



# Viva Insights included in M365 Copilot FAQ

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## General

### **1. What is the summary of these changes and when did we announce this?**

The Viva Insights service plan will be included, in its entirety, as part of the M365 Copilot SKU. We announced this at Ignite 2024. See the [field advisory sent on 11/7/24](#) for the internal comm on this change.

### **2. Will all of Viva Insights be included in M365 Copilot? Are there any features that will not be included?**

Every single feature of Viva Insights will be included in the M365 Copilot SKU.

### **3. How has this been communicated to customers?**

This was publicly announced at Ignite during multiple sessions (including the keynote and M365 general session). It was also announced in the [Copilot Analytics blog](#). We will also be sending Message Center (MC) post notifications to admins 30 days ahead of the date when the service plan will appear in their tenant.

### **4. Is there a minimum threshold of M365 Copilot licenses for customers to be eligible?**

No, there's no minimum threshold of M365 Copilot licenses requirement for customers. All users with any M365 Copilot subscriptions assigned will see Viva Insights service being included in the M365 Copilot SKU.

However, to access certain Viva Insights features such as Advanced Insights, Copilot dashboard and organizational insights, new customers must have a minimum of 50 Viva Insights service plan to be assigned to their tenant.

### **5. How many Viva Insights licenses will be added to customer tenants?**

The amount added will be equivalent to the customer's assigned M365 Copilot licenses. The Viva Insights service plan will simply be included in the M365 Copilot SKU. This means that only the user population who is assigned with a M365 Copilot License will receive the added Viva Insights service plan.

## 6. How will Viva Insights features be configured when added to customer tenants?

Personal and Team Insights will be [available default ON](#).

Advanced Insights will be available default ON. To access this feature, a user [must be assigned either a Viva Insights admin or analyst role](#).

Organizational Insights will be available default OFF. This feature will not be accessible to users [until manager settings are re-configured within the tenant](#).

## 7. What if my customer doesn't want Viva Insights capabilities?

If your customer wants to turn off, turn on, or adjust any Viva Insights functionality they may do so. Customers can also remove the Viva Insights service plan for individual users if desired. For full guidance of how to disable Viva Insights, [click here](#).

## 8. What does my customer need to do to prepare for this?

Customers will fall into two categories – [please see below](#) for details on each category and how to prepare.

## 9. When will these changes take place?

The Viva Insights service plan will begin populating in customers' M365 Copilot SKU starting in mid-March 2025 and will conclude by the end of April 2025.

## 10. What happens from an end user perspective when they are assigned a Viva Insights premium license?

- **Notifications:** Users will not receive any unexpected notifications or nudges related to Personal Insights, Team Insights, Org Insights VITA, Insights Emails, etc. Digest and Digest Welcome emails are paused until further notice as well for all tenants.
- **Personal insights features:** If personal insights was enabled previously, features such as focus time scheduling, praise, and others are included by default. However, additional premium personal insights will also now be available. Please see here for the difference between seeded and premium features that will be available: [Environment requirements for Viva Insights | Microsoft Learn](#)
- **Manager insights features:** If Manager Insights is already ON (under Manager settings in Viva insights) and the tenant has chosen to enable for 'All eligible

managers', then additional managers who have now been enabled via the Viva insights service plan will start seeing Manager insights capabilities.

- **End user Opt-out:** Users can opt out of personal insights, and any opted-out user will not show up in row-level output but will still be available in aggregates in Org Insights and Advanced Insights. The opt-outs will also be applicable to additional Premium personal insights features included as part of VI inclusion to Copilot SKU.

#### 11. What if my customer wants to exclude a certain user or group of users from Viva Insights?

Customers might want to exclude certain M365 Copilot licensed users from being included in the Viva Insights analysis for various reasons. Make sure your customer's Global admin reviews [the end user measurement for M365 Copilot licensed employees](#) to remove the service plan if needed.

#### 12. If my customers have already excluded a certain user or group of users using the Exclusion list for Copilot dashboard, does the exclusion list apply to other Viva Insights features?

No, any user exclusions you make with this feature do not apply elsewhere in Viva Insights or the analyst workbench advanced insights. If you want to exclude users from advanced insights or organizational insights, you need to remove the Viva Insights service plan from them.

#### 13. Where can I learn more about Viva Insights data protection and data privacy?

See the docs pages for: [Technical privacy guide for organization insights and advanced insights](#) and [Privacy guide for admins](#)

#### 14. What services are available to help customers deploy and configure Viva Insights?

FastTrack will continue to deploy and setup Viva Insights and Analyst Workbench (AWB) through a reactive RFA (Request for Assistance) motion. This can be done through submitting an RFA through either the Microsoft 365 Admin Center or [Setup.Cloud.Microsoft](#)

CSU offers updated Unified VBDs to support Copilot Analytics, Viva Insights and Analyst Workbench. For more details, please reach out to your CSAM.

#### **15. Where can I ask questions about these changes?**

For questions please attend our weekly "Copilot Dashboard Office Hours". We run two sessions per week – 5pm PST on Wednesdays and 8am PST on Thursdays. If you do not already have this invite on your calendar, please request from the [Copilot ROI Champs alias](#).

#### **16. What are the various Admin controls available to customers / admins to manage different components of Viva Insights?**

Admins can use the following controls to turn on / off various features of Copilot Analytics (powered by Viva Insights)

- a) Advanced Insights – This is VFAM control which can be turned off by Global Admins. It will pause the Advanced Insights and any assigned Analyst will not be able to access the Advanced Insights portal. By default this will be ON.
- b) Organizational/Manager Insights – This is a control in Viva Insights Advanced Insights – Admin page accessible by Viva Insights Administrator or Global Administrator. This is default off, but can be turned On by Admins.
- c) Personal Insights and Team Insights – The default state for this setting is On. This can be turned ON / Off by Admins for the tenant or end users for themselves.
- d) Copilot Dashboard : Global Admins can turn off Copilot Dashboard in the tenant. It is a VFAM control. The default state for this is ON.

#### **17. What are the timelines for the availability of various controls?**

Manager Insights, Personal Insights and Copilot Dashboard controls are available for all tenants. Advanced Insights VFAM control will be available from mid-Feb for all tenants. It will be turned ON by default. If tenants don't want Advanced Insights ON when the Viva Insights service plan inclusion is complete, then they can turn off this control.

#### **18. What are the timelines for removal of Cohort Analysis in Copilot Dashboard and upload non-Copilot cohort in Admin center?**

The deprecation of the cohort analysis features from the Microsoft Copilot Dashboard and the admin center means that users will no longer be able to compare behavior

metrics between Copilot and non-Copilot users in the dashboard. Additionally, users will no longer be able to upload or manage non-Copilot users' lists in the admin center. This change will take effect by the end of March 2025.

### **19. What are the alternatives for customers who want to continue to do Cohort analysis once the deprecation of the feature is complete?**

After the cohort analysis features are removed from the Microsoft Copilot Dashboard and the admin center, users can continue to analyze data for Copilot and Non-copilot cohorts in Advanced Insights. Advanced Insights will be included as part of the Copilot SKU, allowing users to continue performing cohort analysis. Users can request Viva Insights trial license for non-Copilot cohort. To access Advanced Insights feature, Global Admin need to assign Insights Analyst role in Admin center.

If users have uploaded or managed non-Copilot users' lists in the admin center, they can still download or delete the list until March 2025. After that, the list will be automatically deleted, and users will not be able to upload or manage it again.

## **Customer Category 1**

**Customer has 50+ M365 Copilot assigned licenses and NO pre-existing Viva Insights licenses**

### **1. What does my category 1 customer need to do to prepare?**

There is no action needed to add the Viva Insights service plan, it will automatically be added to your customer's assigned M365 Copilot licenses.

If your customer wants to turn off, turn on, or adjust the Viva Insights functionality mentioned in FAQ item #15 in the above general section, they may do so. See the docs links and resources in the appendix below for guidance. This is also communicated directly to customers via MC posts.

## Customer Category 2

Customer has 50+ M365 Copilot assigned licenses AND pre-existing Viva Insights licenses (paid, trial, or promo)

### **1. What does my category 2 customer need to do to prepare?**

There is no action needed to add the Viva Insights service plan, it will automatically be added to your customer's assigned M365 Copilot licenses.

If your customer wants to turn off, turn on, or adjust the Viva Insights functionality mentioned in FAQ item #15 in the above general section, they may do so. See the docs links and resources in the appendix below for guidance. This is also communicated directly to customers via MC posts.

### **2. Does my customer need to re-assign any roles or re-configure any settings?**

No. All pre-existing Viva Insights roles and settings will be maintained.

### **3. Will there be any data loss when transitioning users from a Viva Insights assigned license to the service plan inclusion in M365 Copilot?**

No.

### **4. My customer is currently taking advantage of the 2:1 Viva Insights promo launched at Ignite. How will that transition work?**

The promo Viva Insights licenses added to your customer's tenant will be in place until the end of their EA contract. At the conclusion of their current EA contact, those licenses will expire and the tenant will default to just the Viva Insights service plans included in any assigned M365 Copilot licenses. Only the user population who is assigned with a M365 Copilot License will receive the added Viva Insights service plan.

For example:

Contoso has 250 licensed M365 Copilot users. They took advantage of the 2:1 Viva Insights promo, and were granted 500 Viva Insights licenses. They have access to those 500 licenses until the end of their current EA contract. Now, their 250 M365 Copilot users have the Viva Insights service plan added to their M365 license in perpetuity. Even after the 500 promo licenses expire, Contoso will still be able to use Viva Insights for their 250 M365 Copilot users.

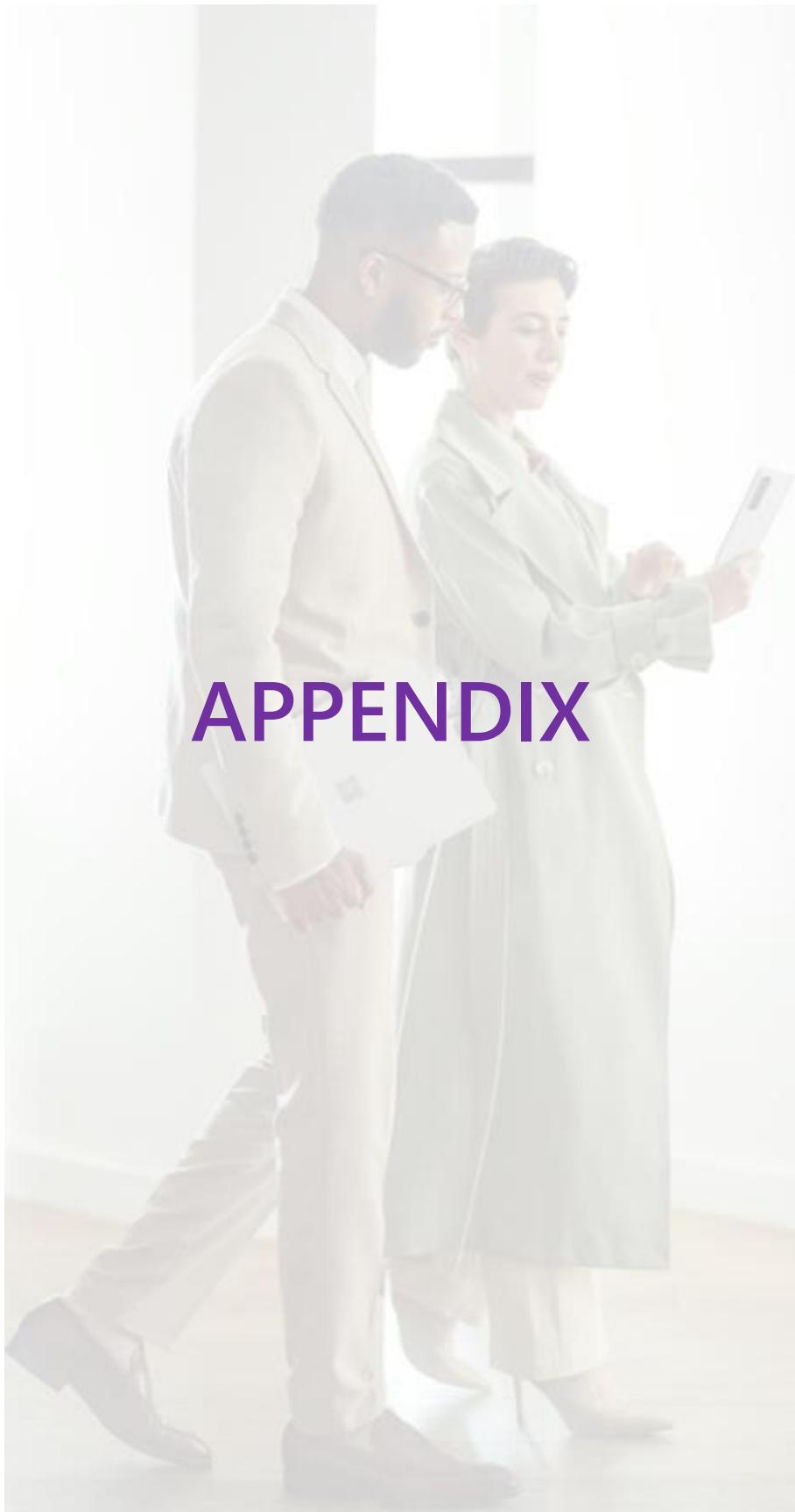
5. My customer is using their 2:1 promo licenses to run cohort analysis for non-Copilot users. How can they maintain the ability to run cohort analysis after their current EA contract expires?

For requests to extend additional licenses to promo customers beyond the expiration of their current EA, please send a request to the [Copilot ROI Champs alias](#).

6. What about other specific customer scenario combos with various Viva Insights and M365 Copilot license thresholds?

	<b>&lt; 10 Viva Insights assigned licenses</b>	<b>&gt;= 10 Viva Insights assigned licenses</b>
<b>&lt; 50 Copilot assigned licenses</b>	<i>They wont have access to Copilot Dashboard or other Advanced Viva Insights features (analyst workbench etc) neither today or post March.</i>	<i>Aka legacy customers, they can continue to use Viva Insights and Copilot Dashboard as today (no impact)</i>
<b>&gt;= 50 Copilot assigned license</b>	<p><b><i>Customer Category 1 listed above</i></b></p> <p><i>Can't use Viva Insights today.</i></p> <p><i>Post March, they will have the Viva Insights service plan added to their assigned M365 Copilot licenses. Your customer will need to set up Viva Insights (see links in the appendix below for setup guidance.)</i></p>	<p><b><i>Customer Category 2 listed above</i></b></p> <p><i>Can use Viva Insights today</i></p> <p><i>Post March, they will have the Viva Insights service plan added to their assigned M365 Copilot licenses. But no need to re-assign roles, or re-upload data. The only call-to-action is to review the newly Insights licensed population and remove the Viva Insights service plan if needed.</i></p>

# APPENDIX



## Links & Resources

Copilot Dashboard	<a href="https://insights.cloud.microsoft/#/CopilotDashboard">https://insights.cloud.microsoft/#/CopilotDashboard</a>
Main MS Learn page	<a href="#">Connect to the Microsoft Copilot Dashboard for Microsoft 365 customers   Microsoft Learn</a>
Viva Insights Admin settings for the Copilot Dashboard	<p><a href="#">Manage settings for the Microsoft Copilot Dashboard   Microsoft Learn</a></p> <ul style="list-style-type: none"> <li>• Remove access to the dashboard for the entire tenant with Powershell <a href="#">Manage settings for the Microsoft Copilot Dashboard   Microsoft Learn</a></li> <li>• Turn off dashboard auto-enablement with Powershell <a href="#">Manage settings for the Microsoft Copilot Dashboard   Microsoft Learn</a></li> <li>• Minimum Group Size <a href="https://learn.microsoft.com/en-us/viva/insights/advanced/admin/manage-settings-copilot-dashboard#:~:text=Set%20minimum%20group%20size">https://learn.microsoft.com/en-us/viva/insights/advanced/admin/manage-settings-copilot-dashboard#:~:text=Set%20minimum%20group%20size</a></li> <li>• Cohort Analysis <a href="https://learn.microsoft.com/en-us/viva/insights/advanced/admin/manage-settings-copilot-dashboard#:~:text=Manage%20and%20upload%20non%2DCopilot%20users">https://learn.microsoft.com/en-us/viva/insights/advanced/admin/manage-settings-copilot-dashboard#:~:text=Manage%20and%20upload%20non%2DCopilot%20users</a></li> </ul>
Upload organizational data	<p><a href="#">Manage settings for the Microsoft Copilot Dashboard   Microsoft Learn</a></p> <ul style="list-style-type: none"> <li>• Through Microsoft Entra ID, which is the default setting</li> <li>• Through an <a href="#">organizational data file in Microsoft 365 that your Global admin uploads</a></li> <li>• Through an <a href="#">organizational data file that your Insights admin uploads</a></li> </ul>
Access management:	<ul style="list-style-type: none"> <li>• <a href="#">Manage access for individual users</a> <a href="#">Delegate access to the Copilot Dashboard</a></li> <li>• <a href="#">Auto-enablement</a></li> </ul>
Sentiment	<p><a href="https://learn.microsoft.com/en-us/viva/insights/org-team-insights/copilot-dashboard#:~:text=sent%20by%20employees.-,Sentiment,-Located%20within%20the">https://learn.microsoft.com/en-us/viva/insights/org-team-insights/copilot-dashboard#:~:text=sent%20by%20employees.-,Sentiment,-Located%20within%20the</a></p> <p><a href="https://learn.microsoft.com/en-us/viva/insights/org-team-insights/copilot-dashboard#sentiment">https://learn.microsoft.com/en-us/viva/insights/org-team-insights/copilot-dashboard#sentiment</a></p> <ul style="list-style-type: none"> <li>• Upload aggregated survey results: <a href="https://learn.microsoft.com/en-us/viva/insights/advanced/admin/manage-settings-copilot-dashboard#:~:text=Upload%20aggregated%20survey%20results">https://learn.microsoft.com/en-us/viva/insights/advanced/admin/manage-settings-copilot-dashboard#:~:text=Upload%20aggregated%20survey%20results</a></li> </ul>
Custom Person Query	<a href="https://learn.microsoft.com/en-us/viva/insights/org-team-insights/copilot-dashboard#:~:text=Add%20Copilot%20metrics%20to%20your%20custom%20person%20query">https://learn.microsoft.com/en-us/viva/insights/org-team-insights/copilot-dashboard#:~:text=Add%20Copilot%20metrics%20to%20your%20custom%20person%20query</a>
Out of the Box Copilot Adoption and Impact Power BI templates	<ul style="list-style-type: none"> <li>• <a href="#">Microsoft 365 Copilot adoption report   Microsoft Learn</a></li> <li>• <a href="#">Microsoft 365 Copilot impact report   Microsoft Learn</a></li> </ul>
FAQs -Data Upload	<a href="https://learn.microsoft.com/en-us/viva/insights/org-team-insights/copilot-dashboard#data-upload">https://learn.microsoft.com/en-us/viva/insights/org-team-insights/copilot-dashboard#data-upload</a>
Technical privacy guide for organization	<a href="#">Advanced insights privacy   Microsoft Learn</a>

insights and advanced insights	
Licensing Scenarios	<a href="https://learn.microsoft.com/en-us/viva/insights/advanced/admin/manage-settings-copilot-dashboard#manage-and-upload-non-copilot-users">https://learn.microsoft.com/en-us/viva/insights/advanced/admin/manage-settings-copilot-dashboard#manage-and-upload-non-copilot-users</a>
Sales Enablement Helpful Resources	<p>Customer-ready resources</p> <ul style="list-style-type: none"><li>• Direct link to Copilot Dashboard - <a href="https://aka.ms/CopilotDashboard">https://aka.ms/CopilotDashboard</a>:</li><li>• Viva Insights Copilot Dashboard documentation - <a href="https://aka.ms/CopilotDashboardDocs">https://aka.ms/CopilotDashboardDocs</a>:</li><li>• <a href="#">Use Copilot Dashboard advanced features with a Viva Insights subscription   Microsoft Learn</a></li><li>• <a href="https://aka.ms/CopilotDashboard1pager">https://aka.ms/CopilotDashboard1pager</a></li><li>• <a href="https://aka.ms/AdvancedCopilotAnalyticswithViva">https://aka.ms/AdvancedCopilotAnalyticswithViva</a></li></ul> <p>Additional internal resources</p> <ul style="list-style-type: none"><li>• <a href="#">Copilot Dashboard landing page on Seismic</a></li><li>• <a href="#">MW Licensing FAQ</a></li><li>• <a href="#">MW Licensing deck</a></li></ul>