CAL STATE EAST BAY

CSUEB IT
Introduction to Microsoft 365 [M365]

Goal

What to expect after migration and an introduction to our new way of communicating and collaborating using M365 Web version.

Hybrid life for now...	
M365	**Google**
Mail	Shared Drives
Calendar	Tasks
OneDrive	Groups
Chat w/ migrated people	Chat w/ non-migrated people
Teams	Photos [not being migrated]

M365 apps vs. Google apps

M365	Google
Outlook (e)Mail	Gmail
Outlook Calendar/To-Do	Calendar
	Tasks
OneDrive	My Drive
Teams	Workspace
MS Suite; Word, Excel, Powerpoint, Forms… etc.	Docs, Sheets, Slides, Forms… etc.

Supported Browsers

Safari and Chrome: Microsoft 365 is designed to work with the current version of the Safari and Chrome browsers.

Microsoft Edge: Microsoft 365 is designed to work with the latest version of the Microsoft Edge browser. Microsoft 365 might continue to work with older versions of the Microsoft Edge Legacy browser, but Microsoft can’t provide any guarantees.

What we'll be covering

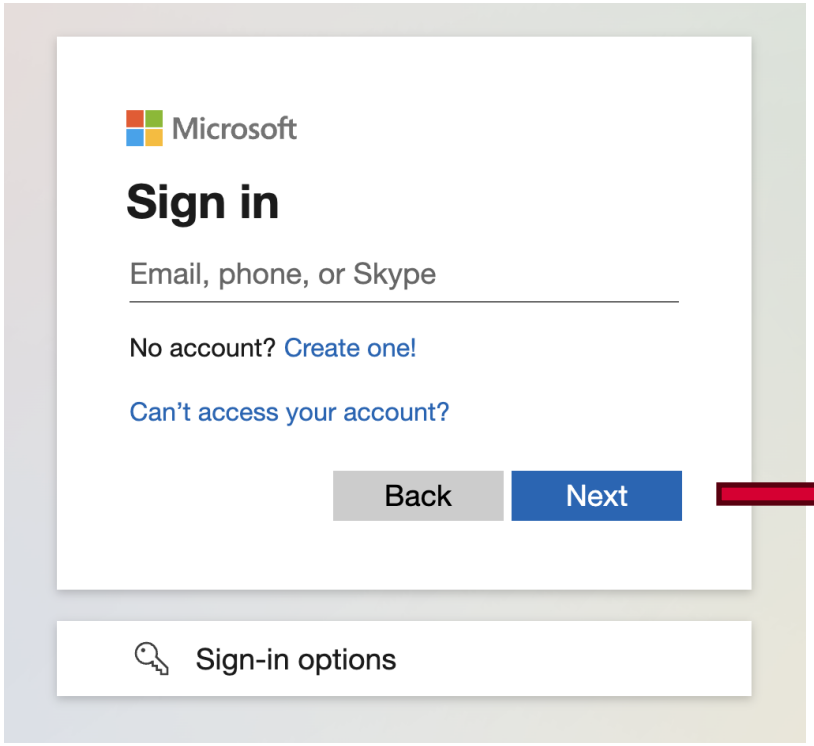
- Accessing M365
- Outlook (e)Mail
- Outlook Calendar/To-Do
- OneDrive
- Teams

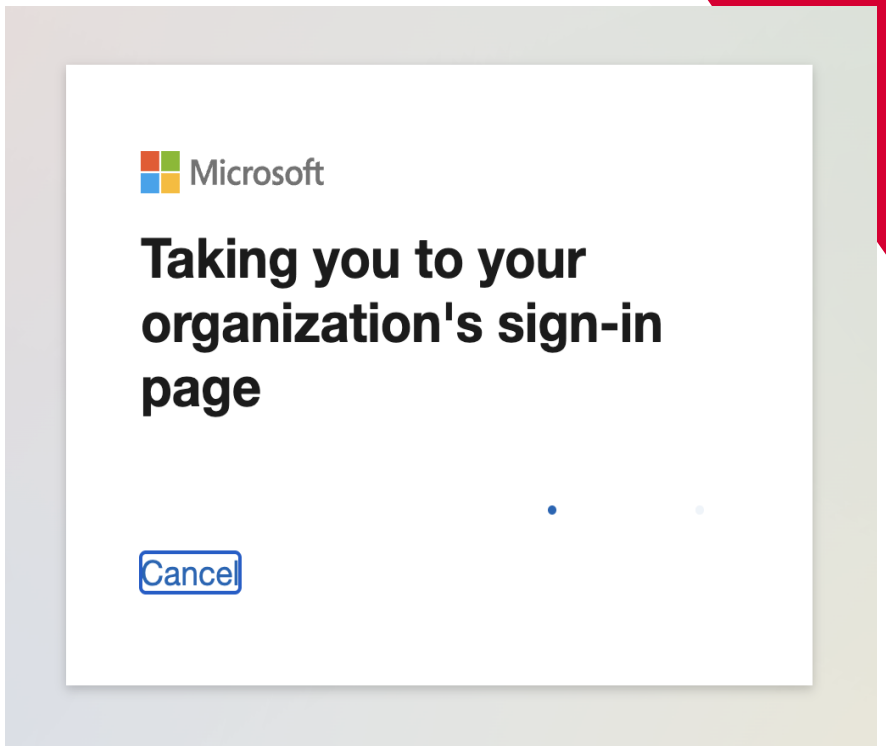
Accessing Microsoft 365

outlook.office.com/mail/

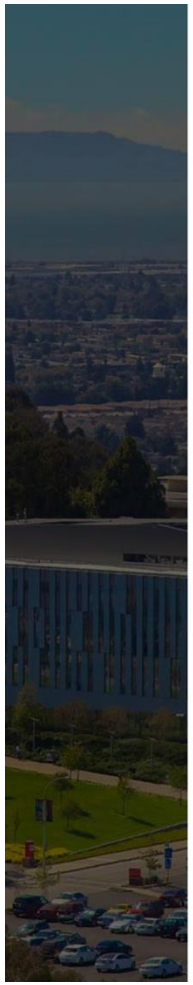
Initial Sign-in Process

1. Go to: outlook.office.com/mail/
2. Enter your CSUEB email address
3. Click Next



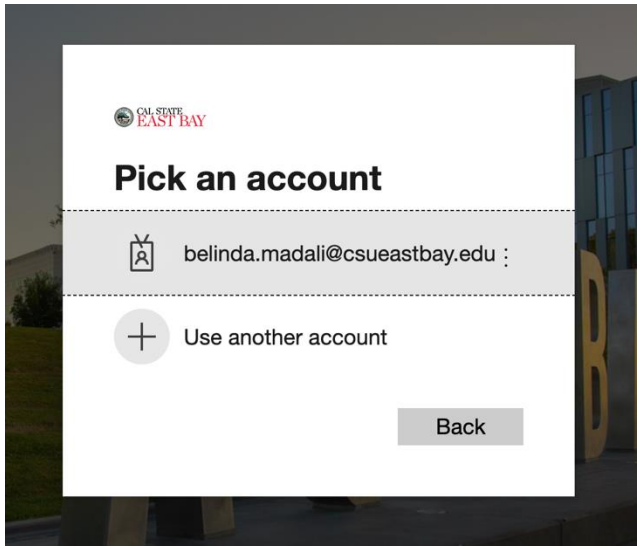


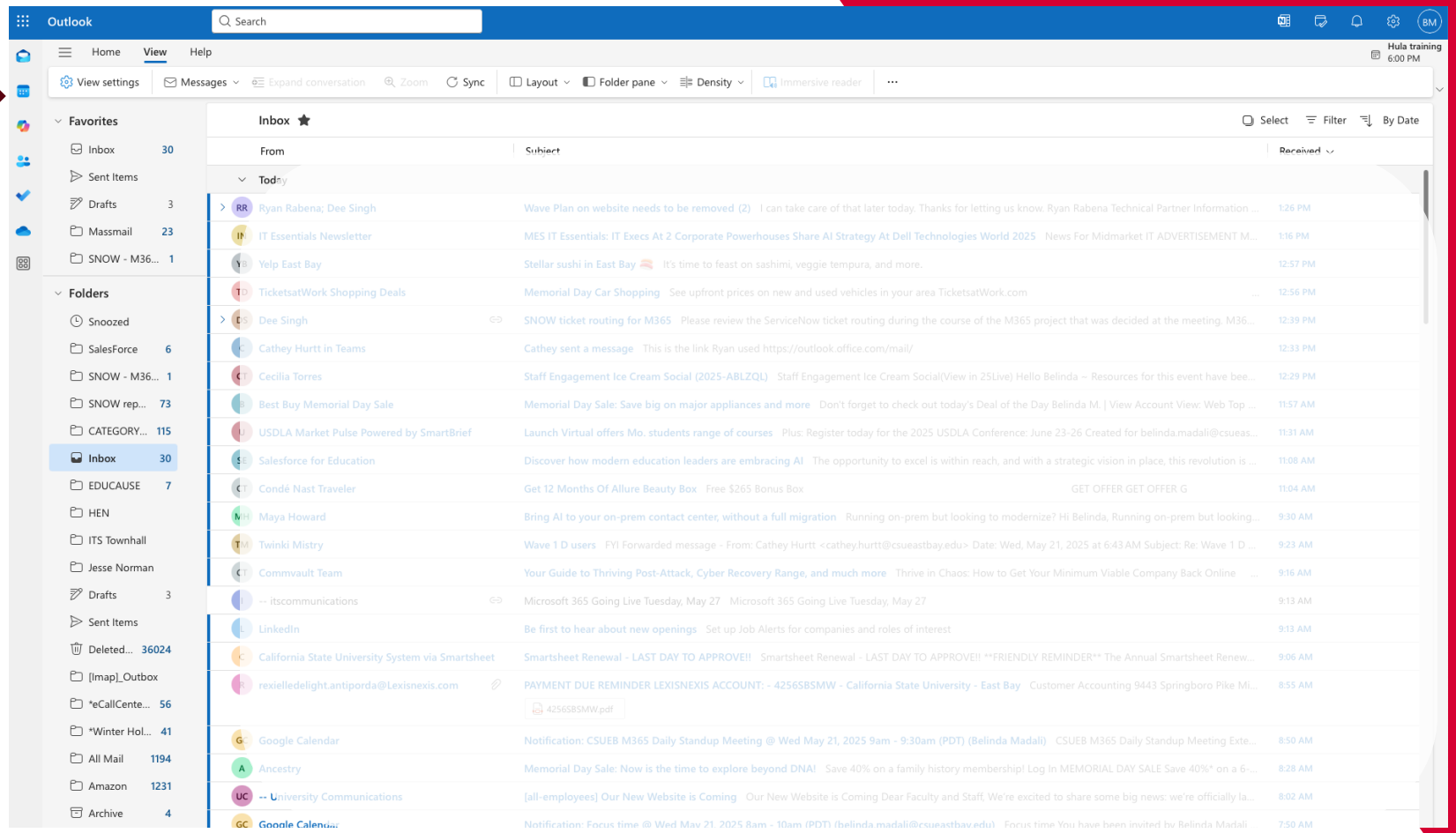
Duo Authentication



- Enter your NetID and Password
- Click Sign In
- This will trigger the Duo authentication.

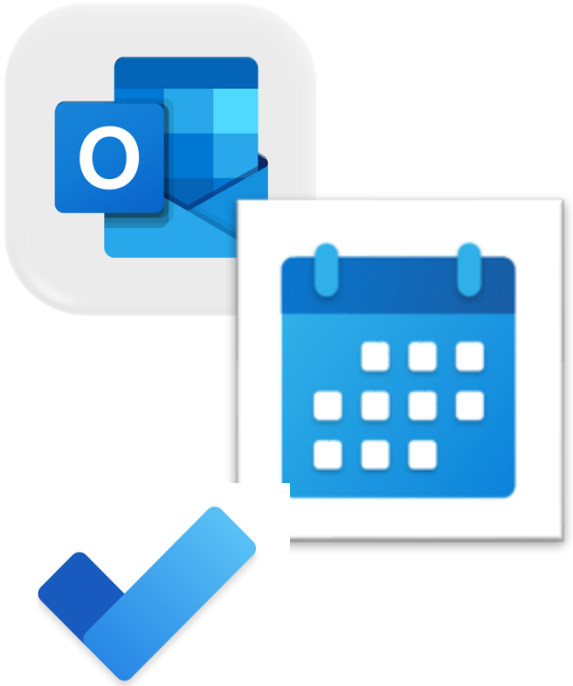
Choose your account and it will take you to your Outlook Mail.





Outlook

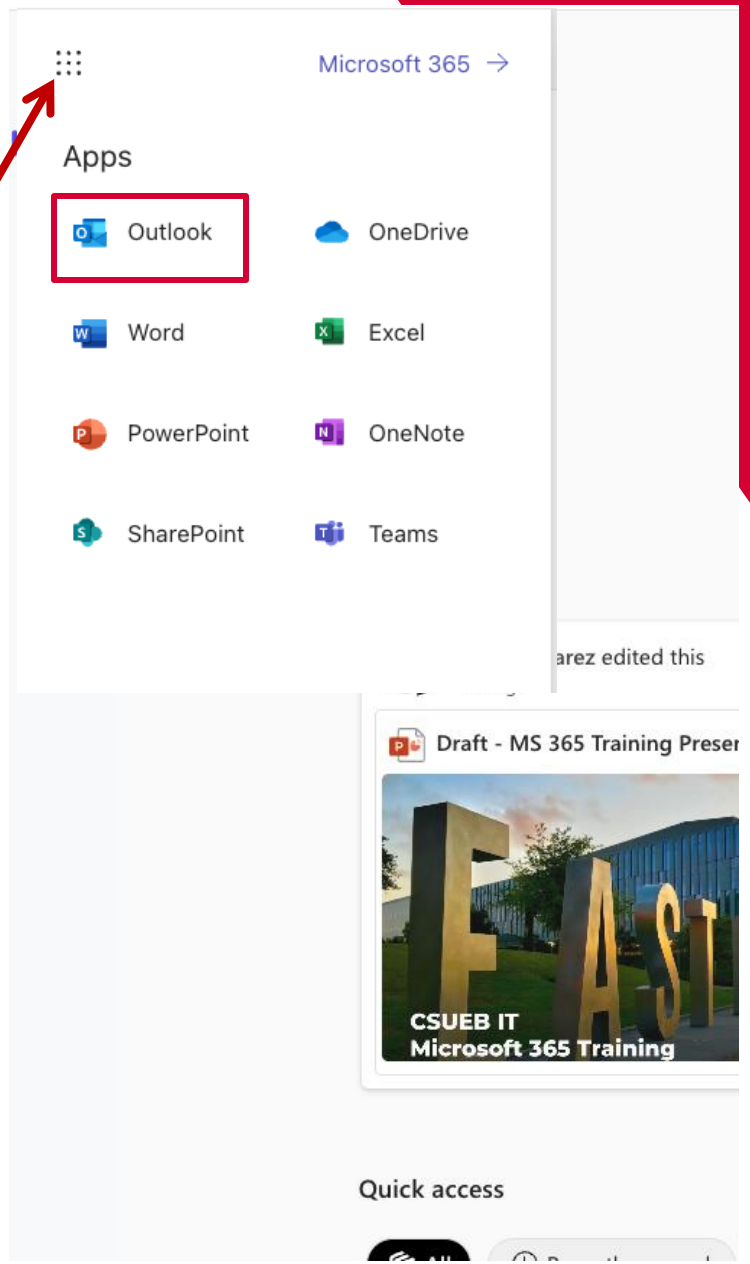
- (e)Mail
- Calendar
- To-Do



Outlook through App Launcher

If you are not in your Mail app already, here is how you would get to it.

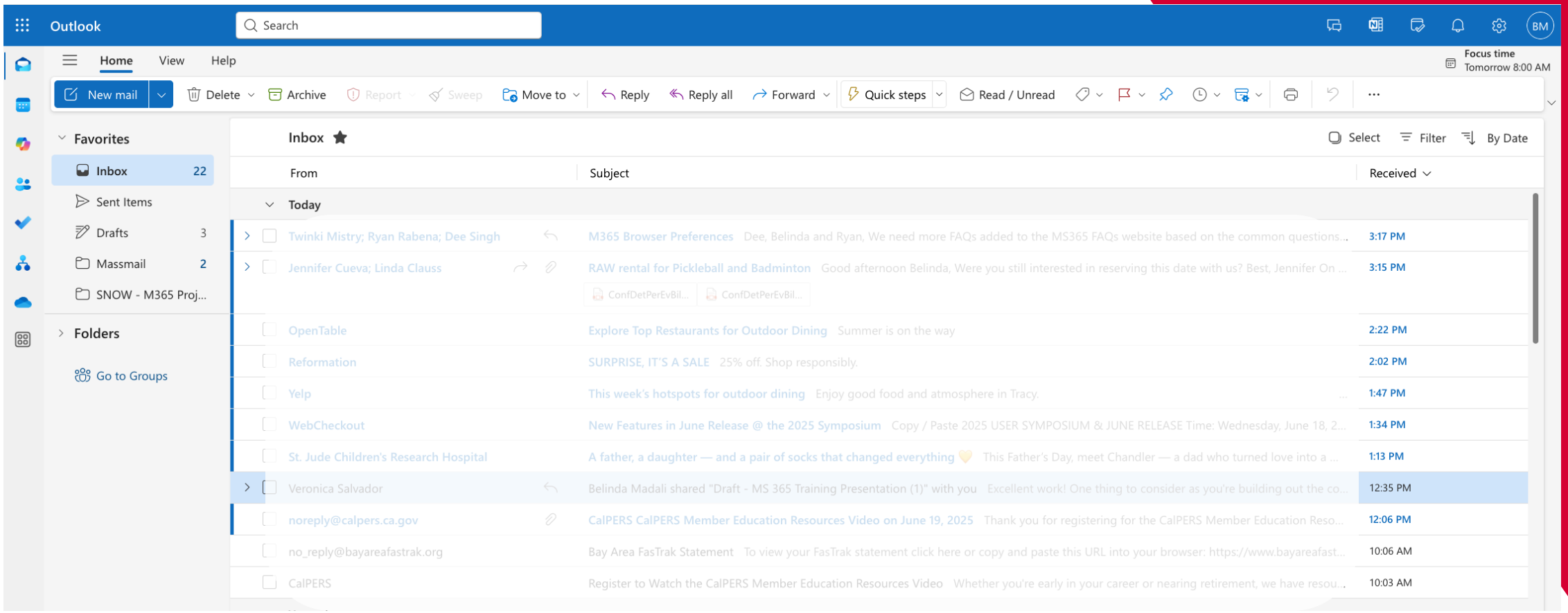
- Top left click the Apps Launcher.
- Choose Outlook



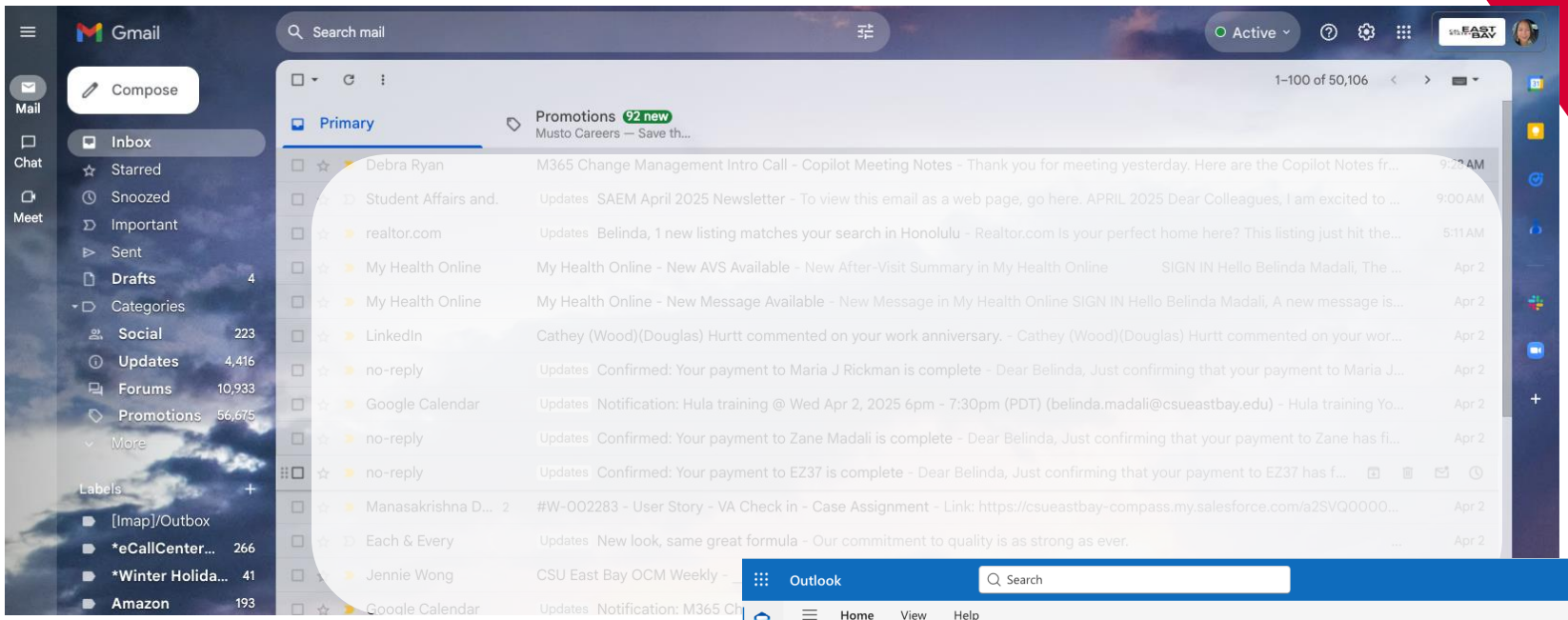
Outlook - Mail

outlook.office.com/mail/

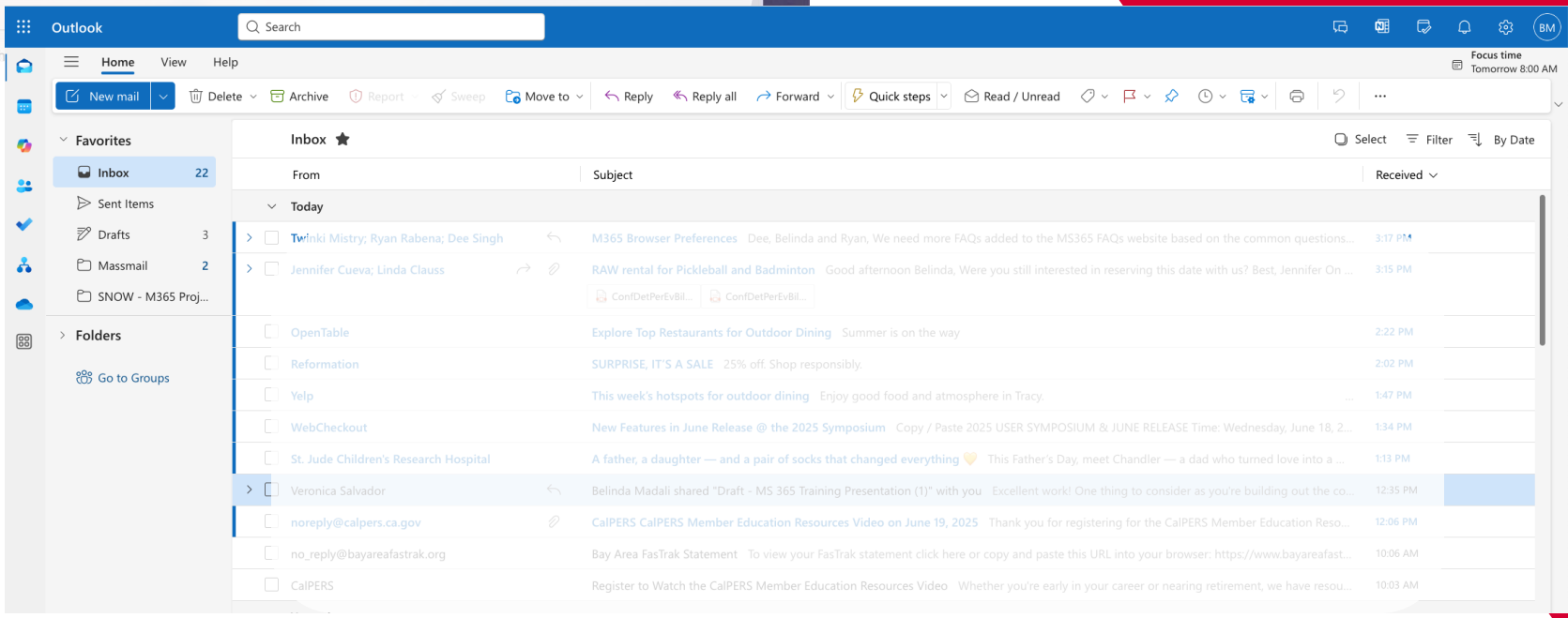
Outlook Mail



Gmail

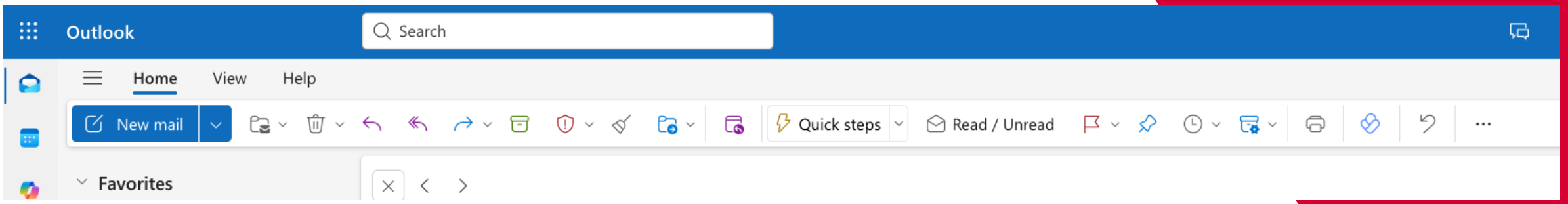


Outlook Mail

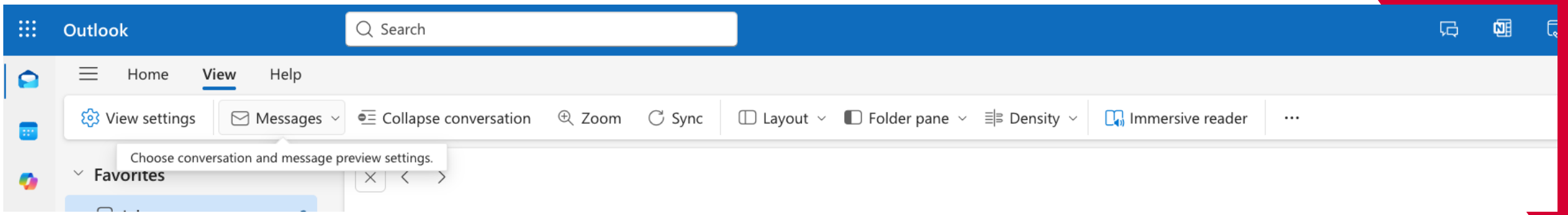


Menu Tabs – Home & View

Home Tab



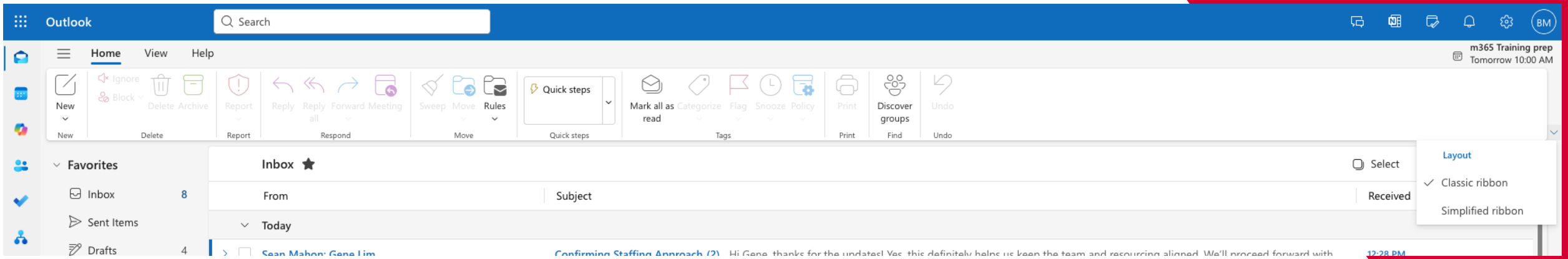
View Tab



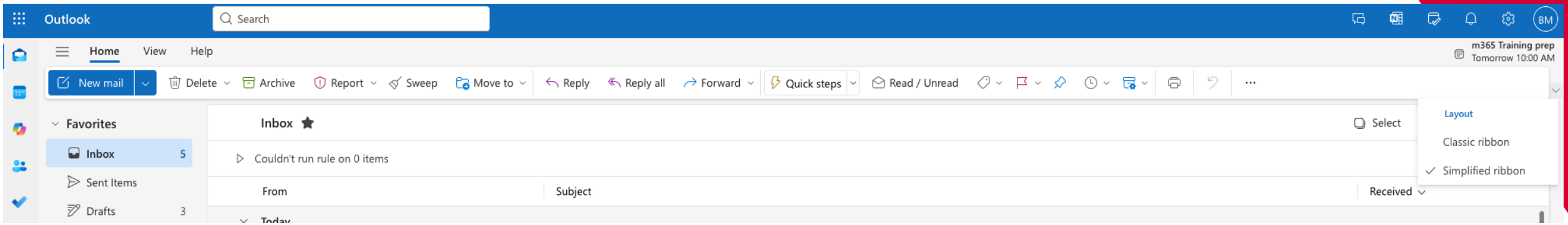
Outlook Mail – Ribbons (top menu)

Two different views for the menu ribbon.

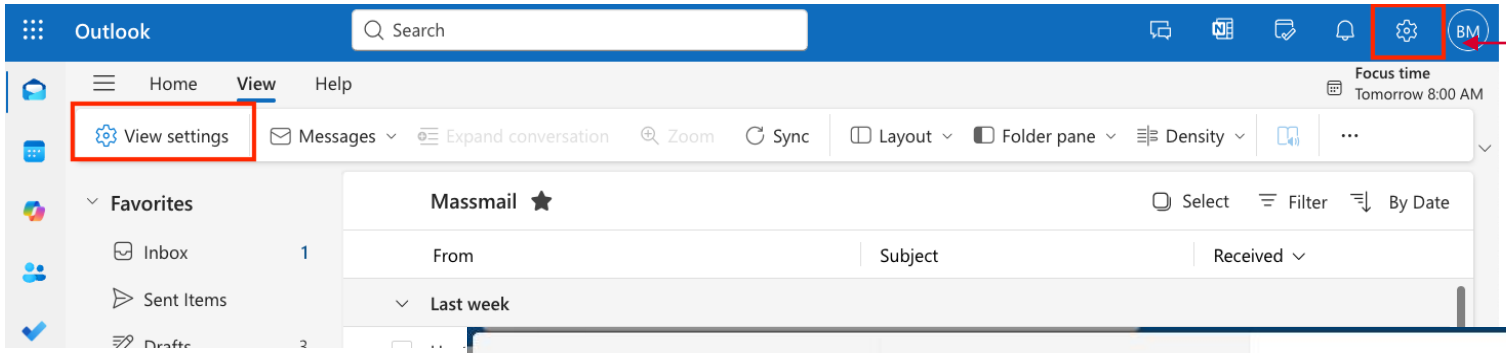
Classic Ribbon



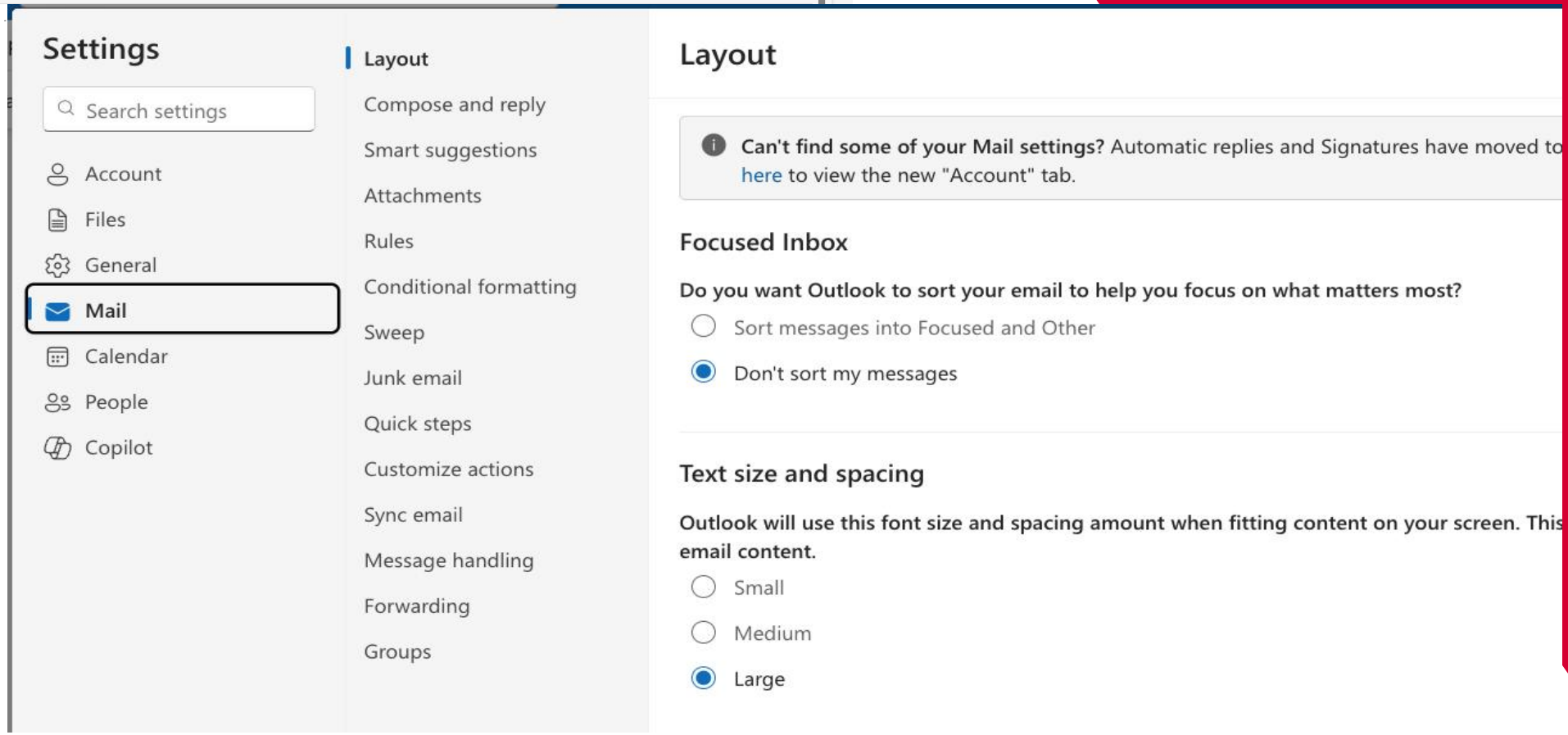
Simplified Ribbon



View Settings (what it covers)



Tip: You can, also, click the gear icon next to your profile to get to "Settings"



***Important:**

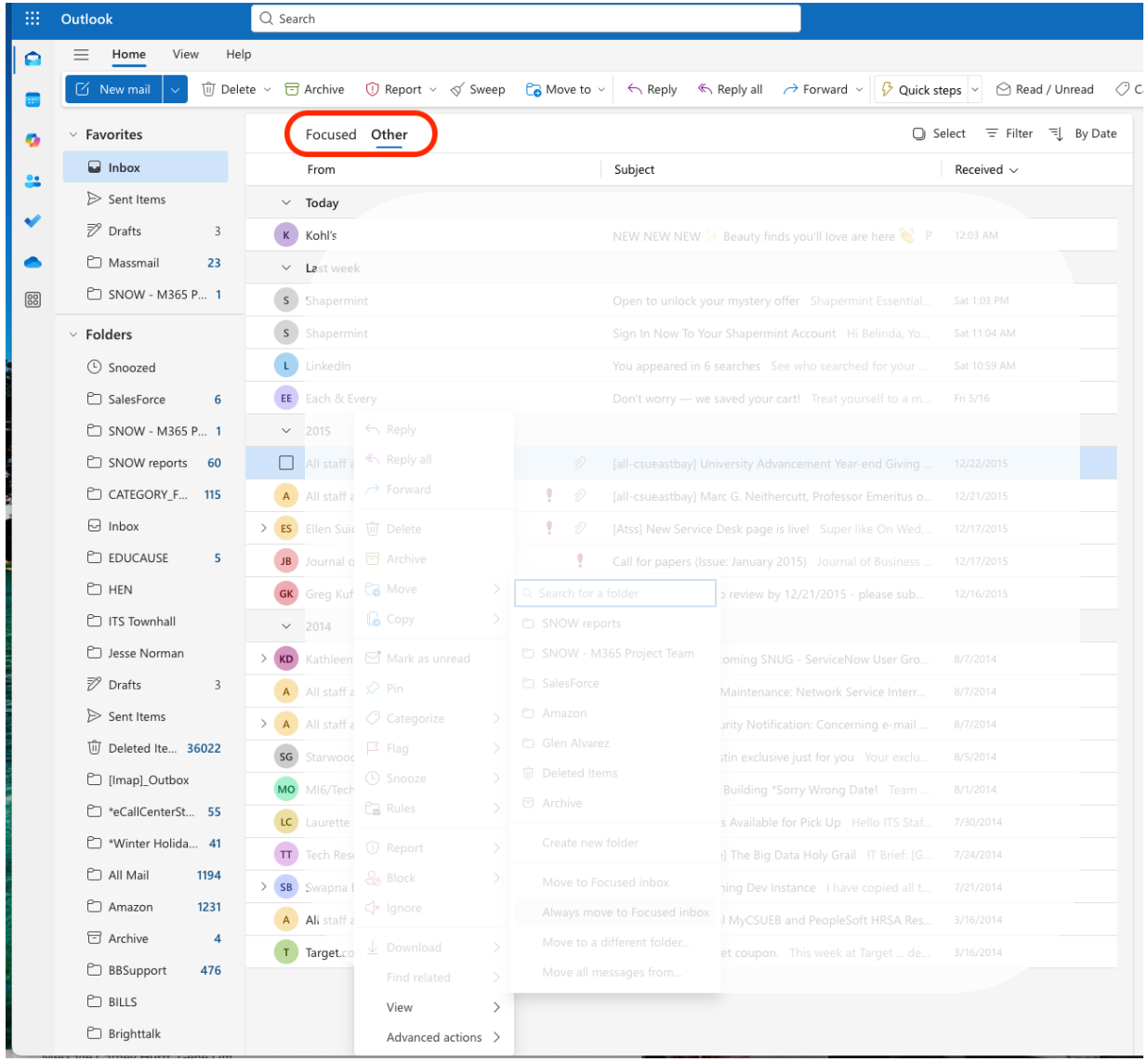
When you log into M365 Outlook you may receive a message stating "your mail is being forwarded to xxxx@gm.csueastbay.edu”

DO NOT CHANGE THIS SETTING.

This is used for the migration purposes.

This will remain this way until we are fully off of Google.

Focused vs. Other

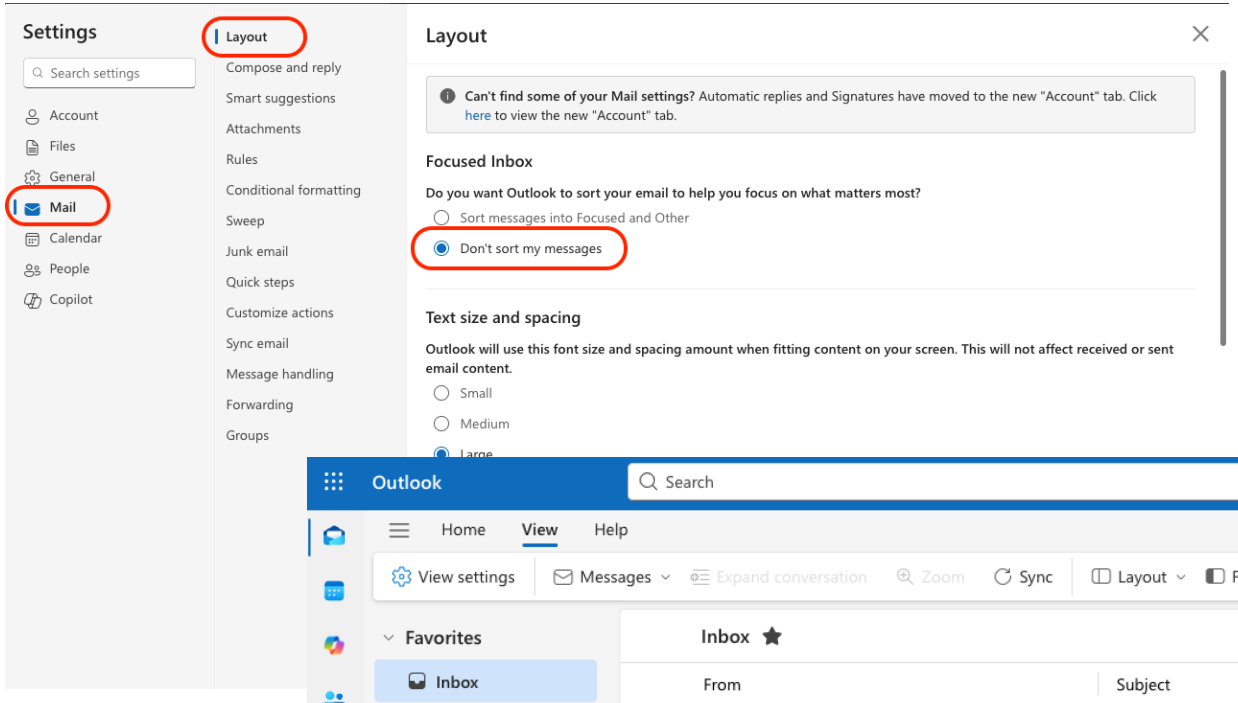


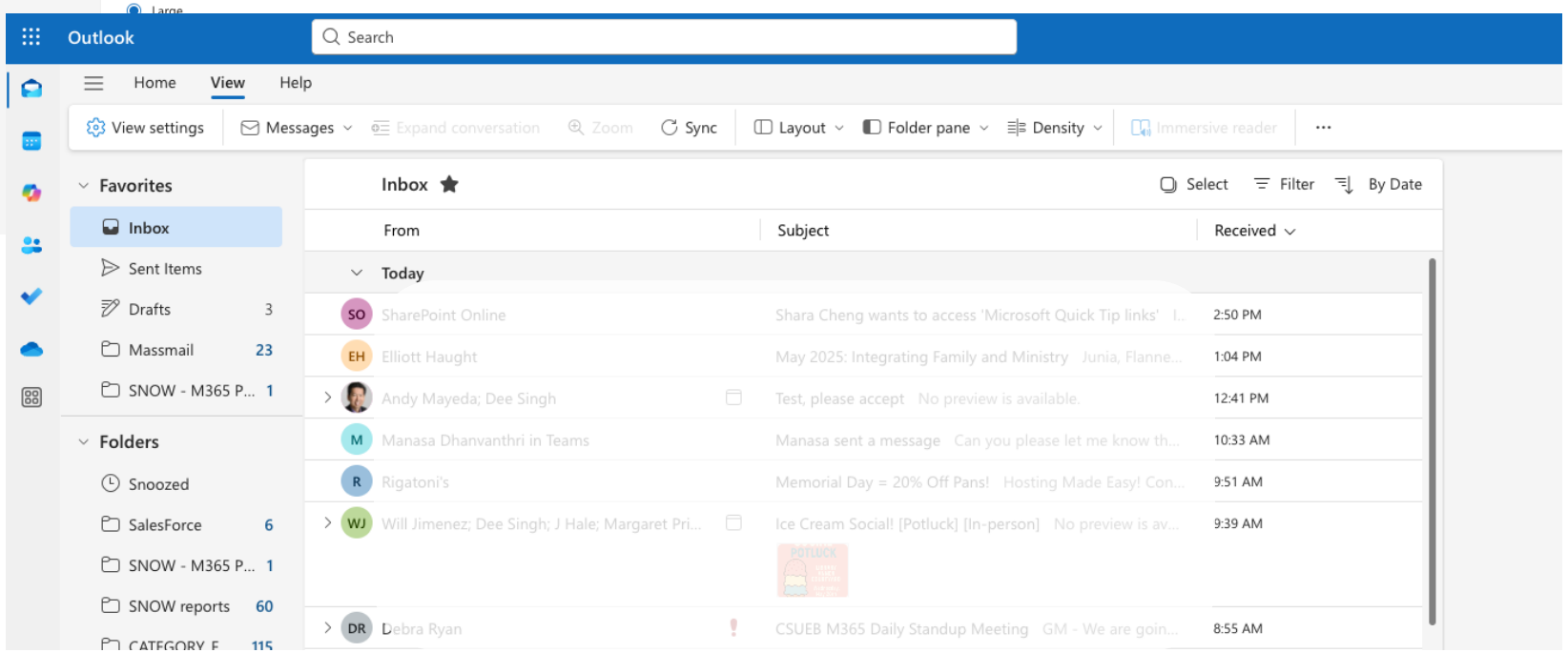
"Focused Inbox intelligently pre-sorts your email so you can focus on what matters.

It places your most important emails in Focused and the rest in Other. Focused Inbox works across all your email accounts, personal and professional."

~ Microsoft

Stop sorting by Focused/Other



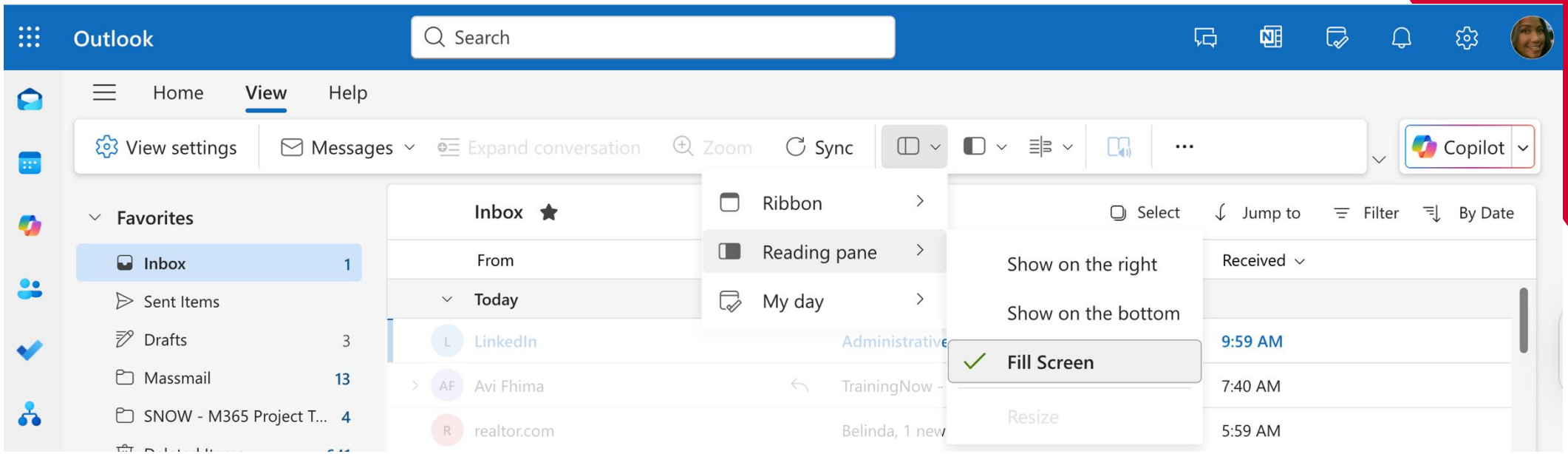


- View Settings
- Mail
- Layout
- Focused Inbox
- Don’t sort my messages.

Layout – Reading pane

Show on the right | Show on the bottom | Fill Screen

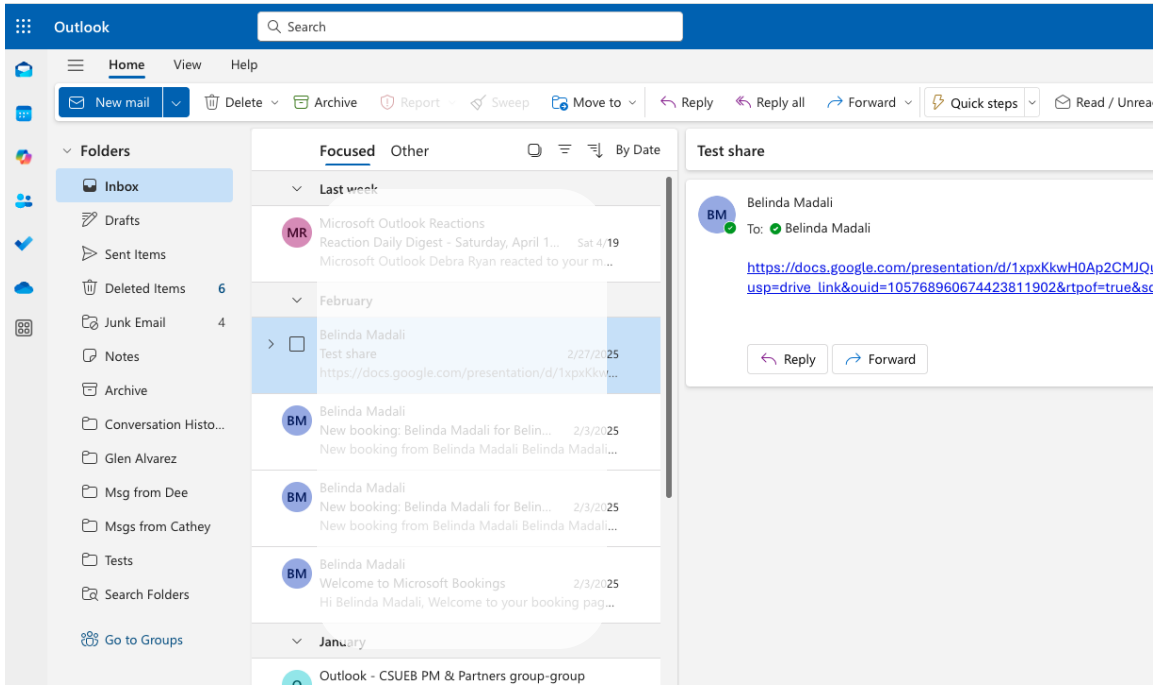
- In Mail go to "View"
- Click "Layout"
- Click "Reading pane"

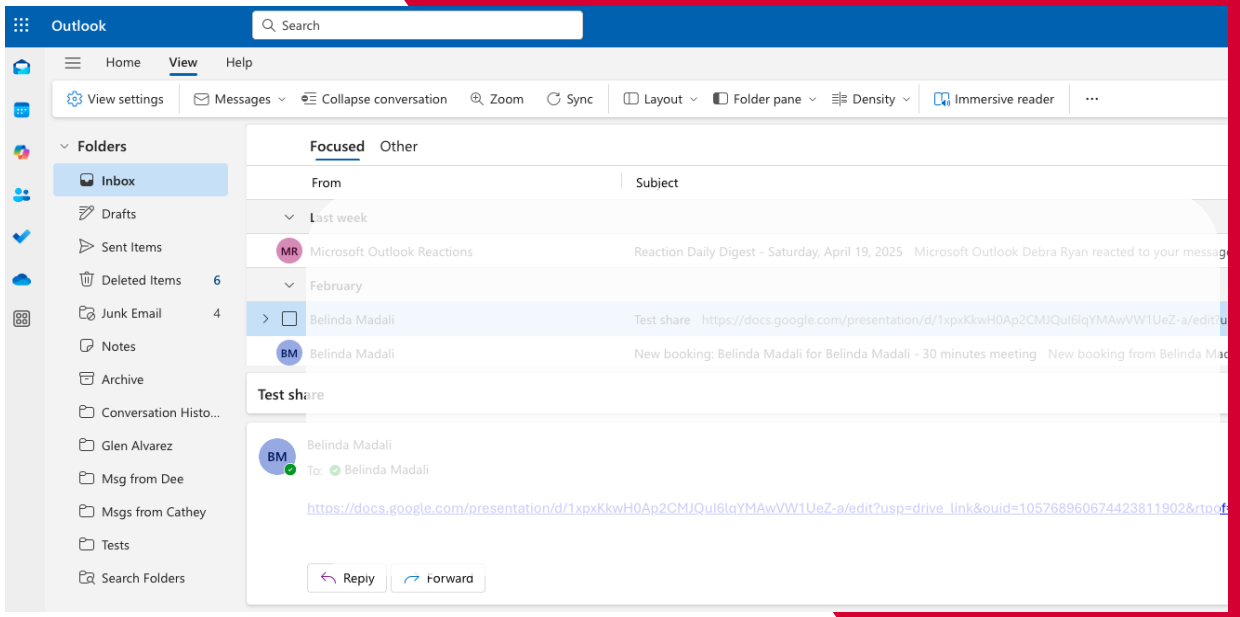


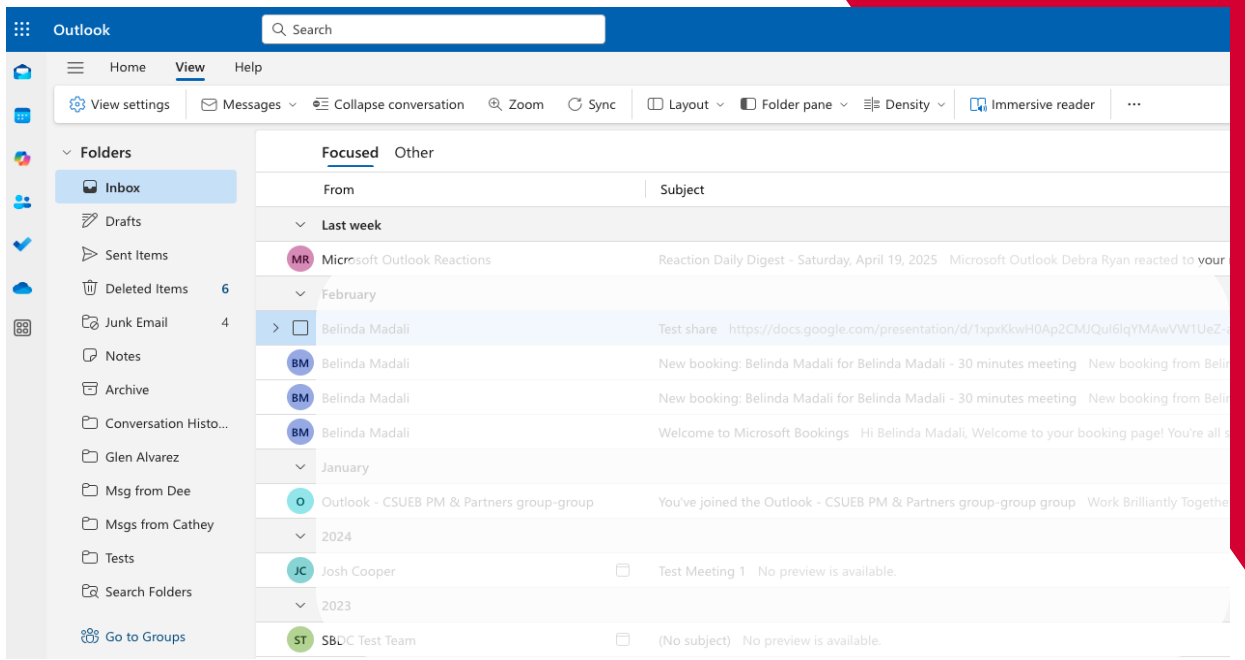
Bottom

Examples of Layout – Reading panes

Right





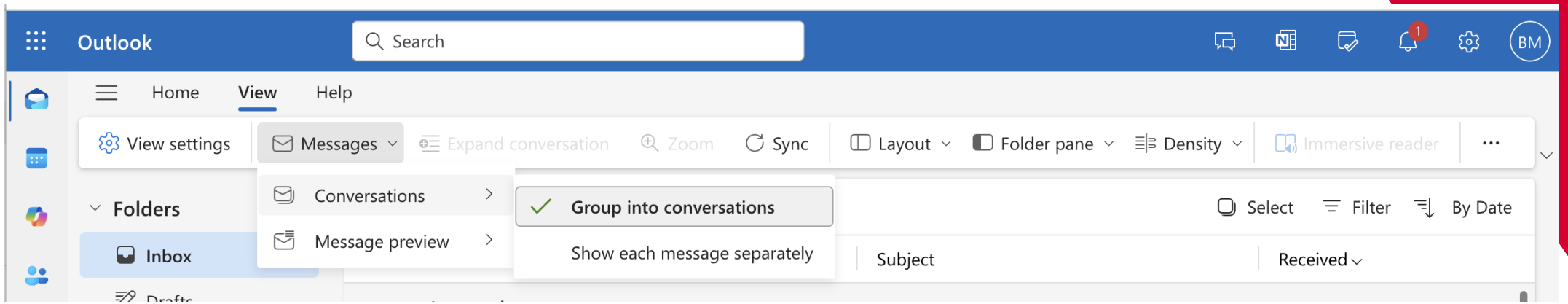


Fill screen (list view)

Email threads = Mail Conversations

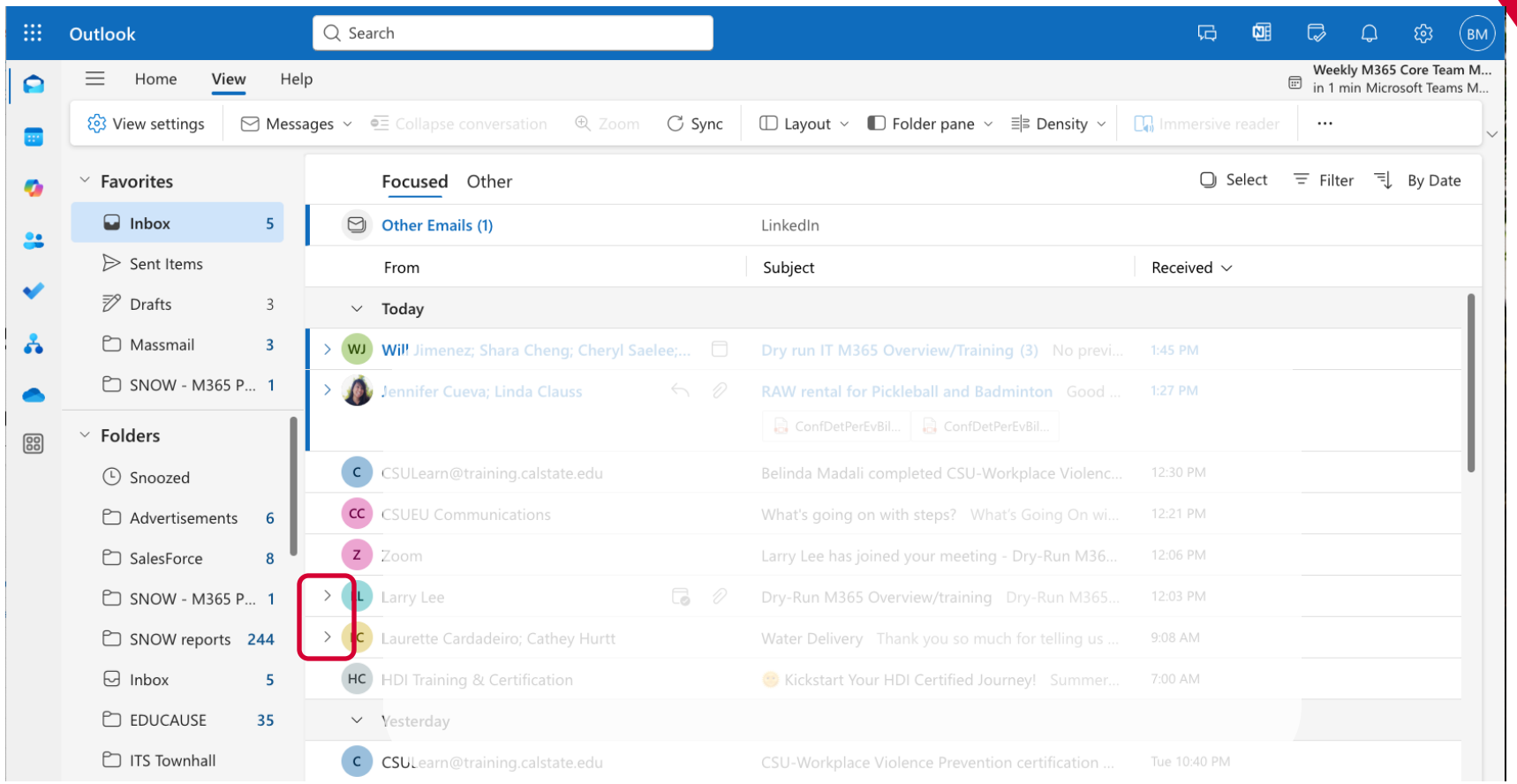
Group into conversations or Show each message separately:

- Go to the "View" tab
- Click "Messages"
- Click "Conversations"



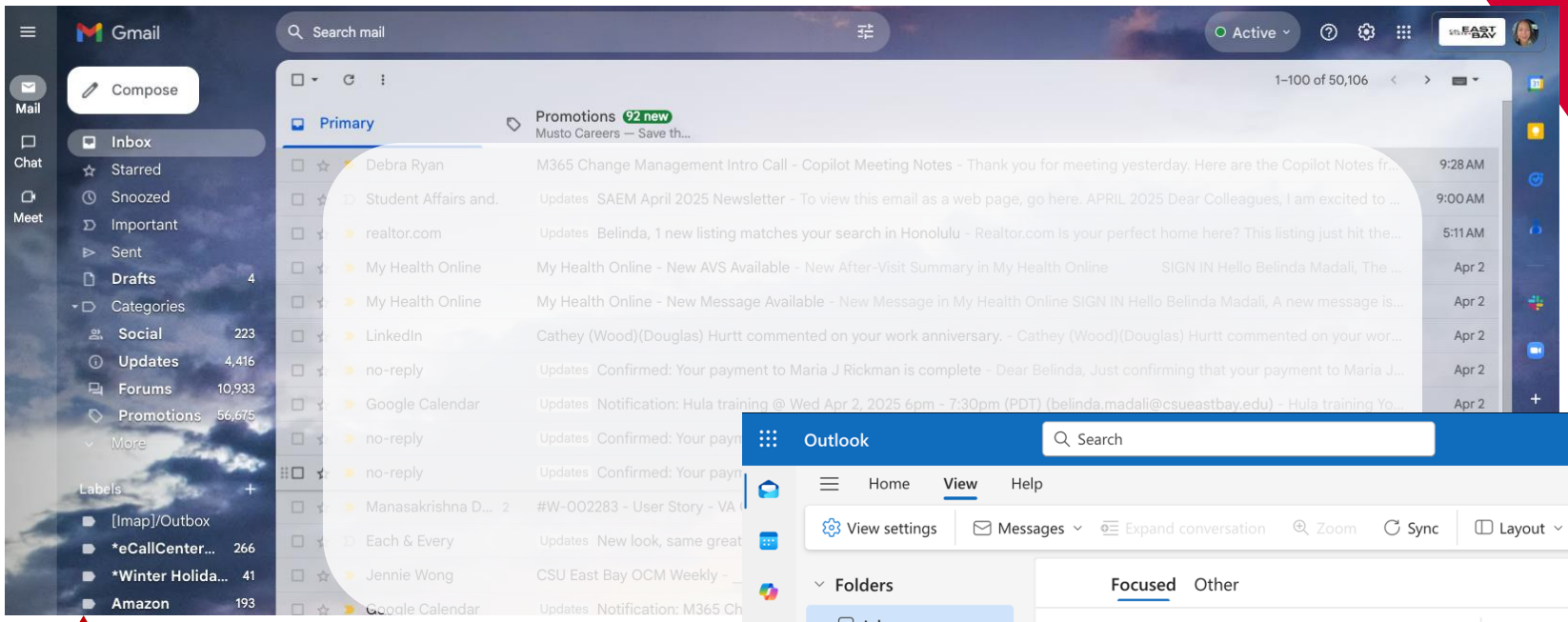
Mail Conversations

Grouped conversations ">" icon in list.



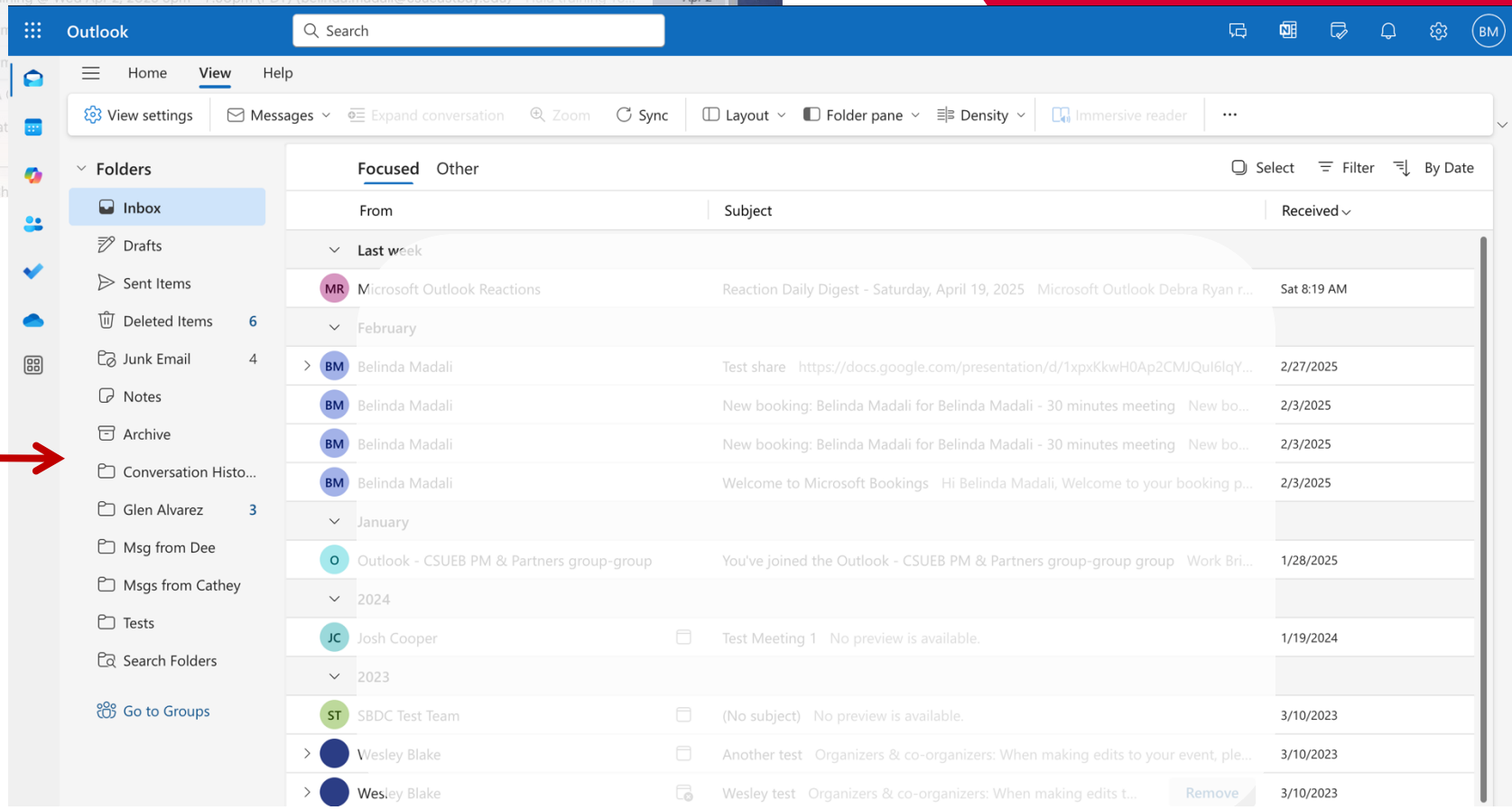
Organizing Your Email

Gmail



Labels = Folders

Outlook Mail



Organizing Your Email

Creating rules (In gmail = filters) to Auto-file Your Emails

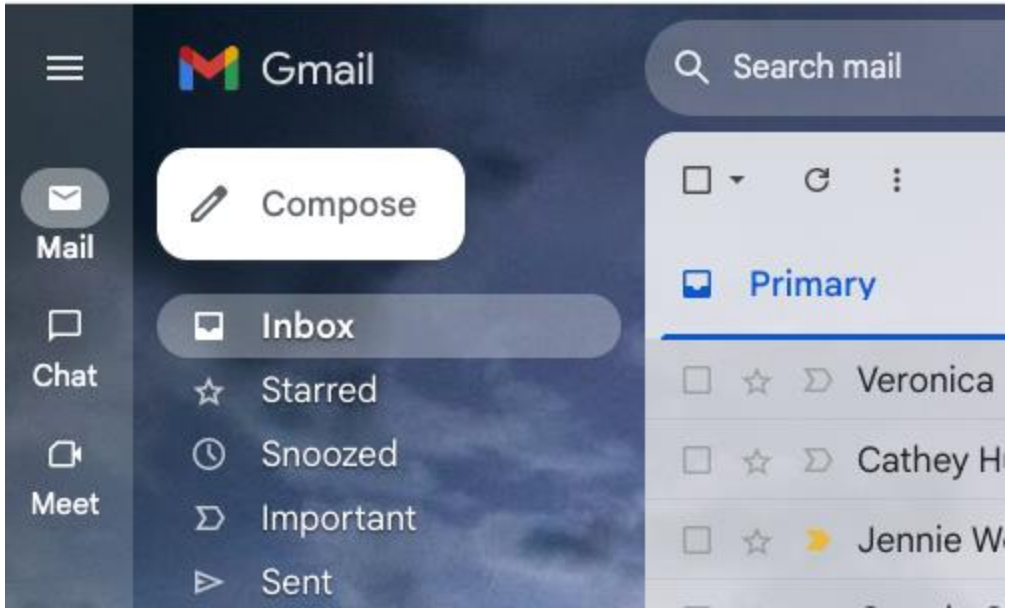
- Right-click a message in your message list that you want to create a rule for, hover over Rules and then select Create rule.
- Choose an existing folder or create one where you want all messages from that sender/s, topics, or other criteria to be moved to, and then select OK.
- After selecting OK, the rule will be applied to all incoming messages with that criteria.

Microsoft instructions on how to create rules

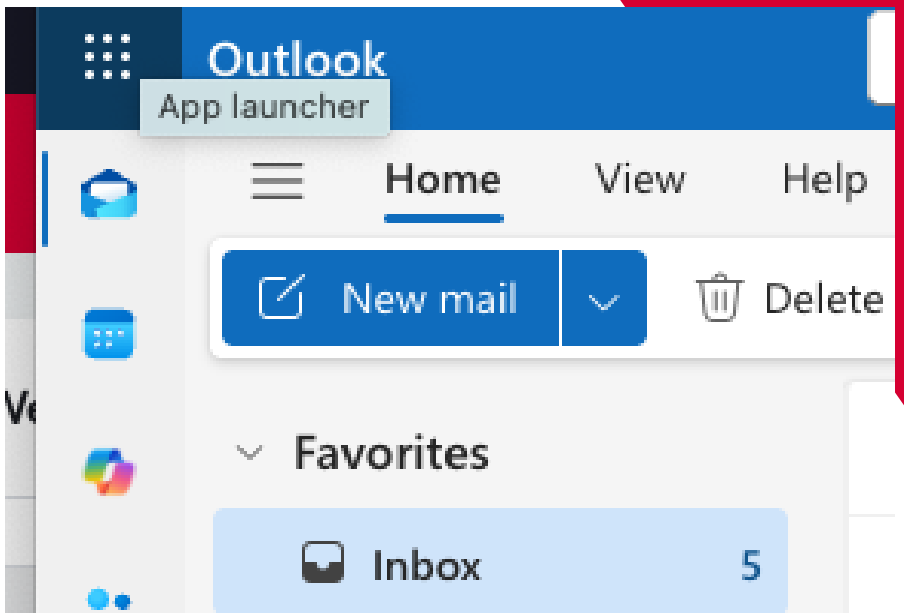
Outlook Mail

The basic, composing an email.

Old – Gmail "Compose"

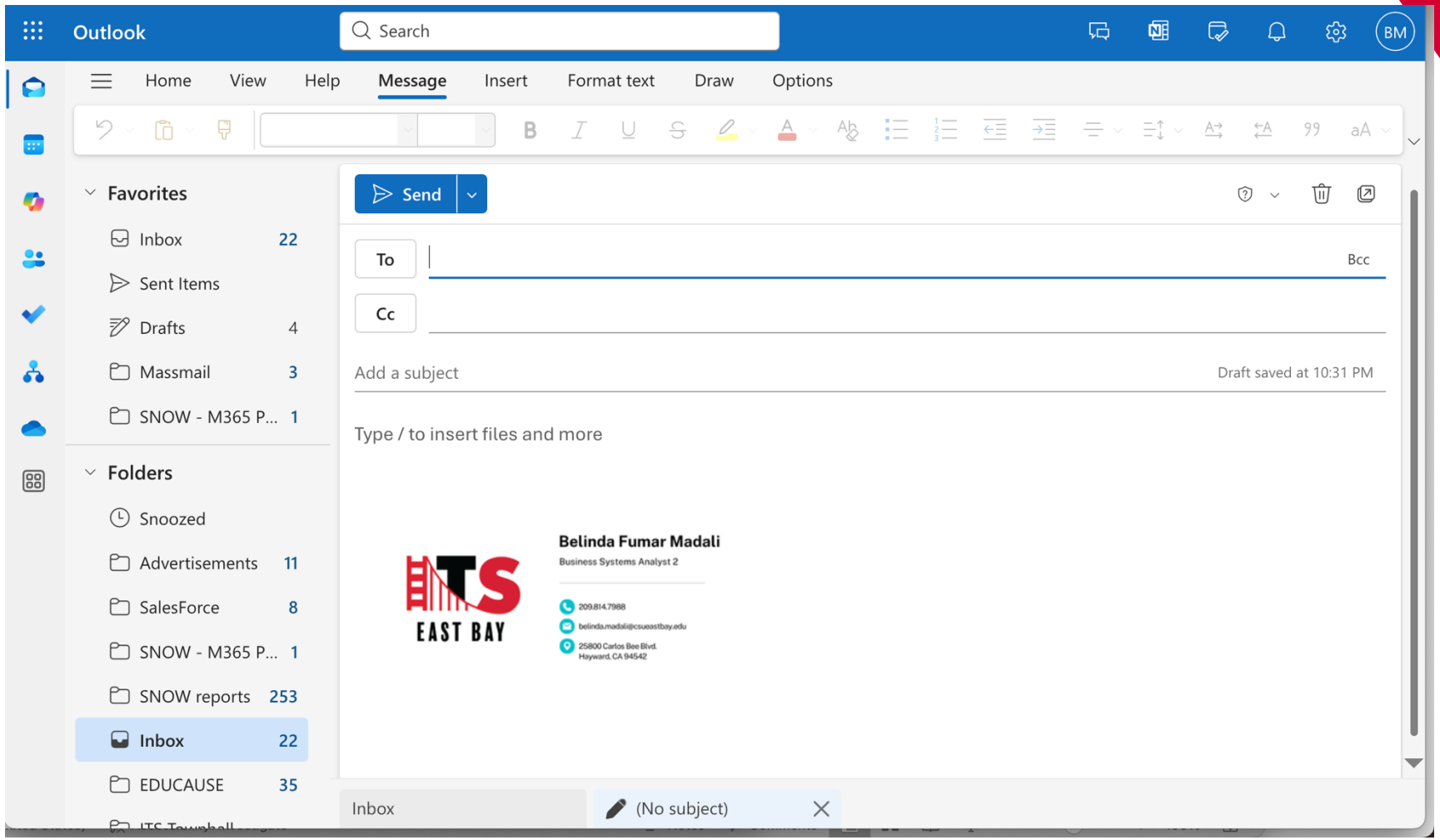


New – Outlook Mail "New Mail"



Outlook Mail

Composing an email.

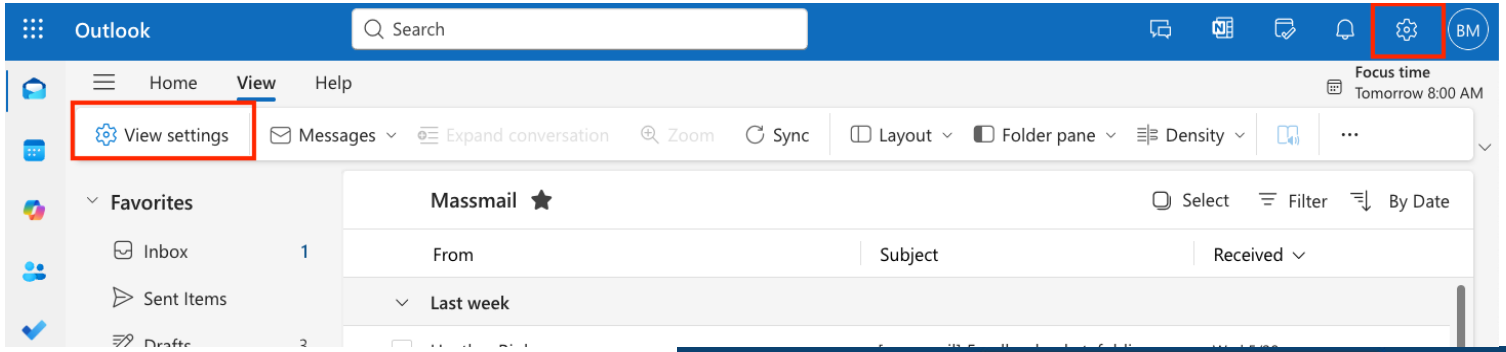


Other features...

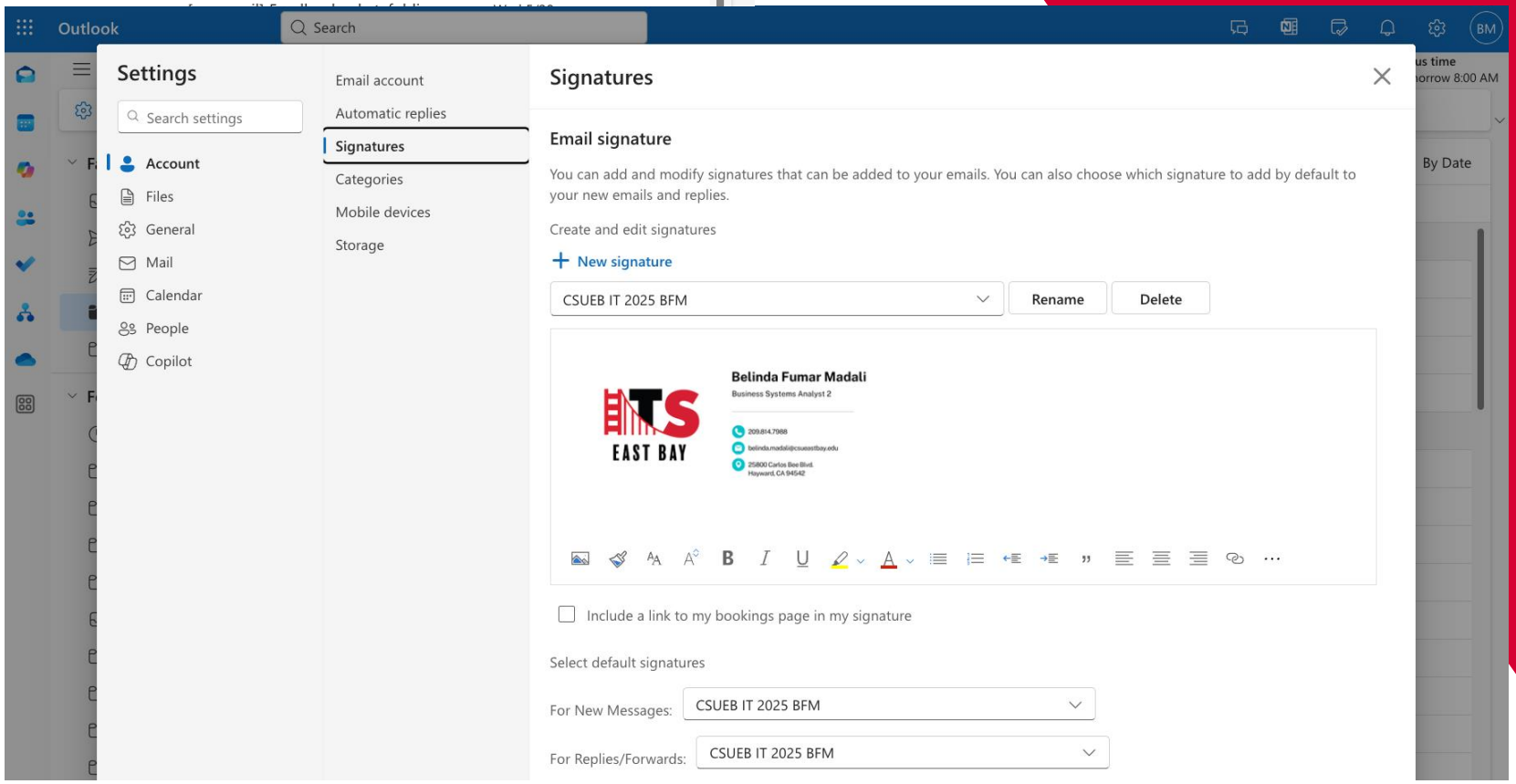
- Signatures for Mail
- Auto-reply (Out of Office/Vacation)
- Department/other Mail accounts
  - You need to know the name of that email account or the email address.
- Delegates
  - Schedule an appointment with IT.

Microsoft instructions on delegates and sharing folders.

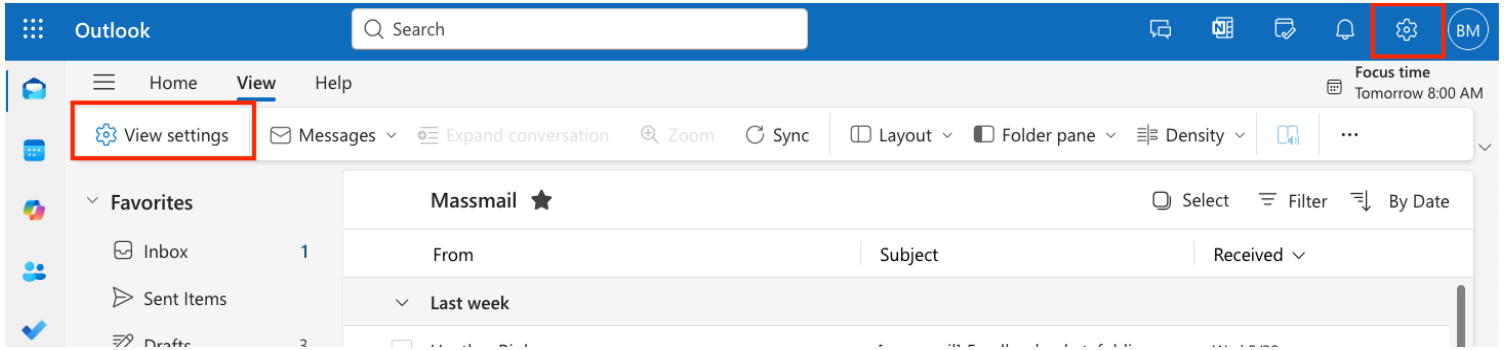
Signatures



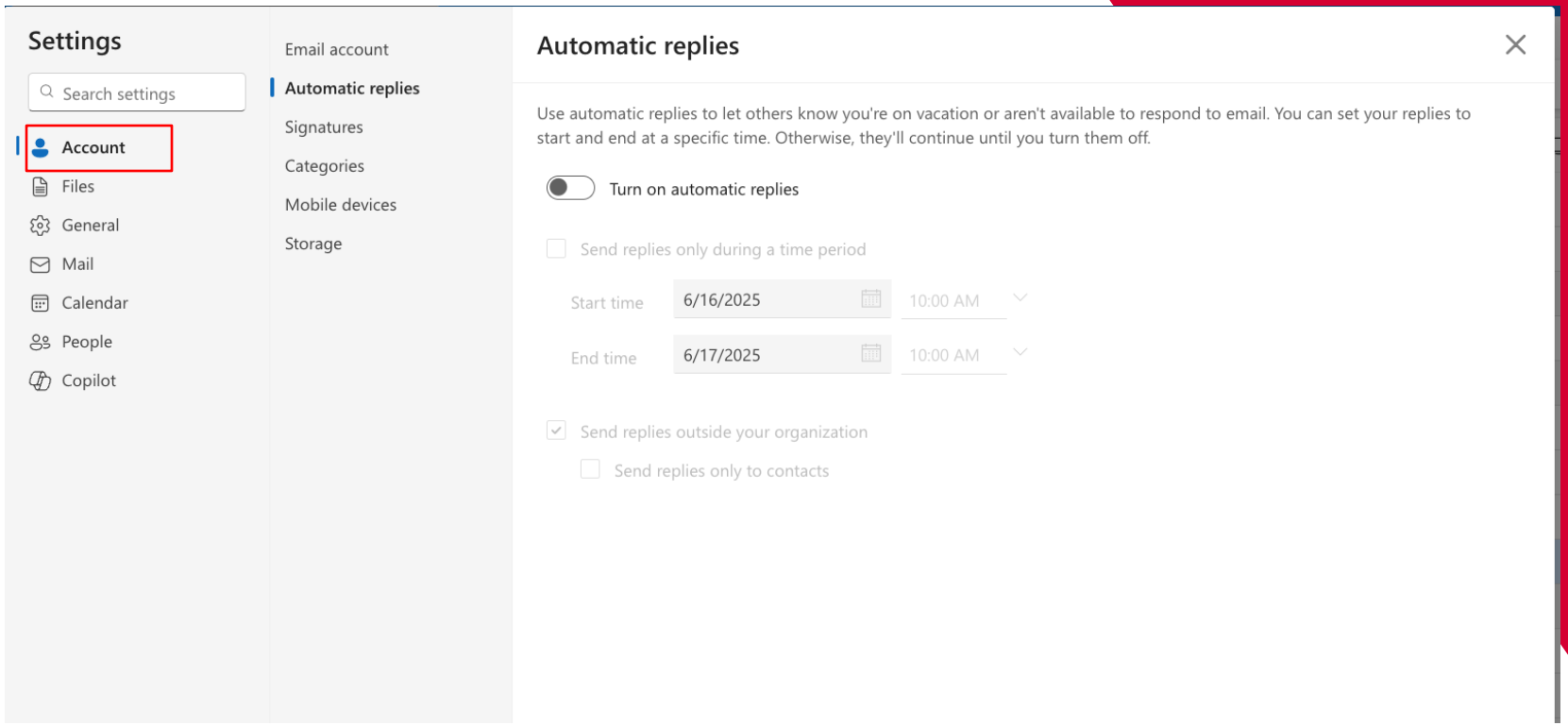
- View Settings
- Account
- Signatures
- + New signature



Auto-Reply (Out of Office)

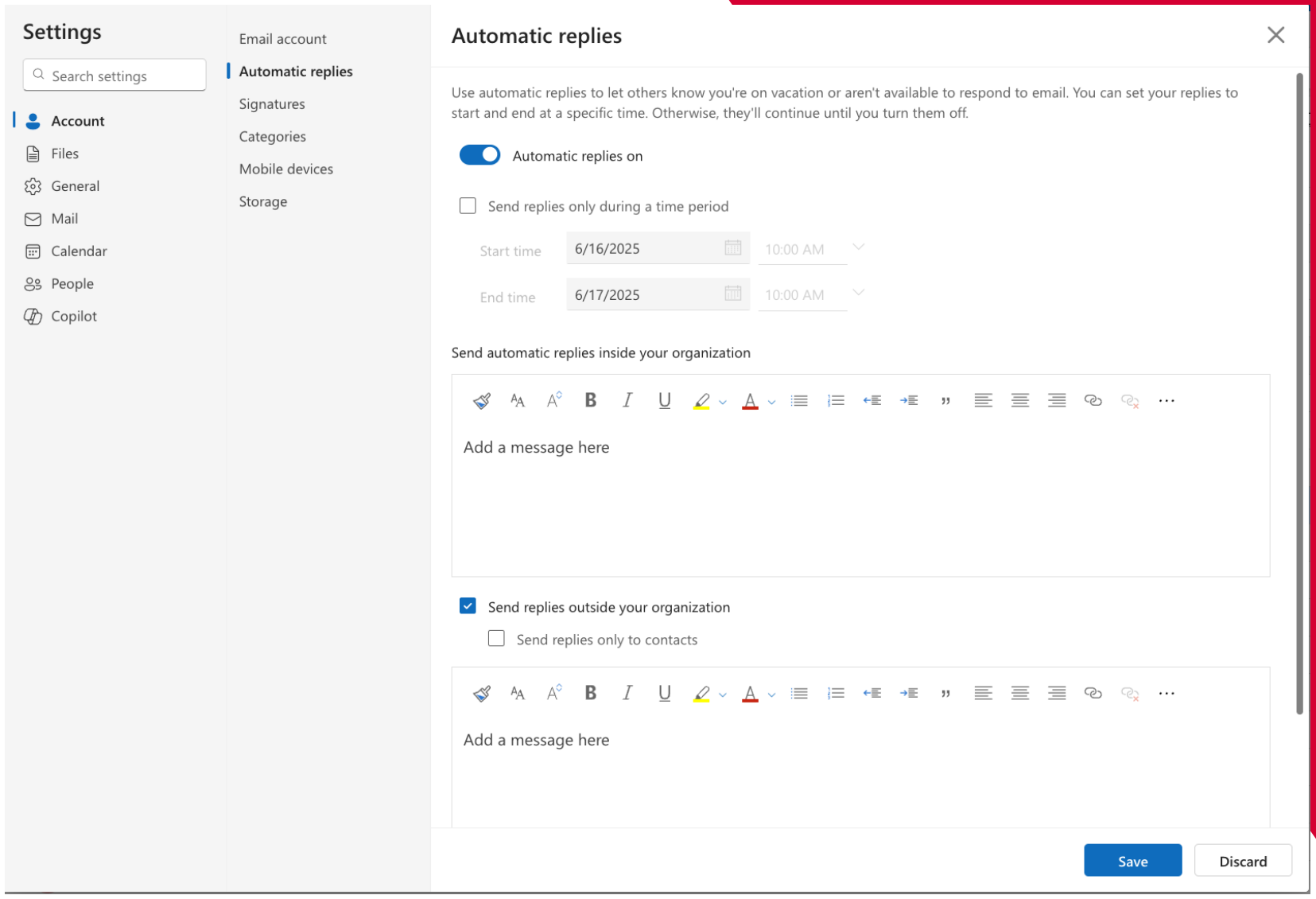


- View Settings [or gear icon]
- Account
- Automatic replies
- Turn on automatic replies



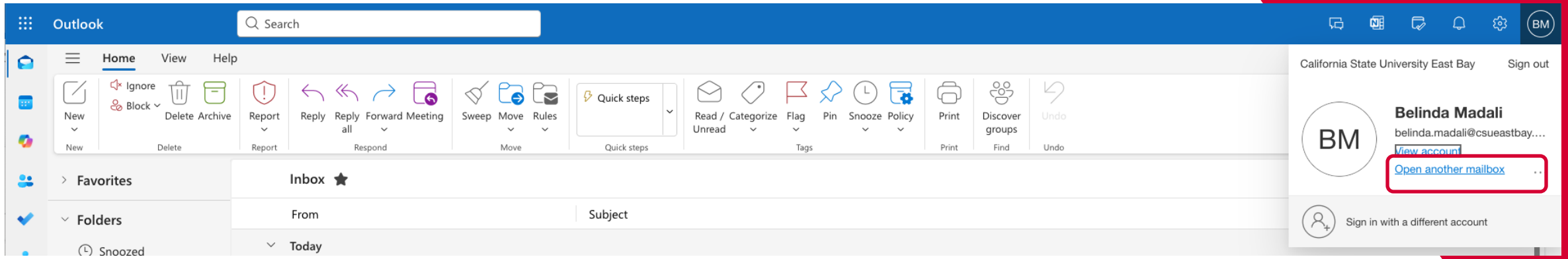
Automatic Replies (Out of Office)

- Set the dates.
- Choose your options.
- Compose your email.
- Click Save



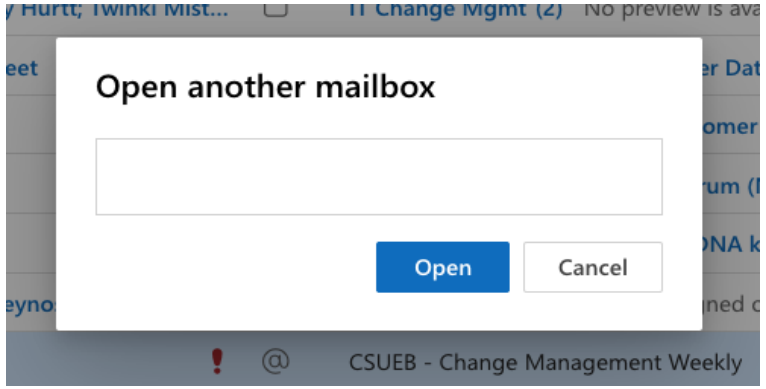
Accessing Department/Non-person Mail Accounts

- **You must know the name or email address associated to the mailbox.**
- **It must be migrated to M365.**
- **You must have access to it.**



OPTION 1 (preferred method)

1. Click your profile on the top right.
2. Choose **Open another mailbox**.
3. Open another mailbox dialog box.

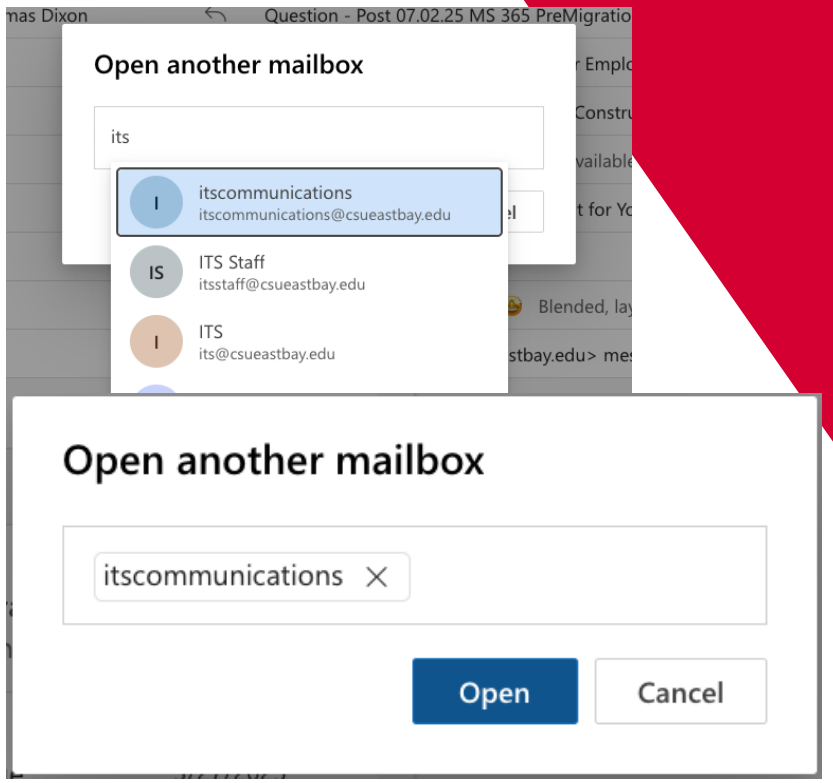


Accessing Department/Non-person Mail Accounts

1. Start typing the name or email address.

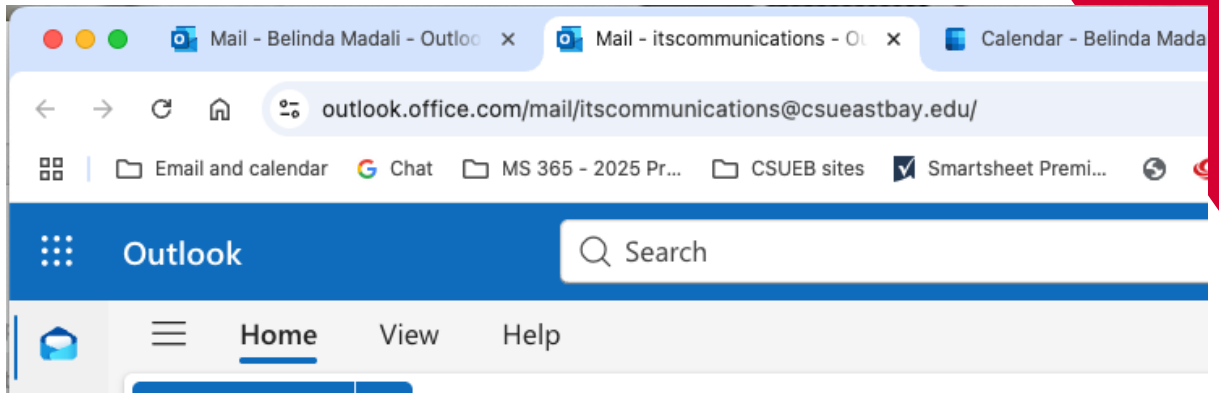
   Choose the account.

2. Click Open



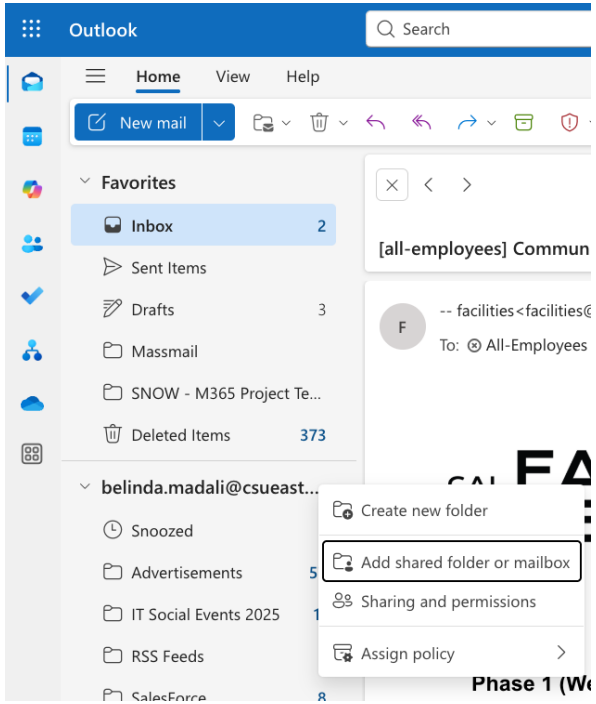
3. The email account will open in a new tab.

4. You will now be able to send and receive from that account.

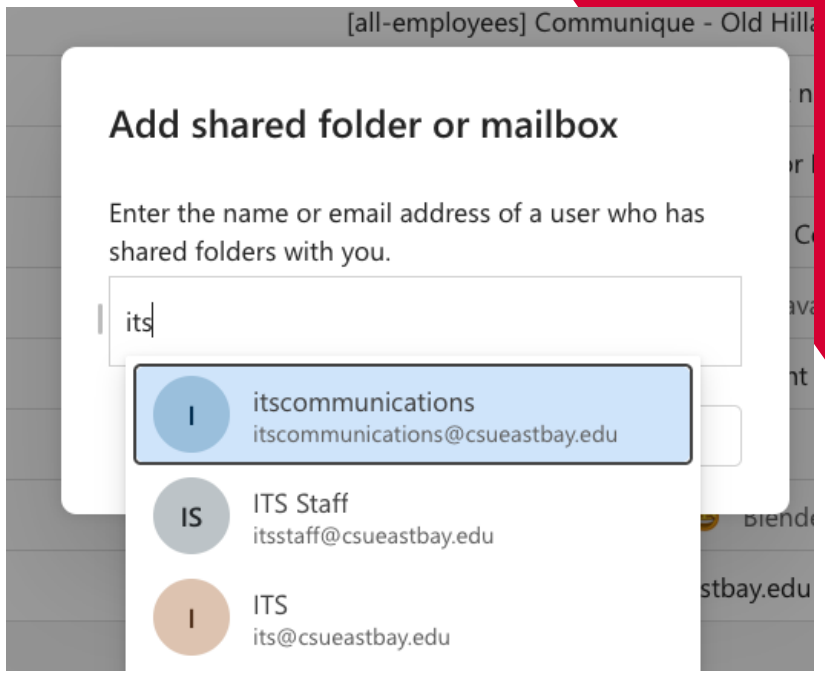


Option 2 : Accessing Department/ Non-person Mail Accounts Within Your Email View

1. In Mail in the left navigation pane.
   Click the icon with the three vertical dots next to your email address on the left nav

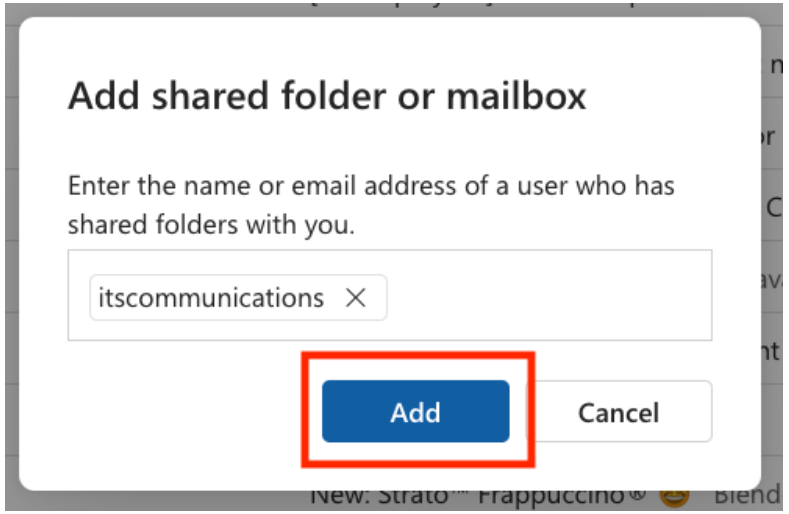


2. Start typing the name or email address.
   Choose the account.



Accessing Department/Non-person Mail Accounts

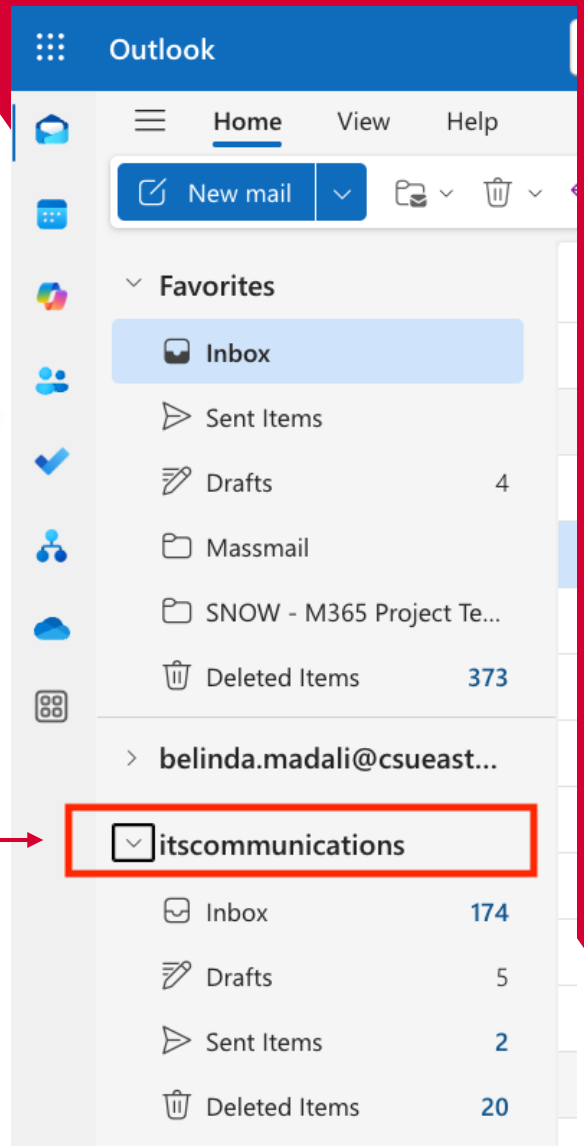
3. Click Add.



4. Once you've added the mailbox, it will show below your list of Folders.

Example:

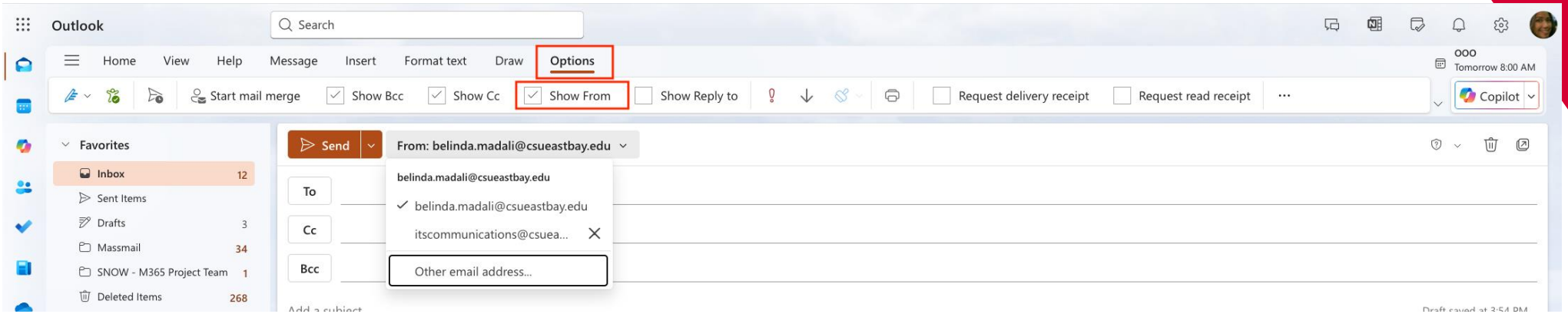
Mailbox is named "itscommunications".



- Please note, you will need to remember to change the "From:" to the appropriate sender. See next slide.

Accessing Department/Non-person Mail Accounts

5. If you do not have the option to change the “From”:
   - Compose an email
   - Go to Options
   - Choose “Show From”
   - You will now be able to choose which account you’d like to send From.



❖ When using option 2, all sent emails will be in your staff Sent folder.

Known Behavior/Facts

- We are not turning off gmail but do not use it.

  It's only used for troubleshooting.

  - It will be configured differently so it will not look the same.
- Google Spam will not be migrated or forwarded.

Outlook – Calendar & To-Do

outlook.office.com/calendar/

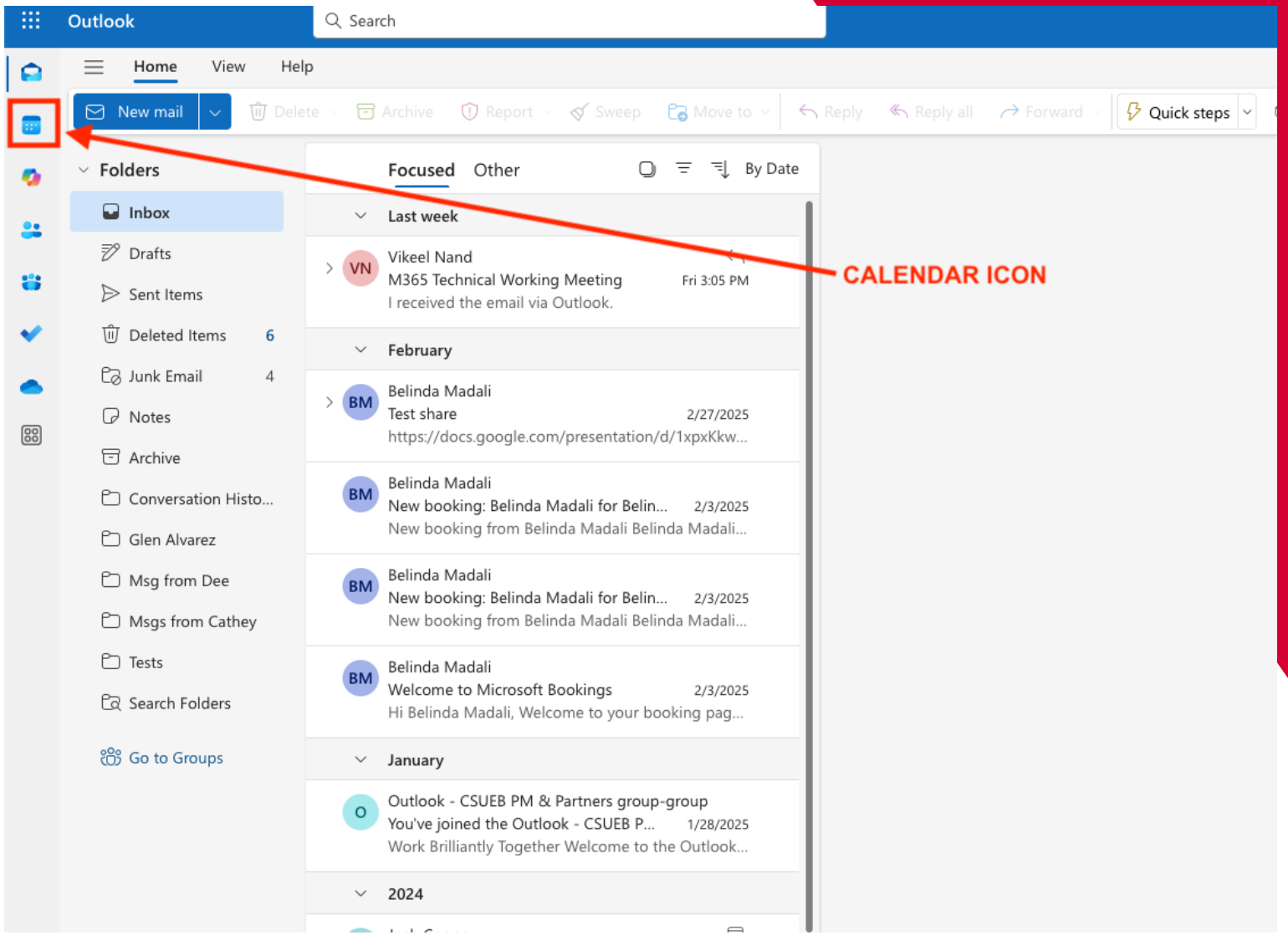
Outlook Calendar

- ✓ View
- ✓ New Event
- ✓ Sharing Your Calendar

Microsoft Outlook Calendar instructions.

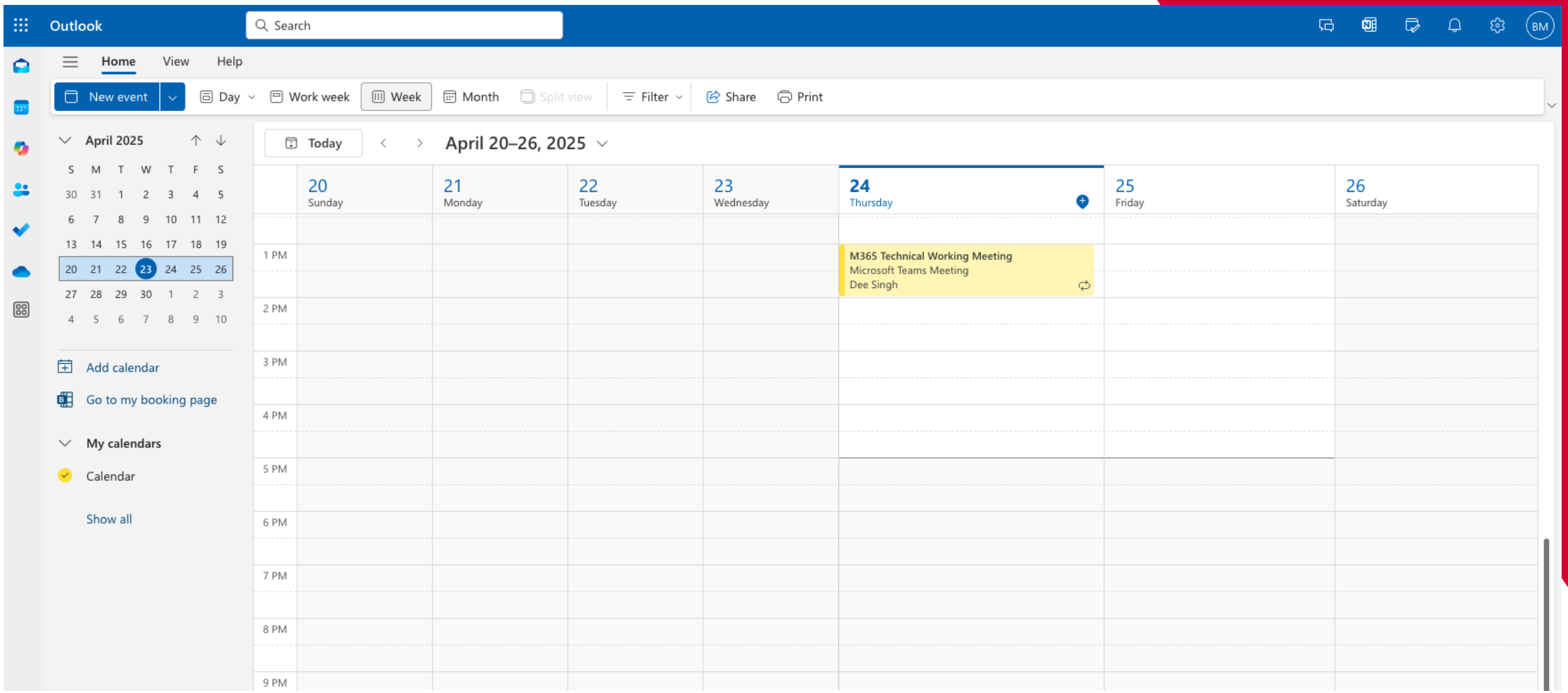
Outlook Calendar

In Mail click the Calendar icon on the left nav menu.



TIP:
Right click the icon and open in new tab so you can have your Mail and Calendar open, you can easily switch back and forth.

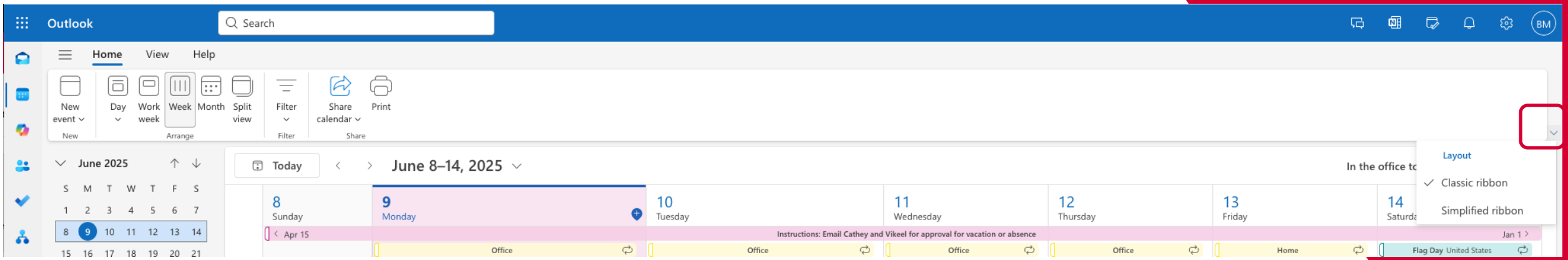
Outlook Calendar



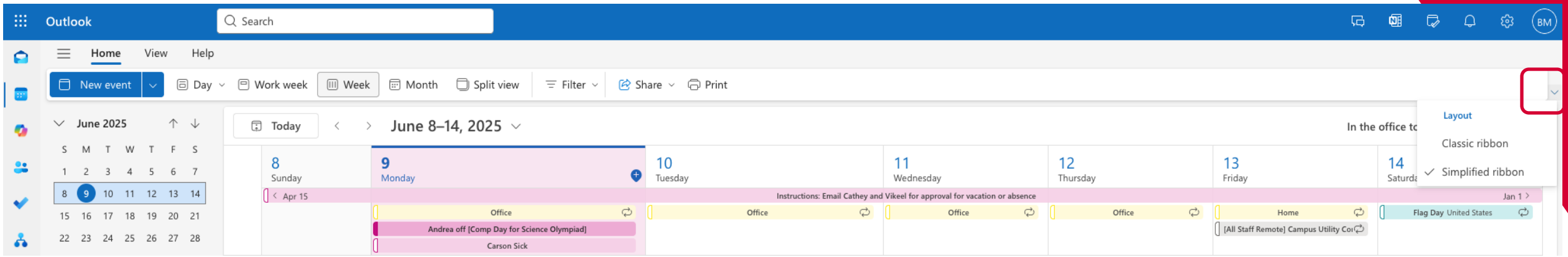
Outlook Calendar – Ribbons (top menu)

Two different views for the menu ribbon.

Classic Ribbon



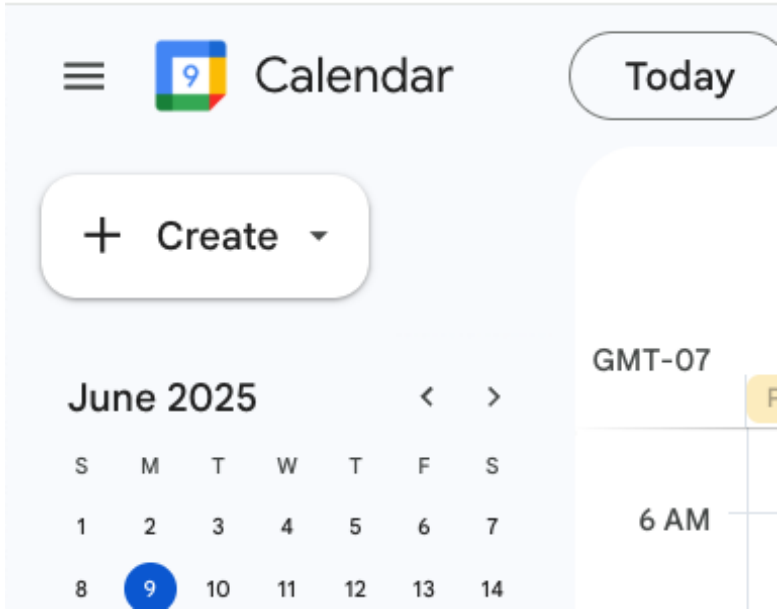
Simplified Ribbon



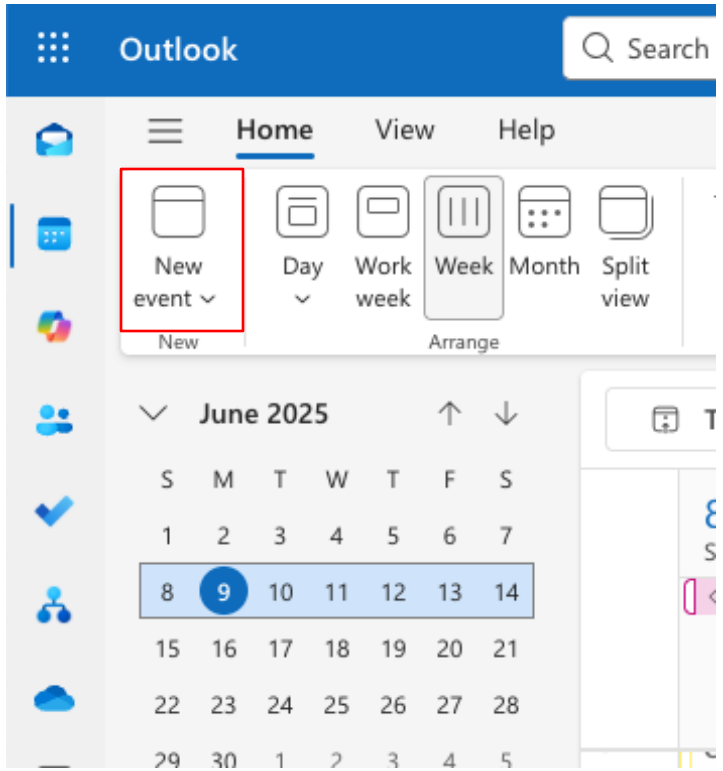
Outlook Calendar

The basic, creating an invite/event.

Old – Google Calendar "Create"

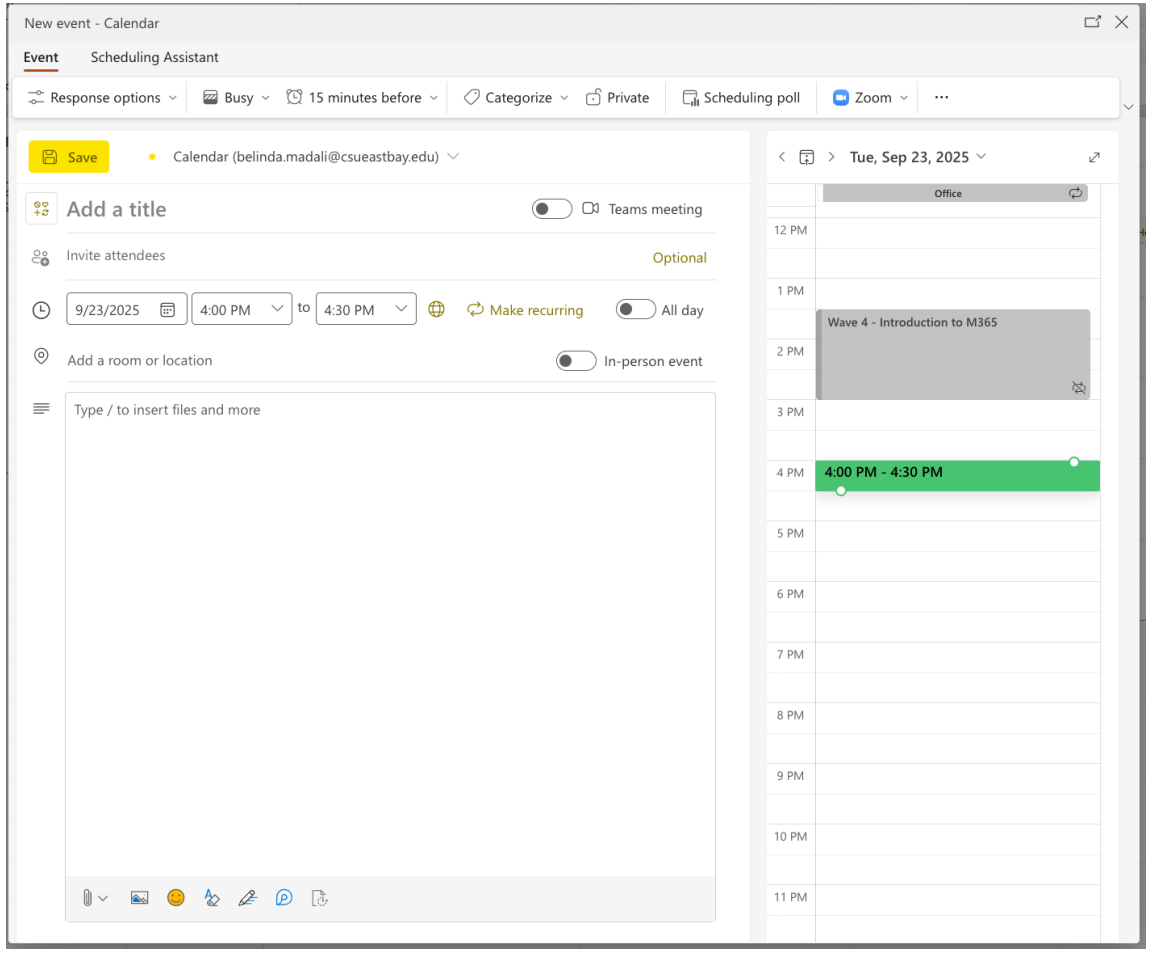


New – Outlook Calendar click "**New Event**"



Outlook Calendar

New Event



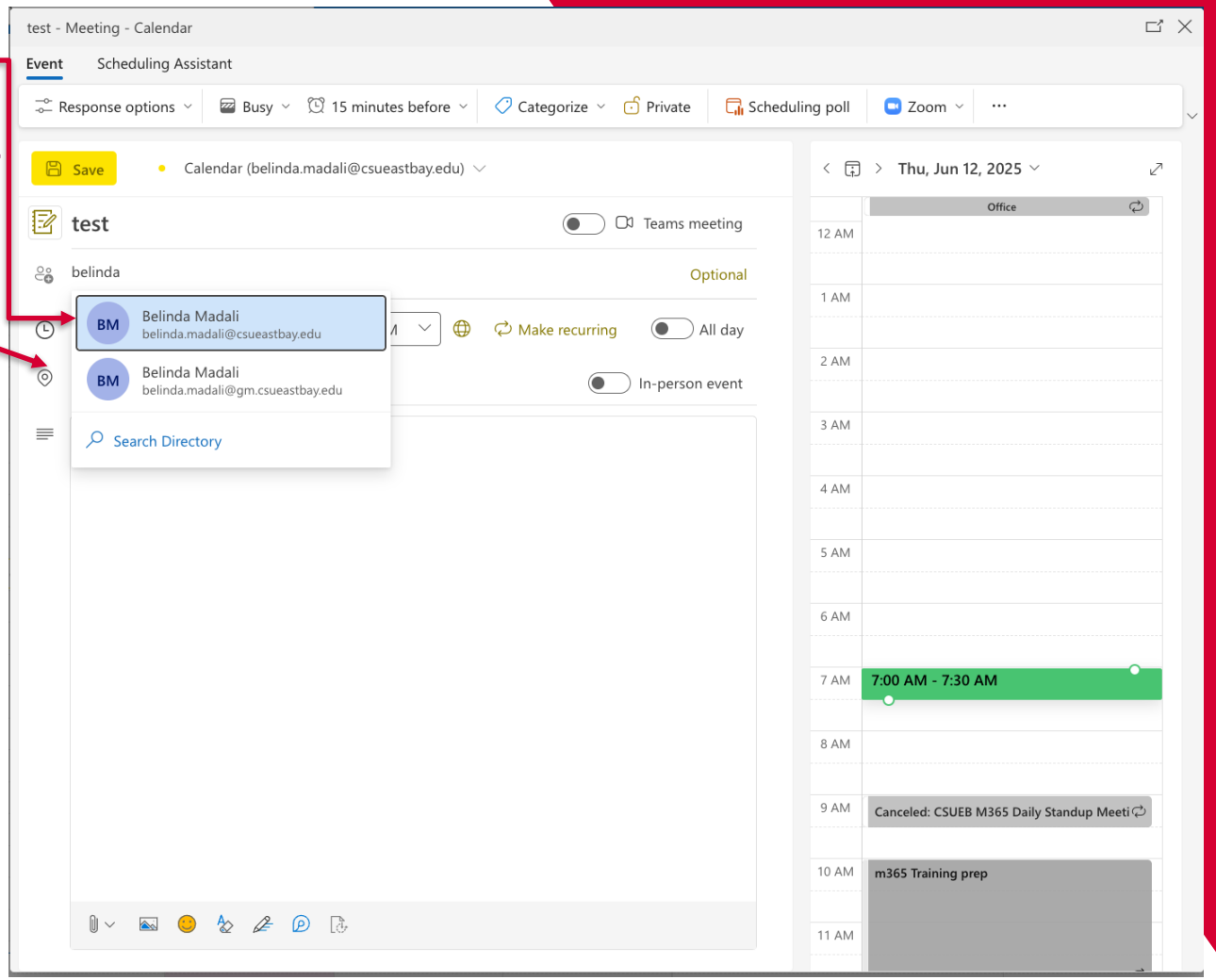
Big question...

How do I check the availability of people who have not been migrated yet?

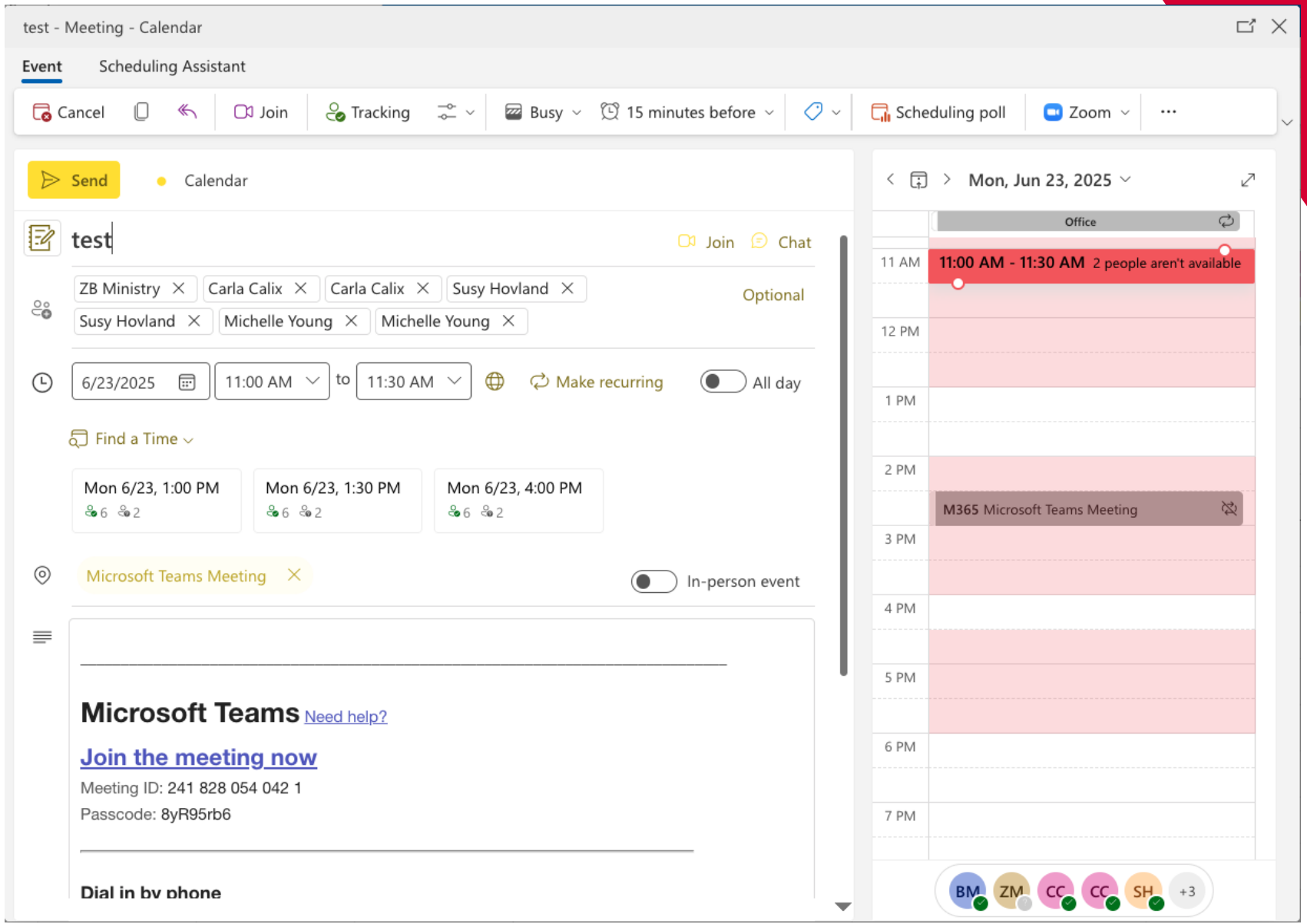
- Use the following format in the ‘Invite attendees’ :
  - firstname.lastname@**gm.**csueastbay.edu
  - firstname.lastname@csueastbay.edu

Create a new event:

- Use the following format in the ‘Invite attendees’ :
  - firstname.lastname@csueastbay.edu
  - firstname.lastname@gm.csueastbay.edu



Checking non-migrated availability – Find a Time:

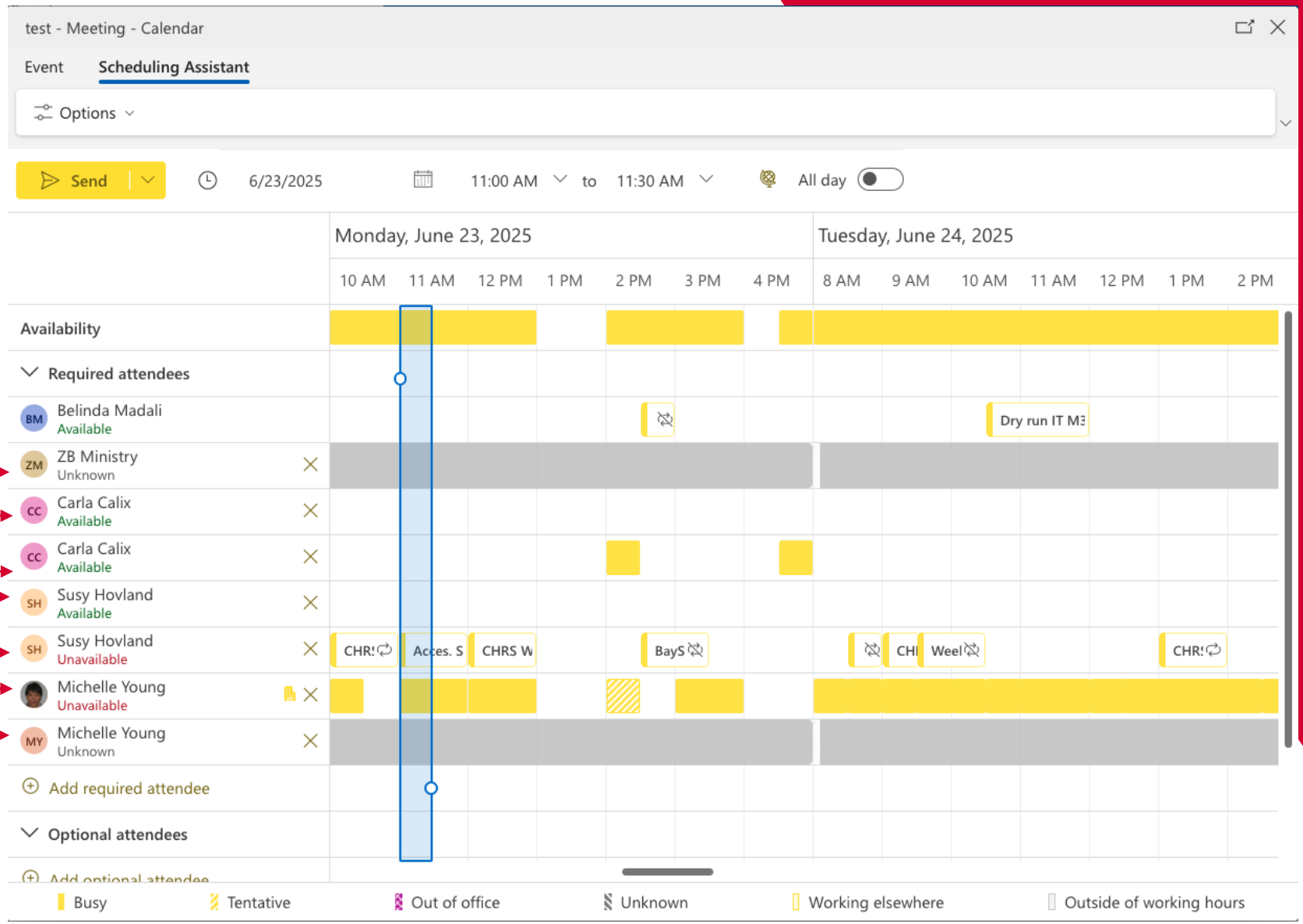


Checking non-migrated availability – Scheduling Assistant tab

You will not see availability for outside of CSUEB invitees.

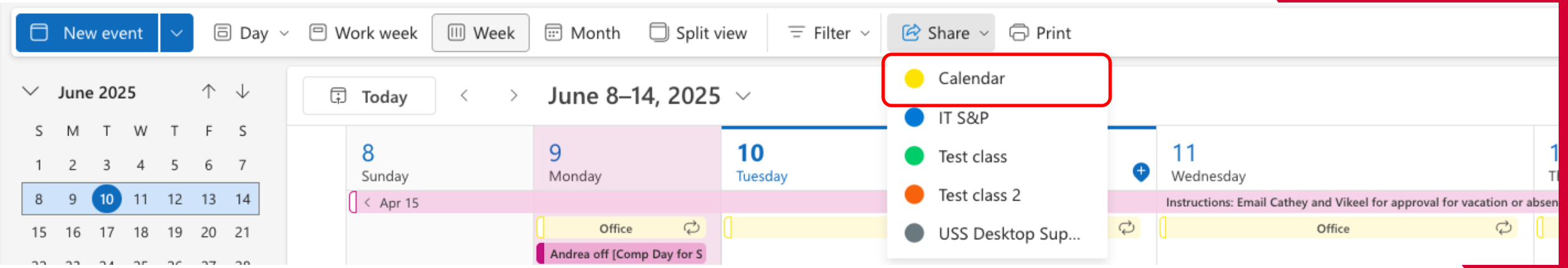
Invitees:

- Non-CSUEB
- CSUEB Non-Migrated
- CSUEB Non-Migrated
- CSUEB Migrated



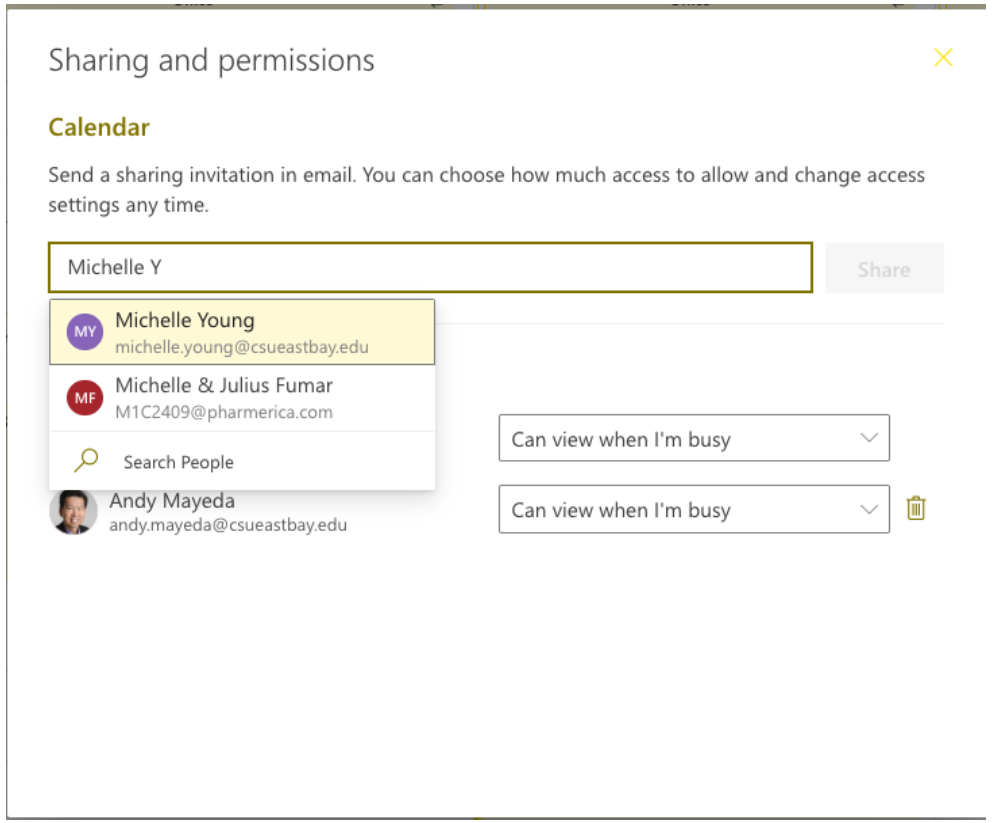
Share your calendar

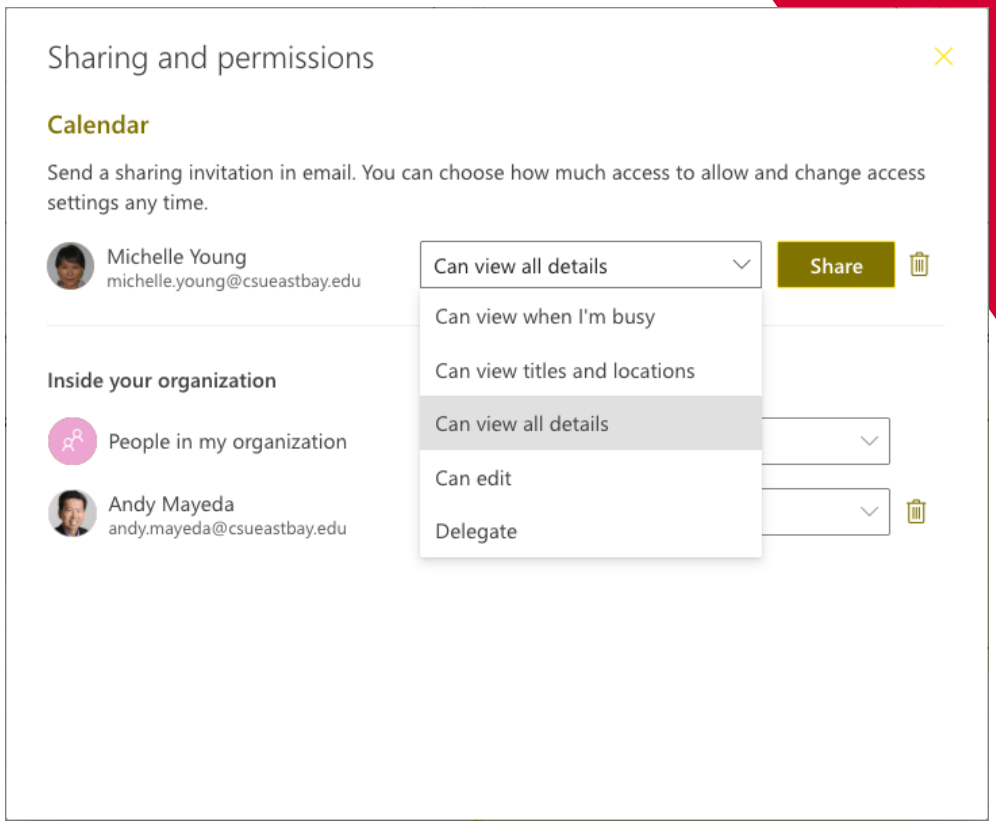
- In Calendar be sure you're on the Home tab at the top.
- Click "Share" on the ribbon (top menu).
- Choose which calendar you'd like to share.



Sharing and permissions

- Start typing the person who you'd like to share with.
  - Choose the person from the drop down list.
- Choose the level of permissions in the drop down list.
- Click "Share"



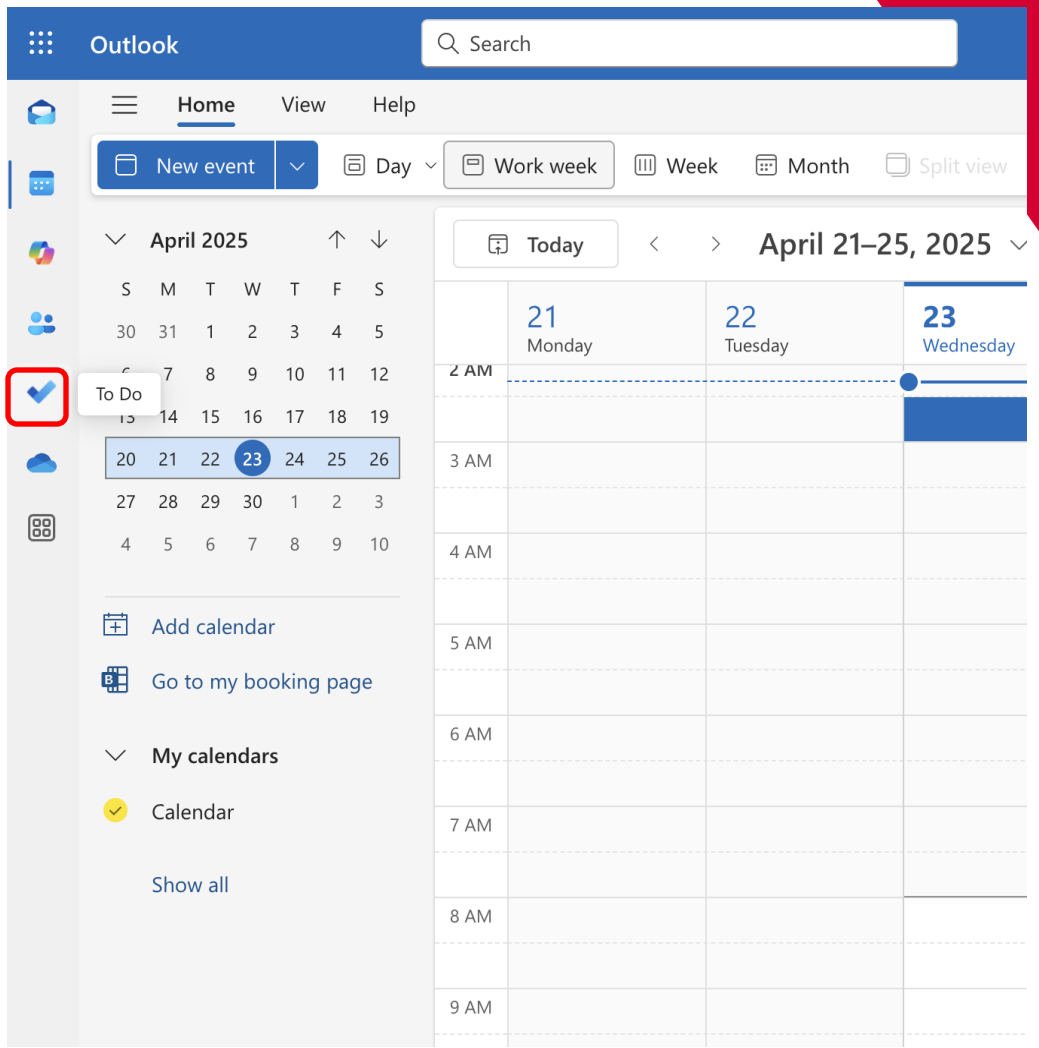


Outlook Calendar Known Behavior

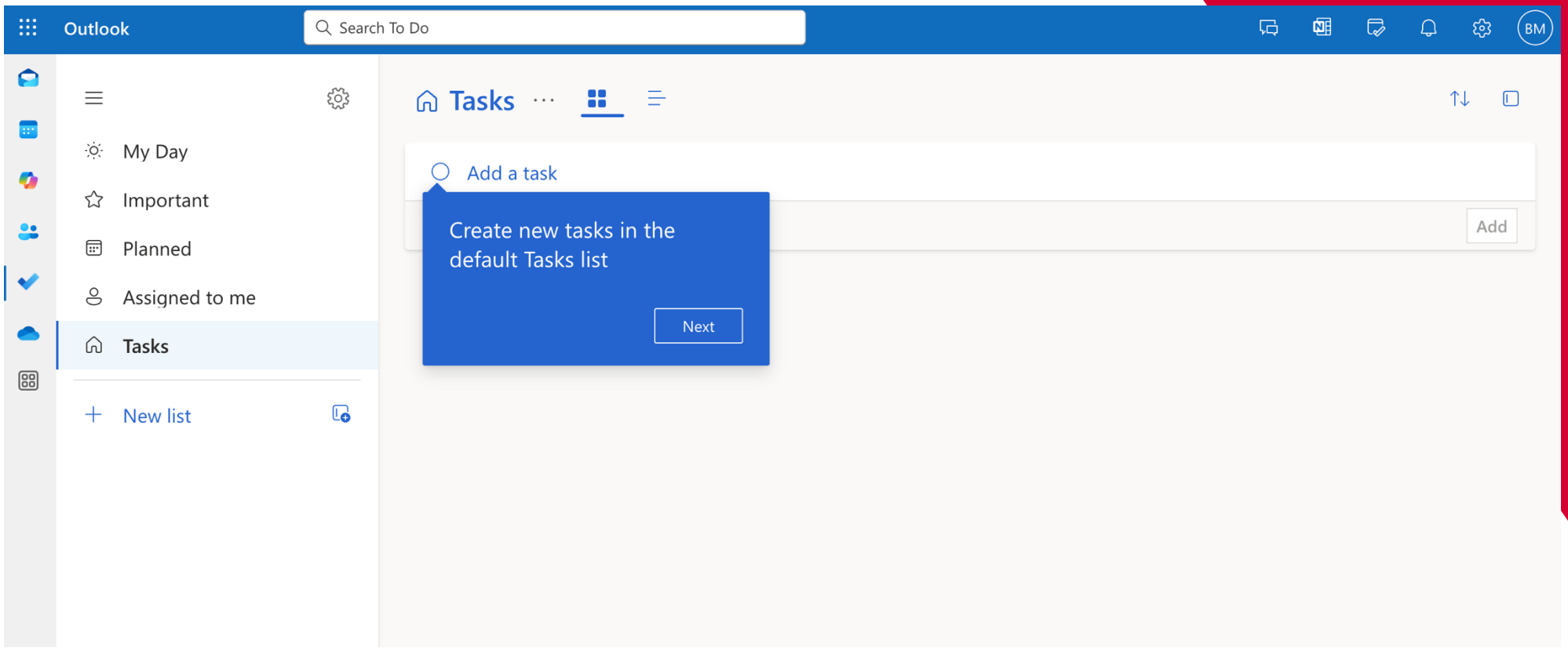
- Canceled meetings that were on your Google Calendar may show up as still active (not canceled) in your Outlook calendar.
- When you schedule a meeting in Outlook and invite non-migrated CSUEB people or outside of CSUEB people, when or if they accept or decline it may not show they have accepted or declined on your calendar.
- When you send a calendar invite, a .ics attachment is included automatically, this will allow the invitee to add (via import) it to their calendar if it doesn't add it automatically.

Outlook To Do

1. From Mail or Calendar click “To Do”

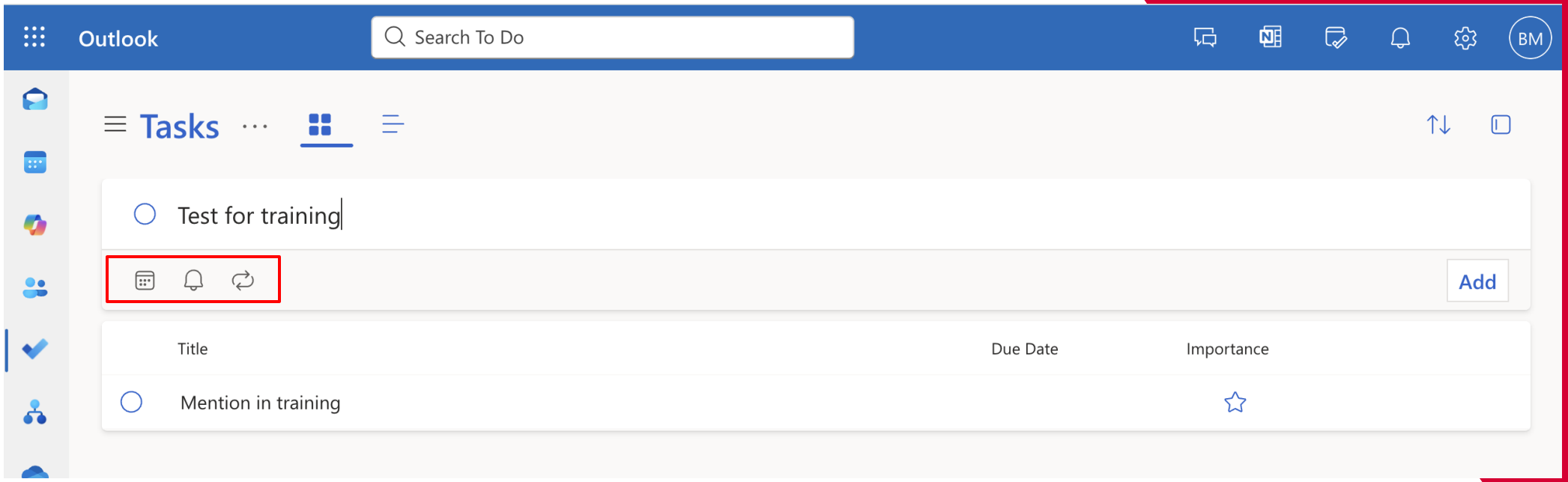


Outlook To-Do



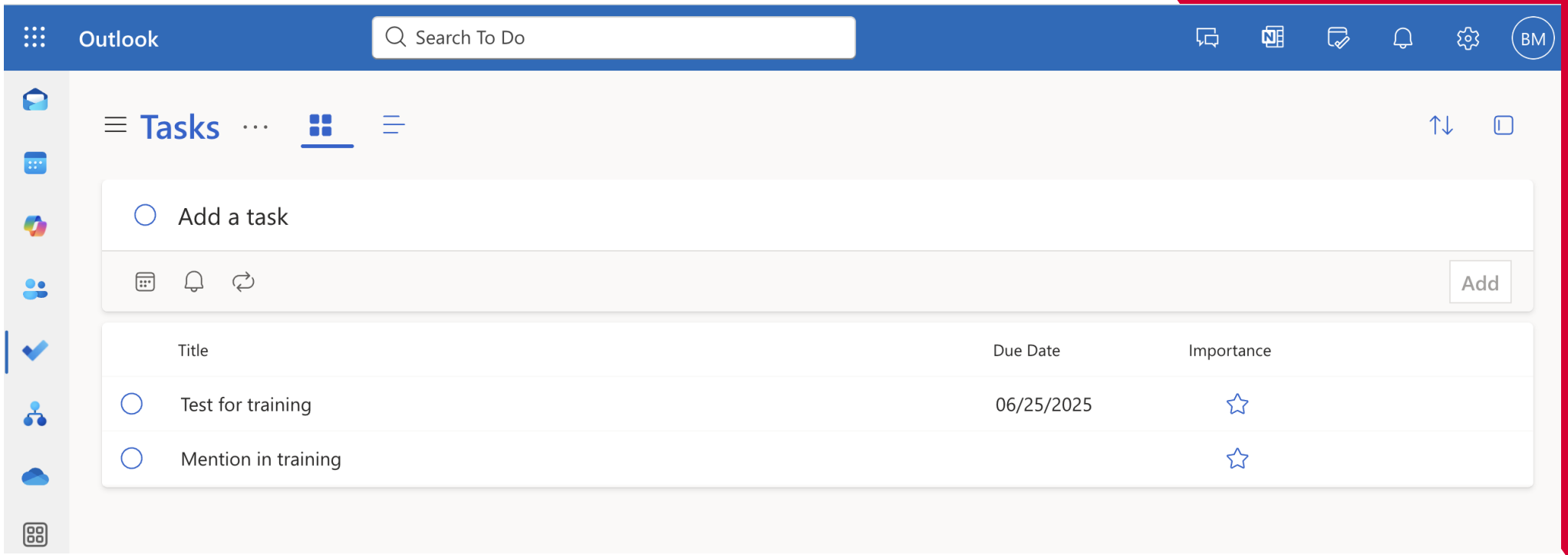
2. Start typing the name of your task where it says “Add a task”.

Outlook To-Do – Add New Tasks



3. After you've added the name of the task, you can set a due date, alarm and repeats.
4. Click "Add"

Outlook To-Do – Tasks list



You will see your new task in your list of tasks.

OneDrive & Teams

- OneDrive: Store files, this is where your Google My Drive files will be moved to.
- Teams: Projects, Department collaboration… etc.

OneDrive

Google My Drive migrated to M365 OneDrive

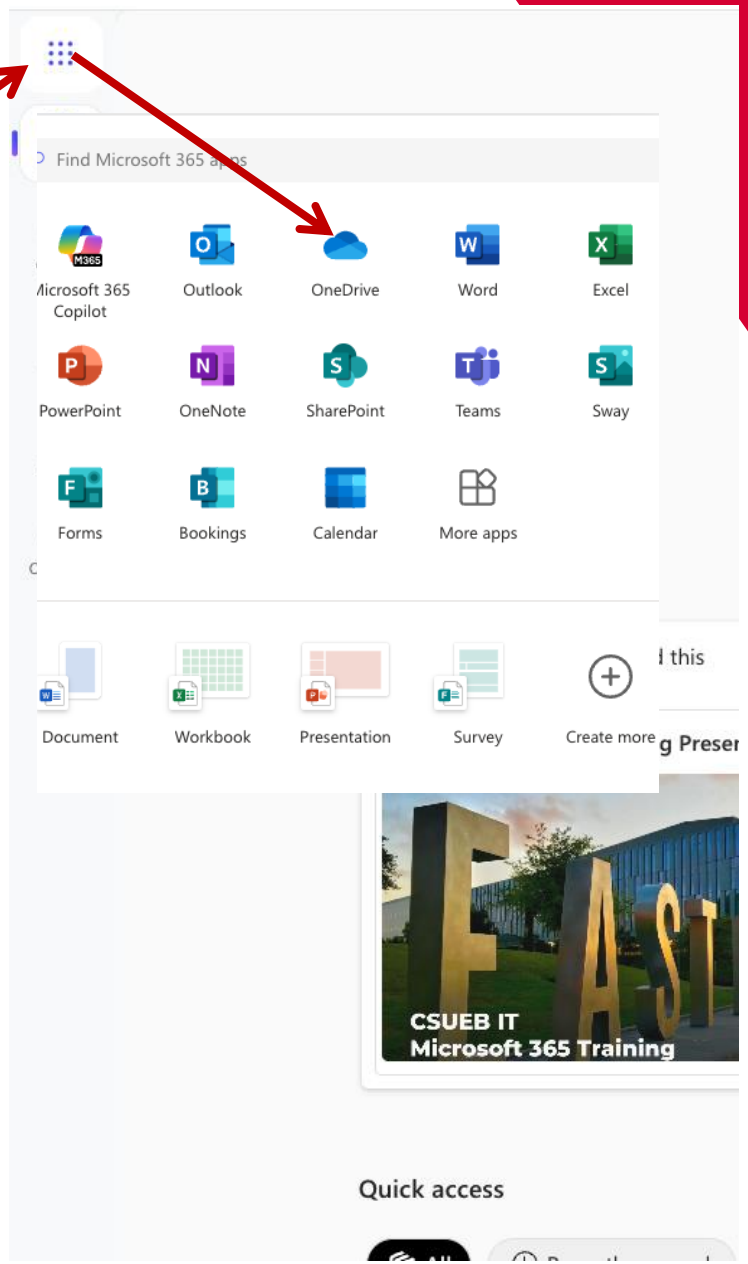
What is OneDrive?

"OneDrive is the Microsoft cloud service that connects you to all your files." - Microsoft

- Use this to store your files.
- You can share these files with others but it’s better to collaborate in Teams; sharing documents with a group of people in one organized space, posting messages, collaborating… etc.

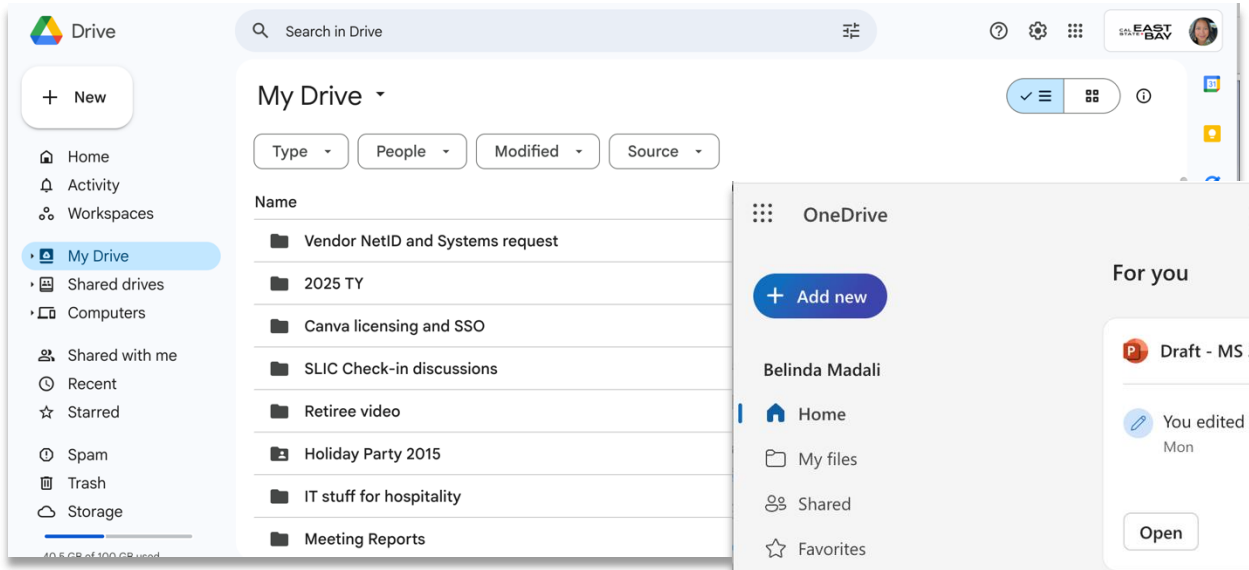
OneDrive App

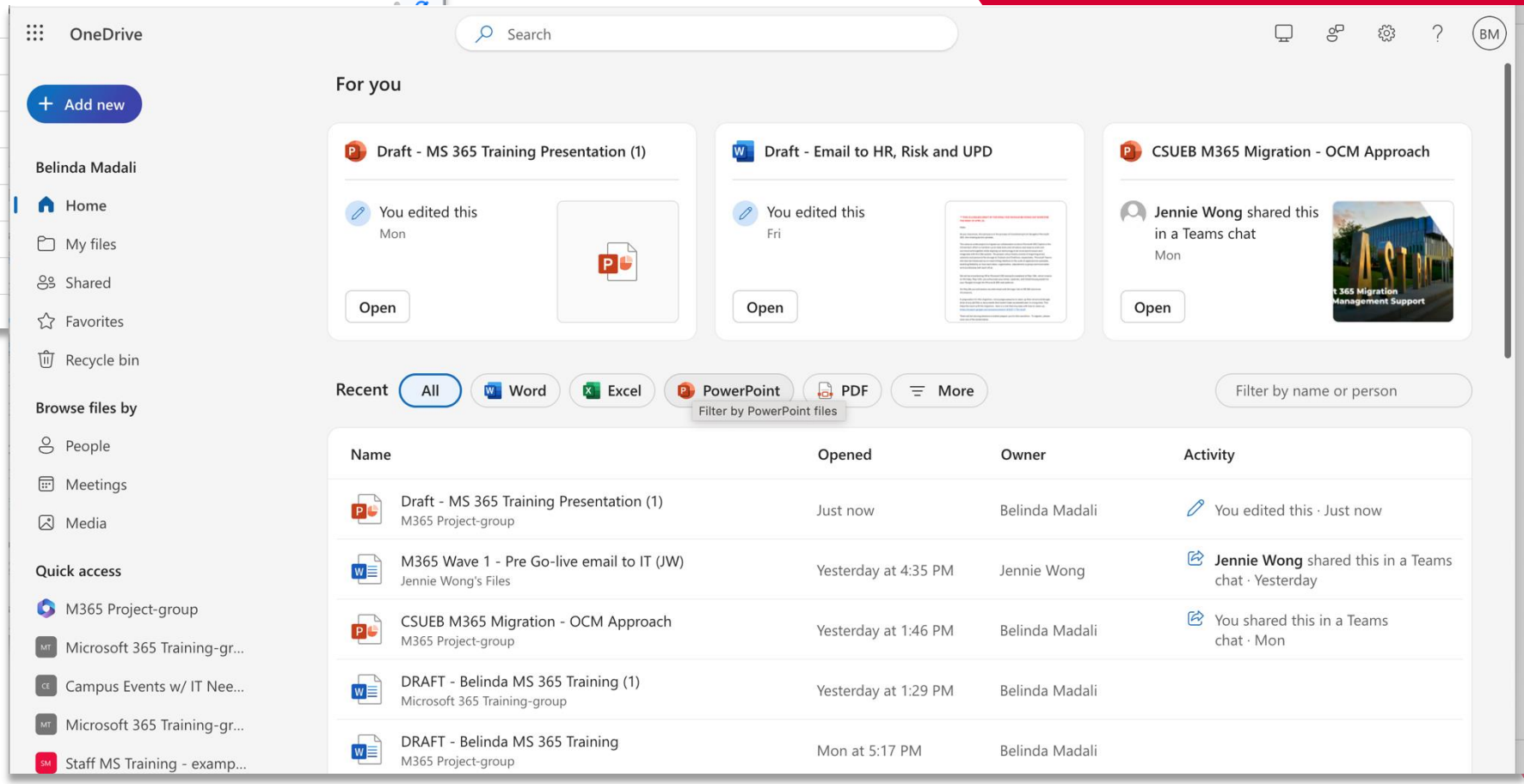
- Top left: Applications launcher.
- Click the icon.
- Choose OneDrive



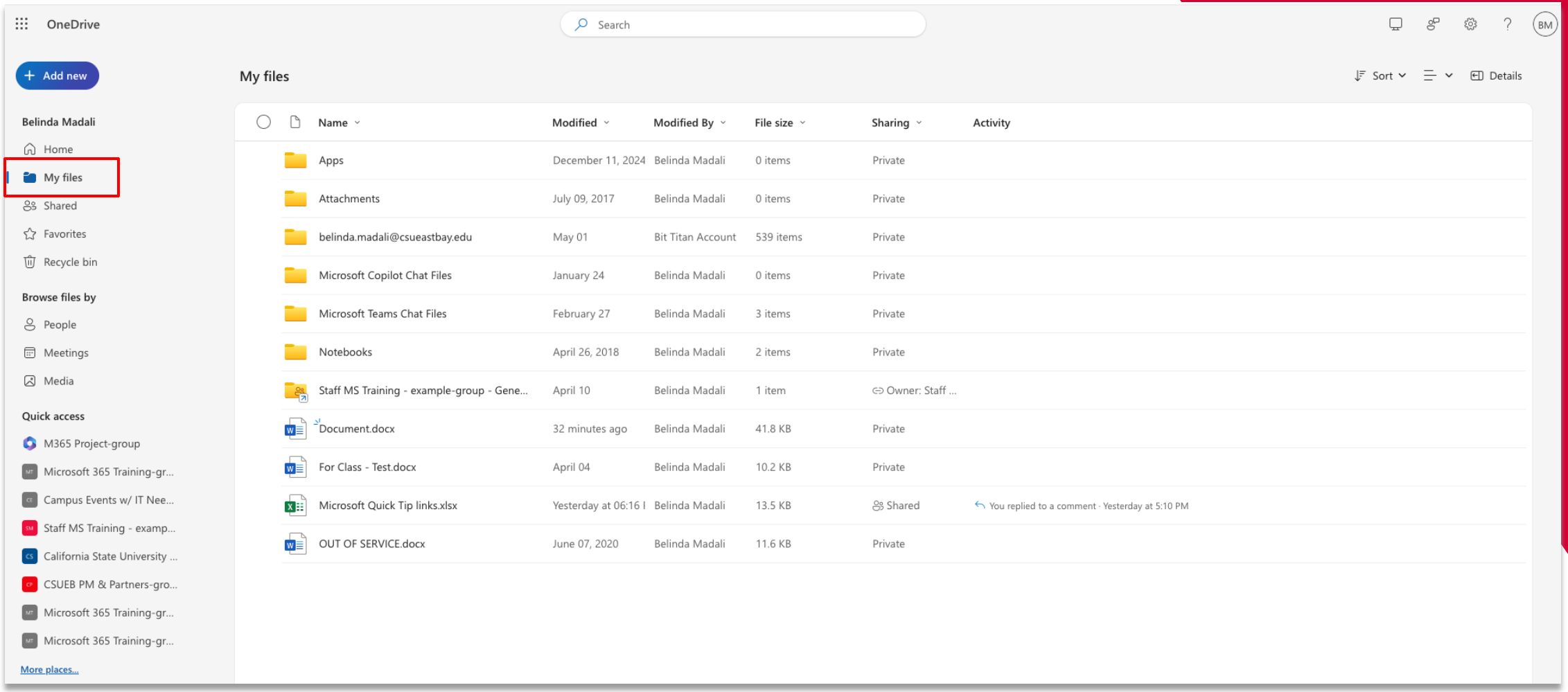
Google Drive - MyDrive

M365 - OneDrive





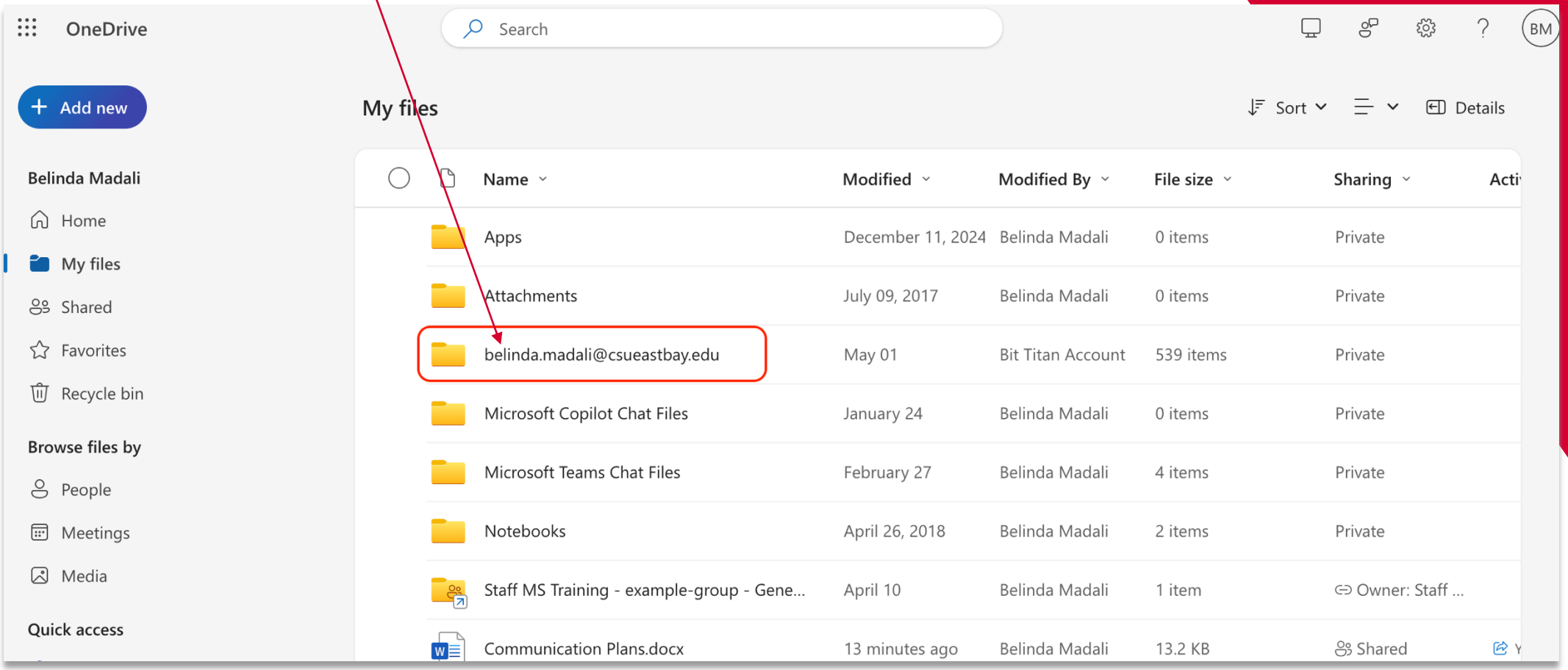
OneDrive – ‘My Files’ folder



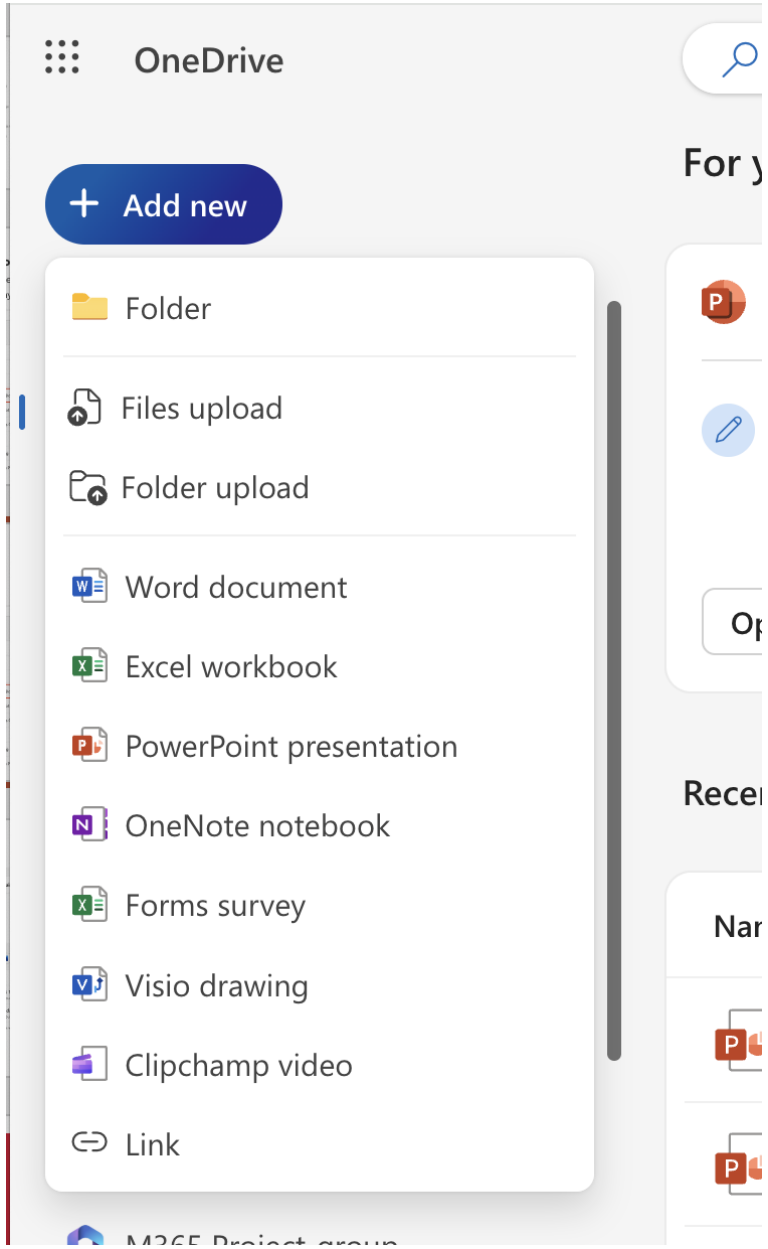
Where did all my files go?!

You should have a folder that is named:

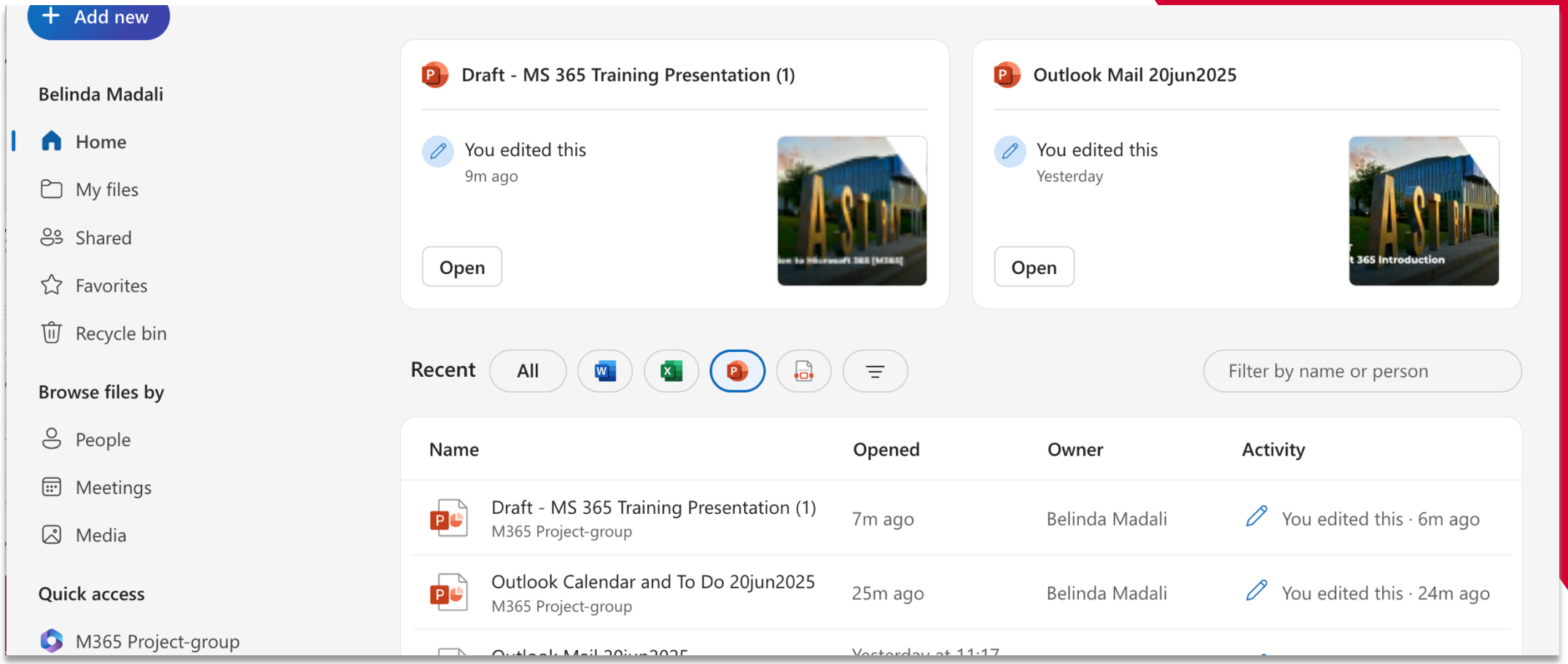
<firstname.lastname@csueasatbay.edu>



+ Add New.


OneDrive
Add new
Folder
Files upload
Folder upload
Word document
Excel workbook
PowerPoint presentation
OneNote notebook
Forms survey
Visio drawing
Clipchamp video
Link

OneDrive – Home .



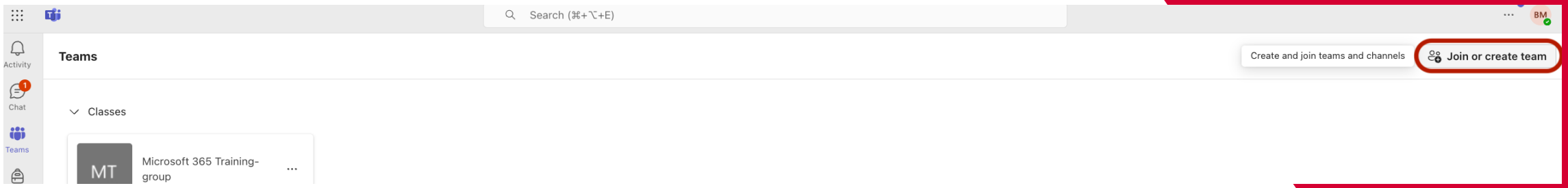
Teams

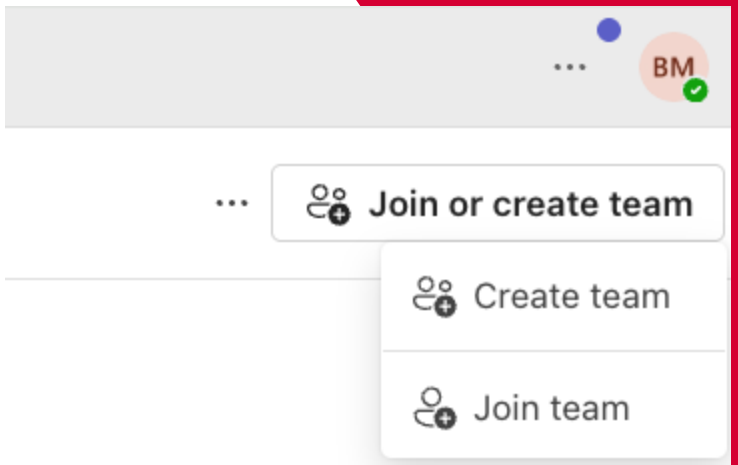
teams.microsoft.com

What is Teams?

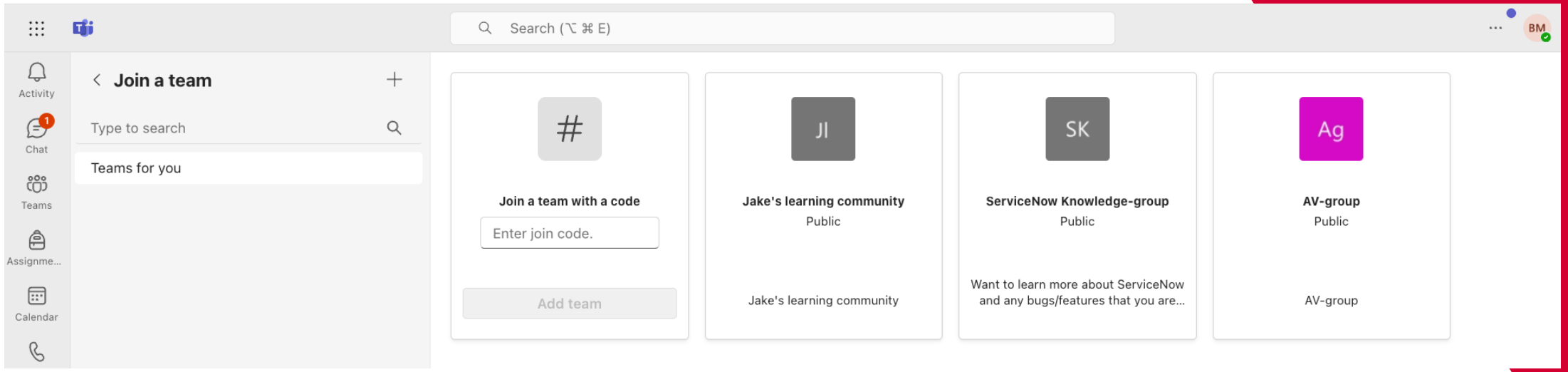
"Microsoft Teams is the ultimate messaging app for your organization—a workspace for real-time collaboration and communication, meetings, file and app sharing, and even the occasional emoji! All in one place, all in the open, all accessible to everyone." - Microsoft

Join a Team


Search (⌘+⌥+E)
BM
Activity
Chat
Teams
Teams
Create and join teams and channels
Join or create team
Classes
MT
Microsoft 365 Training-group


BM
Join or create team
Create team
Join team

Join a Team


Search (⌥ ⌘ E)
BM
Activity
Chat
Teams
Assignme...
Calendar
Join a team
Type to search
Teams for you
Join a team with a code
Enter join code.
Add team
JI
Jake's learning community
Public
Jake's learning community
SK
ServiceNow Knowledge-group
Public
Want to learn more about ServiceNow and any bugs/features that you are...
Ag
AV-group
Public
AV-group

Create a Team

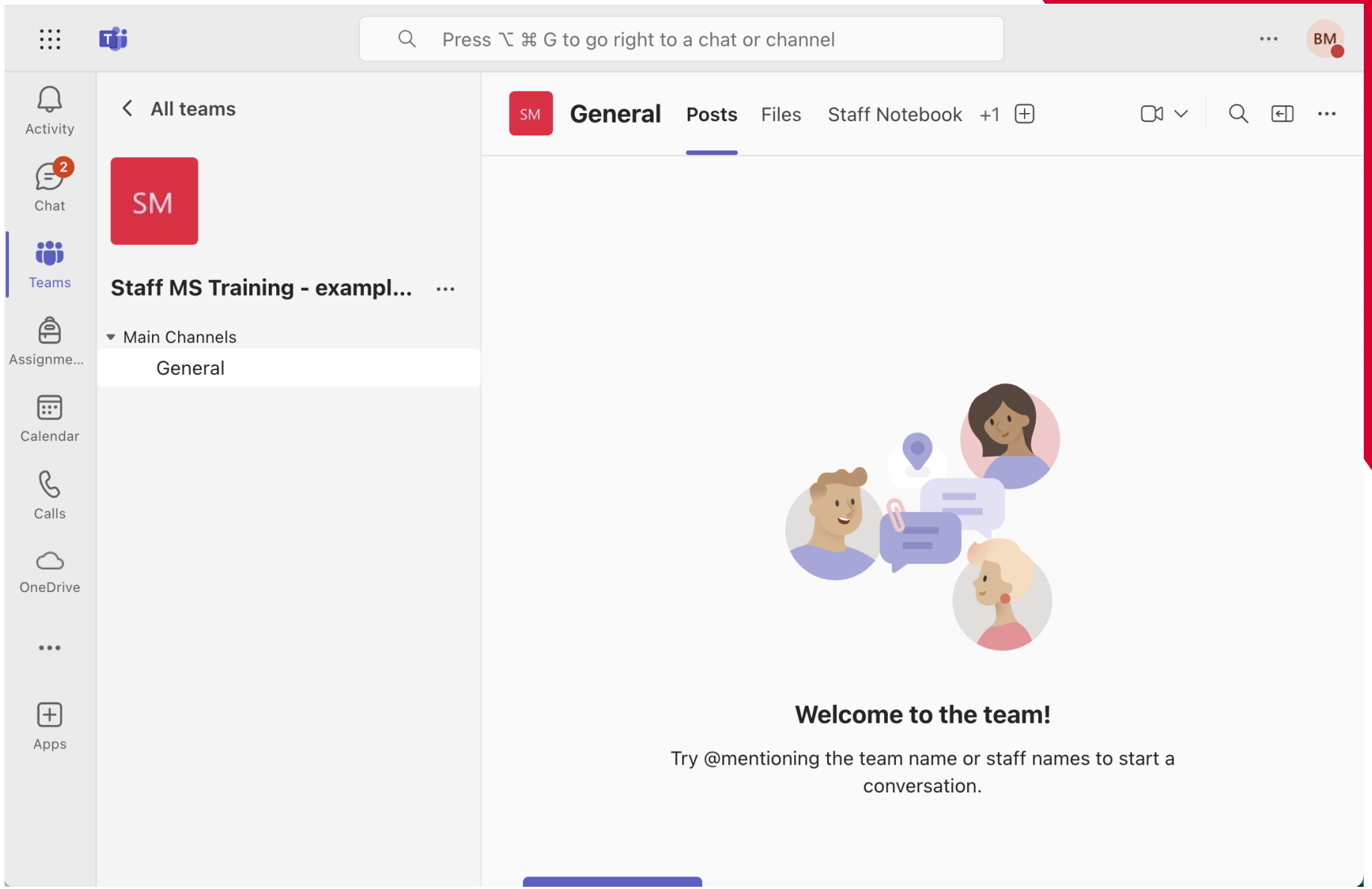
You can not create a Team yourself.

You will need to submit a Service Desk ticket.

What you will need to provide is:

- Name of the Team
- Will this group be public or private?
- Who will be the owner/manager? This person would:
  - Add/delete members
  - Give or remove access rights.

Example of a Team:



Posts vs Chats [Accessed through Teams]

Posts:

- **Purpose:**
  For team announcements, updates, important information, or structured discussions within a channel.
- **Audience:**
  Visible to all members of the channel.
- **Structure:**
  Designed for threaded conversations, creating a structured record of discussions.
- **Use Cases:**
  Announcing upcoming events, sharing important updates, or facilitating discussions on a specific topic within a team.

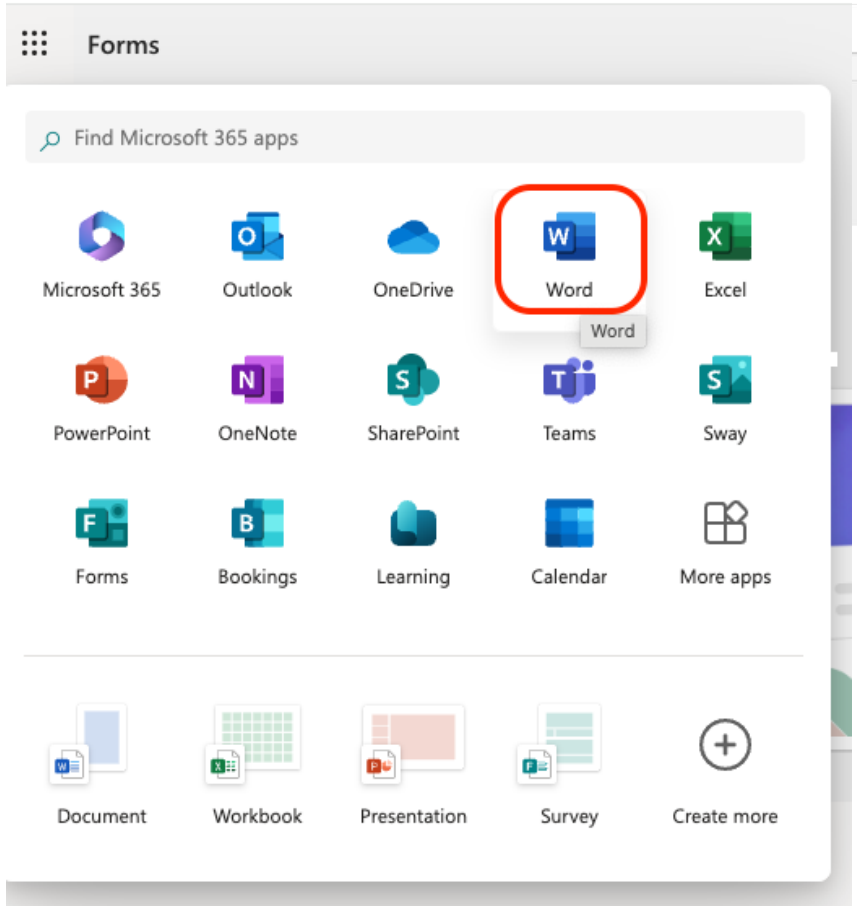
Chats:

- **Purpose:** For quick, informal communication with one or a few individuals.
- **Audience:** Visible only to the participants in the chat.
- **Structure:** More flexible and less structured than posts, allowing for quick back-and-forth conversations.
- **Use Cases:** Asking quick questions, sharing immediate feedback, or coordinating tasks with a specific group. m

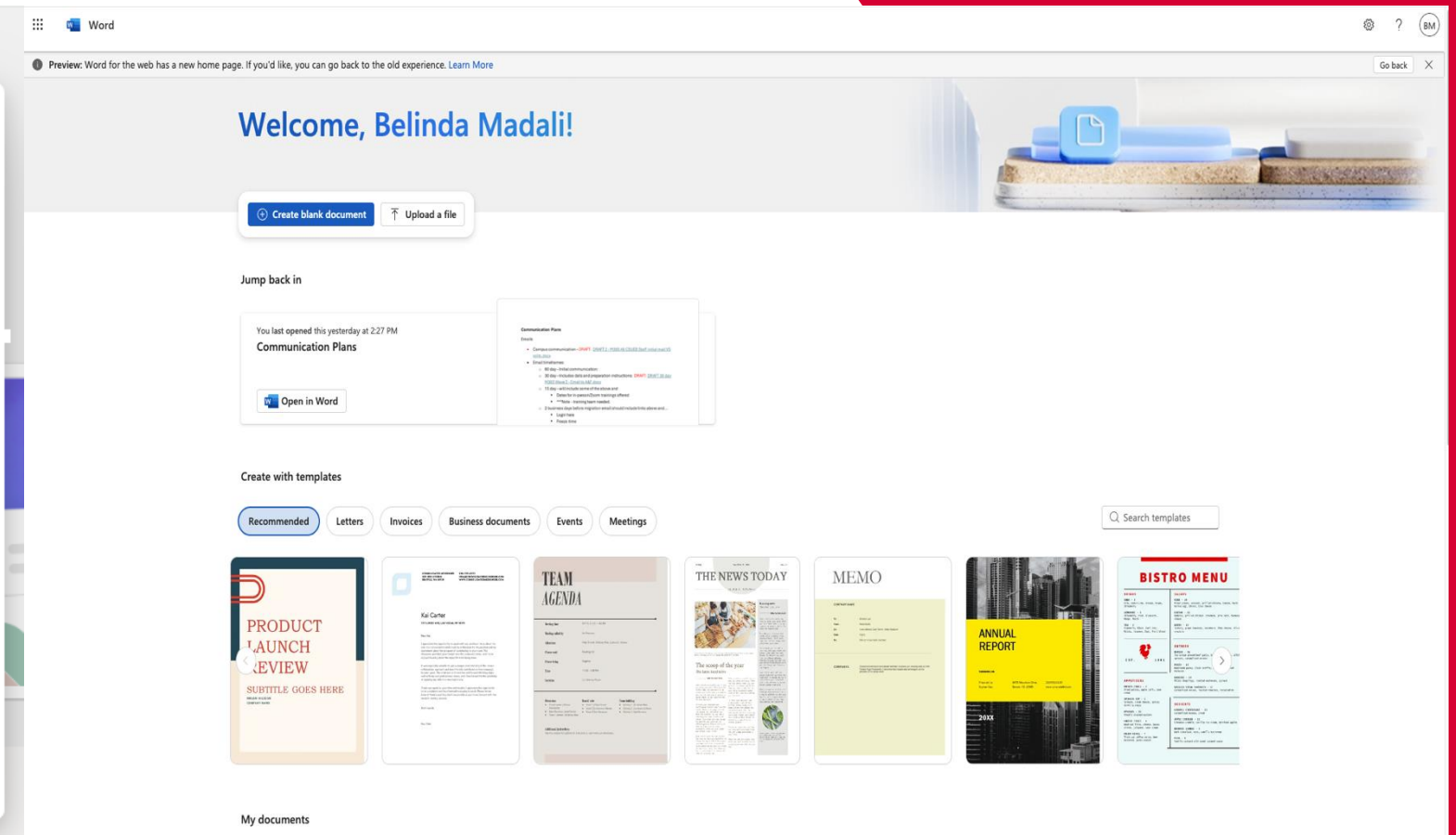
Microsoft Suite
Word/Excel/Powerpoint ...
and more

The Suite - Word

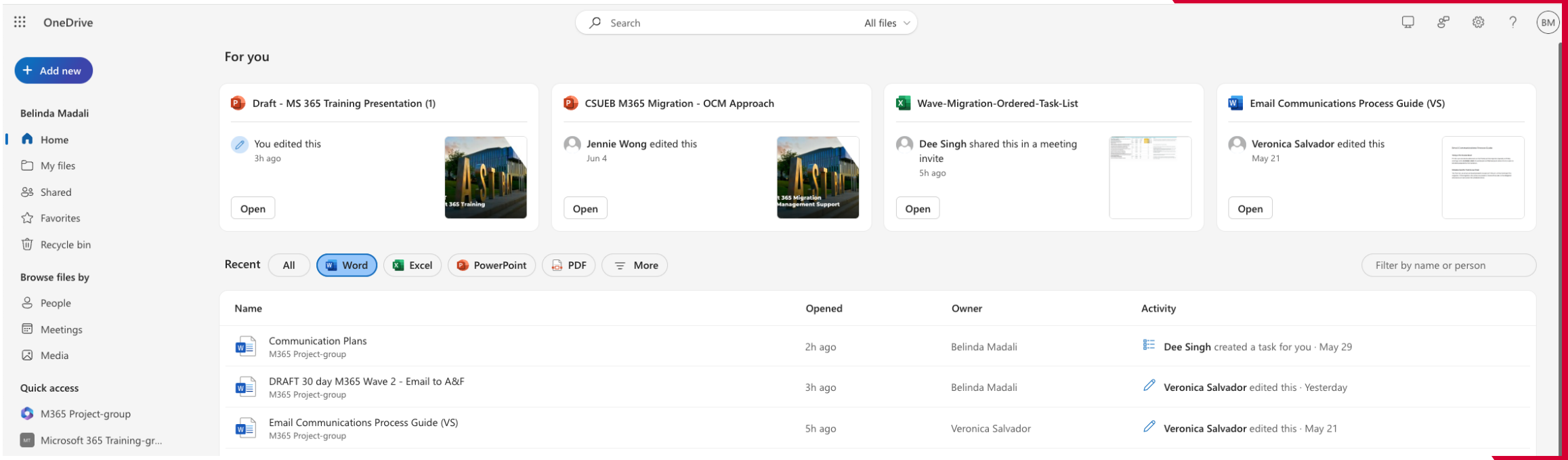
Apps launcher - Word



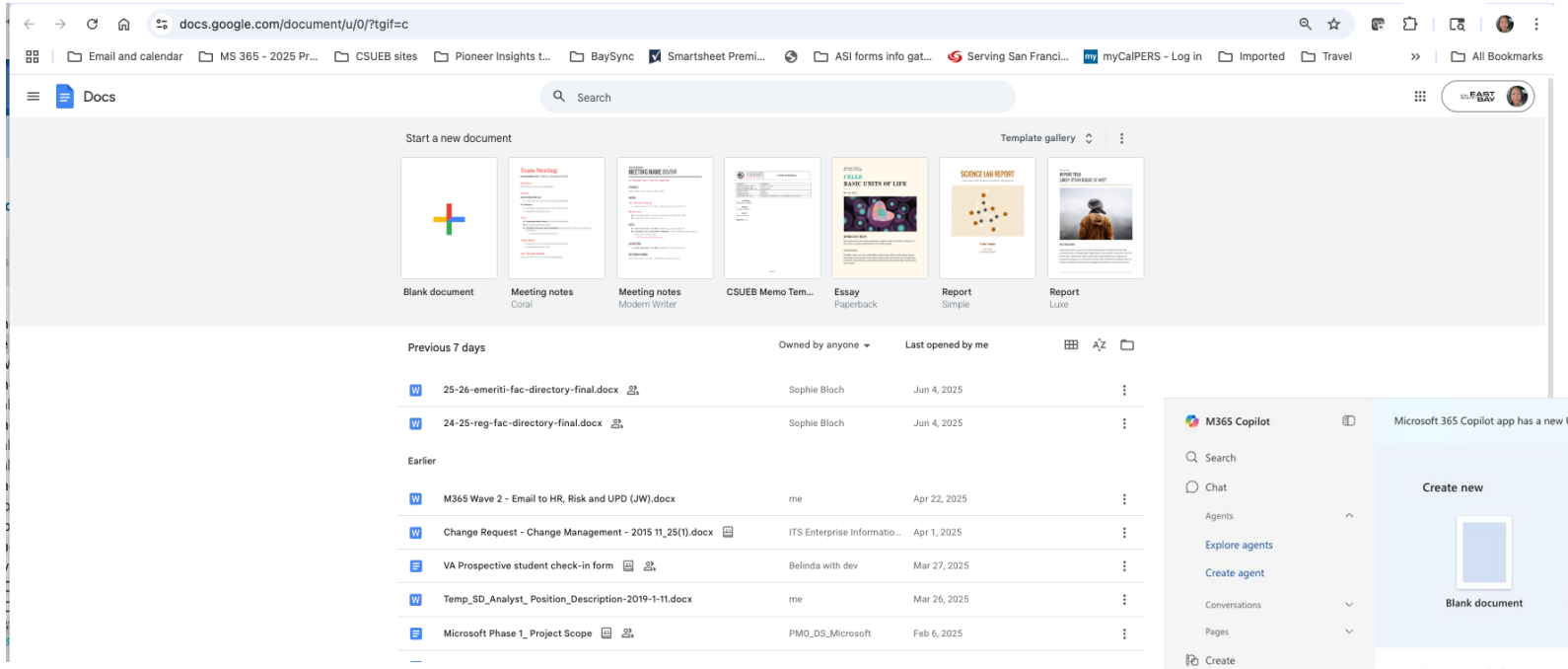
Word (New Layout)



Accessing Word docs through OneDrive

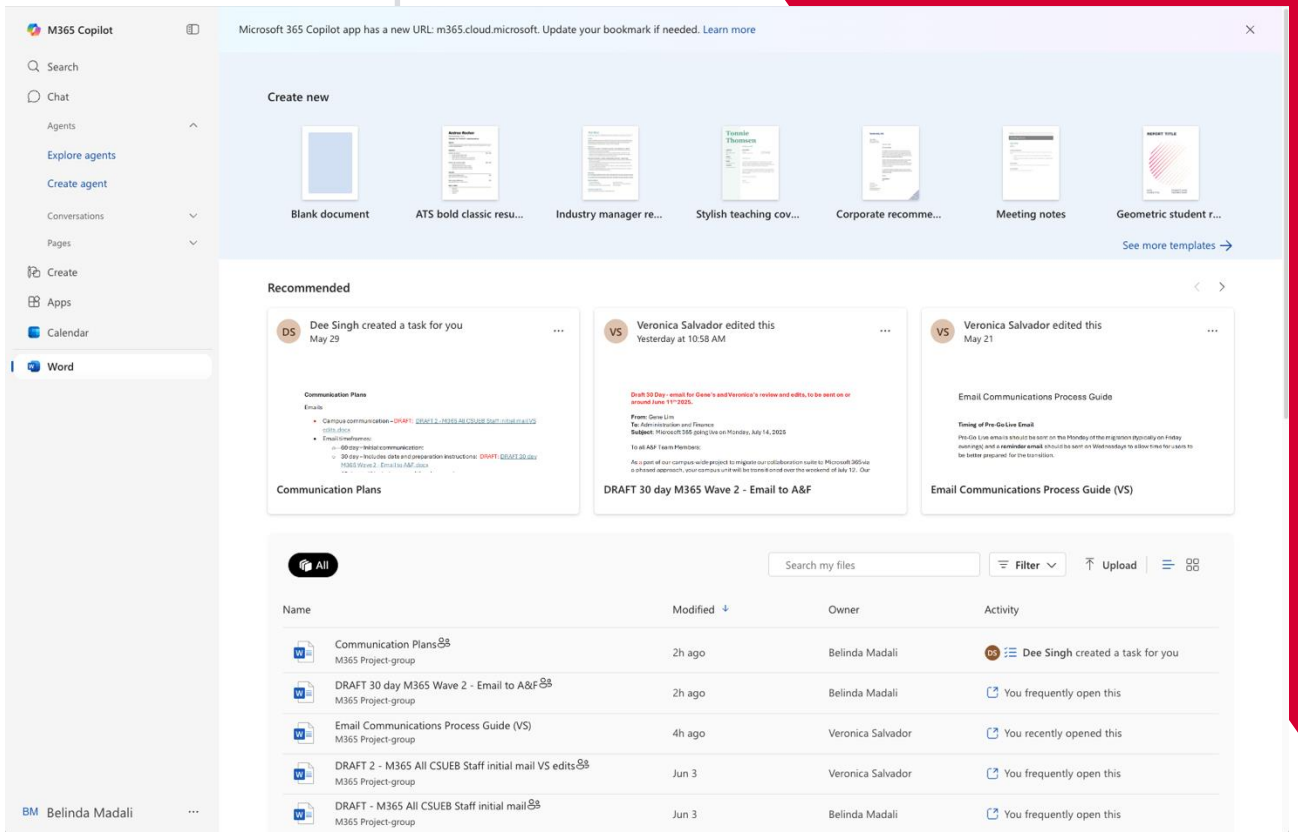


Google Docs vs M365 Word



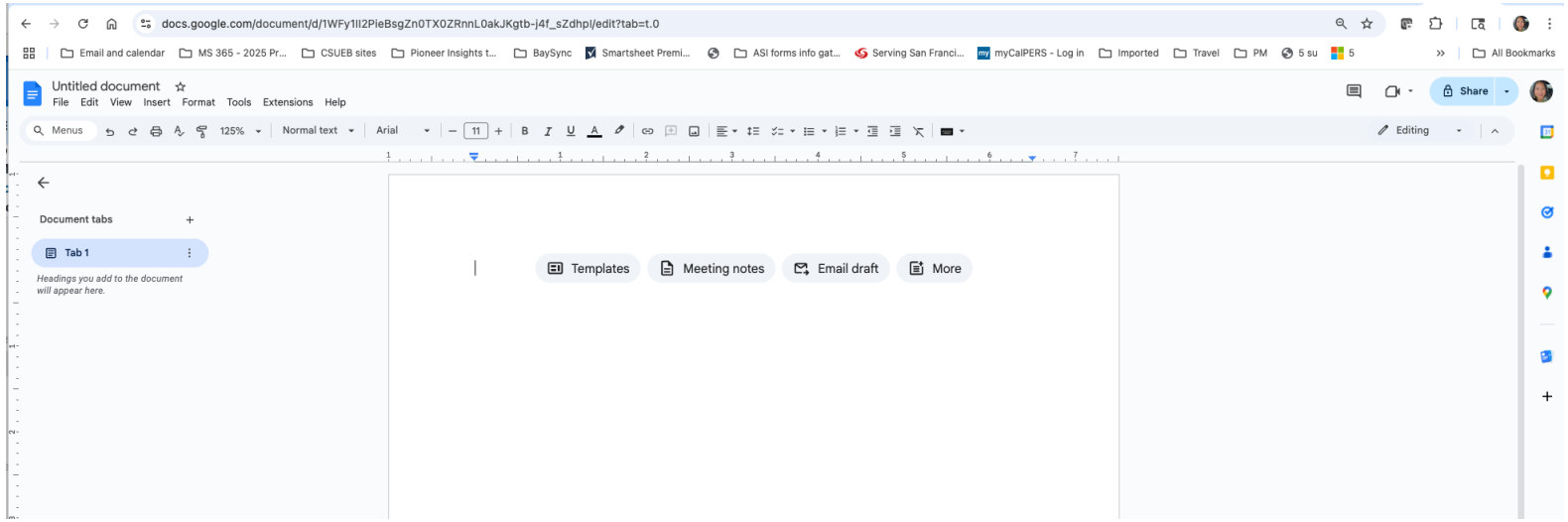
Googles Doc

M365 Word

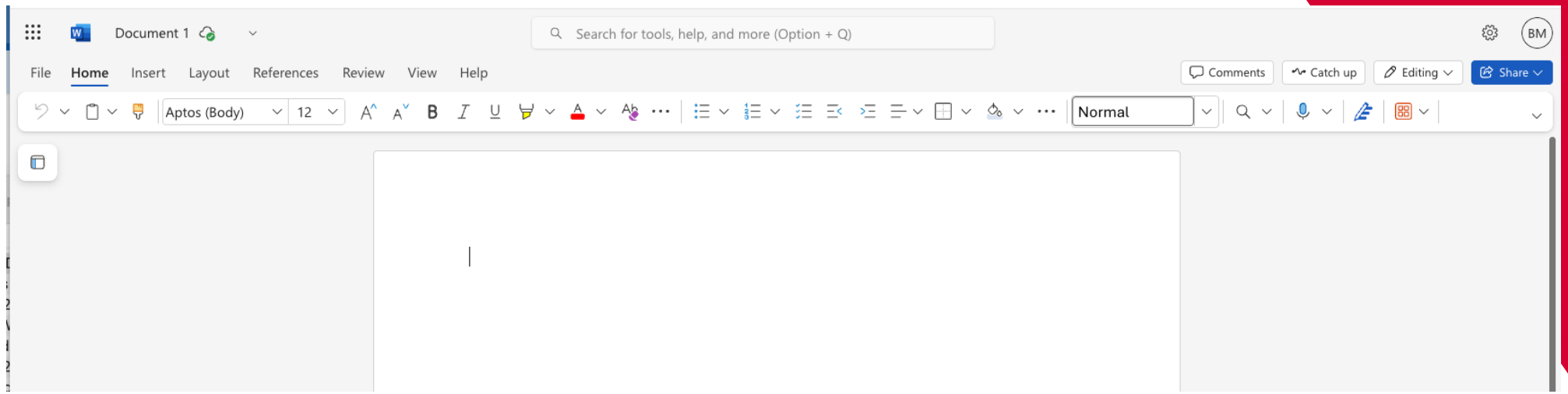


Example of New Document

Google Docs

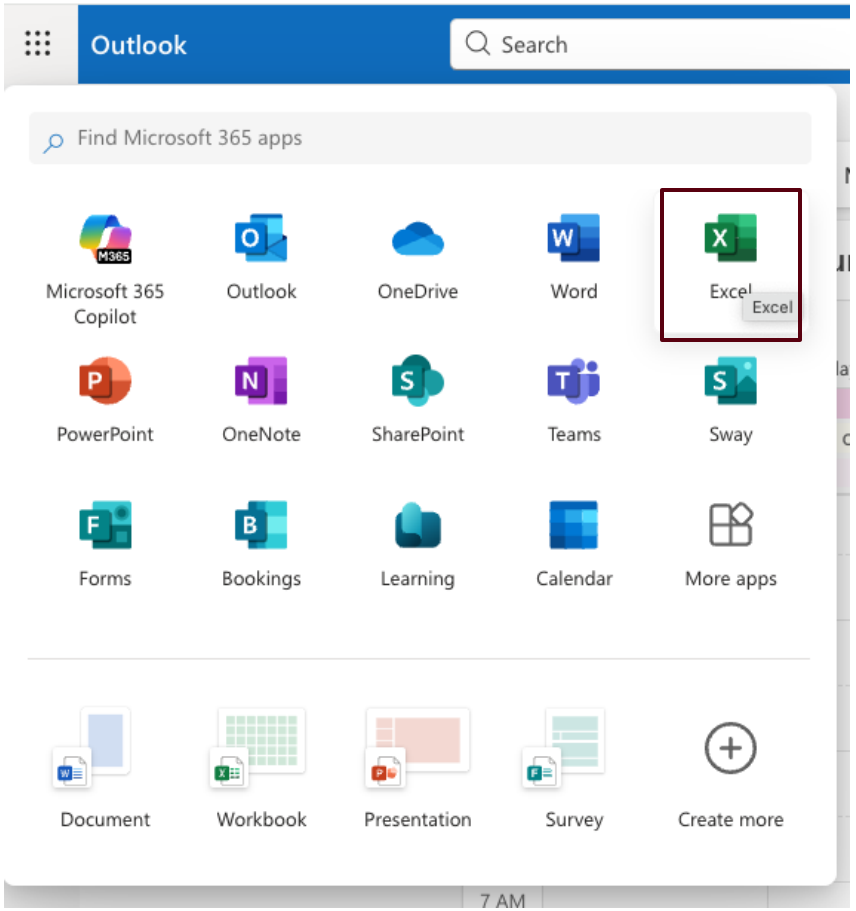


M365 Word

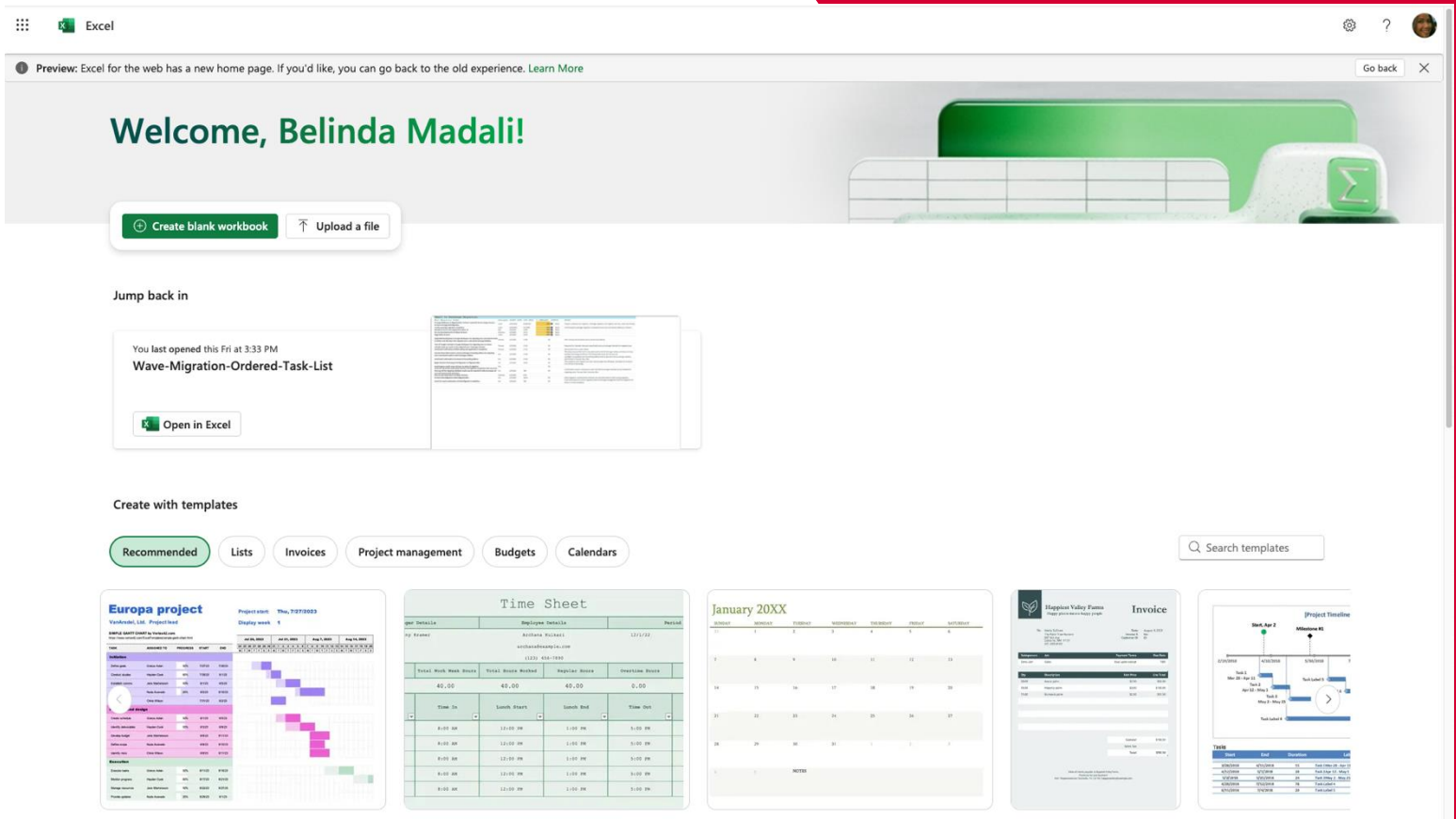


The Suite - Excel

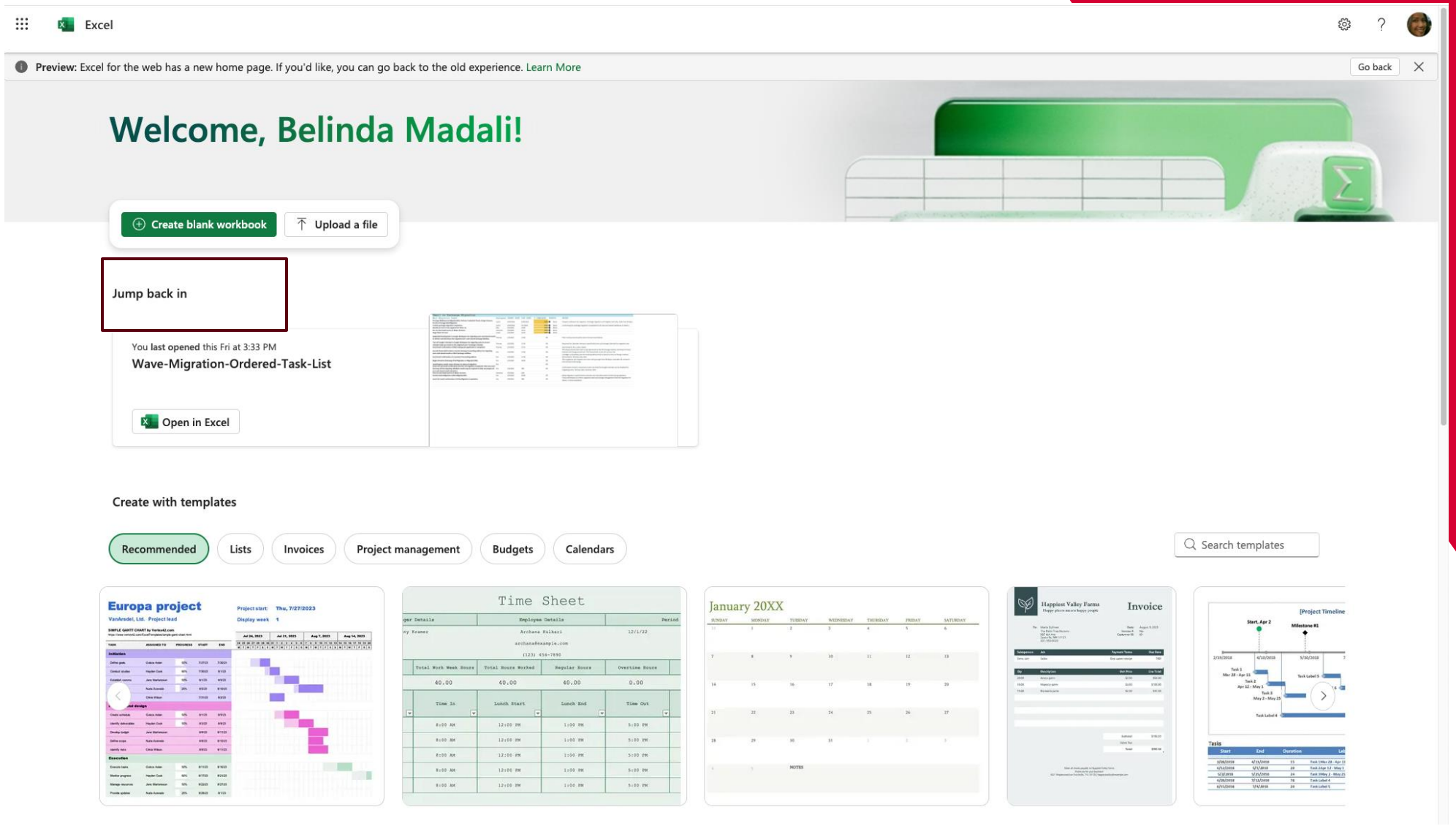
Apps launcher - Excel



Excel (New Layout)

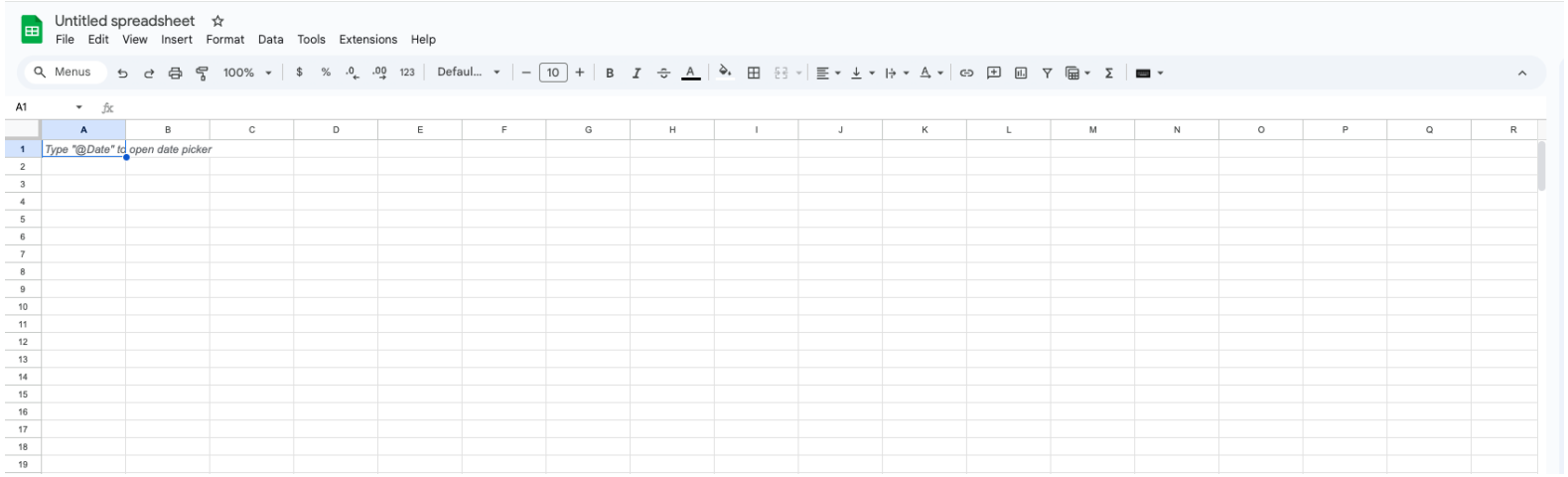


Create new Excel Spreadsheet.

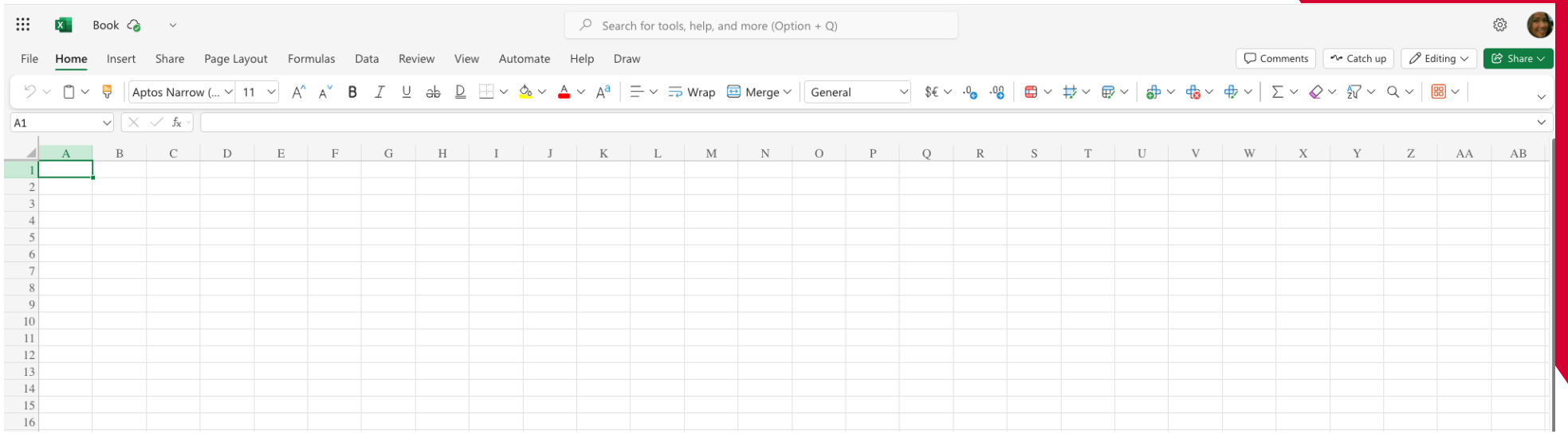


Google Sheets vs M365 Excel

Googles Sheets



M365 Excel



Hybrid life for now...	
M365	**Google**
Mail	Shared Drives
Calendar	Tasks
OneDrive	Groups
Chat w/ migrated people	Chat w/ non-migrated
Teams	Photos [not being migrated]

We are here for you!

If there are any issues or extensive training needed.

Open a Service Desk ticket:

- Send email to: servicedesk@csueastbay.edu
- Go to the Service Desk website to submit a ticket. BUT you may find your answer in one of the links listed on that page: www.csueastbay.edu/servicedesk

Groups

*** Google groups will **NOT** be migrated yet.
They will be migrated in the future.
If you choose to create new groups, do NOT name the group something you use currently in Google.

Groups

“Groups in Microsoft 365 give you collaborative tools to help your coworkers, friends, or family work on a common goal. No matter what kind of account you create a Group with, you can send messages to the group with a dedicated email address and schedule events on a group calendar. Adding Group members is easy when you create a group or add them later.” ~ Microsoft

Create a Group

You can NOT create a Group yourself.

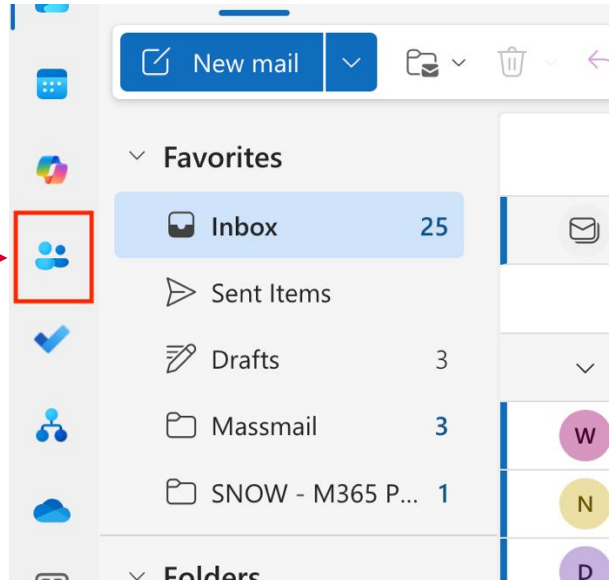
You will need to submit a Service Desk ticket to have it created.

What you will need to provide is:

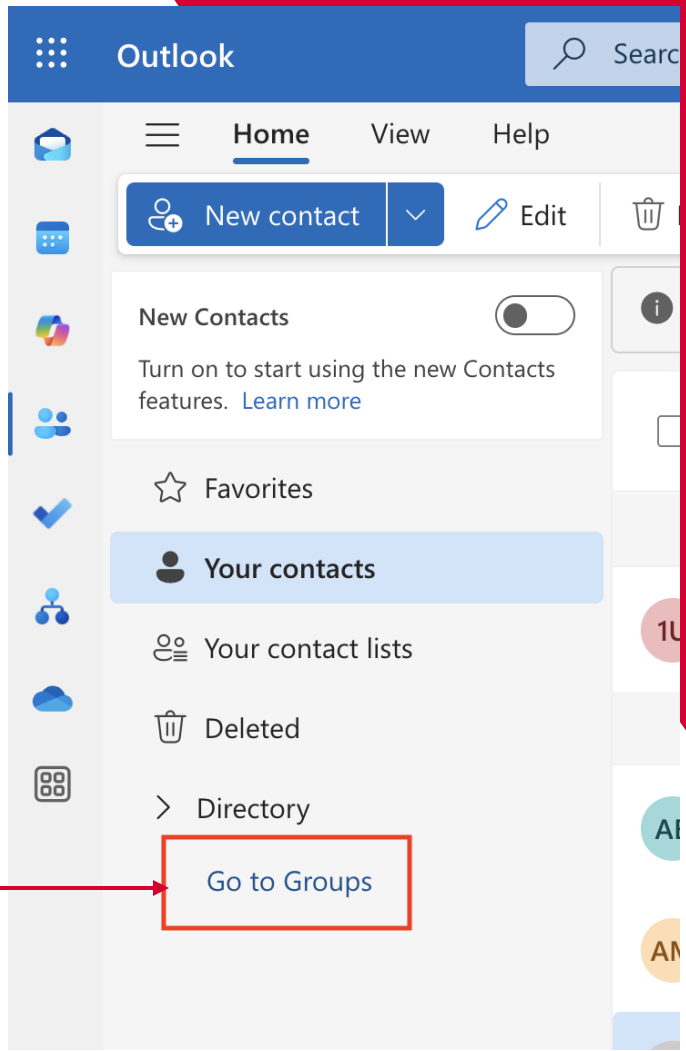
- Name of the Group
- Will this group be public or private?
- Who will be the owner/manager? This person would:
  - Add/delete members
  - Give or remove access rights.

Outlook Groups

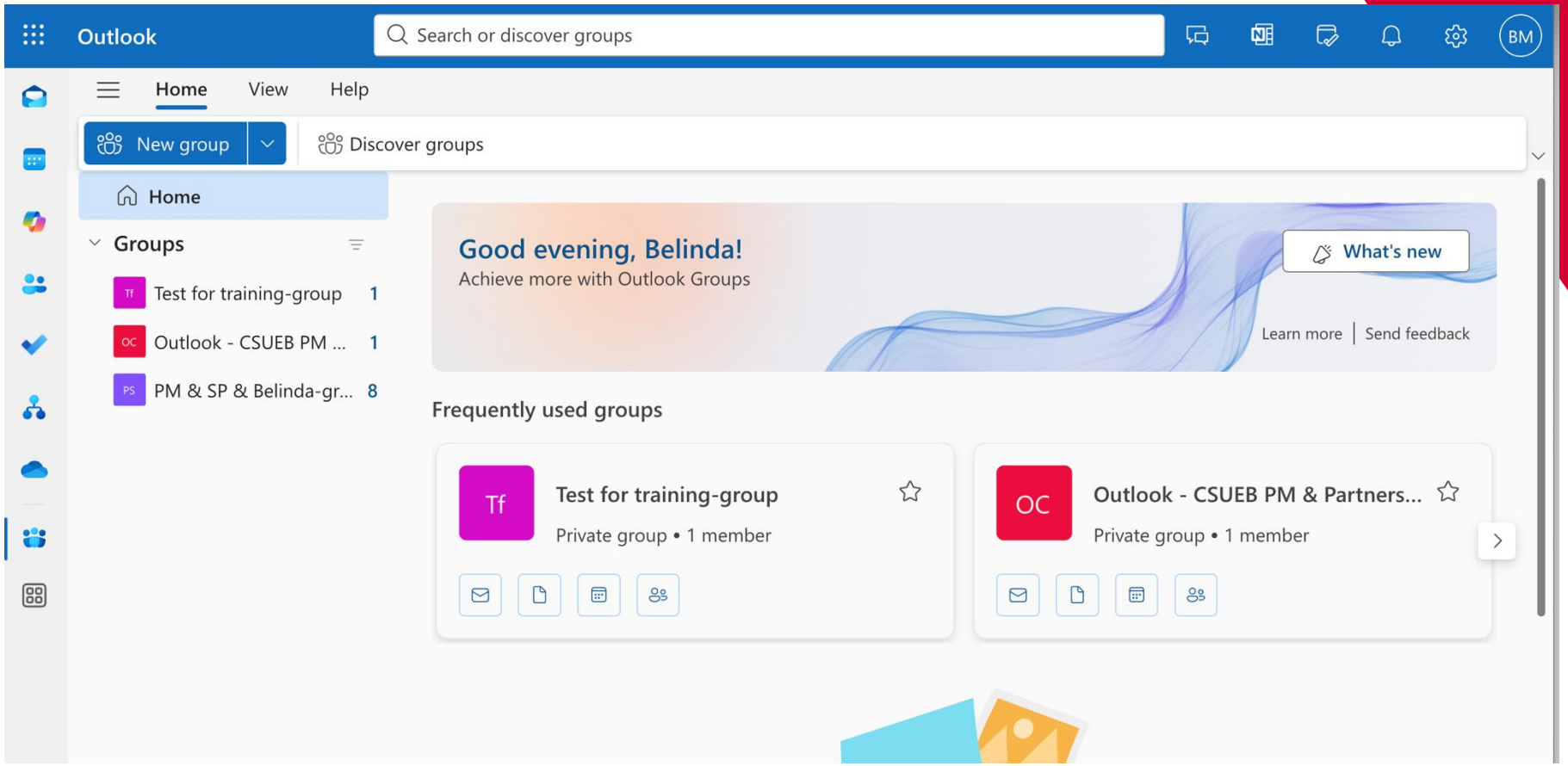
1. From Mail or Calendar click “People”



2. Click “Go to Groups”

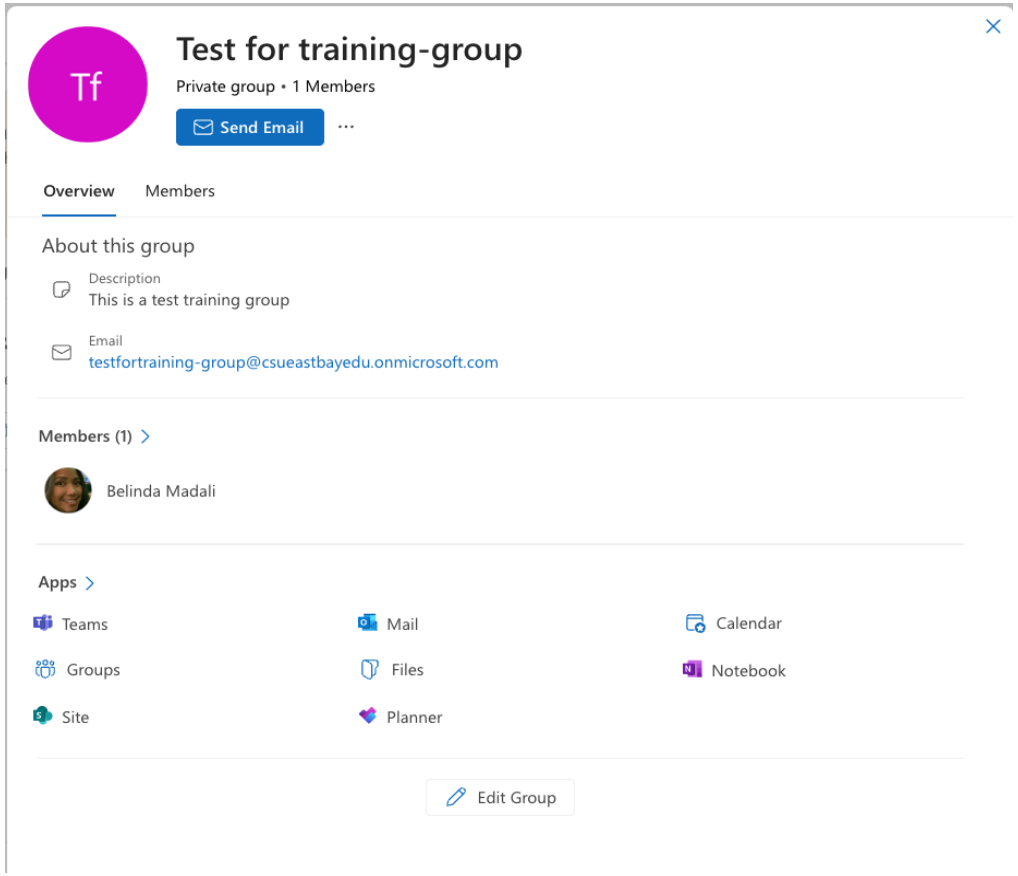


Groups

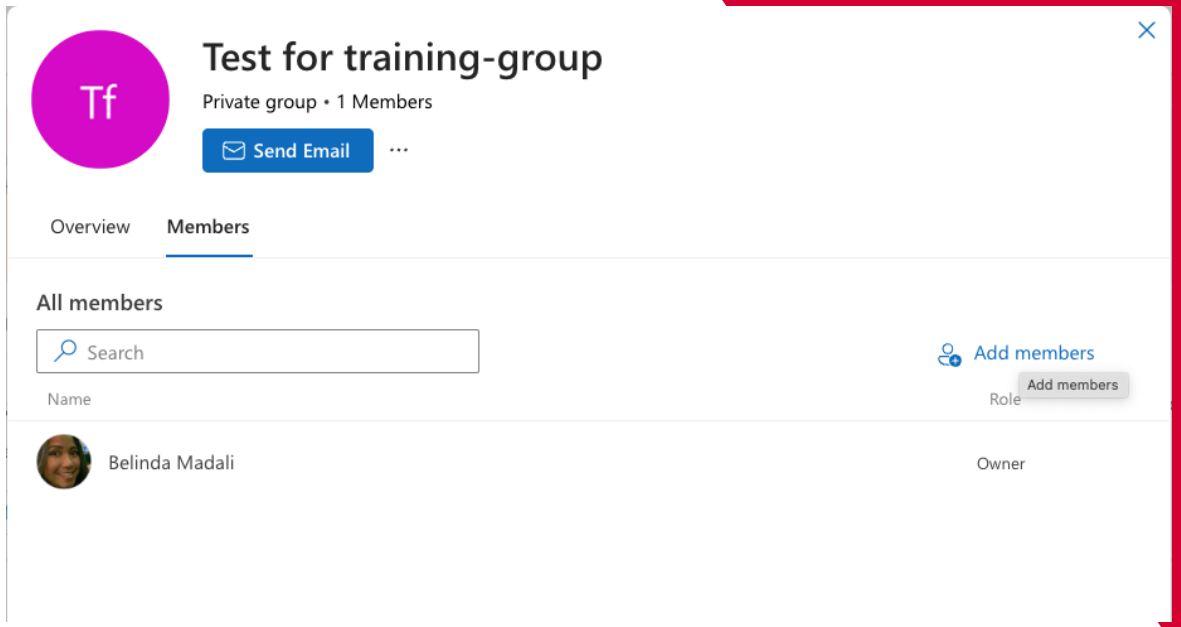


You will see the groups you own or are a member of.

Managing Groups You Own

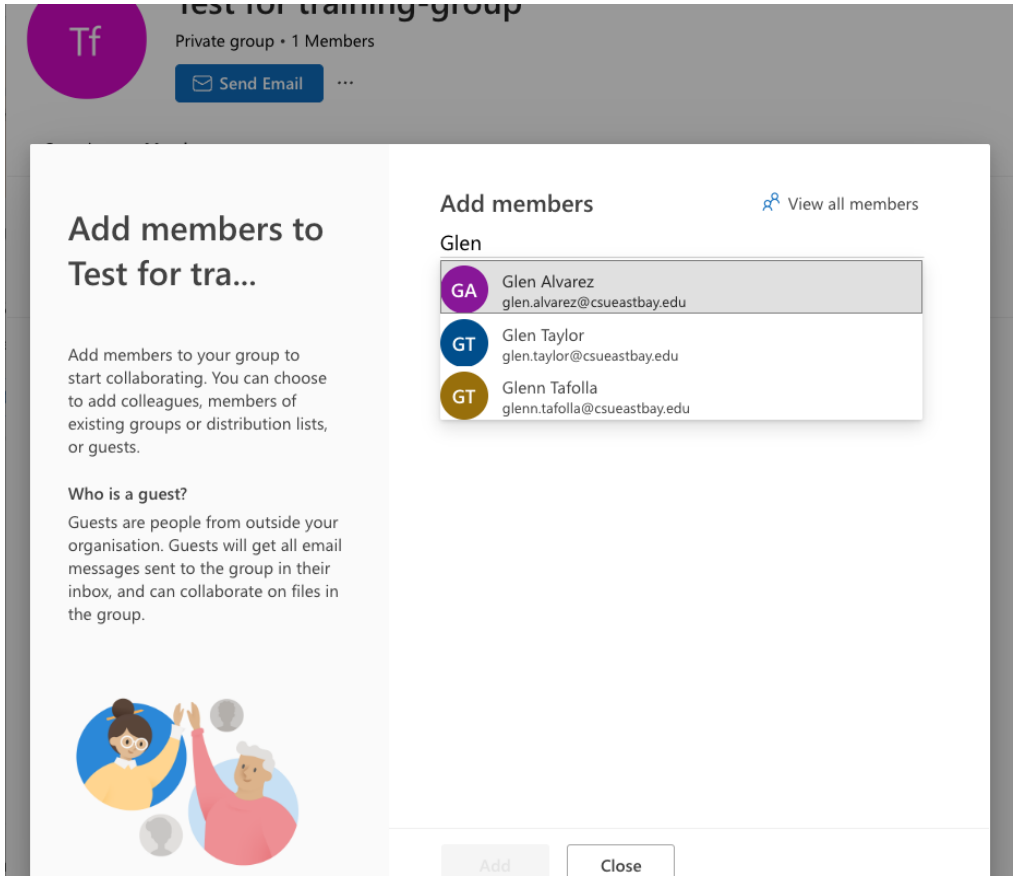


1. Double-click the group.
2. You will see the details of the Group.

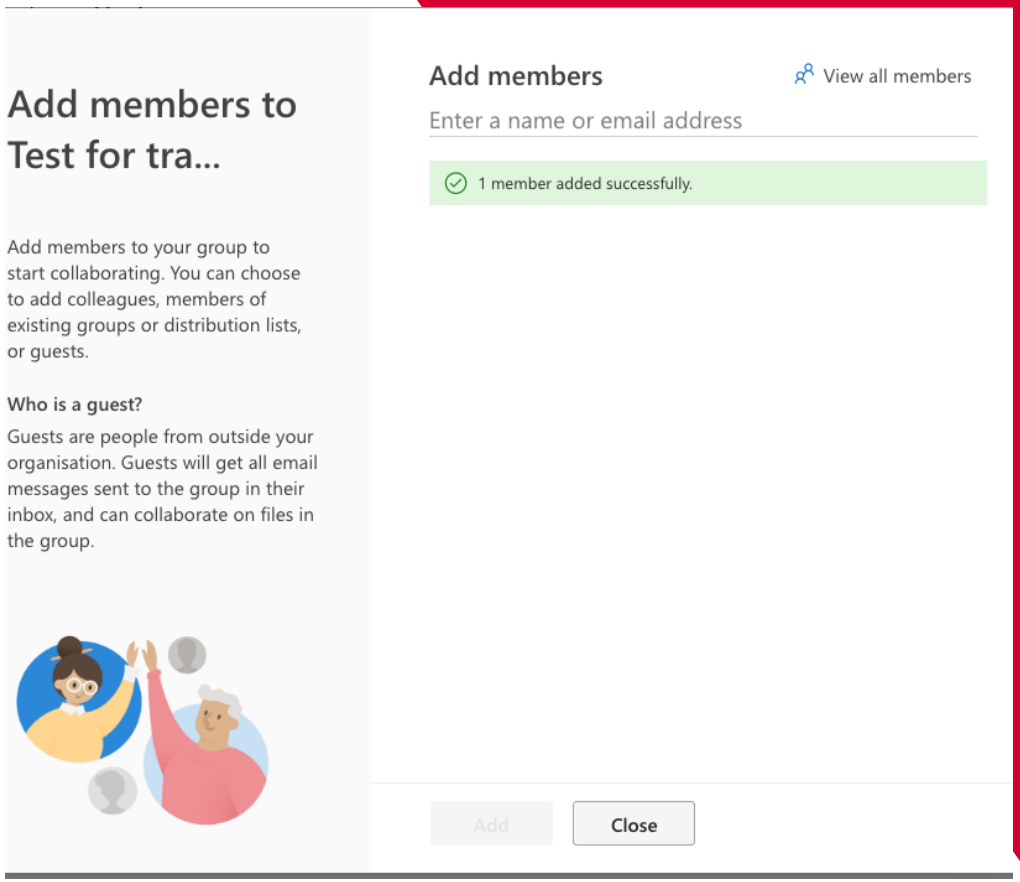


3. Click the Members Tab
4. Click Add members

Managing Groups You Own

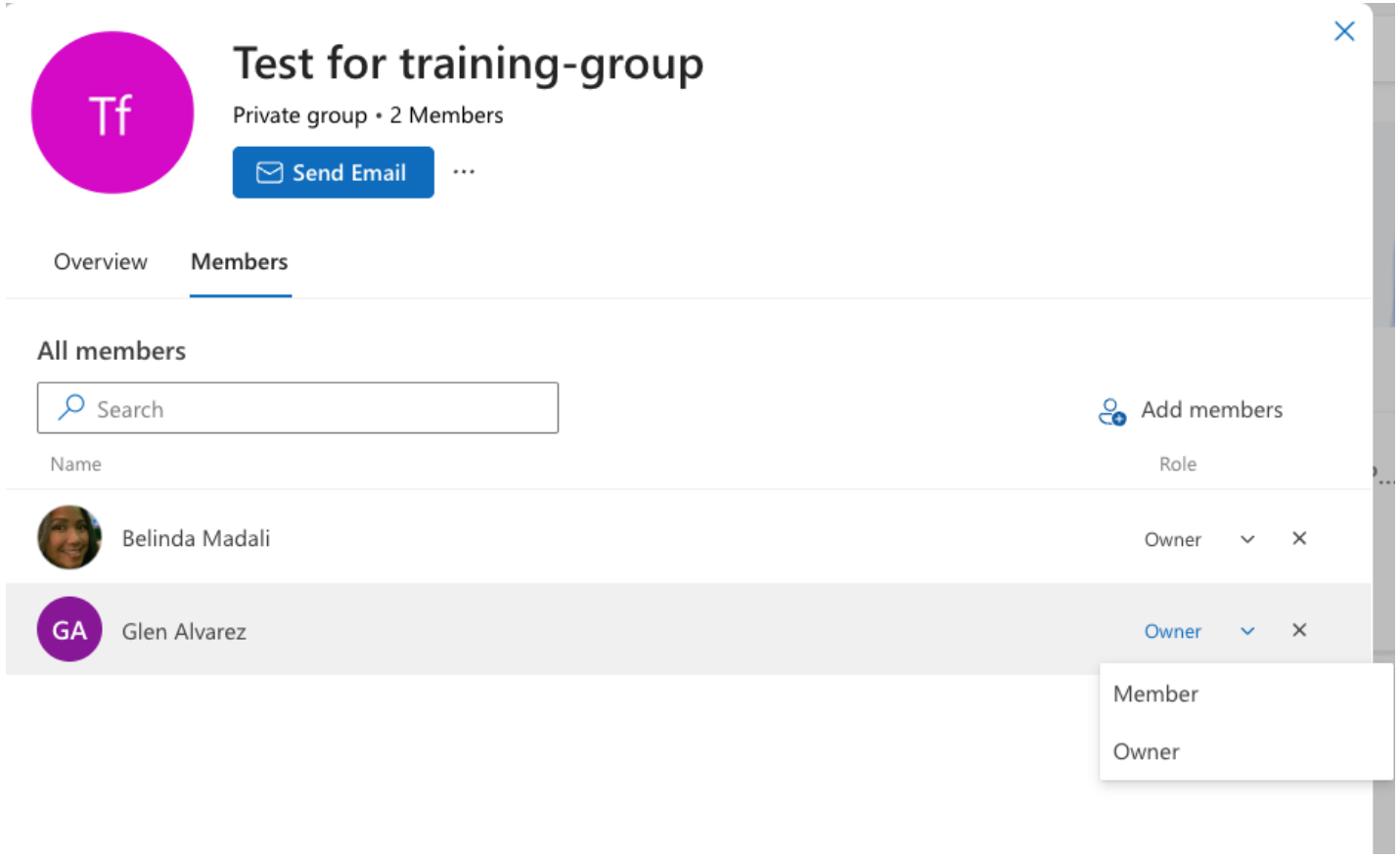


5. Type name under Add members.
6. Choose the person and choose Add.



3. Confirmation member was added, click Close.

Managing Groups You Own



5. You will now see the list of Members and their role.
6. To change the role of the member, you can click the arrow to choose the new role.