Communication made easy with email contacts and calendar

Microsoft in Education

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Office 365

Contents

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Connecting and Collaborating using Email, Calendars and Contacts in Office 365

Email, Calendar and People (contacts) are all part of **Outlook.com*, which is a component of Office 365**. **Lync** and **instant messaging (IM)** work closely with Outlook to help you with setting up your online meetings.

After working through this guide, you should be able to:

- Set up email user groups in Exchange (if you are an administrator)
- Manage bookings for shared resources (i.e. meeting rooms)
- Manage your contacts and set up email groups using Outlook.com
- Import your social media contacts by linking certain networks to your Office 365
- Use Outlook.com to manage your email
- Connect your existing email accounts to your Office 365 Outlook account
- Manage your calendar settings and share with colleagues

Previous guides in this series have shown you how to set up your Office 365 for Education free plan in your educational institution, and how to use some of the basic productivity and sharing tools available such as **Office Online**, OneDrive***** and **SharePoint Site Collections**.

Connectivity is at the heart of Office 365 for Education. Much greater levels of **collaboration** are possible through this ability to connect easily with colleagues and students without the need for face to face interactions all of the time. Powerful levels of connectivity and collaboration are possible using **Exchange** and **Outlook.com** as well as shared calendars and contact information, together with instant messaging and Lync video conferencing. You can even reply to email using instant messaging.

As everything is done within the **secure** and **safe** environment of your Office 365 institution tenancy, communication between staff and students can be monitored for appropriateness and controlled where necessary. This removes any need for other external communication of this kind.

This guide will help you to get started with using the basic features of these powerful connectivity tools. You should hopefully now be getting used to the Office 365 interface and know what the main tabs and toolbars are for.

You can use **Outlook** for all your email, **Calendar** for your appointments and meetings, and **People** for your contacts (these are all functions on the **Office 365 tabs menu**).

*Formerly known as Outlook Web App.
**Formerly known as Office Web Apps.
***Formerly known as SkyDrive.

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1. Using Email to connect and collaborate

- You will probably be familiar with **Outlook** email, and **Outlook.com** gives you similar functions in the same way as the other **Office Online** applications.
- You can connect your email and social media accounts to Outlook and import your contacts and existing email.
- Use the **Task** function to schedule, monitor and manage the progress of tasks set using Outlook calendar and contacts.

2. Your Office 365 Calendar

- You can share your **Calendar** with colleagues and students who have accounts in the your **Office 365 domain** securely and safely. **Office 365 Exchange** makes this secure connection between shared accounts for you.
- This ensures that no one else can see your calendar except you and the people you are sharing it with.
- You can share your calendar with people outside of your institution domain by publishing your calendar and sharing a **link** (generated by Office 365) with those you want to see it.
- However be careful because your calendar will be visible to anyone who has the link.
- Outlook emails that contain a copy of your calendar can be sent to your contacts.

As all interactions and instant messaging with colleagues and students is done within the secure environment of Office 365, there is really no need for these to take place on any other platform. This is particularly important when interacting with students.

3. Your Contacts

- Contact information is displayed on **mini contact cards** that contain information about each contact.
- You can **email** and **IM** contacts directly from the contact cards.
- You can schedule meetings directly from the contact cards.
- You can add contacts directly from emails.
- Managing your contacts is easy - just follow the step-by-step instructions in each area of the **People** tab.

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User Scenario - Connecting other accounts to Office 365 Outlook email

Cobus is a teacher at the school. He has been using Office 365 for a while and is now ready to connect his other email accounts to **Office 365 Outlook** and to import his contacts from email and social media platforms he uses, including **LinkedIn**.

He has **Hotmail** and **Gmail** accounts he wants to connect, and he also has another **Outlook** account. Cobus would like all of his email in one place, and be able to send and receive email.

1. Connecting Hotmail and Gmail to Office 365

- Cobus goes to **Outlook**.com from his **Office 365 dashboard**.
- He clicks on the **settings icon** (shaped like a wheel near the top right of the page) and from the drop-down menu, selects **options** and then **accounts**. His screen now looks like this:
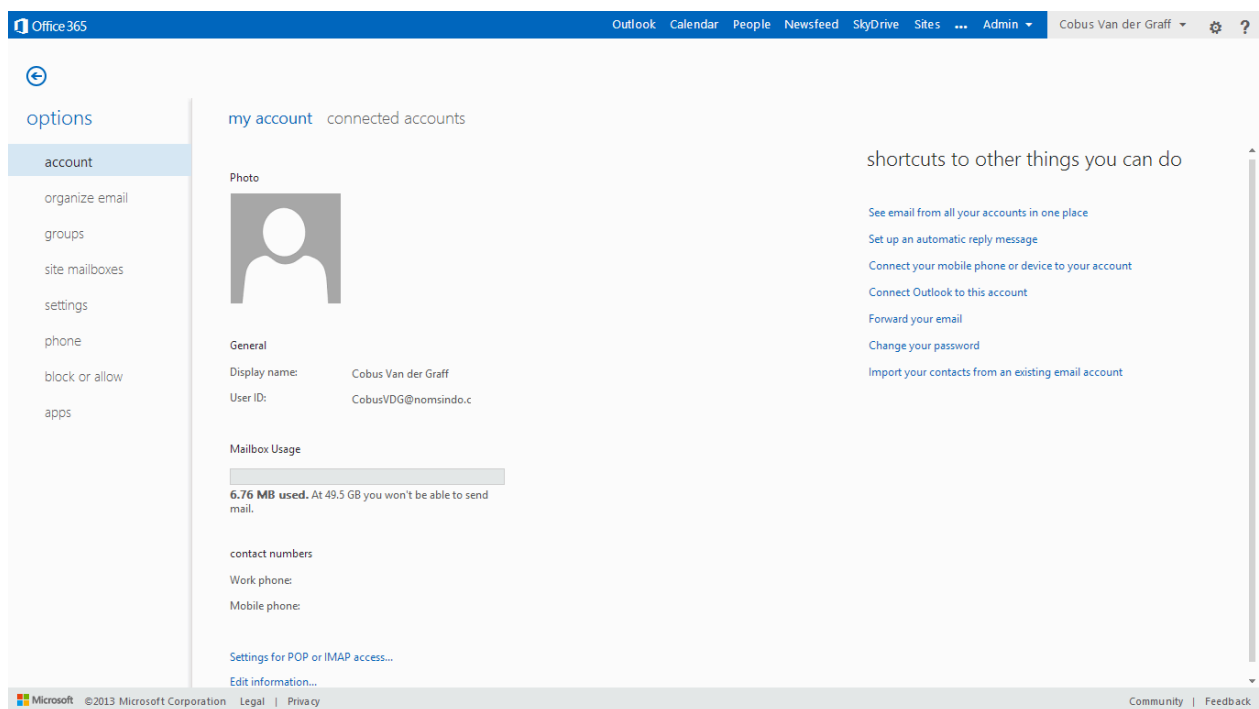
- He clicks on **connected accounts**. He now has the option to connect up to five email accounts to his Office 365 Outlook account.
- He sees that he can also set up his email to be forwarded from Outlook to another account when he needs this.
- He is now ready to connect his Hotmail and Gmail accounts. He clicks on the **+icon** and follows the instructions that appear on the screen.
- He enters his Hotmail email address and password, and Outlook connects the accounts.

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- Cobus repeats these steps for his Gmail account but is unable to connect them. He sees this window and message on his screen:
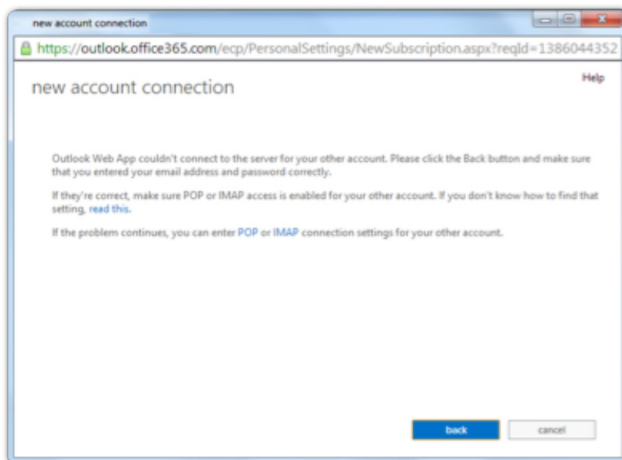
- To connect his Gmail account, he must go to this account and change the settings to enable **POP3 access,** which will then allow him to connect it to his Office 365 Outlook account.

This is the process Cobus follows:

- Sign in to your Gmail account.
- Click **Settings** > **Forwarding and POP/IMAP**.
- Under **POP Download**, select one of the following options:
  - **Enable POP for all mail (even mail that's already been downloaded)** - If you select this option, all old and new email will be downloaded to your Outlook.com account.
  - **Enable POP for mail that arrives from now on** - If you select this option, only new email will be downloaded to your Outlook.com account.
- If you want Gmail to keep a copy of mail sent to your Gmail email address in your Gmail inbox, under **When messages are accessed with POP** select **Keep Gmail's copy in the inbox**.
- Click **Save Changes**.

Cobus then tries again to connect his Gmail account to his Office 365 Outlook. He finds that he needs to go to his Gmail account and follow the instructions in the email from Gmail about connecting accounts. He then tries to connect his Gmail account to Outlook and is successful.

2. Importing his existing Outlook email into Office 365 Outlook

As Cobus already uses Microsoft Outlook as one of his email accounts, he now wants to import all of his emails and contacts to **Outlook.com**. He checks to see which version he is using (the import mechanism is slightly different for each version) and follows the step-by-step instructions he finds at **office.microsoft.com.**

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3. Connecting Social Media accounts and importing contacts

- Cobus scrolls down to the bottom of the **connected accounts** screen. He sees the list of **social media sites** his school Office 365 platform will allow him to connect with.
- He finds he is able to connect his **LinkedIn** account and so clicks on **connect** (to the right of the **LinkedIn icon).**
- Office 365 then imports his contact list from LinkedIn. He goes to the **People** tab on the Office 365 tabs menu and finds that all of his contacts have now been imported and are available to use.
- On the right of this **connected accounts** screen, Cobus notices a list of links to other features of **Outlook.com**.
- He explores some of these links and finds easy to follow instructions and guides for using some more of the features of **Outlook.com**.
- On the left he sees the main **administration** options for Outlook running down the screen and he then explores some of these as well.
- Cobus is able to set up personal email **distribution groups** of his own (his students by class and department colleagues, for example) as well as seeing which **distribution groups** he has already been listed in by other administrators at his institution.
- Clicking on the **left pointing arrow icon** at the top left of his screen returns him to the main **Outlook.com** email page.

Now that all of his email is in one place and his contacts have been imported, he can view and work with his contacts lists by clicking on **people** on the **Office 365 tabs menu**.

He can **update** or **remove** any of his connected accounts by going back to **Outlook.com** and going to **settings** and then **options** in the same way as he set up his connected accounts to start with.

He notices that with Office 365 he can reply to any email from someone else in the school **domain** by **instant messaging (IM).**

- With an email open in **Outlook.com**, he clicks on the **three small dots** at the top right of the screen.
- Hovering over this **icon** gives more functions. He clicks on it.
- A drop-down menu appears, giving him a list of extra email functions and options.
- Clicking **reply by IM** opens up a window where he can type a reply that will be delivered to the sender if they are logged in to Office 365.

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User Scenario - Using the People tab to work with your contacts in Office 365

Cobus van der Graf is a part of his school senior leadership team. Since his institution has started using Office 365 he has found it excellent for learning and teaching, and very useful for making his administrative tasks more efficient.

Cobus has recently been allowed some time to spend on organising professional development for his colleagues. He wants to work with them on how to use Office 365, but he realises that he needs to improve his own knowledge and skills first.

He has not spent much time working with the **People** tab on the main **Office 365 menu** so he decides to explore this function a little more.

He clicks on the **People** tab and explores the screen.

- He can see a list of places where he can find contact information running down the left of the screen.
- He can connect his **Social Media** accounts and import all of his contacts from these sites.
- He can also use the **search** function at the top of the screen to find people to add to his contacts list.
- Clicking on a contact from his list brings up a **contact card** containing all of their information, which he can also edit.

1. Contact information

- Information is stored in the form of mini **contact cards**. Cobus opens up the contact details for one of his colleagues. The screen looks like this:
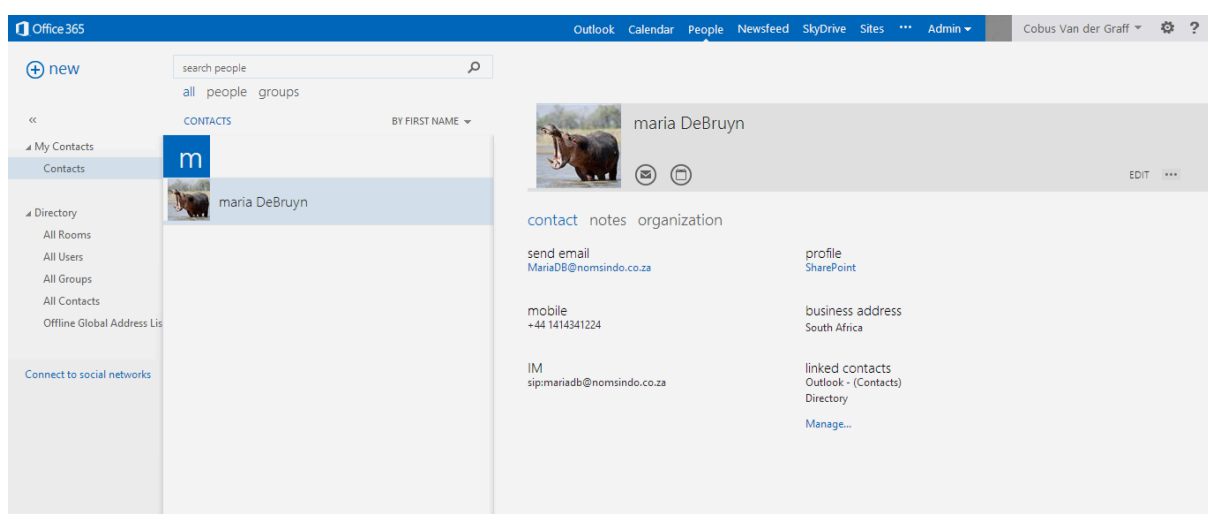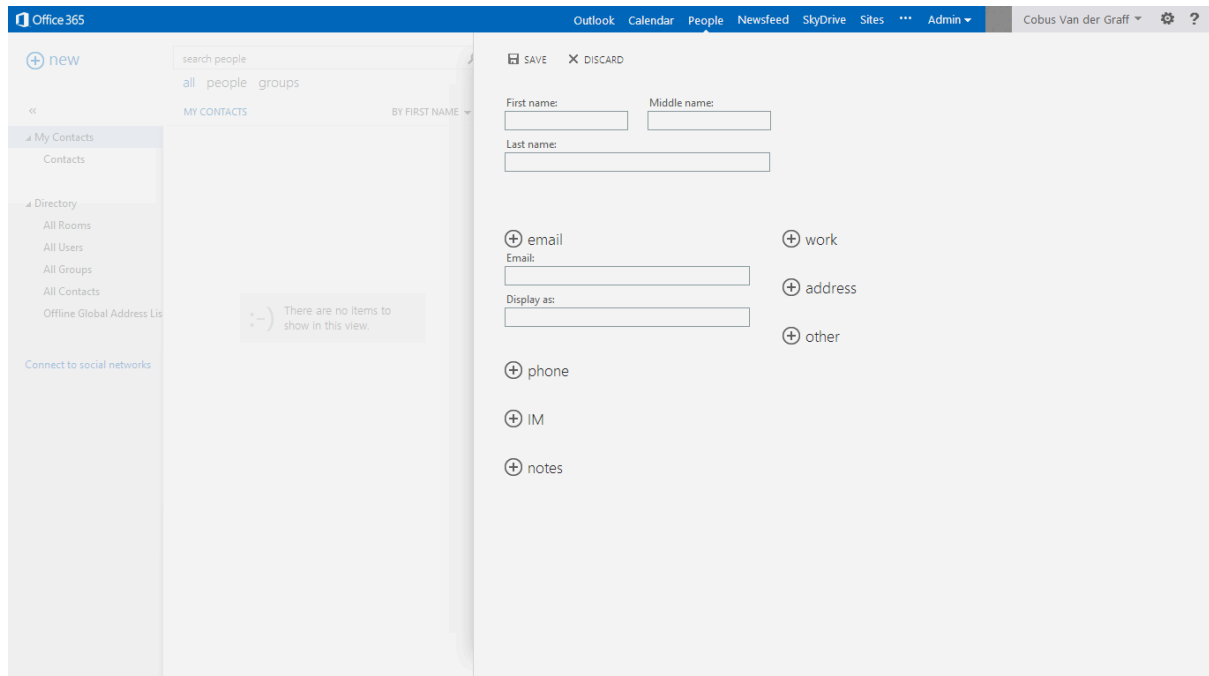

- Looking around the **contact card**, Cobus can see various options. Hovering his cursor over the **icons** reveals information about their functions.
- He can send email (and instant messages) and schedule meetings directly from his contact cards.

8

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2. Creating a new contact card

- Cobus clicks on the **+add new** icon. He is then given the option to create a **new contact or group**. He selects **Create Contact**.
- He is now asked to complete a **new contact information form**. His screen looks like this:


- Cobus fills in all of the fields. He can select the **+ icon** to see more options for that type of information. For example, if the person he is adding to his contacts has multiple phone numbers, he can select the **+ icon** next to **Phone** to add phone numbers.
- He then clicks **save** and his new contact is created. He can find this information again from his contacts list in **People** or in **Outlook** when sending email.

3. Creating groups of contacts

If he wants to create a group of contacts, the procedure is very similar. This will be a personal group rather than a shared distribution group created in **Office 365 Exchange** that everybody can use.

- He clicks on the **+add new** icon and then on the **create group** option.
- He completes the details, giving his group a name and adding individual contacts.
- Office 365 offers him **prompts** as he starts to enter the names of his group members.
- He clicks on **save** when he has finished and Office 365 now creates his personal contacts group for him.

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When Cobus is reading an email, if he clicks on the name of the sender, a **contact card** appears on his screen. It looks like this:
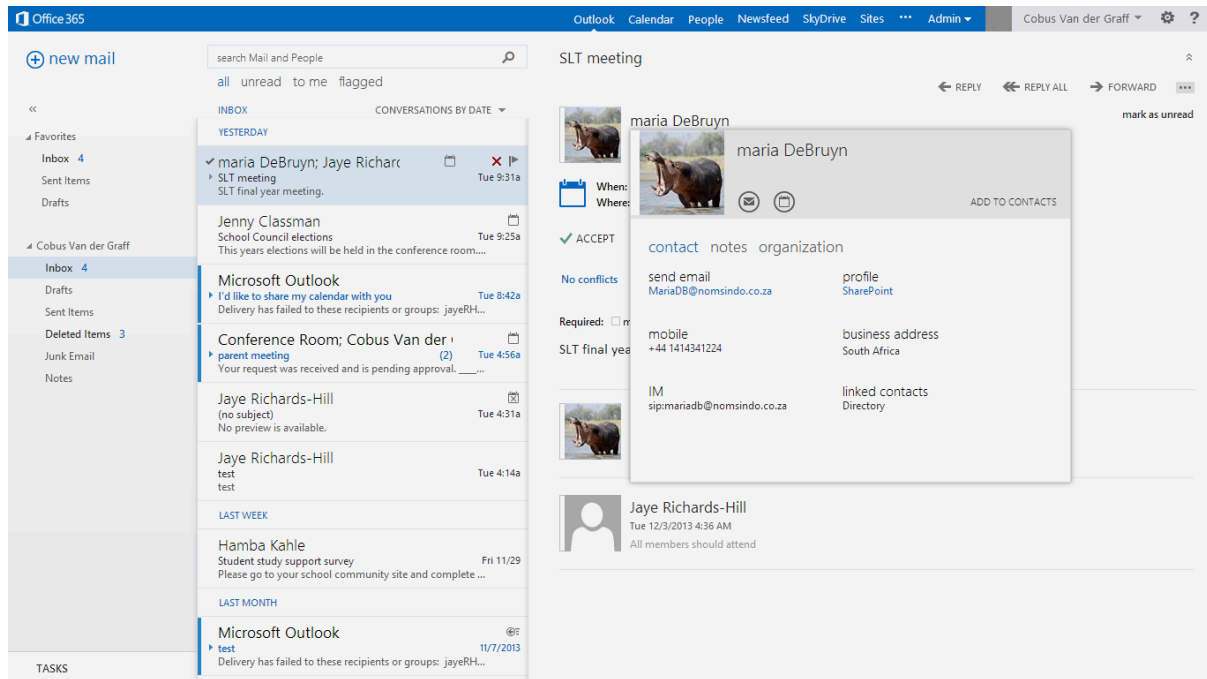
- He notices an option to add the sender to his contacts at the top right of this contact card.
- He clicks on this and a new window opens where he can add any further information. The screen looks like this:
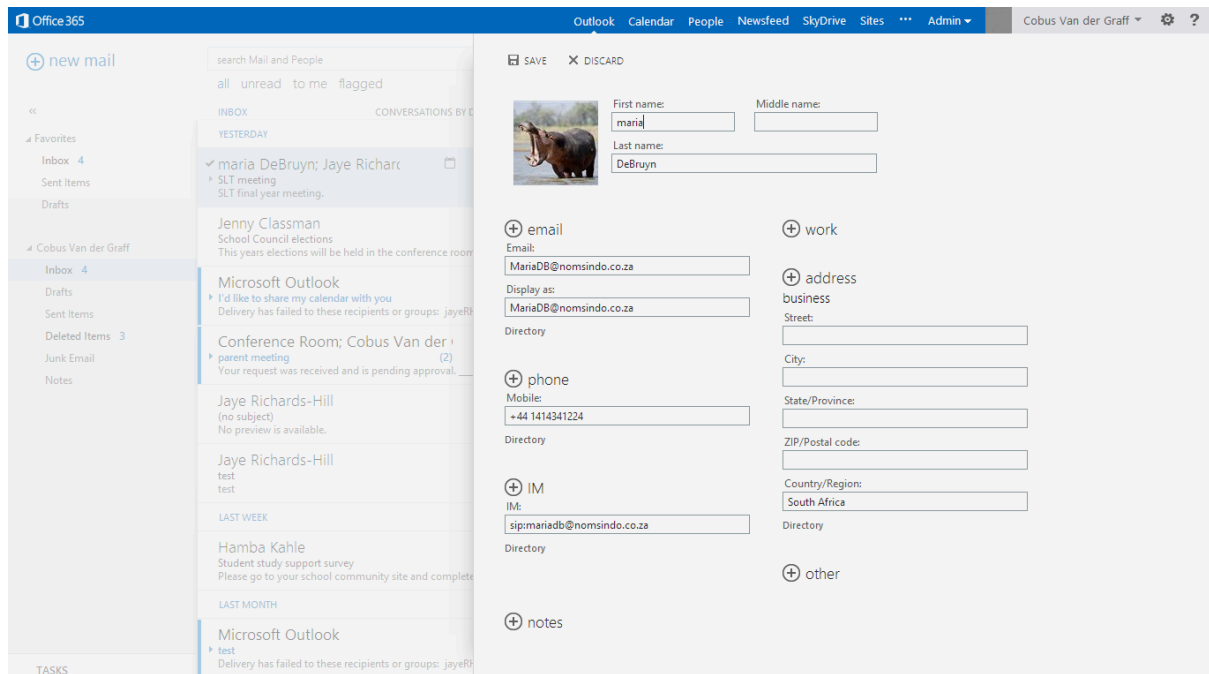
- He clicks on **save** and the sender and their details are now saved to his contacts.

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4. Improving and enhancing communication

- In Outlook Cobus can see **Lync presence indicators** next to every email address.
- He can see at a glance which colleagues are online and available.
- Hovering over the name shows him the different methods he can use to get in touch with that person.
- If they are online, he can start a conversation with them using **IM** or even an impromptu **Lync** meeting.

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# User Scenario - Setting up email distribution groups in Exchange and Outlook

This user scenario looks at using groups for scheduling meetings and keeping in contact with parents and caregivers, but email groups have lots of other uses.

- Mrs de Bruyn is the deputy head who manages admin in her school. She is able to work on **Exchange** because she is an administrator of her institution's Office 365 account.
- She knows there are many functions that a school will not need to use, so she isn't worried that Office 365 Exchange appears to be quite complex.
- The main reason why she wants to use **Exchange** is to set up email **distribution groups** for her institution such as **Staff, Students, Year Groups** and **Departments**.
- She goes to her **Office 365 Admin Dashboard** and clicks on the **Admin** tab from the top Office 365 tabs menu.
- From the drop-down menu, she selects **Exchange**. This opens the **Exchange admin center.**
- She sees lots of different functions but knows that she really won't need to use most of what she sees there, as most of them are for business users. In time she will become more confident and feel able to explore.

For now, she is going to go through the steps involved in setting up **email groups**. This makes it easier to send out bulk email. Some of the reasons her institution might use groups for are:

- Sending out regular staff communications
- Email updates to students and parents or caregivers
- Setting up year groups for students' email
- Setting up school leadership team email
- Sending out regular email to specific departments or faculties
- Email for members of working groups or ongoing projects

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Her screen will look like this:
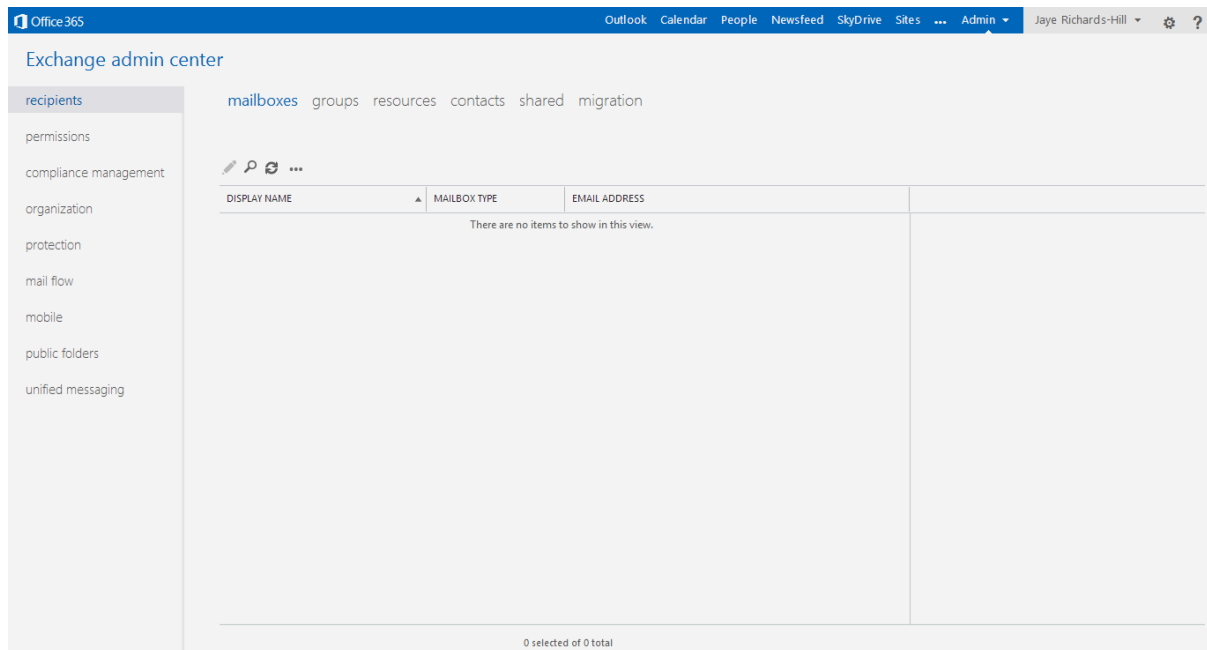
- Mrs de Bruyn clicks on **groups** on the top tabs menu.
- **Adding a new group** is simply a matter of following the on-screen instructions as in previous guides.
- She selects the **+ icon**. A drop-down menu appears.
- Clicking on **distribution group** from the choices opens up a new window on her screen. It will look like this:

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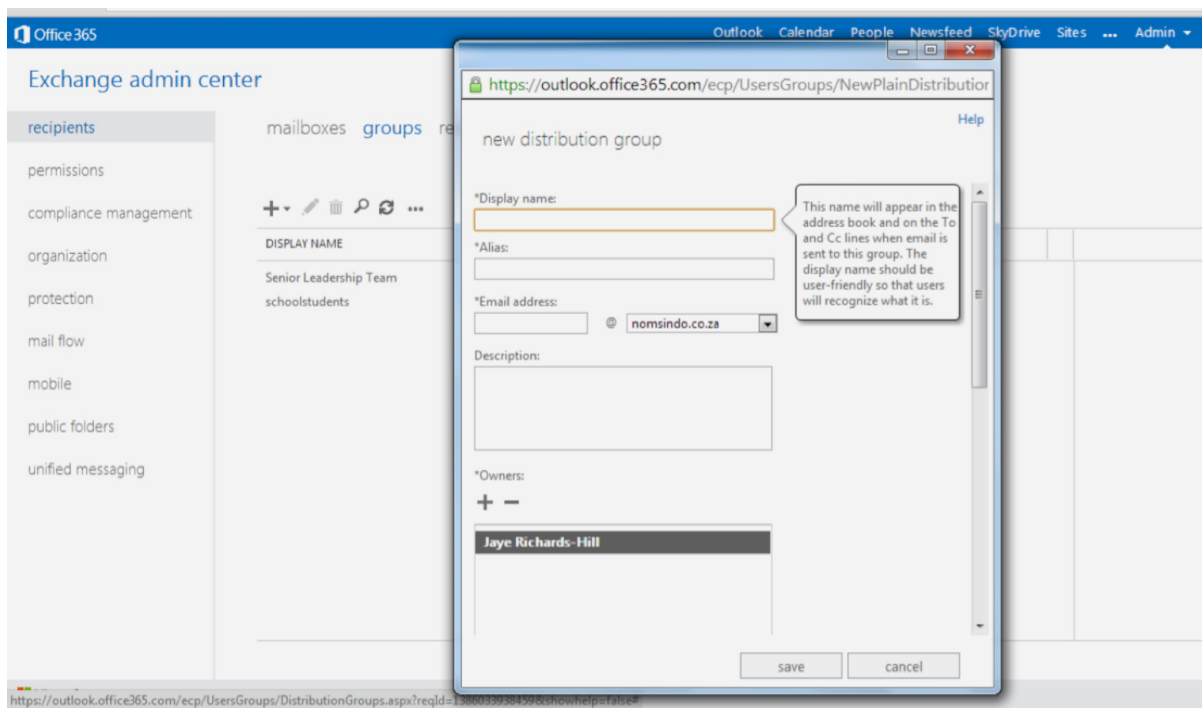
- She works though the fields to create a **distribution group** for her school leadership team.
- The **Alias** is a shortened version of the group name. This will save time when typing the group name into the recipient box each time.
- She uses a shortened part of the group name for the **email address**, for example 'leadership'.
- As she is setting up the new group, she is the **group owner** by default. She can add other **owners** who will also be able to carry out administration functions such as **adding new users** or **deleting users** who have left the institution.
- When she is happy with this, she clicks **save.** Office 365 Exchange will now set up her group. It will appear in the list of other groups that have already been set up by other administrators.
- She can **bulk add** members to the group by hovering over the text and double clicking on the **pencil icon** that appears to the right of the group name. This opens up the **editing** functions box on her screen. A quick way of adding individual new users is to click just once on the icon.

The editing box will look like this on Mrs de Bruyn's screen:
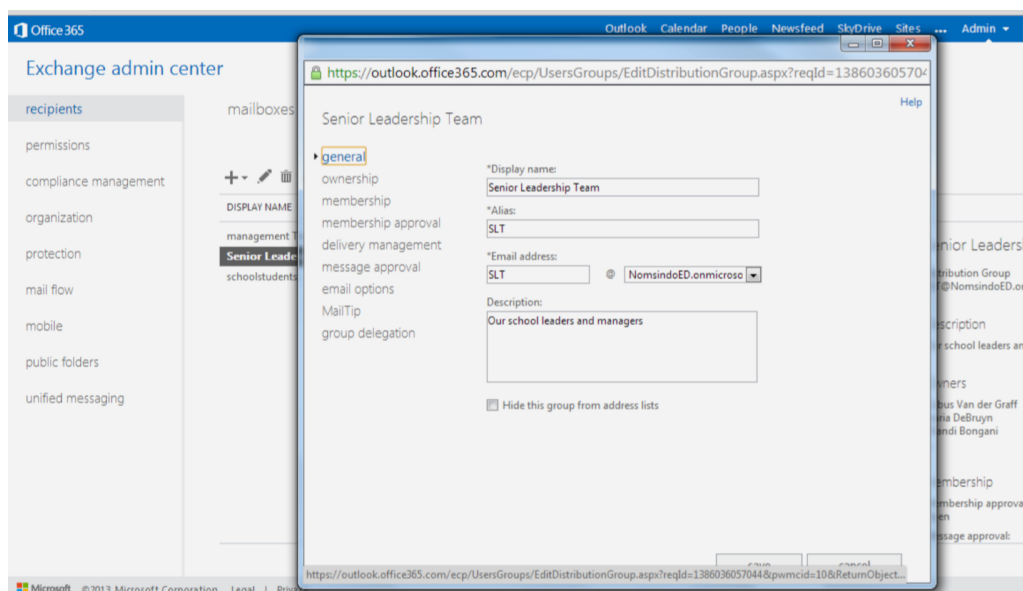
- Mrs de Bruyn now works through the instructions using the menu on the left of the box to **review the owners, add new members** (including herself), change the **approval settings** and other **group settings and email properties**.
- She finds the instructions self-explanatory and only needs to use the **help function** (at the top right corner of the setup box) once.
- She clicks **save** when she is happy and Office 365 Exchange then makes the changes to her distribution group members and settings.
- The group is now ready for use and so Mrs de Bruyn decides to send out an email using the **group email function** to let the other members of the group know that she has set it up.

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She now goes to the main Office 365 tabs menu that runs across the top of the page and clicks on **Outlook**. This opens up her email page.

- She clicks on **+new mail**. The email window opens up on the right of her screen.
- In the **To** line, she starts to type the group name. As she does this, Outlook recognises the group and the name appears as a recipient **prompt** for her to select.
- She types up her email and clicks **send**.
- Almost immediately, she receives a copy of the email as she is a member of this distribution group and so she knows her message has been sent successfully. She sees that she needs to let her team know about their next meeting.
- Mrs de Bruyn clicks **+new mail** again and starts to type in the name of the group. She selects it when the prompt for the group name appears again.
- She finds that if she clicks once on the text containing the group name, another box appears on her screen displaying a list of the group members.
- This box also contains some other useful functions, which Mrs de Bruyn explores. The box on her screen looks like this:
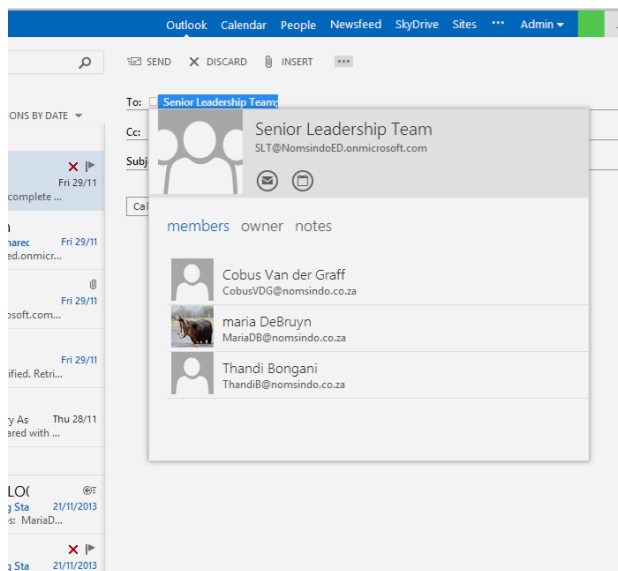
- She hovers over the **calendar icon** above the display names and discovers she can use this function to schedule a meeting.
- She selects this and is given the options for scheduling her meeting. She completes the blank spaces in this box, and uses the **more functions icon** (the three small dots) to attach the agenda as a **Word** document.
- She clicks on **Scheduling Assistant** to view her own calendar for her availability. She can also use this function to see if other members of the **distribution list** are free to attend because their calendars become visible as she enters their names or the distribution group in the **Attendees** line. Once she is satisfied, she clicks **send**.
- When she views her own calendar, she sees that Office 365 has listed the meeting. Clicking on the text opens up the event and she sees that all recipients can reply to her and view the attached agenda as well as viewing all of the other attendees.

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Office 365 works across her **email contacts** and **calendar** to make her job much easier and saves her time and effort.

- She no longer needs to make manual calendar entries and individual emails every time she schedules a meeting.
- When she receives an email notifying her of an event she needs to attend she can enter it into her calendar at the click of a button.
- She is able to see at a glance when other members of her team are available or otherwise occupied when she enters their names into the **Attendees** line of the **Scheduling Assistant** as their calendar availability is automatically shown.
- This also saves her administration time and effort when scheduling events for multiple attendees.
- Her email recipients and groups appear as **prompts** as soon as the first one or two letters of their names are typed into the recipient line of a new email.

Setting up an email distribution group for parents and caregivers

- Mrs de Bruyn now decides to set up a distribution list for the parents and caregivers of her school students.
- She has all of their details on a .csv file and wants to do a **bulk upload** to save time.
- This is easy to do using Office 365 by adding these names to her contacts list. She cannot do this using the **Exchange admin center** as she did for the school leadership team because the parents do not have Office 365 accounts.
- She selects **People** from the main **Office 365 tabs** at the top of her screen.
- She then goes to the **settings icon** (the wheel-shaped one next to her name at the top of the screen).
- A drop-down menu appears and she clicks on **Import contacts**. Her screen looks like this:

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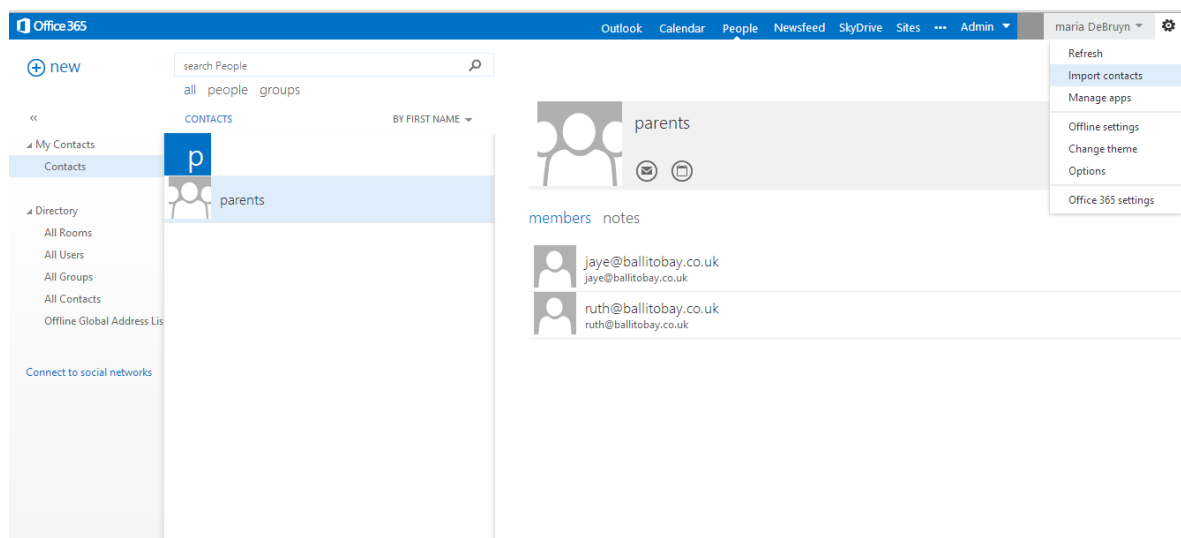
- She is now given the option to upload a .csv file containing all the names and email addresses of her school's parents and caregivers. The screen now looks like this:
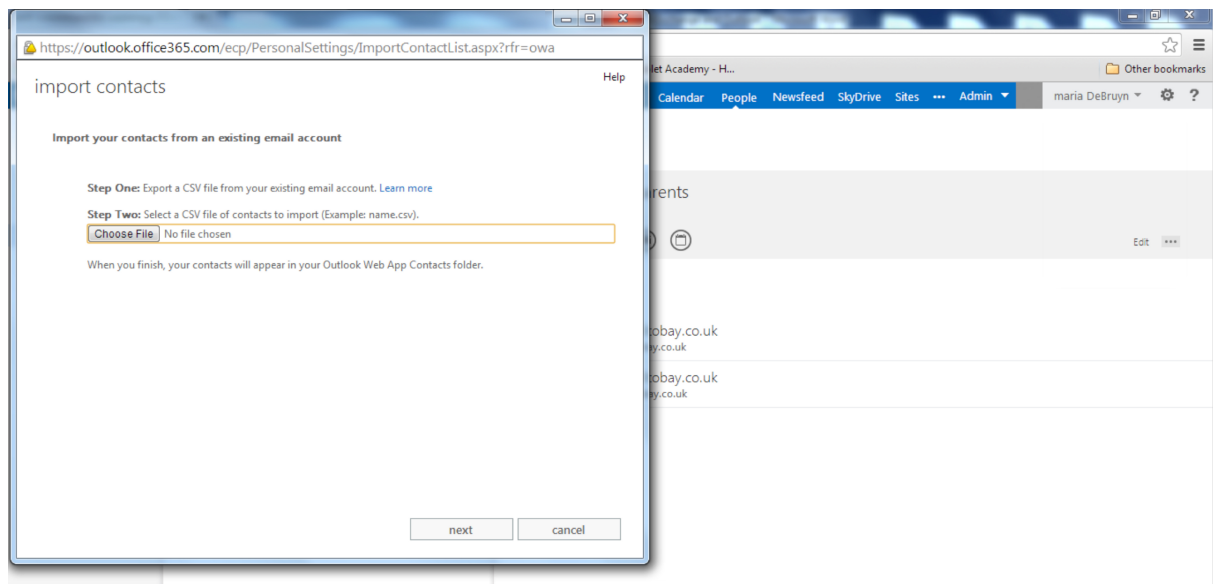
- She selects **Step Two** as she already has a .csv file prepared. She follows the instructions as they appear on her screen and completes the bulk upload.

  *Note: In order to upload your .csv file to Outlook you need to save it correctly in the **.CSV (DOS) MS** format. Use the **Save As** drop-down menu that appears when you first save your file to your computer.*

- Now that her parent list has been uploaded into her contacts, Mrs de Bruyn can set up an email distribution group in Outlook by going to **People** again and clicking on the **+ icon** to the top left of the page.
- She is now given the option to create a **new contact** or **group**. She selects **create group.**
- She gives her group a name and starts to add contacts by searching for the parents' details.
- When all the parents' names have been added, she clicks **save** to create her distribution group.

User Scenario – Staff Communication and Information Gathering

Mrs de Bruyn receives an email from the Education Department asking urgently for some statistical information that is required before the end of the school day.

Before the school had Office 365 this would have meant holding an emergency staff meeting, requiring teachers to leave their classes to hear the request and ask any questions about what they needed to do. This always has a negative impact on learning and teaching.

Forms and paperwork would have been handed out for completion and then collected, and the information collated and returned to the Education Department, all taking up lots of time. Meanwhile students, with no adult supervision, tend to cause disciplinary problems and learning activities are interrupted.

But now, when Mrs de Bruyn receives such email requests, she knows she can use the **communication tools** in Office 365 to save on admin and prevent loss of learning and teaching time.

- She receives the statistics request via **email** from the Department of Education.
- Mrs de Bruyn sends an **email** via **Outlook.com** to all staff using the **Groups** option and the staff distribution group, which has already been set up in Exchange. The email contains a **link** to **OneDrive** where the applicable documents are shared with teachers.
- She adds a **Meeting Request** to the email, marked as **urgent**, and staff members must **accept** it. In this way she keeps track of the process and ensures that the staff will complete the documentation.
- Absentees receive the email on their mobile phones or computers at home. They complete the forms in the same manner as the teachers who are present at school.
- Each staff member opens the documents on **OneDrive** and completes their form electronically. Instructions are provided, but staff can ask questions regarding uncertainties via **instant messaging,** as Mrs de Bruyn's **status** on Office 365 shows she is available.
- She keeps track of the progress of completion by using the **Task** facility in her own **SharePoint personal site**.

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User Scenario - Using Office 365 for Staff Professional Development

This user scenario is a summary of ideas for use in your school or education institution.

Traditionally, **records of qualifications** and teacher's **professional development activities** often go unrecorded or are filed away somewhere. Poor recordkeeping can lead to teachers not being acknowledged for their **professional development** activity and achievements, and these records really should be immediately accessible. Despite this, teachers have often neglected this duty because it is very time-consuming.

Cobus van der Graf is the deputy head teacher who has **staff professional development** as a part of his management responsibility. He understands how important it is for each member of his staff to set up and maintain a **Continuing Professional Development Portfolio**.

He knows that Office 365 can help save time on these administrative tasks and free up more time for quality learning and teaching interactions. He has some ideas about making the process of carrying out and recording staff professional development activity over the course of the school year. He aims to use Office 365 tools and services for the following activities:

- He ensures that each teacher compiles a portfolio of evidence of achievement and details of all professional development activity, such as certificates. This is stored on **OneDrive** for easier access.
- Proof of a workshop attended, in the form of **photos** and **video,** can also be shared in an individual album to enhance this **portfolio**. It can be done using a **mobile device** and uploaded to **OneDrive** to ensure instant capturing of participation at the time of the training activity.
- Photos can be turned into a slideshow on **OneDrive**. If **video** evidence is available it can be edited using **Windows Movie Maker** and stored as media in the same **OneDrive** folder. With 25GB of individual space, there will be room for this sort of evidence of achievement.
- To keep track of professional development through the year, the **Task** function in **Outlook** (at the bottom left of the **Outlook screen**) and shared **calendar** entries in **Outlook.com** can be used to record time spent on certain activities following the annual professional development review between Cobus and each member of staff.
- When professional development opportunities arise, Cobus sends an **email** via **Outlook.com** to the staff. They can then **accept** or **decline** the invitation. Cobus sends regular reminders and uses shared **calendars** showing all **professional development opportunities**.
- The staff then organise their professional development activities using **Calendar** in **Outlook.com**.
- Teachers can create subject groups for group discussions using **instant messaging, Newsfeed** and **Lync meetings.**
- Cobus and the Heads of Departments use the teacher portfolios stored on **OneDrive** by each staff member to identify the strengths and weaknesses of individual teachers and departments. This directs the planning of further targeted professional development opportunities during the year.
- Teachers can participate in surveys created using **Excel Online**. The links to the surveys are sent via **email** in **Outlook.com** and posted in **Newsfeed** in the staff **SharePoint site.**

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- Good practice in learning and teaching is recorded by **blogging** using **SharePoint blogs** to compare classroom experiences and share ideas to further help with staff development. These **blogs** are shared using the school staff **distribution group** set up by the administration staff for the teachers to use.

- Teachers can create a folder in **Outlook.com** with a list of **weblinks** to particular educational online articles they have read to further their knowledge. They can share these folders using email and group **distribution lists** and **contacts** information.

- A folder can be created in **Outlook.com** to keep record of educational correspondence such as Department of Education circulars, minutes of meetings, etc. This could also be done using an **Exchange shared mailbox** for school professional development email.

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User Scenario - Calendar sharing with Outlook

Sharing is a default function in Office 365 and is securely managed by **Exchange** between users within the same domain.

Jenny Classman is chair of the student representative council. She wants to share her calendar with her fellow students as there are several important events coming up. She must also share her calendar with Mrs de Bruyn, the deputy head responsible for student affairs on the senior management team.

- Jenny logs onto Office 365 and selects **Calendar** from the main Office 365 tabs menu. Her calendar opens and she types in the new events the students need to be aware of.
- She then clicks on **Share** and is given a series of choices.
- She wants to share with all the school students so she starts to type **School Students** into the **Share with** box. Office 365 offers her a **prompt,** which saves her from having to type in the full **user group** name.
- She also starts to type Mrs de Bruyn's name and receives another **prompt**. Her screen now looks like this:
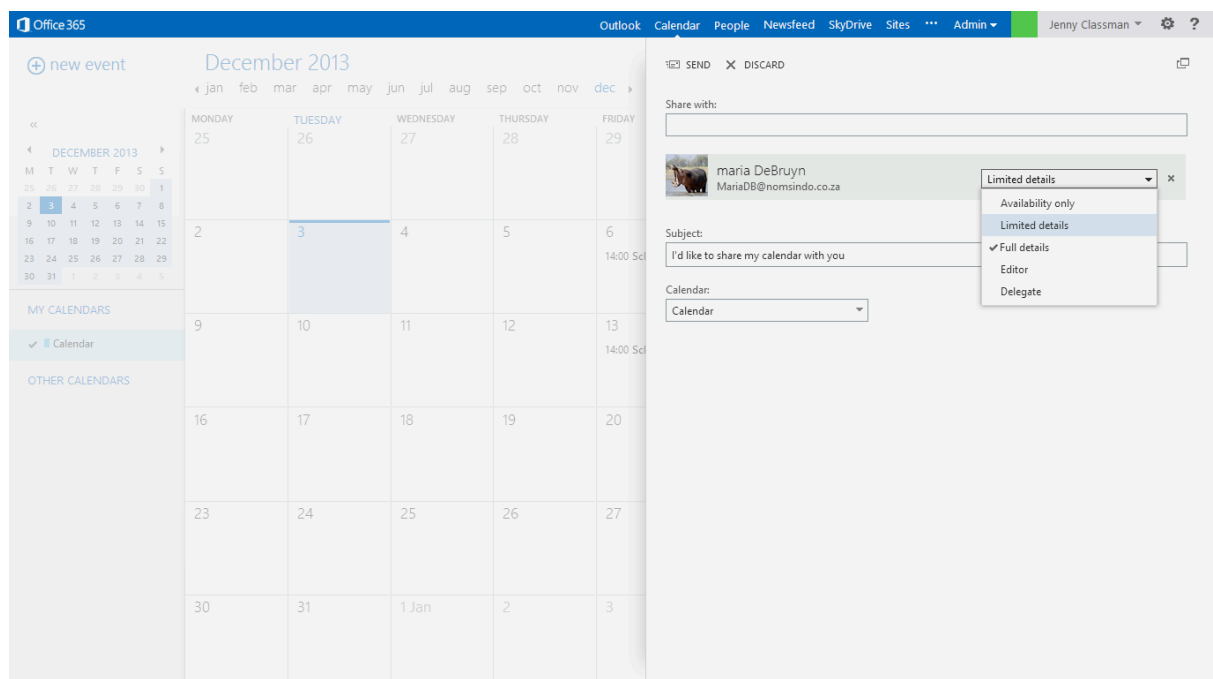

- She then has to decide how much detail she wants to share with them.
- She has three options - **Availability only** is the first choice. The other options allow for more of Jenny's calendar to be shared. She selects **Full details** from the drop-down menu to the right of the recipient's names.
- She then clicks **send**. Each recipient receives an email with a link inviting them to share her calendar.

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- Mrs de Bruyn receives her invitation. She decides to share her own calendar with Jenny as well, although with restricted access by selecting the **Availability only** permission level. Her screen looks like this:
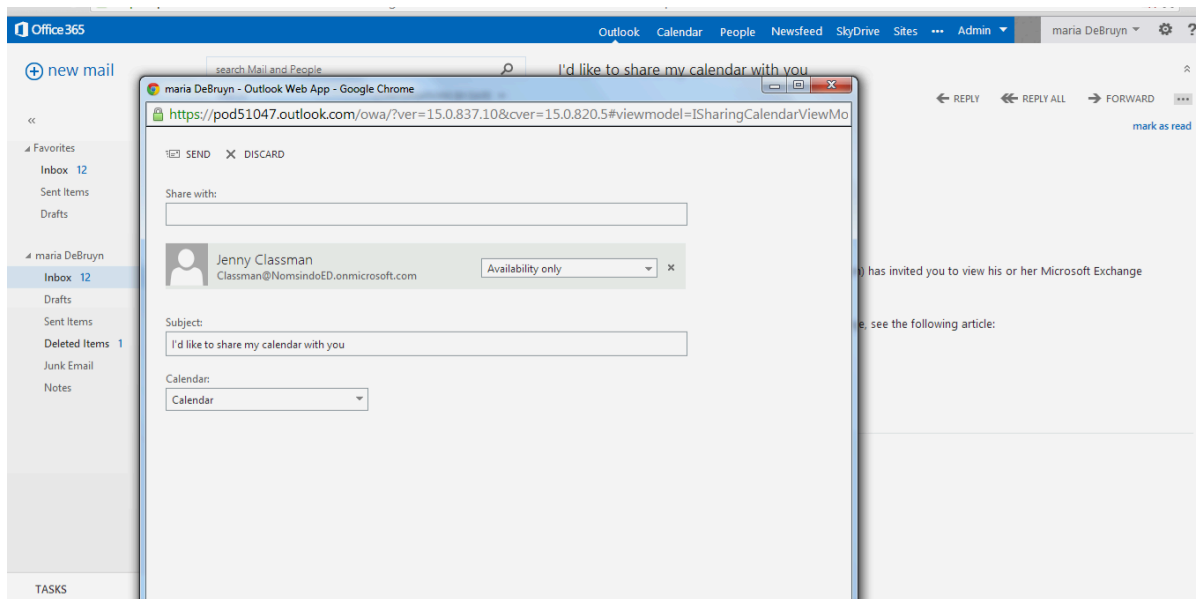

- When she accepts the invitation and clicks on the **Add calendar** link, Jenny's calendar appointments will appear in a **shared calendar screen** with her own.
- Jenny will only see Mrs de Bruyn shown as **'Busy'** on her calendar because the sharing option is set to **Availability only**.
- They can also **hide** each other's shared calendar by going to **My Calendar** and **Other Calendars** on the left side of the page.
- Mrs de Bruyn's calendar now contains **Jenny's scheduled shared meetings**. It looks like this:

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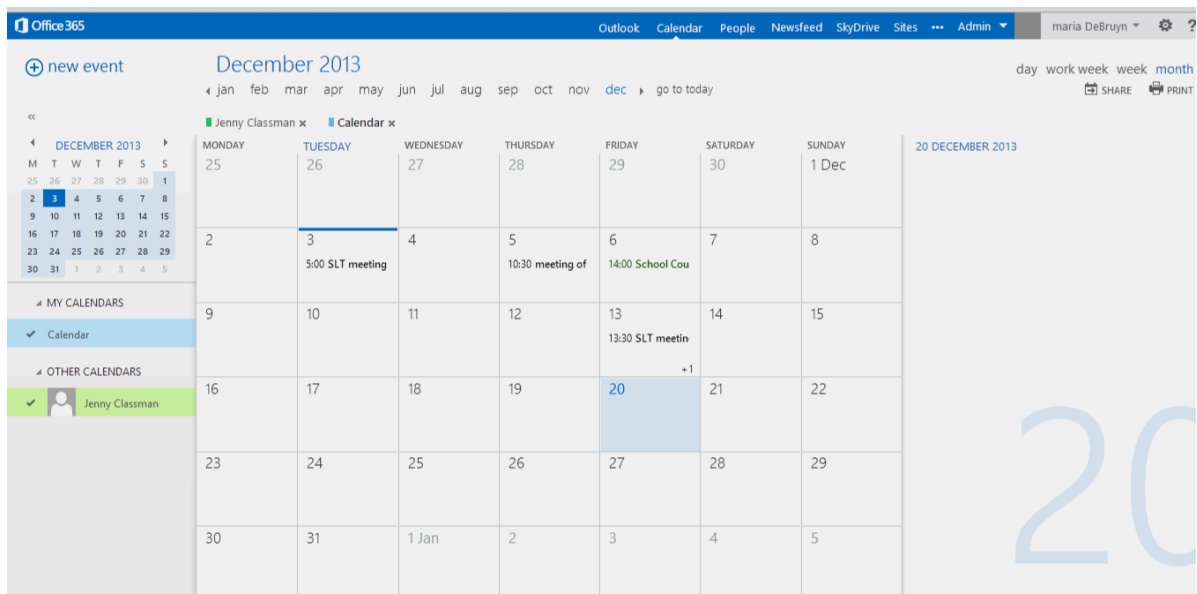
- Jenny explores the other sharing options by going to **Calendar** on the left of her screen and selecting **Permissions** from the drop-down menu.
- This allows her to change the permissions on all of her shared calendars and so she opens the drop-down menu to the right of the Mrs de Bruyn share and sees another two options.
- As before these options are **Limited details,** which will allow the recipients to see the first line of her calendar entries, and **Full details**, which will let them see everything.
- Once she has made her selection, she clicks **save**.
- Jenny now has Mrs de Bruyn's scheduled meetings on her calendar (but only shown as **'Busy'**). Her screen now looks like this:
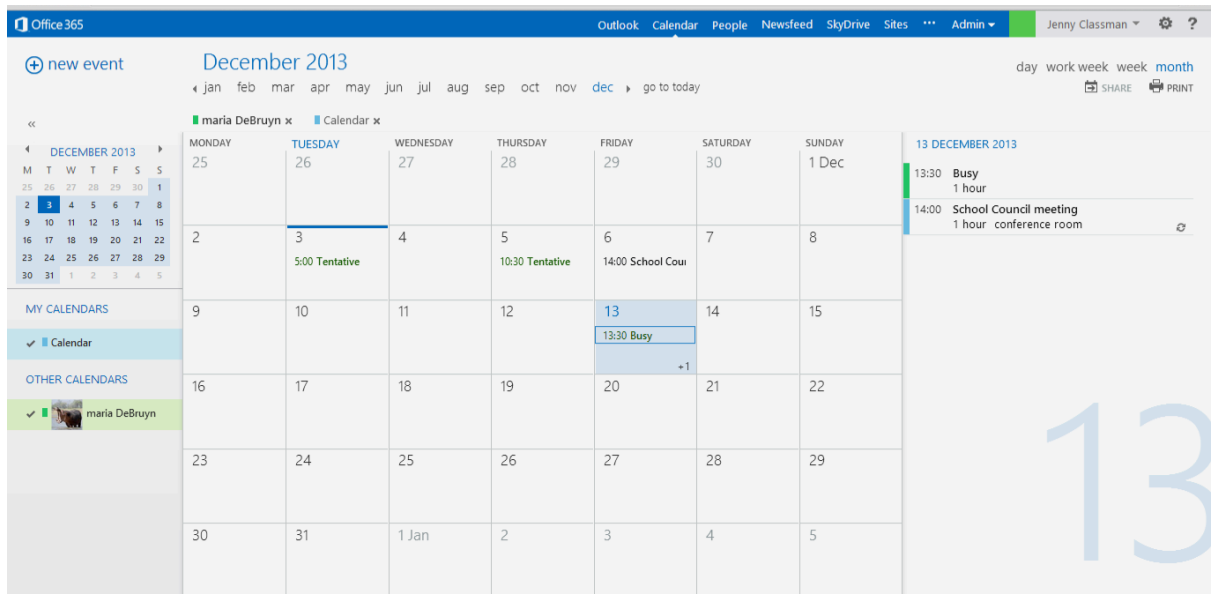
- Jenny's events are shown in blue and Mrs de Bruyn's are in green. At the right side of the screen she can already see a clash of events for Mrs de Bruyn and considers changing her own event to accommodate this. This is where **Office 365 sharing** really becomes very useful and saves time.
- Jenny realises that she should now use the **Scheduling Assistant** function whenever she is making a new calendar entry. This shows her dates and times of all her meetings and those of other users who have shared their calendars with her.
- Her screen will look like this with her calendar alongside Mrs de Bruyn who has shared her calendar with Jenny: (Mrs de Bruyn would see a similar view when she uses **Scheduling Assistant**)

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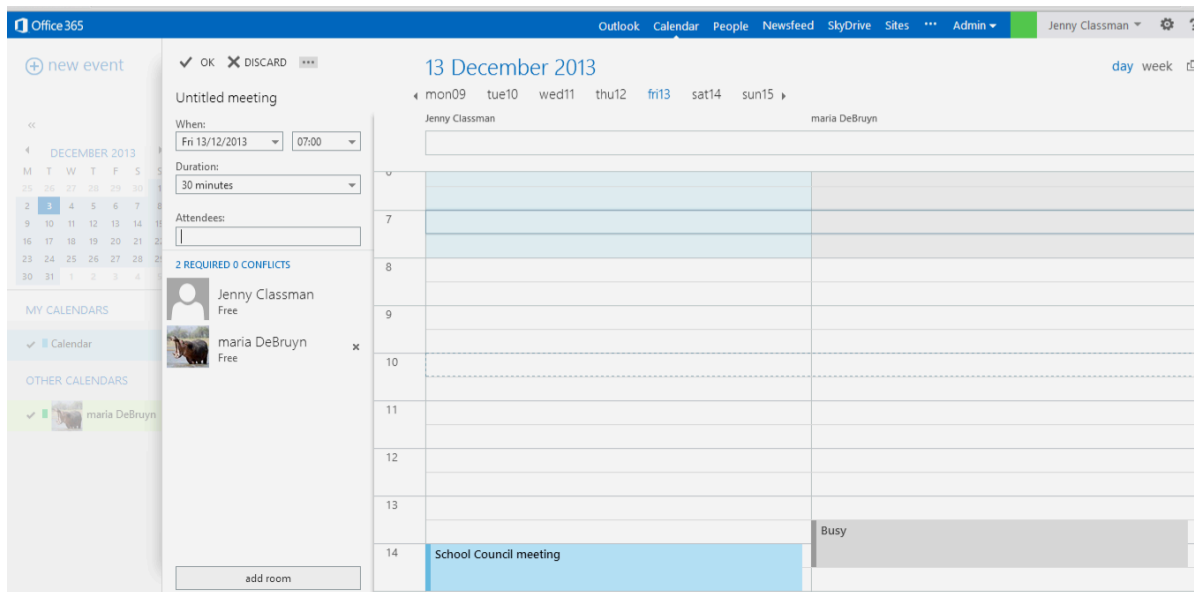
- These **sharing functions** can be very powerful tools for schools and other education institutions as they can save time for everybody when scheduling events.
- Public Calendars with **assessment deadlines** and **examination dates** help students and their parents or caregivers to plan study time and family events so as not to clash.
- Schools can make these calendars available to parents and caregivers by sending out the link in their newsletters or replying with it to parents' emails.
- **Home-school communication** can be greatly improved with shared calendars as they are dynamic and can be kept much more up to date than paper versions that need to be printed, duplicated and sent home.

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