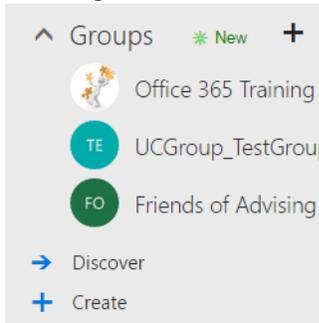


Office 365 Policies and Guidelines

Office 365 Groups

An Office 365 group is a collaborative workspace that gives members access to a shared distribution email, calendar, document library, notebook, and planner.

- **Students must contact [Tech Support](#) to request that an Office 365 group be created for them.** In the request, they should include their name, the purpose of the group, and the name they wish to call the group.
- **Faculty and staff can create an Office 365 group** by logging into [Office 365](#) (or Webmail), clicking on the **blue icon** in the top left-hand corner, and choosing **People**. Here they can create a new group by clicking on the **+icon** next to Groups or the **Create** button.



- Group names should be specific, appropriate, and reflective of the group's purpose. Group administrators accept responsibility for the appropriate use of the group by its members.
- The group name/email will appear in the Outlook Global Address List. To see what other groups have already been created, click on the **Discover** button.
- Once you create a group, it will **automatically add a "UCGroup_" prefix** to the name (e.g. if you named your Group "Test 123", it will be renamed "UCGroup_Test123"). **Do NOT add the prefix yourself when creating the group.** The system will do this automatically for you. It may take a few minutes for the name change to appear.
- Groups can be public or private. **Most groups should be private.** Private groups restrict access to members only. Requests to join a private group must be approved by the group administrator(s). Public groups are open to any Ursinus College faculty, student, or staff member to access and join. **Confidential and sensitive information should NOT be added to a public group.**
- The person who creates the group is the group's administrator by default. Administrators can add group members and assign other group members as administrators. Administrators can also remove group members, approve requests to join private groups, rename the group, and delete the group.
- Group administrators can add non-Ursinus users to the Group by giving them guest access. **Do NOT add external users to Groups that have confidential or sensitive information.**
- **Warning: Be careful deleting a group.** When you delete a group, you are permanently removing all group conversations, email, files, calendar events, notes, and plans. There is no way to recover this information, so **be sure to have a back-up.**
- **Groups that are inactive for more than six months may be deleted by Library and IT.** The Group administrator will be contacted beforehand to see if the group is still necessary.

Planner

- Planner is designed for group (not individual) project management. **Clicking on "New Plan" in Planner will automatically create a Group for you** and an email in the Outlook Global Address List. Therefore, do not click on "New Plan" unless your purpose is to create a Group Plan.