Office 365 Email and Calendar Tips
General Calendaring Recommendations - Outlook clients

• Use the Outlook web client or desktop client
• Accept or decline meetings using web client or desktop client
  – Using an iPhone or Android to process meeting requests can result in unexpected behavior
  – Responding to meeting requests lets organizer know your status
General Calendaring Recommendation – Email Reminders

• “Add an Email Reminder” option available when creating a calendar entry
  – When an attendee declines a meeting, the entry is removed from their calendar
  – The email reminder provides an opportunity for an attendee to reconsider their attendance
General Calendaring Recommendation – Meeting Modifications

• Meeting Entry Date or Time Modifications
  – Outlook resets the response of the attendees
  – After the change, an initial acceptance could then show up as “No Response”
  – Always send updates!
General Calendaring Recommendation – Scheduling Assistant

• Used to find a time that the most number of attendees can attend

• Right-click on attendee to select Attendance Optional
  – Right-click on attendee to change attendance setting from optional to required
General Calendaring Recommendation – Contact Lists Can be used for Scheduling

- Click on the Add Attendee + sign
- Locate List in People folder
- Use + sign to add as required attendee
- Plus sign in front of list name expands list
  - Attendees can be removed
  - Additional attendees can be added

- Right-click on Contact list also allows scheduling and email options
Recurring Meetings – What often occurs

• Often created for the entire academic year
• Inevitably modified as a result of unforeseen circumstances or meeting cancellations
• Attendees don’t always accept the changes;
  – They think they’ve already accepted the meeting notice
• Attendee’s instance becomes out-of-sync with the owner’s instance
Recurring Meetings – Recommendations

• Limit the number of instances in a recurring series
  – If a weekly meeting, limit the recurrence to a month
  – If a monthly meeting, limit the recurrence to 2-3 months or the quarter
Recurring Meetings – Recommendations

• Set an end date on the recurring series
• If changing the date or time for a single instance of a recurring meeting,
  – delete the single instance, and
  – create a new meeting
• Always opt to send updates!
Resource Calendars –

Scheduling a Resource

- A Resource should be added to the calendar entry as an attendee, using the “Add Room” button
- Room displayed if Free
- Resources should not be Meeting Organizers
  - When the Resource Calendar is an organizer, attendees don’t know who to contact if they have a question regarding the meeting
Resource Calendars – Delegation

• Delegation
  – Two or three Delegates should be assigned to a Resource Calendar
  – Delegates receive notifications for the resource
  – Editor rights allow one to add entries directly onto a calendar
Resource Calendars – Full Access vs Delegation

• Full Access
  – Allows the owner to open a resource without a password, set permissions or share calendar

• Delegation
  – Allows you to act on behalf of the resource, accepting or declining calendar entries.
Interesting Calendars

– Academic Calendar: acadcal@calpoly.edu
– NCAA calendars for Cal Poly Sports
– Holiday calendars for other countries
New Features – Calendar Preferences

Events from Email

• Email events can be automatically added to your calendar
  – Airline reservations
  – Hotel reservations
  – Car rental
  – Package delivery

• Events can be added as private entries
New Features - People and Contact Lists

• Four new Views available in People
  – People you frequently contact
  – People on your calendar today
  – Favorites
  – People you may want to follow up with

• Contact Lists
  – Easily email, schedule, and view members
New Features - @mentions

Mentioned by someone else

• Provides awareness
• Outlook can filter on @mentions
• Opened message displays your highlighted name
New Features - @mentions

Mentioning someone else

• @mentions adds to email collaboration
• Type @username in the body of the email
• User’s name is highlighted in the message
• User’s name automatically added to the To… line of the email
Features Coming Soon –
New Home Page for Office 365 users

• Redesigned Interface
  – access to online applications & recent documents

• Office Installation
  – easier to install mobile and desktop applications

• Tool Tips
  – tips will highlight new and unused features
Features Coming Soon – Focused Inbox

- Inbox will have two tabs: Focused & Other
  - Focused tab - emails important to you
  - Other tab - remaining emails
Features Coming Soon – Focused Inbox

• Focused Inbox is determined by
  – identification of people you interact with often
  – content of the message itself
    (newsletter, machine generated email, etc.)
• Algorithm that moves items to the Clutter folder will power Focused Inbox
• Can move mail between tabs
• Focused Inbox will eventually replace Clutter
Features Coming Soon – Email Safety Tips

• Four Safety Tips
  – Suspicious, Unknown, Trusted or Safe.
• Tips will offer an additional layer of protection
• Safety Tip provide
  – a warning to the user when an email is marked suspicious
  – a reassurance when a message is safe
Questions?

• Documentation
  – Servicedesk.calpoly.edu/office-365

• Service Desk
  • 756-7000
  • servicedesk@calpoly.edu
  • Mon – Fri, 8:00 am – 5:00 pm