

#### How to Navigate Office 365 Groups

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#### Sections

1.	Overview of Office 365 Groups in Outlook	1
	How to Access my Outlook Groups	
	Navigating my way around Groups	
	Groups Conversations - Email	
	Group Calendar	
	Group Files - Document Library	
	Group Notebook	
	Group Planner	
	Group Site – Group SharePoint Site	

#### 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
  - o Learn about Groups
  - <u>Unite your team with Groups in Outlook</u>



### 2. How to Access my Outlook Groups

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

Apps								
		w	×	2	N	SharePoint	uji	ŶŹŶ
Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	Planner
Explore all your	apps $ ightarrow$					$\mathbf{}$		

- 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.

	IET Volunteer
=	+ New message
$\sim$	Folders
$\sim$	Inbox
	Useful emails
$\odot$	Junk Email
Ø	Drafts
⊳	Sent Items
Ŵ	Deleted Items 40
Ē	Archive
	Conversation Histo
	New folder
$\sim$	Groups
	VSWP 111
	Office 365 Project 1
	VEB 8
	James test team 1
	Roll-out Starr Only 3
	More
	Discover groups
	Manage groups

• To Access a Group select the relevant Group name



• The **Group** will open

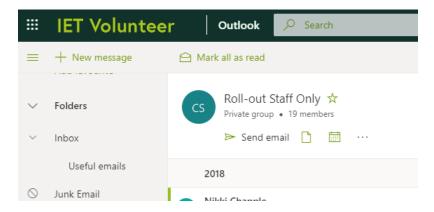
Demo Group	🧐 🤁 🐵 (	A 8 members
Conversations Calendar File	Notebook Connectors More 🗸	Joined 🗸 🕠
⊕ New 🗧 Reply all → Forward		
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RSS IET E&T News - Digest Tue 15:: Walsh, chief executive of BA owner International Air	IET E&T News - Digest Demo Graup:	\$  v
RSS IET E&T News - Digest Mon 15:: Her plans to tighten regulation on the internet to c	RSS Tue 06/06/2017 1521	~
Seen conversations	British Airways IT catastrophe blamed on "human error"	
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# 3. Navigating my way around Groups

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

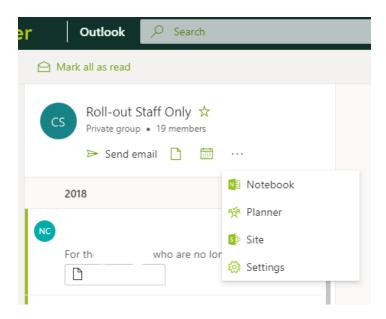


• Under the name of the Group you will find the how many members it has and whether it's a private or public group. To open a name list of all the members click on the number of members displayed



- 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.

Demo Group	🚯 🔞 💌 🔺 8 members
Conversations Calendar Files Notebook Connectors More ~	Joined 🛩 🚥
⊕ New ⇒ Reply all → Forward	
Unseen conversations	G
Demo Group Ter tiene scorp Ter tiene scorp	۲ ۱
Seen conversations Add a message or drag a file here	
RSS 87.960 How-o Digest Twar 15.11 Winds charter executive of BA revore International Air RSS	
IET E&T News - Digest Mon 1220 Her plans to lighten regulation on the internet to G	
RSS BITEM Here-Digest Sectors Acting sub-scheme Acting and Apple.	
RSS Seend Discard 👸 📷 🧐 🎤 🕅 🗸	

- 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



Send Discard 🕛 📐 😳	y ((ŋ) 🗸
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• 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.

Public grou										
Conversion	17 ¥	łotebook Connectors M	lore V							
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday				
29 Away	30	31	1 Jun	2 11:10 Test meeting 11:30 test skype meeting	3	4				
5	6 Visit to TAG Airfield 18:30 Revised time for Aerospac	12:30 Test demo meeting 12:30 Test demo meeting	8 🖎 9:00 New Meeting - Test 10:30 test	9 😓	10 🗠	11 🗠				

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

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	聞 Too	day 🔶 🕂	<b>a</b> :	ave 🔋 Discard 📑 Scheduling Assistant 🔤 Busy 🗸 ⊘ Categorise 🗸 🗵 Response o	options 🗸 🐳				ek ∨
^ ↓ s s	9	25 Mon	•	Add a title		> v	/ed, March 27, 2019	$\sim$	
2 3 9 10 16 17	10		8	Invite attendees Or	Optional	12	- 12:30 You are available	•	
23 24 30 31	11		©	27/03/2019 🛄 12:00 🗸 to 12:30 🗸 🍳 All day		13			
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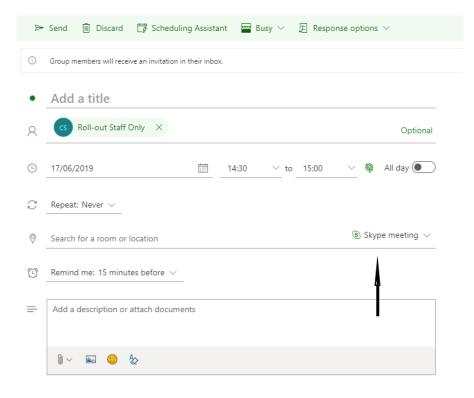
• Make sure you select the correct calendar to send it from.



• 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)

Roll-out Staff Only >     •   Add a title     •   Add a title     •   •   Add a title     • <th>18</th> <th>Tue</th> <th colspan="4">19 Wed</th>	18	Tue	19 Wed			
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• If it is going to be a Skype meeting, select Skype meeting so that the Skype login details get added to the appointment





- 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

Notebook								
Pages								
Site contents								
Recycle bin	Documents							
Edit	+ New ∨ ↑ Upload ∨ Ĝ Sync 🕅 E	+ New $\checkmark$ → Upload $\checkmark$ G Sync 🗖 Export to Excel						
	$ ho$ Name $\sim$	Modified $\smallsetminus$	Modified By $\smallsetminus$					
	Communities Rollout	March 1, 2018						
	Files to Keep	June 13						
	Volunteer Groups	Yesterday at 9:21 AM						

• 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

III OneNote Onlin	Project - Volunteer Trial	Project - Volunteer Trial Notebook
File Home Insert Dra	w View Print 😨 Tell me what you wan	to do Open In Desktop Give Feedback To Microsoft
Notebooks	Find on this Page (Ctrl+F) P + #	Add my IET volunteer signature
+ Section	+ Page	Thursday, May 25, 2017 10:20 AM
How To Guides	Add my IET volunteer signature	Setting up your IET Volunteer Office 365 Email Signature
FAQS - Mail	Add or Change your Photo	1. Select the Mail icon
FAQS _ Volunteer Trial	Forward my mail to another Mailbox	2. Keep the language as English (United Kingdom) and select your time zone. Then save
FAQS - Training and Support	Setting up additional or changing securi	
FAQS - 365 Logon	Overcome problems using Volunteer 36	
FAQS - Office 365	Add an IET Volunteer Office 365 a/c to t	(inclusion)
FAQS - Skype for Business		
FAQS - Groups		Your mail box will open.     On the left hand side you will have you inbox, draft mail and sent box.
FAQ5 - Planner		4. On the left hand side you will have you mook, draft mail and sent box.      5. It will also display which Volunteer Groups you belong to
FAQS - OneDrive		
FAQS - OneNote		Citize 105   Outlook 17 US Name 100
FAQS - Delve		A later Men Men Men Men Men Men Men Men
FAQS - Word PowerPoint Excel		
FAQS _ Accessibility		
FAQS - Data Security		Connection     Connection     Connection     Connection     Connection     Connection     Connection
		6. To configure your email signature select the cog icon in the top right hand menu bar to geen up a

- 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

	OneNote (	Online	Project - Volunteer Tr	ial				Project - Volunteer
File	Home Insert	Draw	View Print 🖓 Te	ll me what you want	to do	Open In Desktop	Give Feedback To Microsoft	
H Sectio	ebooks	(	nd on this Page (Ctrl+F) Page	<b>ب</b> - ۹		May 25, 2017 10	lunteer signatu <sup>D:20 AM</sup>	re
How	To Guides	A	dd my IET volunteer sign	ature				
FAOS	- Mail	Δ.	dd or Change vour Phote		Setting	up your IET Volun	nteer Office 365 Email Signa	ature

# 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

Technical		
$\bigcirc$	+	
lt keeps loggi	ing me out using IE	
Skype - My m	neeting and I am no	ot a presenter

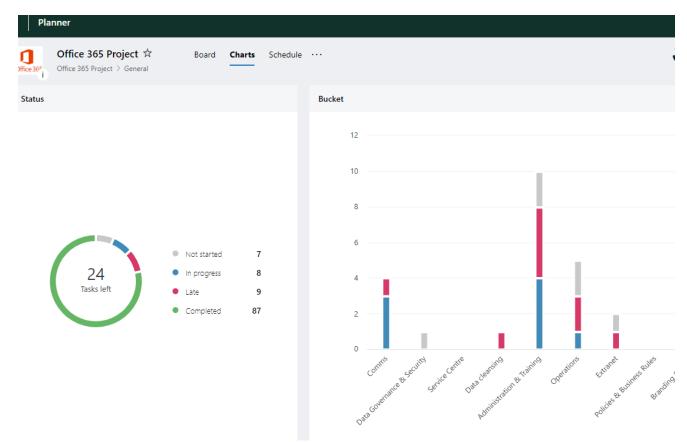
- Enter the **Task name**, set a **Due date** (if required) and **Assign** the task to one or more people (if required) then select **Add task**
- The new task will now appear in the bucket list
- To add more detail to the new task click on it to open it
- Change the **Bucket**, update the **Progress** 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									
R. 🔘 .									
Bucket	Progress		Start date		Due date				
Administration $$	In progress	$\sim$	01/31/2019		05/08/2019				
Description					Show o	n card 🗌			
Most docs in the Tools & Resources tab need updating with the new logo.									
Checklist									
Attachments									
Add attachment									
Comments									
Type your message here									
						Send			
C . This is work in progra	ess.				April 24, 2019	9 12:37 PM			
Meeting with James	May to update som	ne of the	guides.		April 11, 2019	9 10:42 AM			

• 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.

