

How to Navigate Office 365 Groups

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Technical Difficulty – 🌶️

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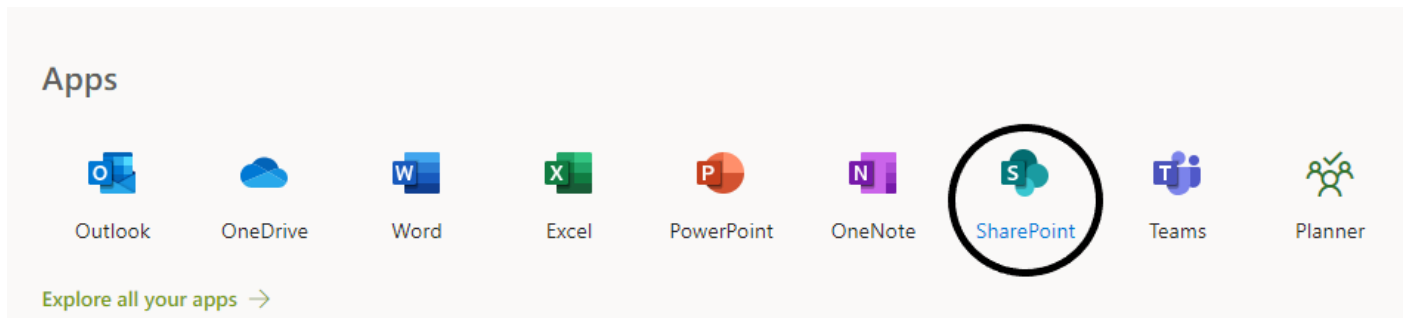
1. Overview of Office 365 Groups in Outlook

- Office 365 Groups in Outlook give you a way to bundle collaboration related to an organisation, project, interest, client or anything else.
- Collaboration can be restricted to just internal team members or can be extended to external team members outside the firewall depending on how the Office 365 environment has been set up.
- Office 365 Groups provide a set of tools that allow you to collaborate with your teammates when writing documents, creating spreadsheets, working on project plans, scheduling meetings, or sending email.
- Groups in Office 365 let you choose a set of people that you wish to collaborate with and easily set up a collection of resources for those people to share. You don't have to worry about manually assigning permissions to all those resources because adding members to the group automatically gives them the permissions they need to the tools your group provides.
- When you create a group in Outlook you'll get:
 - Shared Inbox – For email conversations between your members. This inbox has an email address and can be set to accept messages from people outside the group and even outside your organization, much like a traditional distribution list. All new members have access to all past conversations;

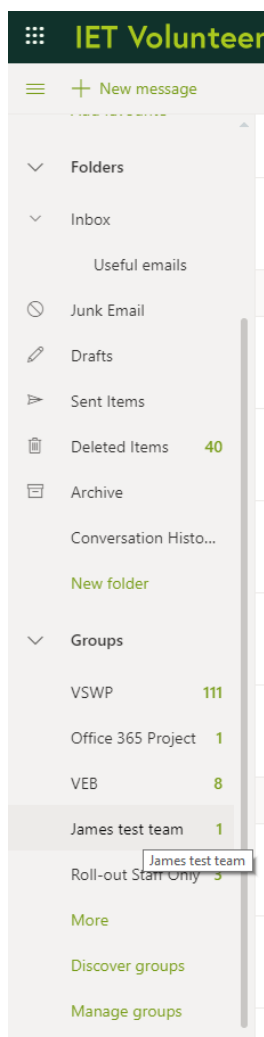
- Shared Calendar – For scheduling deadlines, events and meetings related to the group or logging team members availability;
 - SharePoint Document Library – One central place for the group to store and share files. No more multiple copies and file attachments;
 - Shared OneNote Notebook – For gathering ideas, research, and information or storing agendas, meeting notes, workshops notes etc.;
 - Planner – For assigning and managing project tasks among your group members, follow ups and who does what; and
 - SharePoint Team Site – A central repository for information, links and content relating to your group.
- Groups can either be **Private** – Anyone can see what's inside or **Public** – Only approved members can see what's inside
 - To find out more about office 365 Groups visit Microsoft Support web site
 - [Learn about Groups](#)
 - [Unite your team with Groups in Outlook](#)

2. How to Access my Outlook Groups

- Groups are accessed via your **Mail** from the home page or via the **App Launcher** 

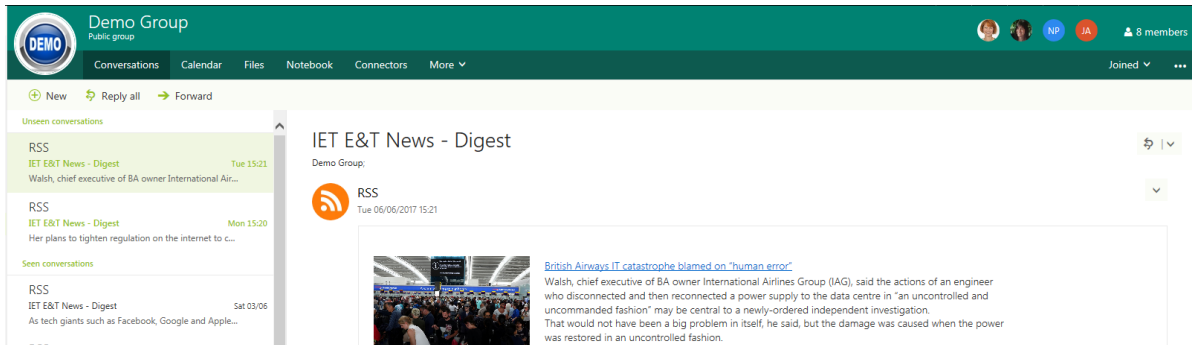


- The list of Groups that you belong to will appear in a list on the left-hand menu in your mail box.
- Note: If you are a member of many Groups they may not all appear on one page and you may have to select **More** to see the rest of the Groups.



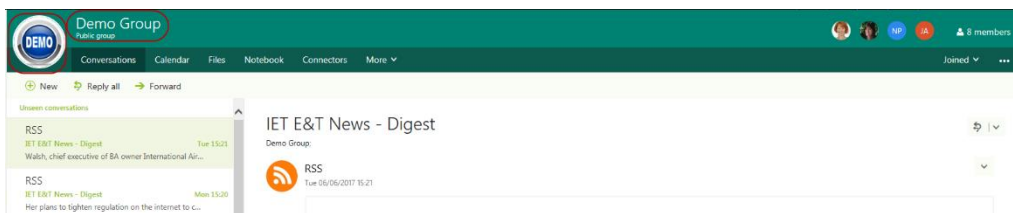
- To Access a **Group** select the relevant **Group** name

- The **Group** will open

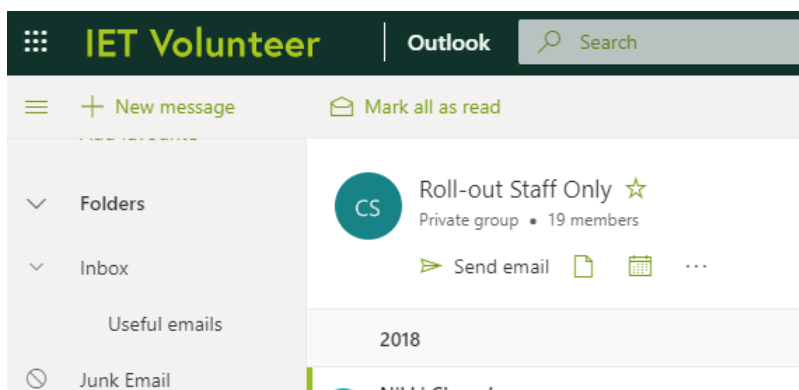


3. Navigating my way around Groups

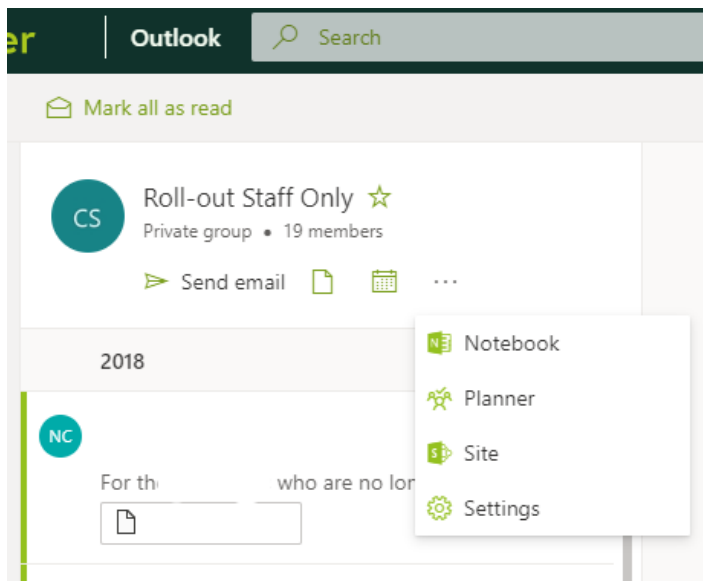
- All Groups have a standard layout.
- At the top left is the Group Logo and the Group Name



- Under the name of the Group you will find the how many members it has and whether it's a private or public group. To open a name list of all the members click on the number of members displayed

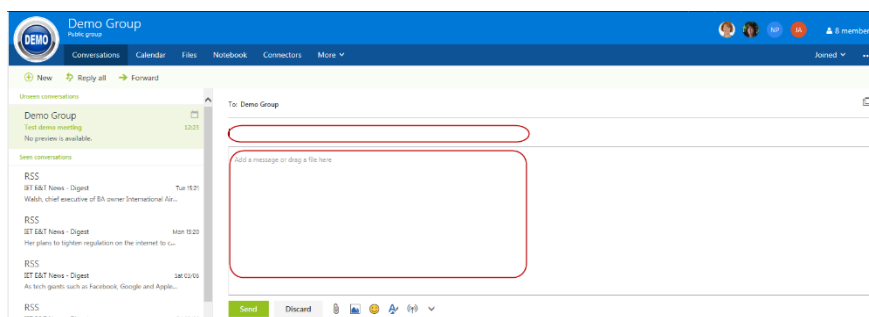


- Under the name of the Group there are more options available, i.e.:
 - If you want to send an email to all members of the Group, hit the **Send email** icon – no need to CC in everybody;
 - To access Group files, click on the icon next to **Send email**;
 - To access the Group calendar, hit the **Go to the group calendar** icon – next one along;
 - Clicking on the three dots will open a list of more options (see below)



4. Groups Conversations - Email

- Each Group has a share Inbox – called **Conversations** to record email conversations between your members.
- This inbox has an email address and can be set to accept messages from people outside the group and even outside your organization, much like a traditional distribution list.
- All new members will have access to all past conversations of the Group.
- By default, all the email **Conversations** will be displayed on the home page with the list of email conversations down the left-hand side and the most recent conversation open in the right hand reading pane.
- To create a new email, select **New message**
- Add a subject line and content.



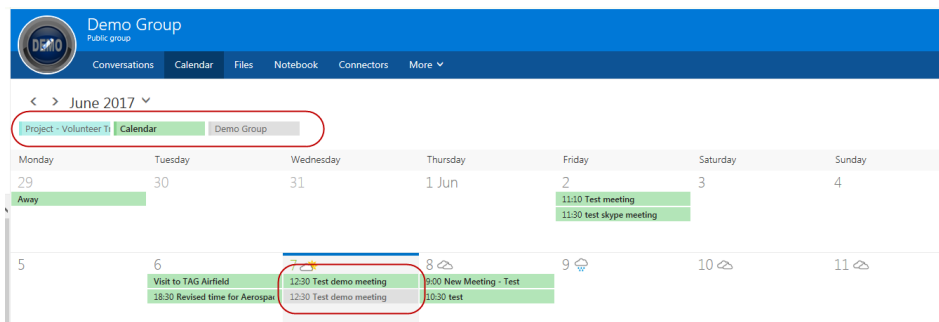
- Note: if the Group has enabled the setting for notifications to be emailed to members then a copy of the email will be sent to each member of the Group.
- When you are ready to send your email select **Send**



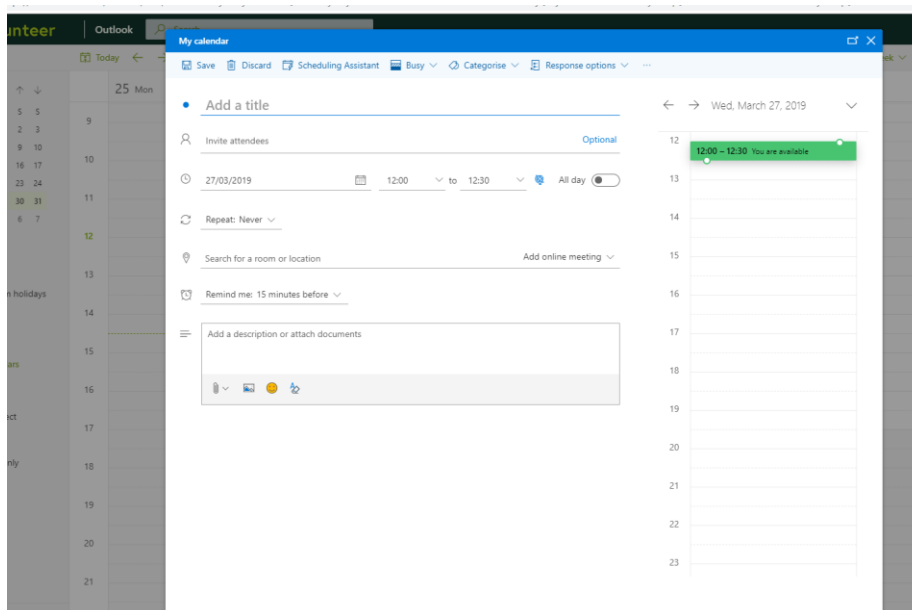
- You also have the ability to **Reply** and **Forward** emails. You will find them in the right-top corner.

5. Group Calendar

- Each group has a shared **Calendar** for scheduling deadlines, events and meetings related to the group or logging team members availability one share calendar.
- The **Calendar** tab displays the group calendar plus you own calendar (called Calendar) plus any other Group calendars you have open.
- You will see all the meetings overlaid on top of each other. For example on the 7 June there is a meeting in the Demo Group as it is shown in Grey and it is also shown in my own personal calendar shown in Green.



- To create an appointment double click on the day that you want the appointment on and a new appointment will open.



- Make sure you select the correct calendar to send it from.

- If you have selected a **Group Calendar** and if you want all the people in the Group to be invited, you need to either enter their names or email addresses (this is the convoluted option) or simply click on Invite members down the bottom of the calendar window (see below)

The screenshot shows a calendar window with a green header 'Roll-out Staff Only'. Below the header, there are several input fields and options:

- Add a title**: A text input field.
- Invite required attendees**: A text input field with a person icon.
- Date and Time**: A date picker set to 17/06/2019 and a time range from 14:30 to 15:00.
- Search for a room or location**: A text input field with a location pin icon.
- Repeat**: A dropdown menu set to 'Never'.
- Remind me**: A dropdown menu set to '15 minutes before'.
- Footer**: A green 'Save' button, a white 'Discard' button, and a 'More options' link.

 A black arrow points to the 'Invite members' link located below the reminder text.

- If it is going to be a Skype meeting, select Skype meeting so that the Skype login details get added to the appointment

The screenshot shows a calendar window with a green header. Below the header, there are several input fields and options:

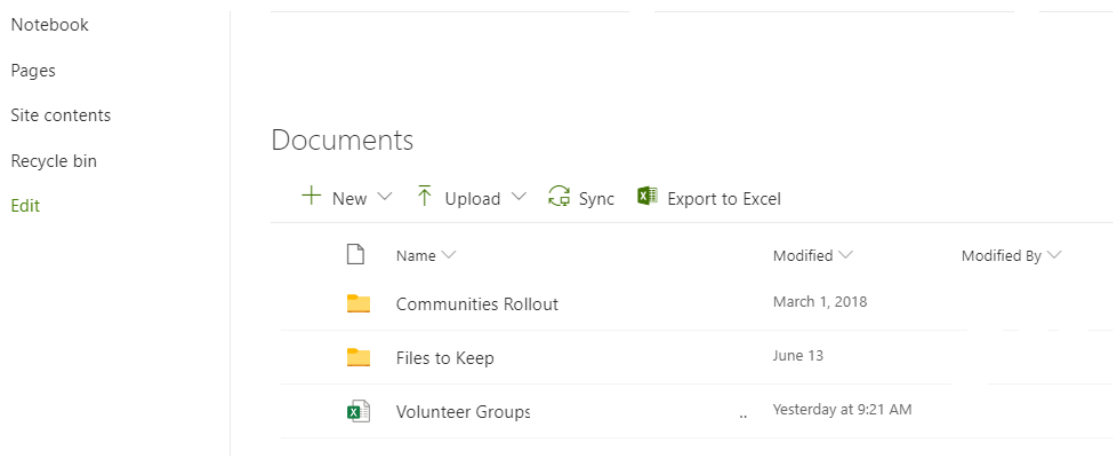
- Add a title**: A text input field.
- Attendees**: A text input field with a person icon and a dropdown menu set to 'Roll-out Staff Only'.
- Date and Time**: A date picker set to 17/06/2019 and a time range from 14:30 to 15:00.
- Search for a room or location**: A text input field with a location pin icon.
- Repeat**: A dropdown menu set to 'Never'.
- Remind me**: A dropdown menu set to '15 minutes before'.
- Footer**: A green 'Save' button, a white 'Discard' button, and a 'More options' link.

 A black arrow points to the 'Skype meeting' dropdown menu located below the reminder text.

- Complete the appointment details
- When ready to send select **Save**
- After you have saved the appointment it will appear in the calendar and be sent to the attendees who can accept or decline the request as per normal Outlook processes.

6. Group Files - Document Library

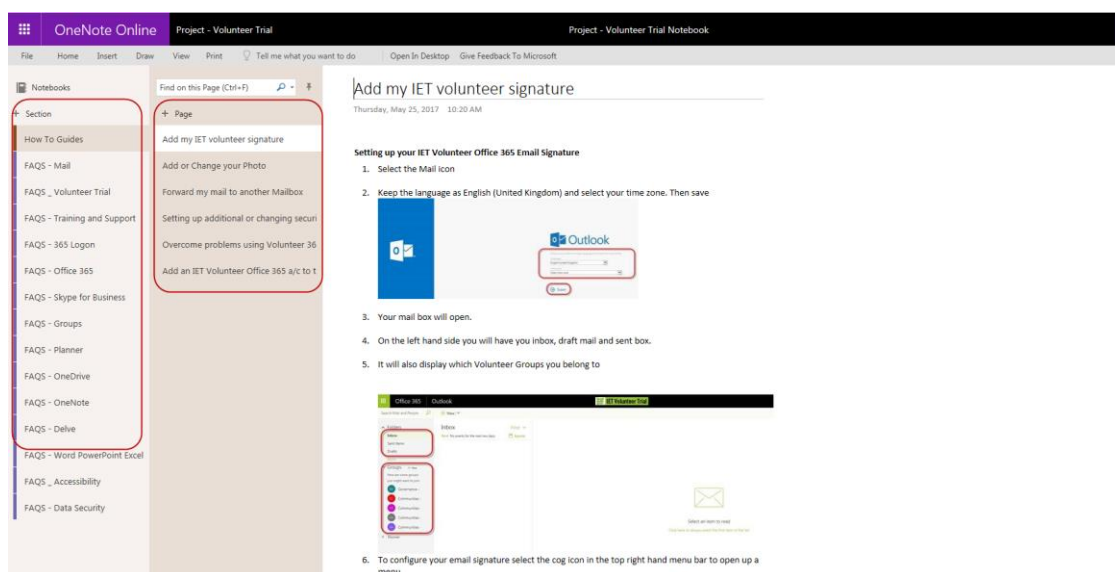
- Each Group has a Document Library one central place for the group to store and share files. No more multiple copies and file attachments.
- A file stored in the Group Document Library is owned by the library and not by an individual person. The benefit of this is if that person leaves the organisation and their account is closed any associated files owned by that person will be deleted. Files created by the person but stored in the Group will remain.
- All files stored in the Group Document Library can be edited by all members of the group whether internal team members or external team members so support collaboration without the need to send emails with attachments.
- When someone leaves the group, they will automatically lose access to the files in the Group
- A file only needs to be stored once and links sent to other people to access the file.
- When you select a file you can **View**, **Email** or **Download** it. If you double - click on the file it will automatically open it
- Select **New** to create a new **Word, Excel or PowerPoint** file using the online versions of the products



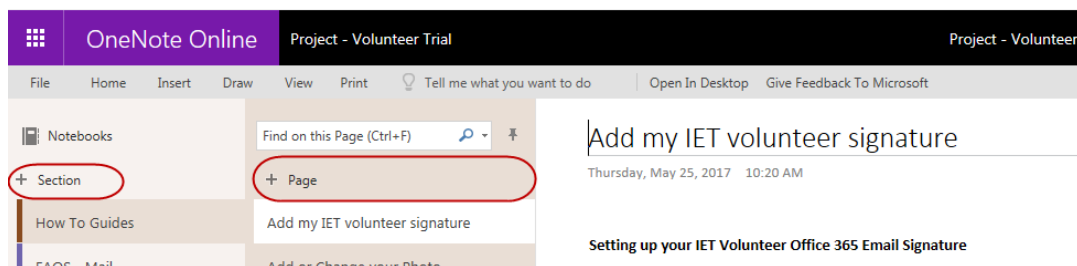
- To upload an existing file into the Group file, select **Upload** and save the file you want to upload into the Group site.

7. Group Notebook

- Each group has a shared OneNote Notebook for gathering ideas, research, and information or storing agendas, meeting notes, workshops notes etc. How the notebook is used is up to the group to decide.
- Each notebook is made up of **Sections** and **Pages**.
- By default, the first page of the first section will show in the display pane on the right hand side
- Click on a Section to show the pages within that section and then select on the page to display the content



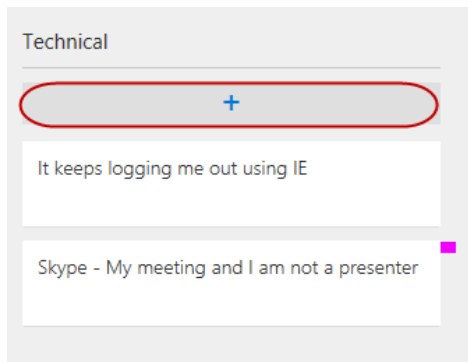
- Add a new page to an existing section by selecting + **Page** and then enter your content.
- Add a new section by selecting + **Section** and then entering the content into a new page



8. Group Planner

- Each group has a **Planner** for assigning and managing project tasks among your group members, follow ups and who does what.
- Tasks are grouped into headings called **Buckets**. You can decide to call these buckets anything you want.

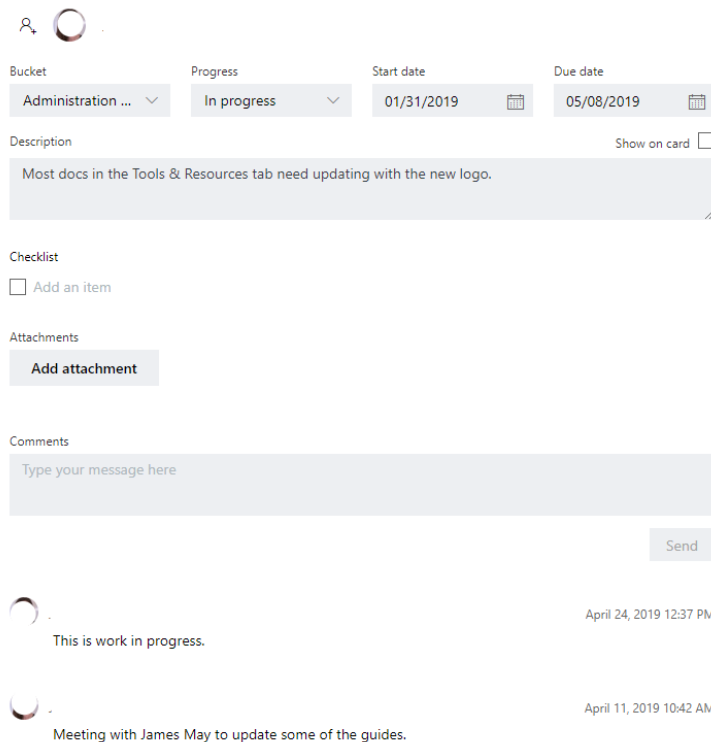
- To add a task to a bucket select the + under the relevant **Bucket** heading



- Enter the **Task name**, set a **Due date** (if required) and **Assign** the task to one or more people (if required) then select **Add task**
- The new task will now appear in the bucket list
- To add more detail to the new task click on it to open it
- Change the **Bucket**, update the **Progress** from Not started to in progress or Complete, add a **Start date**, change or add a **Due date**, add a checklist, add a **Description** or add **Attachments**, **Links** or **Comments**

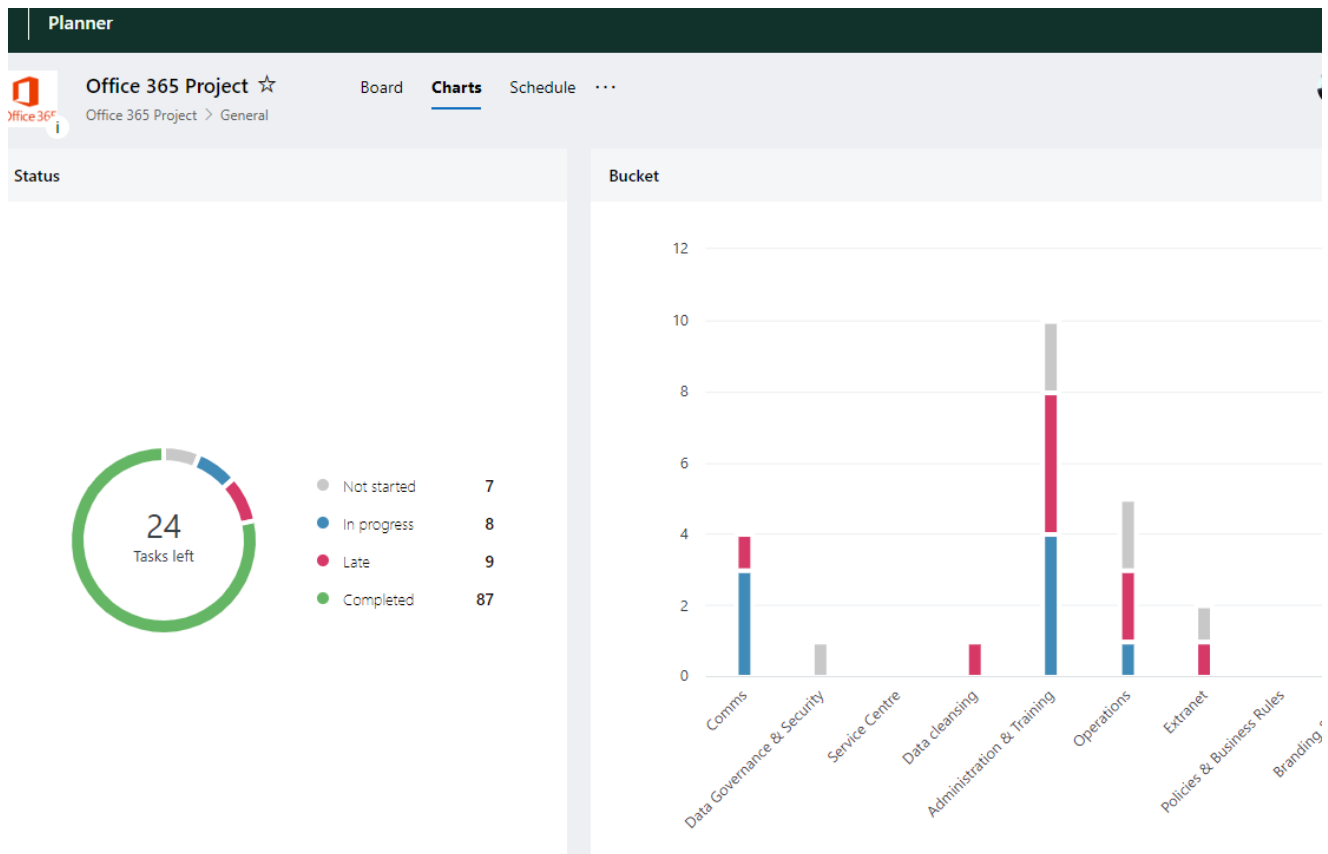
updating all the doc.

Last modified 04/24/2019 by you



- The task summary will get updated to reflect the changes made

- You can view the **tasks** in different ways. By default, they are grouped by **Bucket name** however, you can group by **Assigned to** and **Progress by** selecting the **Group by** option at the top right of the screen
- You can also see a chart view of the Planner by selecting **Charts**
- This will show you a graphical representation of your Planner Board



9. Group Site – Group SharePoint Site

- Each group has a **SharePoint Team Site** a central repository for information, links and content relating to your group.
- Not part of this how to guide.

