Contents

1. Purpose

Carleton is launching a new email system, **Carleton Email**, to enhance email services for undergraduate and graduate students. The University has contracted with Microsoft to provide the underlying system.

The purpose of this **Pilot** is to surface & resolve any problems with the service; and to develop & test the documentation for both end users and the CCS Service Desk.

2. Sign-up

You will be informed once you have been accepted into the Pilot program. Once accepted, every time you log into Carleton Central, you will be prompted to sign-up for your new **MyCarletonOne account** and **Carleton Email**. You can always click on *Remind me later*, and continue on to the other Carleton Central services.

3. What Participants Get

Upon Sign-up, you will receive:

- Your new **MyCarletonOne account** *which replaces your Student Computing Account*
- Your new **Carleton Email** account *which replaces your old @connect.carleton.ca address*
- Your own **@carleton.ca** address
- No interruption in mail delivery—any *messages sent to your old @connect.carleton.ca address will automatically be delivered to your new Carleton Email account.*

Use your new MyCarletonOne account anywhere you currently use your Student Computing account, to log into: WebCT, the PC labs, MyCarleton Portal, CU-Wireless. Read your new Carleton Email through the MyCarleton Portal email, or directly access it through your smartphone or personal computer's built-in email software.

Key Terms Used in this Document

MyCarletonOne account: A new accountname and password for students, staff & faculty, which will eventually be used by all services on campus.

Carleton Email: A new email system for Students which provides 10GB of storage and an @carleton.ca address.

Student Computing account: The 8-character account assigned to all students, and being replaced by the MyCarletonOne account.

Connectmail: The legacy Student email system, @connect.carleton.ca, being replaced by the **Carleton Email** system.

MyCarleton Portal: website providing 1-click access to Carleton Central, WebCT, News announcements, and your student email account.

Carleton Central: website providing course registration and other services. Login directly using your Student ID & PIN, or access through the MyCarleton Portal.

4. Graduate Student, or Work at Carleton?

Are you a Graduate student, and/or do you work at Carleton? If so, you may also have an employee Outlook Exchange email account in addition to your Connectmail account. Signing up for **Carleton Email** will not affect any employee email account you may have. i.e. If you have two accounts, you will retain both, as is the current practice.

Your **Carleton Email**'s *@carleton.ca* address will intelligently route your student-related and work-related email to your appropriate student or work email account. For details see Appendix A.7

5. Pre-sign Up Checklist

You don't need to worry about migrating any existing Connectmail messages to your new **Carleton Email** account—we will automatically do this for you. However there may be some other configurations you have made in your Connectmail account that you also wish to bring over. Here is a checklist.

Item	Action	Details
1. **Are you Using Address Book in Connectmail?**	**IF** you want to import into your new **Carleton Email** account, …then **export** your Connectmail address book	Appendix A.1
2. **Do you have entries in the Connectmail calendar?**	**IF** you want to import into your new **Carleton Email** account, …then **export** your Connectmail calendar	Appendix A.2
3. **Have you set auto-forwarding on your Connectmail?**	**IF** you want to recreate this auto-forward in your new **Carleton Email** account, …then **note** which address(es) you are forwarding to in Connectmail	Appendix A.3
4. **Do you have any Connectmail filters (rules) configured?**	**IF** you want to recreate rules in your new **Carleton Email** account , …then **note** what filters (rules) you have created in Connectmail to auto-file mail into folders	Appendix A.4

6. Walk-Through of Sign Up

6.1 Register for Pilot

www.carleton.ca/ccs/carleton-email/carleton-email-pilot

We will confirm your request by email with instructions.

6.2 Review Pre-sign Up Checklist

As per Section 5. Pre-sign Up Checklist, we migrate all your Connectmail messages to your new **Carleton Email** account. So if you don't use Connectmail's addressbook or calendar, and haven't configured any Connectmail rules to auto-file your email, proceed to the Sign up step.

However if you have used these Connectmail features, and wish to retain any entries you have previously made in Connectmail's addressbook or calendar, log into the **MyCarleton Portal** now, and export your Connectmail addressbook and/or calendar. See Appendices A.1-A.4 for details.

6.3 Activation of your new **MyCarletonOne** Account

To activate your new MyCarletonOne account, you walk through a series of 6 screens, as shown below to configure your password, assign your security answers to reset your password, and note the terms of use:

> **Prompted just for MyCarleton Email account?**
>
> This will occur if we have detected that you have already signed up for **your MyCarletonOne** account. For example, in addition to your student role, you may also have a staff or faculty role and have already participated in an earlier MyCarletonOne rollout for your unit. You will therefore only be prompted to create your **Carleton Email** account and you're done. See Appendix A.8

1

Personal Information   Student Services

HELP   EXIT
12346789 Jay J. Smith
Feb 16, 2012 12:34 pm

MyCarletonOne Activation

Step 1 of 6: Start

Activate your new MyCarletonOne account to get your new Carleton Email

Once you have clicked on the link, you will be asked to enter a new password and provide responses to security questions.

Your MyCarletonOne Account will replace your Student Computing Account.

Use your new username and password to access the MyCarletonOne Portal (which provides access to Carleton's Learning Management System, Carleton Central and Carleton Email), computers on campus (labs and e-kiosks), ~~Carleton Mobile~~ and the wireless network.

Once activated, you will get your new Carleton Email with the address **jaysmith@cmail.carleton.ca** Access your new Carleton Email by logging into MyCarletonOne Portal.

[Sign me up for my new MyCarletonOne Account] [Remind me later]   …and also this short form: jay_smith@carleton.ca

2

Personal Information   Student Services

HELP   EXIT
12346789 Jay J. Smith
Feb 16, 2012 12:41 pm

Review Carleton Email Checklist
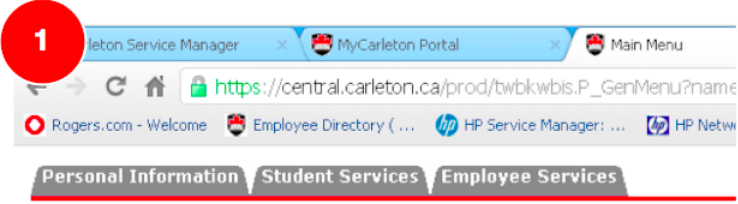
Step 2 of 6: Carleton Email Checklist

Here is a list of things you should do before proceeding:

- Export your Connect account's Contact List
- If you forward your Connect email to another email address, then make a note of the recipient email addresses
- If you have any filters on your email, make a note of them
- etc.

If you need to do any of these things, please click on the "EXIT" button or close your window. When you return to Carleton Central you will be prompted to complete the Carleton Email signup process.

[Continue] [Exit]

3

HELP EXIT
12346789 Jay J. Smith
Feb 16, 2012 12:43 pm

Review Carleton Email Terms of Use

Step 3 of 6: Carleton Email Terms of Use

Below are the terms of use. Please review them now.
Once you have finished, please add a checkmark to "I accept the Terms of Use specified above", and then press the "Continue" button

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CHAPTER IV. WHAT JOHN RANCE HAD TO TELL.

IT was one o'clock when we left No. 3, Lauriston Gardens. Sherlock Holmes led me to the nearest telegraph office, whence he dispatched a long telegram. He then hailed a cab, and ordered the driver to take us to the address given us by Lestrade.

"There is nothing like first hand evidence," he remarked; "as a matter of fact, my mind is entirely made up upon the case, but still we may as well learn all that is to be learned."

"You amaze me, Holmes," said I. "Surely you are not as sure as you pretend to be of all those particulars which you gave."

"There's no room for a mistake," he answered. "The very first thing which I observed on arriving there was that a cab had made two ruts with its wheels close to the curb. Now, up to last night, we have had no rain for a week, so that those wheels which left such a deep impression must have been there during the night. There were the marks of the horse's hoofs, too, the outline of one of which was far more clearly cut than that of the other three, showing that that was a new shoe. Since the cab was there after the rain began, and was not there at any time during the

---

☐ I accept the Terms of Use specified above [Continue]

4

Carleton Central

HELP EXIT
12346789 Jay J. Smith
Feb 03, 2012 02:21 pm

Set Your MyCarletonOne Password

Step 4 of 6: Please set your MyCarletonOne password now

To change your password, enter a new password in the "Password" and "Confirm Password" boxes and click Save.

The only special characters allowed are ! % * _ + - ~ ( ) [ ] : , . and ?

Your password must also conform to the following rules:

1. Must be at least 8 characters.
2. Minimum Lowercase: 1
3. Must follow at least 3 of these character rules:
   ◦ at least one lowercase letter
   ◦ at least one uppercase letter
   ◦ at least one number
   ◦ at least one special character but NOT the following: ", #, @, &, ', `, $, (,), /, ;, ~, \, ^, |, >, =, < or spaces
4. Cannot contain parts of your username.
5. Cannot be one of your last 10 passwords.

Password: [   ]
Confirm Password: [   ]

[Save] [Clear]

> Please note that submitting your new password may take a couple of minutes to complete.

RELEASE: 8.2

Carleton

5

Carleton Central

HELP EXIT
12346789 Jay J. Smith
Feb 03, 2012 02:22 pm

Set Your MyCarletonOne Security Answers

Step 5 of 6: Set Answers to Authentication Questions

If you forget your password, the system will prompt you for the answers to all authentication questions associated with your account.

Please answer **at least six** of the following questions.

In what city or town was your first job? [   ]
In what city was your father born? [   ]
In what city were you born? [   ]
What is the name of your favourite teacher? [   ]
What street did you live on in the 4th grade? [   ]
Where did you take your first vacation? [   ]
What is the name of your oldest cousin? [   ]
What is your favourite movie? [   ]
What is your favourite play? [   ]
What is your maternal grandmother's first name? [   ]

[Save] [Clear]

> Please note that submitting your new answers may take a couple of minutes to complete.

RELEASE: 8.2

Carleton

6

HELP EXIT
12346789 Jay J. Smith
Feb 03, 2012 02:26 pm

MyCarletonOne Activation Complete

Step 6 of 6: Signup Complete

You have successfully set your password and security answers.

Congratulations! You have successfully signed up for MyCarletonOne and Carleton Email.

On Carleton Central's main menu you will now be able to access a new menu named "My Credentials" to review your MyCarletonOne and Carleton Email credentials and other important information, such as where to change your MyCarletonOne password. This menu can be accessed at any time via Carleton Central.

Please click the button below to continue to the Carleton Central main menu.

[Continue]

6.4 If you forget your new Carleton Email address & MyCarletonOne account

Just log into Carleton Central, *www.carleton.ca/central* and click on the last menu item under **Personal Information**

7. Walk-Through of Carleton Email

7.1 Log into the **MyCarleton Portal** using your new **MyCarletonOne account** & password

www.carleton.ca/portal

Use your new **MyCarletonOne account** anywhere you used your old 8-character Student Computing account, to log into the MyCarleton Portal, WebCT, the PC labs, CU-wireless...

To prevent any confusion, once you have signed up for Carleton Email, references (1), (2) to Connectmail in the MyCarleton Portal are automatically removed for you.

You have 1-click access to Carleton Email as shown in (3) below.

The short form of your Carleton Mail address is also shown, as a handy reminder (4).

7.2 First-time access to **Carleton Email**

7.2.1 If you are already logged into **Hotmail** or other **WindowsLive** service

A browser window will open indicating you are already logged in. Just click on **Sign out**, then close this window. Then re-click the **Carleton Email** icon in the MyCarleton Portal.

N.B. If you wish to regularly be logged into both Hotmail and your MyCarleton Email, see Appendix A.6.
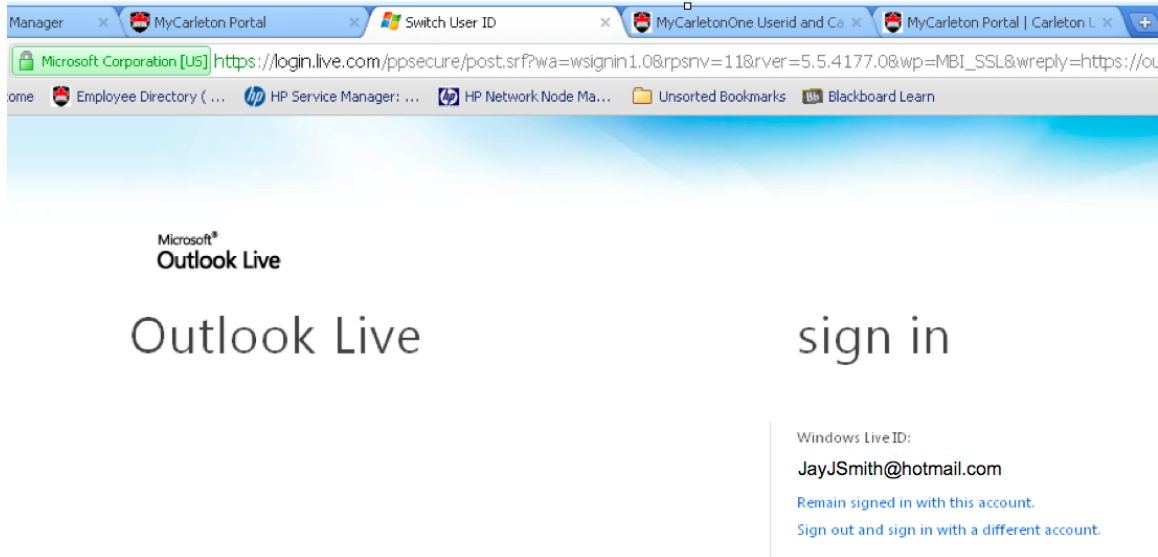
7.2.2 First-time access to **Carleton Email** – Setting Timezone

Currently first time users of **Carleton Email** are asked to set their Time zone: UTC-5:00 Eastern Time
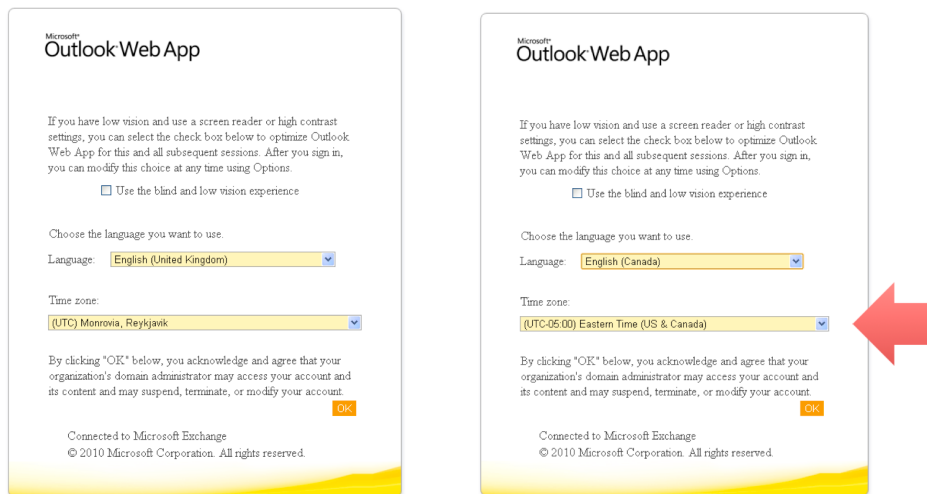
7.3 Carleton Email window — Initial emails

Initially you will receive 3 automatic emails:

1. Welcome to Carleton Mail

2. Message that the process to automatically transfer your old Connectmail messages has begun. This process may take up to 24 hours.

3. Message that the process to automatically transfer your old Connectmail messages has completed.

> **Pilot Participants**
>
> There may be a delay before the initial *Welcome email* arrives. We have received one report that it failed to arrive at all.
>
> When the process to transfer your Connectmail messages completes, you may have to log out of Carleton Email and log back in to see all your mail folders, *if* you had created additional mail folders in your Connectmail account.

DRAFT DOCUMENTATION:

Screen shot to be updated illustrating the initial messages which are automatically sent.
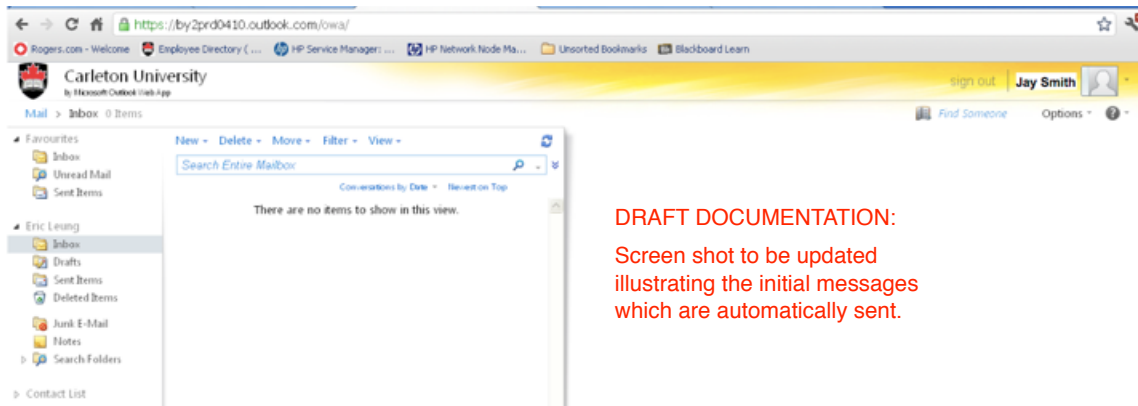
APPENDICES

A.1 How to Transfer Address Book

If you have used the Address Book in Connectmail and wish to transfer your entries to **Carleton Email**, follow these steps:

1. Open Connectmail in the MyCarleton Portal
   - Click on the **Address Book** tab
   - Click on **Import/Export**
   - Scroll down to the Export section,
   - Select *Microsoft Outlook*
   - Click on **Export Now**
   - Save the .csv file

2. Sign up for Carleton Email

3. Open **Carleton Email** in the MyCarleton Portal
   - Click on **Contacts** link (lower left hand corner)
   - Click on **Import...** link
   - Click on **Choose File**
   - Select the .csv file saved above
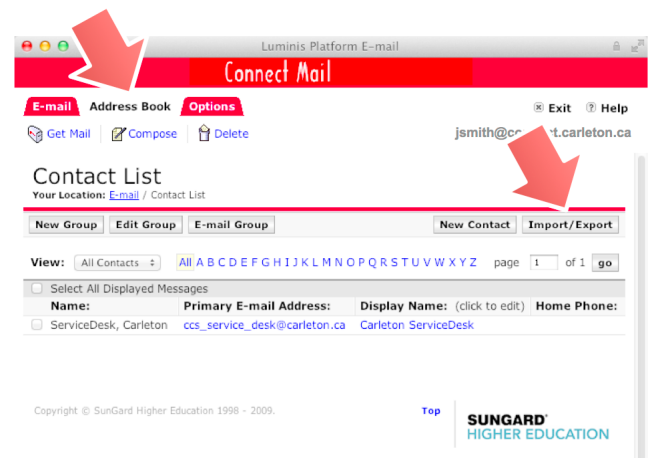
A.2 How to Transfer Calendar Entries

Transferring calendar entries from Connectmail's calendar to **Carleton Email** is not easy. But it can be done. If you have used the Calendar in Connectmail, and if you wish to transfer your entries to **Carleton Email**'s calendar, you will need access to a PC running Outlook 2007 or Outlook 2010:

1. Open Connectmail in the MyCarleton Portal
   - Click on the **Calendar** icon (upper right hand corner)
   - Click on **Calendar** tab
   - Click on **Import/Export** link
   - Scroll down to Export
   - Select the default File Format: iCal
   - Check *Export with Attachments*, if desired
   - Select the date range
   - Click on **Export**
   - Save the .ics file

2. Sign up for **Carleton Email**

3. Configure Outlook 2007 or Outlook 2010 on a PC to access your Carleton Email account
   - Configure Outlook to access your Carleton Email account
     - o Open **Carleton Mail** in the MyCarleton Portal
     - o Click on **Options** link
     - o Select *See All Options…*
     - o Click on *Settings for POP, IMAP, and SMTP access...* for your server settings
     - o Click on **Connect Outlook to This Account** link for Outlook configuration instructions
   - Import the .ics file saved above into Outlook
     - o A set of annotated screenshots illustrating how to do this for Outlook 2007 and Outlook 2010, courtesy of University of North Alabama:
       www.una.edu/compcenter/live/How to Import Calendar to Live@Edu.pdf
   - The calendar will now be accessible from Carleton Email in the MyCarleton Portal

A.3 Auto-Forwarding

If you have configured Connectmail to auto-forward to another email address, this setting will not be migrated to your new Carleton Email account. With 10GB of storage, you may no longer have a need to do this. However if you still wish to auto-forward your **Carleton Email** account, you can.

If you wish to verify or have forgotten the address(es) you have auto-forwarded your Connectmail account:

1. Open Connectmail in the MyCarleton Portal

   - Click on the **Options** tab
   - Click on the **Auto Forward** link
   - Note the address(es) to which your Connectmail is forwarded

2. Sign up for **Carleton Email**

3. Open **Carleton Email** in the MyCarleton Portal

   - Click on **Options** link
   - Select *See All Options…*
   - Click on **Forward your e-mail** link
   - Scroll as necessary to the section labeled *Forwarding*
   - Enter the address to which you'd like your Carleton Email forwarded
   - Check/uncheck the box, as you prefer: *Keep a copy of forwarded messages…*
   - Click on the *Start Forwarding* link

A.4 How to Transfer Connectmail Filters (Rules)

If you have configured Connectmail to auto-file your messages into folders based on rules, you can recreate those rules in **Carleton Email**.

1. Open Connectmail in the MyCarleton Portal

   - Click on the **Options** tab
   - Click on the **Filters** link
   - Note the filters you have configured (you may find it convenient to just print the webpage)

2. Sign up for **Carleton Email**

3. Open **Carleton Email** in the MyCarleton Portal

   - Click on **Options** link
   - Select *See All Options…*
   - Click on **Organize E-mail** link
   - Click on **New…** link to (re-)create your Connectmail rule

A.5 Configuring your smartphone or laptop

In addition to accessing your **Carleton Email** via the MyCarleton Portal website, you can also use the email client software built into your smartphone or available on your personal computer.

A5.1 Exchange Method

Carleton Email supports talking to your smartphone using either **Exchange** or **IMAP** protocols. If your smartphone's built-in email client supports Exchange connections, use that:

> **Email standards**
>
> Two standards in commonplace usage for email connectivity are **IMAP** and **Exchange**. If your smartphone's built-in email client supports Exchange connections, you will usually find that a simpler and richer connection method, *as it adds calendar and address book syncing*.

- Exchange Userid (WindowsLive ID): your **Carleton Email** long form address
  e.g. *jaysmith@cmail.carleton.ca*
- Password: your MyCarletonOne password

- Supplemental Instructions: Microsoft also provides directions from within **Carleton Email**:
  - Open **Carleton Mail** in the MyCarleton Portal
  - Click on **Options** link
  - Select *See All Options…*
  - Click on *Learn how to get Direct Push e-mail on your cell phone* link

A5.2 IMAP Method

If your smartphone or laptop's email client software does **not** support **Exchange** connections, you can still create an IMAP connection to your **Carleton Email**.

1. To view your **Carleton Email** IMAP settings in the MyCarleton Portal
   - Open **Carleton Email** in the MyCarleton Portal
   - Click on **Options** link
   - Select the *Settings for POP, IMAP, and SMTP access...* link, to view your mail server settings

     Inbound mail server settings:

     IMAP server: pod51009.outlook.com
     Port: 993
     Encryption: SSL

     Outbound mail server settings:

     SMTP server: pod51009.outlook.com
     Port: 587
     Encryption: TLS

2. Your IMAP userid will be the **long form** of your **Carleton Email** address
   e.g. *JaySmith@cmail.carleton.ca*

   Tip: You can view the **long form** of your Carleton Email address in Carleton Central. See Section **6.4**

3. The configuration of your smartphone's built-in email client varies by phone OS (Android, iOS, …) and model. In addition to documentation from your vendor, Microsoft provides a series of links in Carleton Email, viz:
   - Open **Carleton Mail** in the MyCarleton Portal
   - Click on **Options** link
   - Select *See All Options…*
   - Click on *Learn how to get Direct Push e-mail on your cell phone* link

A.6 Using your personal Hotmail account

You cannot be logged into **Carleton Email** and into a personal WindowsLive account (e.g. HotMail) *at the same time, in the same browser*. Microsoft provides the underlying system behind Carleton Email. From Microsoft's perspective, the **long form** of your Carleton Email address (e.g. *JaySmith@cmail.carleton.ca*) is just another WindowsLive ID. Microsoft imposes by default a restriction that only a single WindowsLive ID can be logged on from within the same browser. See Section **6.4** to look up the **long form** of your **Carleton Email** address.

For many **Carleton Email** users this is not a problem. Either they don't use Hotmail, or if they do, they have no problem logging off it, when they wish to log into Carleton Email and vice-versa. However if you would liked to be logged into Carleton Email and your personal WindowsLive ID at the same time, here are two simple strategies:

- Use a different browser (Internet Explorer, Firefox, Chrome, Safari…) for each WindowsLive ID. For example, use Internet Explorer for Carleton Email, and Firefox for your personal Hotmail. As long as you are using different browsers you can be logged into both your Carleton Email and your Hotmail.

- Forward one of your Email services to the other. See Appendix A.3

A.7 If You Also Have Employee Email account

Are you a Graduate student, and/or as a student working at Carleton, you **may** also have an employee Outlook Exchange email account in addition to your Student Connectmail account. Signing up for **Carleton Email** will not affect any employee email account you may have. i.e. If you have two accounts, you will retain both, as is the current practice.

Your **Carleton Email**'s *@carleton.ca* address will intelligently route your student-related and work-related email to your appropriate student or work email account.
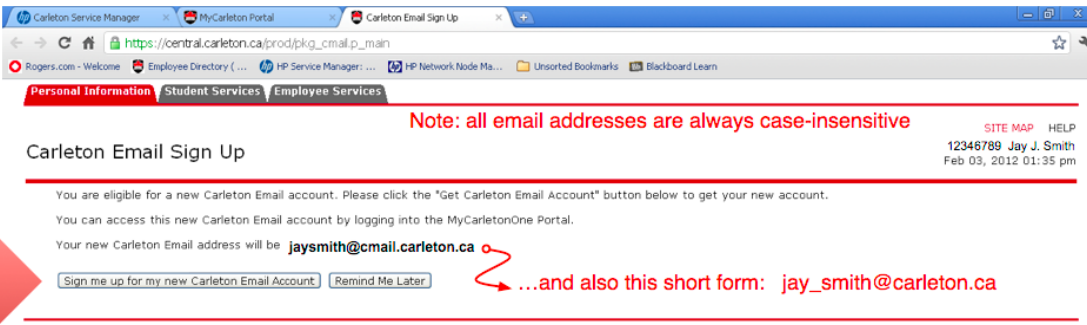
To understand how it does this, we need to explain the **long form** and **short form** of your Carleton Email address in more detail. See Section 6.4. The actual address used by Carleton Email is the **long form**, e.g. *jaysmith@cmail.carleton.ca* The other address which is called an "Alias" or just the **short form**, e.g. *jay_smith@carleton.ca*. It always points to the **long form**. For the majority of students, the two addresses are interchangeable.

However **if** you also have an employee Outlook/Exchange account, we configure the **short form**, *jay_smith@carleton.ca*, to your employee Outlook/Exchange: *jaysmith@cunet.carleton.ca*. When your employment terminates, we repoint the short form of your address back to your Carleton Email address.
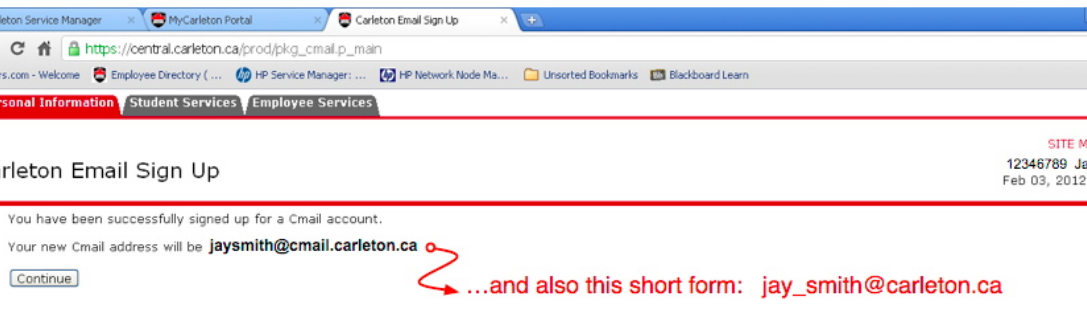
The **net result**: while you are working at Carleton you may receive the odd student-related email in your employee Outlook/Exchange account, but you'll never receive work-related email in your **Carleton Email** student account. We think this achieves the right balance.

A.8 If You Already have a MyCarletonOne account

IF during sign up, we detect that you have already a **MyCarletonOne** account, we immediately prompt for to sign up for your **Carleton Email** account: