Ins and Outs of Office 365 and Outlook

April 6 2016
Agenda

• Introduction
• Outlook 2013 tour & client features
• Working with the Address Book/lists
• Shared mailboxes
• Rooms / Shared Calendars
• Searching
• Skype for Business / One Drive / Groups
• Q & A
Introduction

- Office 365 Phase 1 – Complete (Migration of mail, calendar, contacts)
- Office 365 Phase 2 – In Progress (OneDrive, Office Online, Skype, Groups)
- Office 365 Phase 3 – Application Migration (TeamRooms, Doc Libraries, Custom Apps)
Outlook 2013 Tour
Reading Pane - On
Reading Pane - Off
Message Preview
Sorting Messages

[Image of email interface with sorting options and a list of emails]
Conversation View

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fri 10-16</td>
<td>Tara</td>
<td>Hi Craig, Sorry for late reply. I worked all day and...</td>
</tr>
<tr>
<td>Fri 10-16</td>
<td>Tara Mcauley</td>
<td>Hi Craig,</td>
</tr>
<tr>
<td>Fri 10-16</td>
<td>Craig Brown</td>
<td>Hi Tara, Sorry I was on the phone with Microsoft</td>
</tr>
<tr>
<td>Thu 10-15</td>
<td>Tara Mcauley</td>
<td>Hi Craig, Okay thank you. Yeah it still won't let me.</td>
</tr>
<tr>
<td>Thu 10-15</td>
<td>Craig Brown</td>
<td>Hi Tara, I checked again, and it is not showing</td>
</tr>
<tr>
<td>Thu 10-15</td>
<td>Tara Mcauley</td>
<td>Hi Craig, It told me both times that my password...</td>
</tr>
<tr>
<td>Thu 10-15</td>
<td>Craig Brown</td>
<td>Hi Tara, No problem at all. I checked your Active...</td>
</tr>
<tr>
<td>Thu 10-15</td>
<td>Tara Mcauley</td>
<td>Hi Craig, I'm sorry for such a late reply to this...</td>
</tr>
</tbody>
</table>
Sorting Folders / Favourites
To-Do Bar

For those of you who have already completed this survey – thank you. For those who haven’t, this is a reminder to please complete this survey. No personal information is being collected and all responses will be kept confidential.

In an effort to have more comprehensive mental health supports for our students and our campus community, we are conducting an environmental scan of the existing mental health initiatives and services at the University of Windsor. Dr. Mohsan Beg (Director of the Student Counselling Centre) and Anne Mullan (Accessibility and Human Rights Manager) will be collecting and analyzing your answers to this survey information to identify what we are doing well and where gaps still remain with regards to mental health support for our students. Results of this survey will be shared in an open meeting in the upcoming semester for all interested faculty, staff, and students.

The survey can be accessed at: http://uwindsor.fluidsurveys.com/s/mental-health-survey/
To-Do / Tasks

• Can create to-do tasks from scratch, or from an e-mail
• Set due date, track progress
• Send status updates to others
• Assign to-do's/tasks to others
To-Do / Tasks
To-Do / Tasks
Clutter

- Figures out what you don’t look at, moves it to clutter
- You can move messages from Clutter to inbox, and system will learn msg not clutter
- Can be turned on/off in Outlook Web Access
Quick Steps

Message:
From: Craig.Brown@uwindsor.ca
To: HELPDESK
CC:
Bcc:
Subject: FW: Noah Screenshots
Attached: [File]

Please see the following e-mail I received:

Craig Brown BA
Computing Consultant, Messaging & Collaboration
Information Technology Services
401 Sunset Ave, Windsor ON Canada N9B 3P1
T 519 223-5000 x2743  F 519 973-7083
Craig.Brown@uwindsor.ca
www.uwindsor.ca/its

Quick Steps

FILE   MESSAGE   INSERT   OPTIONS   FORMAT TEXT   REVIEW

Quick Steps

Create Calendar...  Forward to Help...  Report Spam
Backup Reports  To Manager  Team Email
Done  Reply & Delete  Create New

Quick Steps

Subject: Reminder to Complete Mental Health Survey

To All Faculty and Staff:

For those of you who have already completed this survey – thank you. For those who haven’t, I
survey. No personal information is being collected and all responses will be kept confidential.

In an effort to have more comprehensive mental health supports for our students and our camp
environmental scan of the existing mental health initiatives and services at the University of Wat
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information to identify what we are doing well and where gaps still remain with regards to menta

University of Windsor
Quick Steps

Example:
- Reply to Microsoft support
- Click quick step, it will open up a reply and once sent, move the Original message to a folder
Pop Out Message

From: Craig.Brown@uwindsor.ca
To: Michelle Pilutti
Subject: RE: Annette Demers has shared 'Document Management Committee'
Read Receipts

**Tracking**

Delivery and read receipts help provide confirmation that messages were successfully received. Not all e-mail servers and applications support sending receipts.

For all messages sent, request:
- [ ] Delivery receipt confirming the message was delivered to the recipient’s e-mail server
- [ ] Read receipt confirming the recipient viewed the message

For any message received that includes a read receipt request:
- [ ] Always send a read receipt
- [ ] Never send a read receipt
- [ ] Ask each time whether to send a read receipt

- ✔ Automatically process meeting requests and responses to meeting requests and polls
- ✔ Automatically update original sent item with receipt information
- [ ] Update tracking information, and then delete responses that don’t contain comments
- [ ] After updating tracking information, move receipt to: [ ] Deleted Items [ ] Browse...
Forwarding Messages

• When forwarding a message, Outlook uses the name of the person if they are in the directory, and not e-mail address:

  From: Christopher Wainscott
  Sent: October 20, 2015 12:13 PM
  To: Bodek Frak; Craig Brown
  Subject: "Clutter"
  Hi guys,

  From: ScreenConnect [mailto:info@e.screenconnect.com]
  Sent: October 19, 2015 3:00 PM
  To: Craig Brown
  Subject: New Options & Pricing from ScreenConnect

• This can cause an issue if forwarding a student address – multiple names, etc.
Forwarding Messages

- Solution is to “Forward as attachment”
- This preserves the original message, with the original addresses
Saving Sent Messages

• By default, sent messages go into the 'Sent Items" folder
• You can pop out the message, to choose a folder to save the reply
• This is done on a per-message basis
• Can also drag message into a folder, and reply from there – if setting for "save reply in original folder" is checked
Backstage Options
Signatures
Signatures

• Signatures do not travel between clients/the web – must be setup on each instance of Outlook
Automatic Replies

Account Information

Account Settings
- Change settings for this account or set up more connections.
- Access this account on the web: https://outlook.office365.com/owa/universityofwindsor.ca

Automatic Replies (Out of Office)
- Use automatic replies to notify others that you are not available to respond to e-mail messages.

Mailbox Cleanup
- Manage the size of your mailbox by emptying Deleted Items.
- 46.2 GB free of 49.5 GB

Rules and Alerts
- Use Rules and Alerts to help organize your incoming e-mail.

Slow and Disabled Add-ins

Automatic Replies - Craig.Brown@universityofwindsor.ca

- Do not send automatic replies
- Send automatic replies
  - Only send during this time range:
    - Start: Tue 2015-10-20 2:00 PM
    - End: Wed 2015-10-21 2:00 PM

Automatically reply once for each sender with the following message:

Hello, I am out of the office until Tuesday, September 8. During this time I will not have access to e-mail. Please direct all inquiries to helpdesk@universityofwindsor.ca or call 519-253-3000 Ext. 4440. I will respond to your e-mail upon my return.

Regards, Craig
Archiving

• With 365, messages older than 2 years will be moved to your archive
• If you had an archive in Lotus Notes, it will show in 365 with the migrated contents
• You can manually move messages from your mailbox to your archive (quick step!)
• Assign a policy to a message to have it archived earlier
Archiving
Name Lookup

- Outlook for Windows does not look up names automatically. Must use “Check Names” button or “Control+K” to force a lookup from the directory.
Address Book
Advanced Search
Other Address Books
Distribution Lists

The image shows a computer interface with an address book titled "All Distribution Lists - Craig Brown@uwinc". The list includes various distribution lists under different categories such as "Aboriginal Education Centre - staff", "Advancement - Campus Appeal Champions", and others, each with associated email addresses.
Editing Distribution Lists
Shared Mailboxes

• Added as a separate account
• This allows for signature, rules, automatic replies
• Sent messages go into sent folder
Shared Mailbox
Adding Shared Mailboxes

• Must have permission to open shared mailbox
• If you add a shared mailbox you don’t have permission to, Outlook will become very slow/unresponsive
• Once mailbox is added, it is located in your left hand navigation pane
Shared Mailboxes on the Web

• Easy to access a shared mailbox on the web
  • https://outlook.office.com/owa/mailboxid@uwindsor.ca
  • Login with your UwinID and password
Shared Mailboxes

• Each shared mailbox has an address book and a calendar
• Useful for sharing contacts amongst a department, shared events on a calendar
• Shared calendar shows in your list of calendars
Shared Address Book
Shared Mailbox Settings

Account Information

1. helpdesk@uwindsor.ca
   - Microsoft Exchange
2. Craig.Brown@uwindsor.ca
   - Microsoft Exchange
3. helpdesk@uwindsor.ca
   - Microsoft Exchange

Automatic Replies (Out of Office)
Use automatic replies to notify others that you are out of office, on vacation, or not available to respond to e-mail messages.

Mailbox Cleanup
Manage the size of your mailbox by emptying Deleted Items and archiving.

Rules and Alerts
Use Rules and Alerts to help organize your incoming e-mail messages, and receive updating alerts as specified.
Shared Mailbox Notes

• Signature must be setup on each computer accessing mailbox
• Message templates are stored locally, not on server
• Unread marks – once a message is read, it appears as read for all users of shared mailbox
Rooms

- Rooms you have permission to view show up under “My Calendars”
- Selected rooms will be indicated by colour
Rooms

• Only those that have permission to view a room can see booking details – everyone else sees free/busy only

• Rooms can be setup to restrict booking to certain individuals, others can be declined or sent to the room owner for approval
Booking a Room

- You can book a room directly on the room calendar, or through the meeting interface.
- Booking through the meeting interface allows you to use the scheduling assistant.
Room Finder
Scheduling a Meeting

• Scheduling a meeting in Outlook is similar to Notes
• Enter invitees (no FYI available)
• “Optional” is available, however it isn’t obvious to recipient
• If you don’t want responses, turn off under “response options”
Scheduling a Meeting
Scheduling Assistant

- Scheduling assistant allows you to add a number of people to find the best time when everyone is available
- Can add rooms with the room finder as well
- Reduce the amount of time to spend trying to book meetings
- Outlook will display people's free/busy time – but not details unless granted
Scheduling Assistant
Re-Occuring Meetings

• Unlike Lotus Notes, custom meeting dates are NOT supported in Outlook
• Repeating meetings must follow some sort of pattern
Meeting/Invite Best Practices

• Accept/Decline requests – do not delete
• Limit re-occurrences – each change results in an exception; too many cause problems
• Instead of cancelling re-occuring meeting, change end date
• Do not use re-occuring meeting to share attachments – Use One Drive instead
Find Time

- Doodle-like meeting poll integrated with 365
- Allows you send out a list of potential meeting times
- Recipients vote on the time that works for them
- Can automatically schedule (if selected)
- Available at findtime.microsoft.com
FindTime

1. Quickly find times that work for you and all your attendees.
2. Attendees see a visual summary of voting to date, helping them make the best choice.
3. Attendees receive an email and can vote on their preferred times.
Accepting Meetings

- The Outlook meeting accept/decline feature has a number of options:
Accepting Meetings

- Send Response Now – sends acceptance/decline back to organizer
- Edit response – allows you accept/decline with a message
- Do not send a response – allows you to accept or decline the invite without sending any indication at all!
Accepting Meetings

Accepted with “Send the response now”:

<table>
<thead>
<tr>
<th>Name</th>
<th>Attendance</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Craig Brown</td>
<td>Meeting Organizer</td>
<td>None</td>
</tr>
<tr>
<td>John Testerski</td>
<td>Required Attendee</td>
<td>Accepted</td>
</tr>
</tbody>
</table>

Accepted with “Do not Send Response”:

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Sharing Your Calendar

• Easiest way to share your calendar is through the web interface – it does all the work for you

• Multiple levels of access – limited details, full details, ability to edit, or full delegation

• A delegate to your calendar can accept/decline meetings on your behalf
Sharing Your Calendar
Sharing Your Calendar

- Share with: 

  - Craig Brown
  - Craig.Brown@uwindsor.ca

- Subject:
  - I'd like to share my calendar with you

- Calendar:
  - Calendar

- Full details:
  - Availability only
  - Limited details
  - Editor
  - Delegate
Hi Craig, I'd like to share my calendar with you!

John Testerski

John Testerski (tester1@uwindsor.ca) has invited you to view his or her Calendar. Click the Open button above.
Accessing Another Calendar
Searching

- Outlook has an “Instant Search” capability
- E-mail addresses and all text in an e-mail, calendar and contacts is indexed
- Use instant search to look up e-mail address, word or phrase
- Can search entire mailbox, specific folders, other mailboxes, archive
- Can specify time range to search
Searching

• You can narrow your searches
• “Expense Reports” – searches exact phrase
• Expense AND Reports – search will find items with both expense, and report but not necessarily in that order
• Expense NOT Reports – will find items with expense, but not report
Search Options

Outlook Options

- General
- Mail
- Calendar
- People
- Tasks
- Search
- Language
- Advanced
- Customize Ribbon
- Quick Access Toolbar
- Add-Ins
- Trust Center

Change how items are searched with Instant Search.

Sources
- Change the Outlook stores indexed by Windows Search

Results

Include results only from:
- Current folder
  - Current folder
  - Current mailbox when searching from the inbox
  - Current mailbox
  - All mailboxes

- Include messages from the Deleted Items folder in each data file when searching in All Items
- When possible, display results as the query is typed
- Improve search speed by limiting the number of results shown
- Highlight search terms in the results

Highlight color:

Notify me when results might be limited because search indexing is not complete
Advanced Search

Advanced Find

Look: Messages
In: Inbox

Search for the word(s):
In: subject field only

From...
Sent To...

Where I am: the only person on the To line
Time: none

Find Now
Stop
New Search
Skype for Business

- Skype for Business is not built-in to Outlook, separate program installed with MS Office on your computer
- Instant message capability, inside and outside the University
- Also provides video conferencing, online meetings, presentations
- Integrates with Outlook
Skype for Business

• Login = yourUwinID@uwindsor.ca, password = yourUwinPassword
• Outlook has presence indicators:
  Green = Available
  Yellow = Away
  Red = Do Not Disturb
• Skype will use your calendar information to automatically set you as “in a meeting”
Skype for Business
Skype for Business

- Do you really need to reply with an e-mail? Why not respond with an instant message?

- If someone is away and you send them an IM, they will receive it as an e-mail
Skype for Business
Missed conversation with Dan Papineau

☐ Dan Papineau; ☐ Craig Brown

From: Dan Papineau
Sent: Wed 2015-07-15 2:21 PM
Modes: 🔵

pappyp@uwindsor.ca [2:18 PM]:

Don't forget to put in for Lotto Max if you want in
Skype for Business

• Skype for Business apps for Android and Apple iOS let you stay in touch while on the move
• Instant Messaging available now in Outlook Web Access
• Full Skype experience coming soon
• Integration with our telephone system?
One Drive

• One Drive is cloud-based storage within Office 365, similar to Drop Box
• Work on files in the cloud, sync files locally, access on mobile devices and web browser
• Current 1TB limit
• Easy to share files and work collaboratively
365 Groups

• Similar to a Lotus Notes Team Room
• Area for group messages, a group calendar, One Note and group One Drive
• Great for storing and sharing files amongst a group
• Accessible through Outlook 2016, browser, mobile apps
Office Online

• Word, Excel, Powerpoint, One Note in a browser
• No need to install software on your computer
• Create, open, save files right from your One Drive
• Share files instead of sending as attachments
Q & A