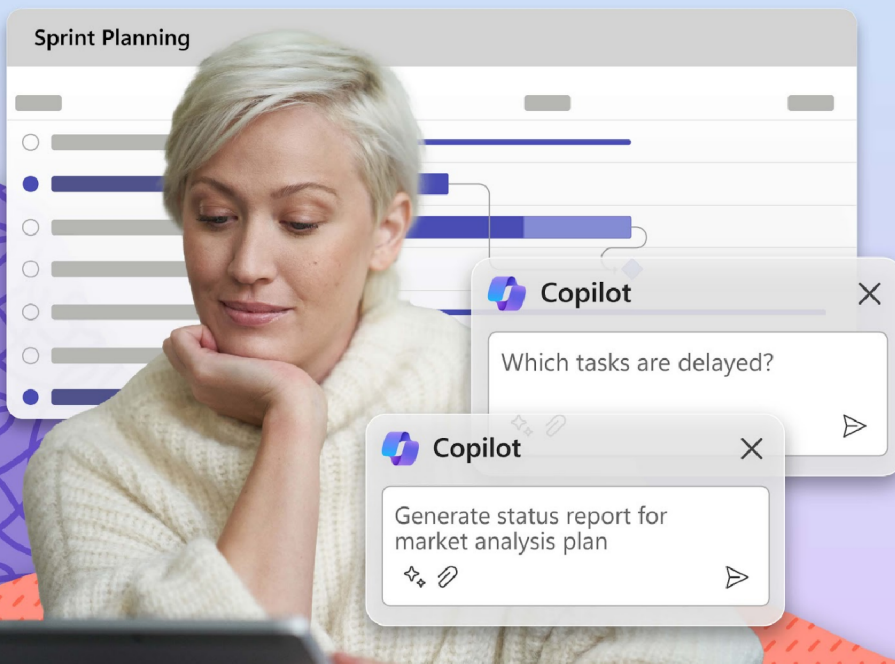
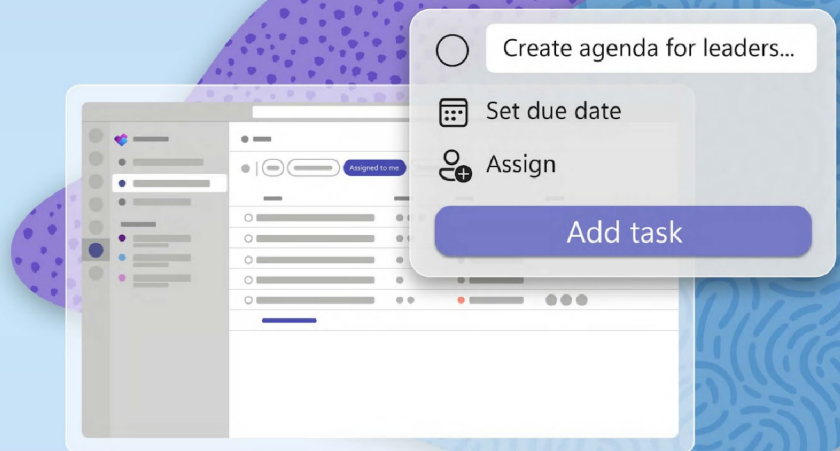
To track the status of her team's tasks, Patti clicks on **Task history**.



## 3:00 PM

Patti wants to review the market analysis plan with leadership. She still has a lot to accomplish today, so she uses Planner to prioritize. Patti clicks **My Day** and adds a task reminding her to create an agenda for her next leadership meeting.

For a full view of her workload, Patti clicks on **My Tasks** to see everything upcoming.



## 4:30 PM

Before attending her last meeting, Patti wants to confirm she has completed today's tasks. In **My Day**, she finds a pending task—she needs to send her leadership team a status report with her team's progress on an ongoing development sprint. She clicks on **Sprint Planning** within the **My Plans** view, using **Copilot\*** prompts to see overdue tasks and the plan's overall status.

## 5:15 PM

The Copilot-generated answers give Patti the information she needs to email an update.

With tasks assigned and relevant notes included, everyone knows what to do—no matter where or when they're working.





## Microsoft Loop

### Day in the life - Consultant

Sara is a senior consultant who works across multiple projects for her firm. She uses Microsoft Loop to be more productive and deliver value to clients regardless of when and where she is working.

#### 7:45 AM

Sara starts her day by checking her Outlook mobile app on the bus. She sees a Loop recap email called "Start your day by getting in the Loop" to review new activities in Loop, which includes an at mention from her manager regarding new information for an upcoming client call. She gives a thumbs up to acknowledge she's up to date and ready to chat.

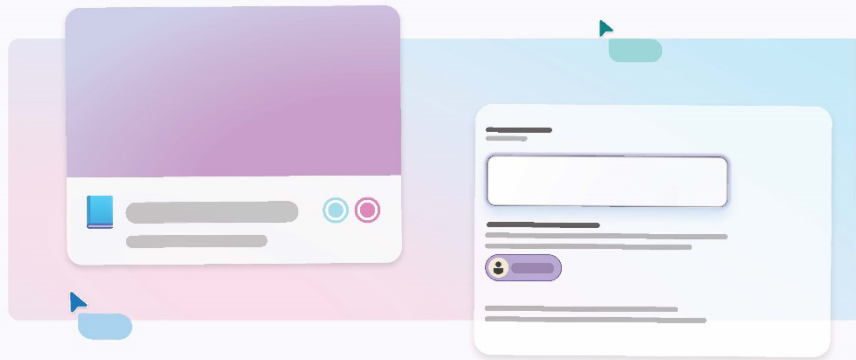


#### 9:30 AM

Sara and her team join a meeting and take notes in real time with Collaborative notes. They mark off agenda items and list follow up tasks for the team, knowing that the captured tasks sync to Planner and To Do, whichever tool the individual prefers.

#### 10:30 AM

After the meeting, Sara opens the Loop app and creates a Loop workspace for the new project. She uses Jumpstart to add stakeholders and collect relevant content such as the statement of work and client overview to add to the workspace. She adds the Collaborative notes as a Loop page in her workspace to keep everything together.



#### 1:00 PM

Sara creates a new Loop page using the Project planning template, which her team updates with background context, an opportunity statement, and goals for the project. She includes a progress tracker component on the page and adds the key next steps for her team to update. She shares the page as a Loop component in Teams chat for her team to contribute to.

#### 3:00 PM

Once her distributed team has made updates, Sara shares the progress tracker as a component with leadership via Outlook to update them on the project progress. Regardless of where the component is shared, she knows everyone will see the latest updates as the component updates in real time across apps.

#### 3:30 PM

To better outline planning for the client, Sara creates a Planner board to review project progress in weekly stand ups. Sara pastes the newly created Planner board directly into a Loop page, knowing it will sync any changes regardless of where updates are made.

#### 4:30 PM

Sara shares the project planning page as a component with her manager via a Teams chat to keep him updated. He reacts with a "heart" boost directly in the component to show how pleased he is to see the progress on this project.





# Microsoft 365 Apps Day in the life — HR Manager

Updated March 2020

Meet Jose, HR Manager at Contoso. Empowering employees is at the core of everything he does. He is passionate about diversity in the workplace and is helping to transform the company's culture to be more inclusive.

## 7:30 AM

Drinking coffee at home, Jose reads a newspaper article about the number of companies investing in diversity programs to promote inclusive hiring. He wants to share the article's stats with his peers, so he opens **Microsoft Excel** on his iPhone and uses the Insert Data from Picture feature to capture a table.



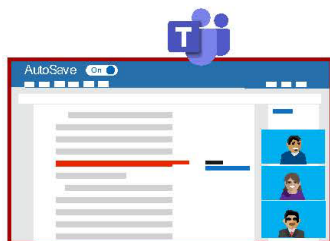
## 8:30 AM

At work, Jose and his peers use coauthoring to assemble the "Diversity and Inclusion Onboarding Handbook" in **Microsoft Word**. With real-time collaboration in Word, Jose can see the presence indicators and the changes his peers are making as they occur. He inserts the **Excel** table from the newspaper article.



## 9:30 AM

Jose joins a video conference using **Microsoft Teams**, where his manager, Ana, shares the Handbook on her desktop so they can finalize the latest updates as a group. As they make changes, the draft is automatically saved in Teams eliminating the need to email around documents for reviews and the risk of version control problems.



## 9:55 AM

At the end of the meeting, Ana uses **Microsoft Planner**, which is integrated into **Teams**, to assign Jose two tasks: summarize the handbook in a format that's easy to share in an email; and, ensure the handbook is accessible to current and future employees who may have disabilities.



## 10:30 AM

Back at his desk, Jose decides to create the summary in **Microsoft Sway**. Sway automatically converts the **Word** document into a dynamic website that HR can easily share, making the reading material more engaging for employees. Sway's visually striking online canvas can be viewed from any screen. Plus, Jose can easily insert the CEO's announcement video in the Sway.



## 11:30 AM

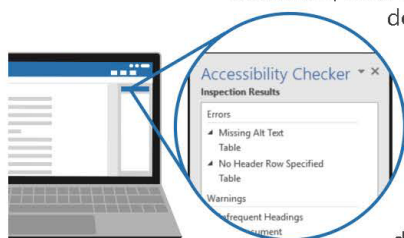
Jose checks off the handbook summary task in **Planner** and shares the **Sway** URL with his group in **Teams** so they can give him feedback. He joins his peers for lunch.



## 12:30 PM

Back from lunch, Jose plans to spend the entire afternoon ensuring the handbook is accessible, which will be the first time he's done something like this.

Instead, he knocks it out within the hour because he finds the Accessibility Checker on the Review tab in **Word**, which guides him step by step how to make a Word doc accessible.



## 1:45 PM

With his extra time, Jose decides to gain deeper insights. He uses **Microsoft Forms** to create a quick survey to ask hiring managers what they already know about diversity hiring practices. Minutes later, the survey is done, and he shares the survey URL in the managers' **Teams** channel. He can track responses in Forms and export the results to **Excel** to share with his peers.





# Microsoft 365 Copilot:

## Prompting do's and don'ts

Get the most out of Copilot and avoid common pitfalls by learning **what to do** and **what not to do** when writing prompts.

### Do's

- ✓ **Be clear and specific.**  
Provide specific instructions to Copilot, such as topic, purpose, tone, and required length.
- ✓ **Keep it conversational.**  
Give feedback to Copilot based on the quality of its responses to help the AI learn and match your preferences.
- ✓ **Give examples.**  
Use clear and specific keywords or phrases when asking Copilot to write a piece of text for you. This helps it generate more relevant and creative copy.
- ✓ **Ask for feedback.**  
Requesting feedback from Copilot helps it to understand your needs and preferences, and to provide you with more relevant, helpful responses.
- ✓ **Write legibly.**  
Use correct punctuation, capitalization, and grammar when writing prompts, as this will help the AI produce better quality text and responses.
- ✓ **Check for accuracy.**  
Occasionally, Copilot may make mistakes. Always check Copilot's responses for accuracy, grammar, and style, and watch out for irrelevant or inappropriate content.
- ✓ **Provide details.**  
Provide Copilot with contextual details to help it generate more accurate, consistent responses. For example, the genre, characters, and plot to a story.
- ✓ **Be polite.**  
Using kind and respectful language when chatting with Copilot helps foster collaboration and improves the AI's responsiveness and performance.

### Don'ts

- ✗ **Be vague.**  
When prompting Copilot, avoid using vague language, and be as clear as possible to receive better-quality responses.
- ✗ **Request inappropriate or unethical content.**  
Copilot is not responsible for the content or the consequences of your writing. You should respect local laws, rules, and the rights of others.
- ✗ **Use slang, jargon, or informal language.**  
This may cause Copilot to give low-quality, inappropriate or unprofessional responses.
- ✗ **Give conflicting instructions.**  
Prompting Copilot to perform a task that includes multiple or conflicting pieces of information in the same request can confuse the AI and result in lower quality responses.
- ✗ **Interrupt or change topics abruptly.**  
This could disrupt Copilot's writing process. Always close or finish a task before starting a new one. When starting a new task, write "New task."

# Microsoft 365 Copilot:

## The art and science of prompting

**Prompts** are how you ask Microsoft 365 Copilot to do something for you — like creating, summarizing, editing, or transforming. Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

### 1. Tell Copilot what you need

There are many types of prompts you can use depending on what task you want done.

- ✓ **Learn about projects and concepts:**  
"What is [Project X] and who are the key stakeholders working on it?"
- ✓ **Edit text:**  
"Check this product launch rationale for inconsistencies."
- ✓ **Transform documents:**  
"Transform this FAQ doc into a 10-slide onboarding guide."
- ✓ **Summarize information:**  
"Write a session abstract of this [presentation]."
- ✓ **Create engaging content:**  
"Create a value proposition for [Product X]."
- ✓ **Catch-up on missed items:**  
"Provide a summary of the updates and action items on [Project X]."

### 2. Include the right prompt ingredients

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

#### Goal

What response do you want from Copilot?

#### Context

Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for a meeting with Client X to discuss their "Phase 3+" brand campaign. Focus on Email and Teams chats since June. Please use simple language so I can get up to speed quickly.

Which information sources or samples should Copilot use?

#### Source

How should Copilot respond to best meet your expectations?

#### Expectations

# Microsoft 365 Copilot:

## The art and science of prompting

### 3. Keep the conversation going

Following up on your prompts help you collaborate with Copilot to gain more useful, tailored responses.



#### Generating content ideas

Lead with broader requests, then give specific details about the content.



#### Gaining insights

Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.



#### Enabling insightful meetings

Request a meeting recap, then ask for more information about what you should know.



#### Translating languages

Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.



#### Storytelling assistance

Ask Copilot to write a story, then guide it by giving more specific, relevant details.



#### Solving technical problems

Present a technical problem, then narrow it down, or ask for step-by-step guidance.

### Helpful hints to keep in mind

#### Know Copilot's limitations.

Copilot is limited to your current conversation, so give lots of details.

#### Be professional.

Using polite language improves Copilot's response.

#### Communicate clearly.

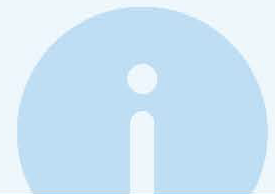
Pay attention to punctuation, grammar, and capitalization.

#### Use quotation marks.

This helps Copilot know what to write, modify, or replace for you.

#### Start fresh.

Avoid interrupting and type "new topic" when switching tasks.





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