Microsoft 365 Quick Start Overview Guide

1. Online Resources
- **Access the M365 Hub online for resources, training and more**
- **NEW M365 Instructions page:** https://www.uregina.ca/is/m365/m365-hub.html

2. URegina Microsoft Work/School Account
- Sign in with **username@uregina.ca** and your usual uregina password

3. Multi-Factor Authentication (MFA) with MS Authenticator
Once you have setup MFA, you will periodically be prompted to verify your Sign In with the MS Authenticator app, or with a hardware token. It will not prompt every time you Sign In on the same system, but it may ask when you open MS Office or access online.

4. Online access to Outlook, Office 365 apps, OneDrive, OneNote and more
- Sign in at https://portal.office.com to access apps online
  - Select apps on left side menu, click 'Apps' icon to access more apps
  - To download and install Office 365 (including Outlook) on other systems and laptops
    - In upper right, click "Install and more" – "Install Microsoft 365 Apps"
    - Click install Office to download the installer
  - To download and install MS Teams on other systems and laptops
    - On left side, click Teams to open Teams online
    - Click the … menu at top right, choose "Download the desktop app"
- **Quick Tips:**
  - ➢ Create documents, spreadsheets, and presentations.
  - ➢ Share files through OneDrive
  - ➢ Collaborate in real-time with colleagues on Office documents.

5. Outlook Email and Calendar
- Open the MS Outlook app (software) or Sign In online https://www.outlook.com

a) Email
- Access Email by clicking the 'Email' icon in the left side menu
- **Quick Tips:**
  - ➢ Default Inbox view shows 'Focused' and 'Other' tabs. To switch to "All" and "Unread" tabs instead: In "View" menu click to turn off 'focused inbox' feature.
  - ➢ Reading Pane is on by default, move or turn off in View menu – Reading Pane drop down.
  - ➢ You will need to recreate rules and signatures, and update category colors.
  - ➢ **NEW: Quarantine for suspicious messages. You will receive an email when a message has been quarantined with a link to review the messages.**

➢ View Quarantine anytime by Sign In at: https://security.microsoft.com/quarantine
➢ Click checkbox in front of message to select, click checkmark at top left to release to your Inbox, click trashcan icon to Delete the message.
➢ To set a sender as trusted in Outlook: Home – Junk – Junk Email Options – Safe Senders

b) Calendar
- Access the Calendar by clicking the 'Calendar' icon in left side menu
- **Quick Tips:**
  ➢ New Appointment is just for you, similar to a 'posted appointment' in GroupWise
  ➢ New Meeting is for inviting others, the 'To" field is called 'Required', the cc: field is called "Optional"
  ➢ To do a Busy Search, click "Scheduling Assistant" menu at the top, click to select the chosen meeting time, then click the "Meeting" menu at the top to return to the meeting invitation
  ➢ Easily make the meeting a Teams meetings by clicking 'Teams Meeting" in the top menu, and it will create a link and add the details.
  ➢ **Recurring Meetings do not always copy properly from GroupWise to Outlook. Cross-reference with GroupWise calendar for accuracy for the first few weeks.**
  ➢ When opening a recurring meeting, you can choose 'Just this one' or the 'Entire Series'. There is no longer the option to edit 'this instance forward', you will need to end the recurrence, and create a new meeting for a new time going forward.

c) Contacts and Address Book
- Access Personal Contacts and addressbooks by clicking the 'People' icon in left side menu
- **Quick Tips:**
  ➢ There will be a folder 'first.last@uregina.ca' that is empty
  ➢ View the 'First Last' folder for your name to view your Personal Contacts
  ➢ Frequent contacts will be there in a separate folder.
  ➢ Ensure you are in the correct folder before you click 'New Contact' in the Home menu. When you click New Contact, it will be added to the folder you currently have highlighted.
- Access Address Book" for all employee accounts in "Home" menu – "Address Book"
- **Quick Tips:**
  ➢ **In Address Book dropdown, select "All Distribution Lists" to see groups by department.** Note: Administrators that had access to GroupWise will still need to keep these lists up to date in Outlook. Open a list and click 'Modify Members'.
  ➢ Select 'Global Address List' to view all accounts
  ➢ Select 'UR Employees' to view individuals
  ➢ Select 'UR Shared Mailboxes' to view all the generic accounts

d) Shared Mailboxes/Calendars and Delegate rights (Proxy Access)
- Shared mailboxes show as a folder in the Outlook App
- You will have the same access in Outlook that you previously had in GroupWise
- **Quick Tips:**
  - ➢ **==RECOMMENDED USE: Sign In online at http://www.outlook.com with your personal account, click your initials at the top right, choose 'Open another mailbox'==**
  - ➢ This will open the shared account in its own tab and ensure that emails are 'From' that account and Sent Items are only stored in that account.
  - ➢ Shared accounts can be accessed directly within the Outlook App, but note that a copy of Sent Items is also stored in your personal account, which may not be desirable and new items will require you to select the 'From' address (default is personal account).

6. <u>OneDrive</u>
- Access OneDrive folder in windows folder list or Sign In online https://www.onedrive.com
- **Quick Tips:**
  - ➢ If the 'OneDrive' cloud folder is not visible in your list of folders, launch it by clicking Windows icon start menu at lower left, start typing OneDrive and click to open.
  - ➢ Contents from I: drive will be in a folder called "I_Drive"
  - ➢ Files from FILR personal storage will be in a folder called "FILR_PS"
  - ➢ Securely store and access files from anywhere, and facilitate collaboration by sharing files

7. <u>Network File Storage: Accessing new Network Drives (T:, S:, O:, P:, L: etc.)</u>
- **Change:** Network Drives will be essentially the same but are moving to Windows servers.
- **Quick Tips:**
  - ➢ Folders will show with a slightly different path but drive letters will be the same.
  - ➢ OLD "Vol2(\\compserv.cc.uregina.ca)(T:)", NEW "T-Drive(\\ad.uregina.ca\uofr)(T:)"
  - ➢ If you are not seeing new network folders, double-click desktop icon "Map New Drives"
  - ➢ To view old drives (read only mode) double-click desktop icon "Map Old Drives". An alternate drive letter will be used (ie: T: will show up as X:).
  - ➢ Utilize network drives such as T:/ for archival purposes and historical data.
  - ➢ Files are static and not available for concurrent collaboration like OneDrive or Teams.

NOTE: On unmanaged/other system FILR, Webdrive, OES client, and Kanaka are no longer options for accessing network drives. Set up access with CIFS on Windows (https://www.uregina.ca/is/tech-notes/technote629.html) and MacOS (https://www.uregina.ca/is/tech-notes/technote630.html).

8. <u>MS Teams (official implementation and training in early May)</u>
- **Open the Teams app (software) or Sign In online at https://www.teams.com**
- **Quick Tips:**
  - ➢ Conduct meetings and chat with colleagues.
  - ➢ Create Teams for projects or employee groups.
  - ➢ Share files and collaborate within channels.