OUTLOOK ONLINE
Help Me *k*Now™ Guide

USING THE APP LAUNCHER

Outlook Online is Microsoft's online hub for messaging, calendars, contacts and tasks. Outlook Online takes the features of its desktop cousin and packs them into an online platform you can use on any internet-connected device, without requiring installation of the desktop application. All you need is a web browser like Internet Explorer or Chrome. Navigate to your Okta page, log in with your Network username and password , and select the Office 365 icon to gain access to your email account. This will load the Office 365 homepage, click the App Launcher in the upper left corner and select the Mail tile to load Outlook (see Image 1).

Email messaging is the core of the Outlook Online App. To create a new email, click **New** in the command bar. When you type names directly into the **To** and **Cc** fields, Outlook Online will suggest contacts to use. If you do not see the desired contact you can click the field button and search for your contact. To change the search location click the expansion arrow to the left of the search bar and pick your location. After you have added all of your contacts, click **Save**. Add a Subject and the text of your message. You can also format the text using the format tools or add items such as attachments, images or shapes. Click **Send** when your message is ready.
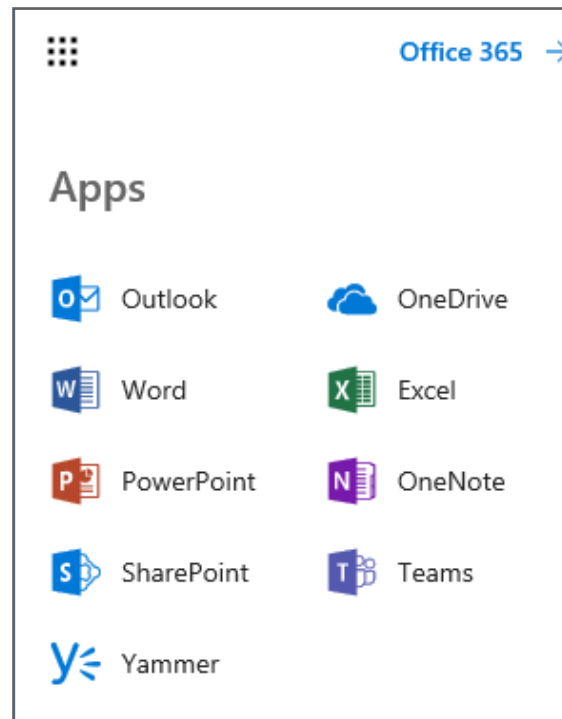

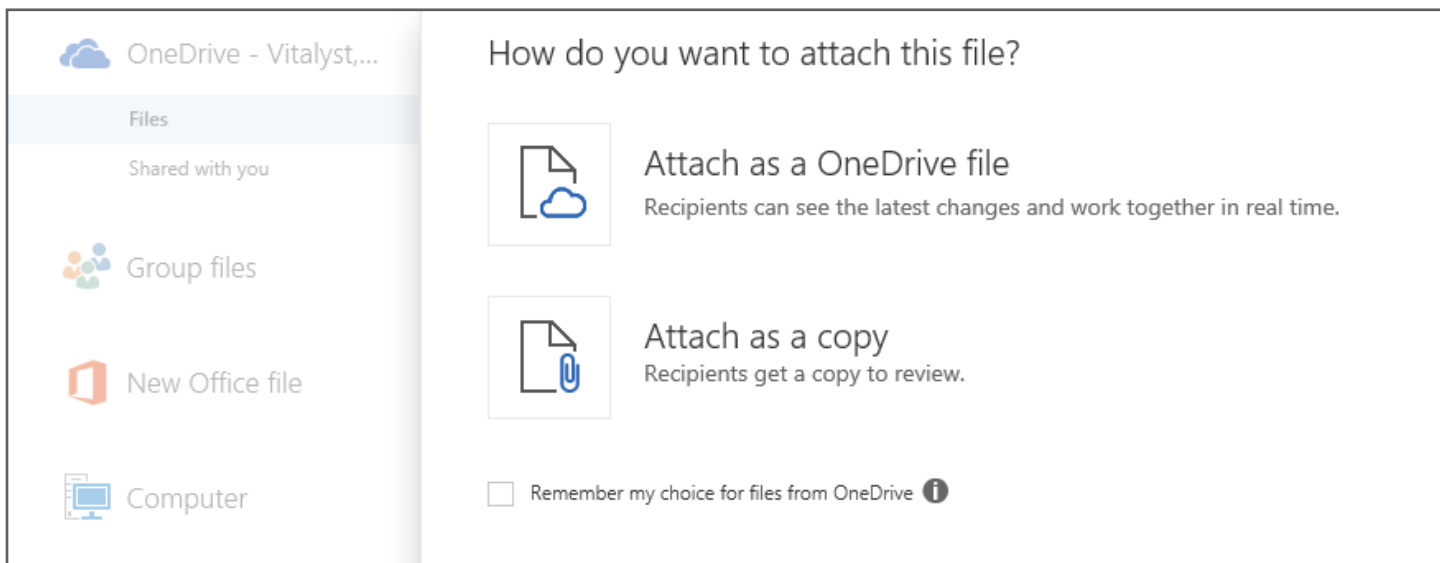*Image 1. Office 365 App Launcher*

ATTACHING FILES

Image 2. Outlook Online Attachment Pane showing OneDrive Options

Attaching a file in Outlook Online is a slightly different process than in the full application. In a message, click **Attach**. If the file is saved to your computer or a network drive, click **Computer**, and attach the file as you normally would. When you insert a file from OneDrive for Business, you have two options. The first option is to **Attach as a OneDrive file**, the second is to **Attach as a Copy** (see Image 2). Attach as a Copy attaches the file in the manner you are used to, by creating a copy and adding it to your message. Attach as a OneDrive file creates a link to the file and gives you the option to grant permissions to the recipients. After selecting Attach as a OneDrive file, click the drop down arrow next to the attached file and select Change Permissions. In the **Change Permissions** pane, select the new permission level and click OK. Remember, when using Attach as a OneDrive file, everyone is looking at the same file so there will no longer be individual copies of the same file on each individual's computer.

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REPLYING TO A MESSAGE

Replying to a message in Outlook Online is very similar to creating a new email, the process of adding contacts, and attaching files are the same. To initiate a reply, first select the message you want to reply to. To the right of the Senders name, you will see the option to **Reply**. If you do not see the correct option, click the drop down arrow to the right of Reply. You can then select the appropriate reply option, such as **Reply All**, **Forward** and **Reply all by meeting** (which creates a meeting with all the email recipients).

Vital Tip: To always use a specific reply action, you can change the default Reply option. Simply click Change Default and then select your desired option *(see Image 3)*.
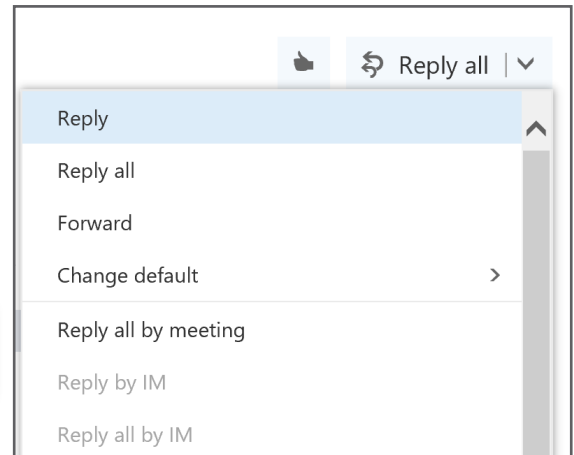

Image 3. Reply Options for a Message

APPOINTMENTS AND MEETINGS

Appointments and Meetings while similar, have the main difference of being able to invite other or not. Creating a **New Appointment** or a **New Meeting** require similar steps and both are accomplished in the Calendar. To get to the Calendar, use the navigation pane at the lower-right corner of Outlook Online.
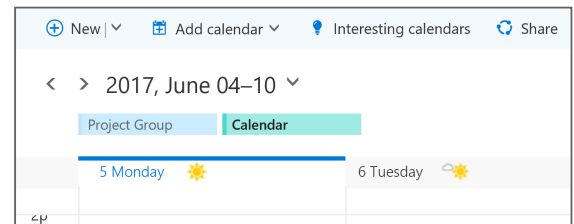

Image 4. Outlook Online Calendar Command Bar

To Create a New Appointment or Meeting:

1. Click New on the Command bar or select a date and time in the calendar *(see Image 4)*
2. Enter a title and location. If this is an appointment, click Save
3. If you are creating a meeting, click More Details
4. Add people to the meeting, edit the date and time, set up a recurrences, add a reminder, and attach files *(see Image 5)*
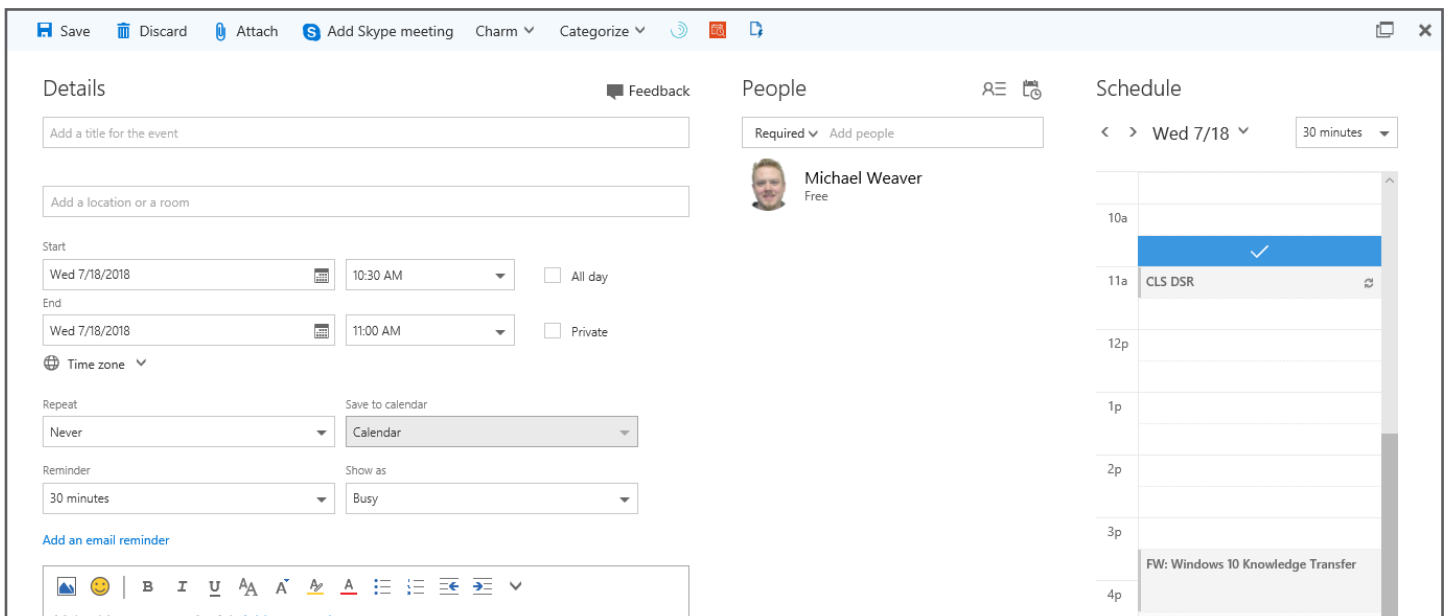5. Click Save and your event appears in your calendar at the specified date and time

Image 5. New Outlook Online Event

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CONTACTS

Creating a new contact in Outlook Online is simple. Use the Navigation pane to navigate to People. In the **People** app, click **New** and fill out the fields, click **Save** at the top of the **Add Contact** pane and your contact is saved

Sometimes, you may receive an email from someone whom you want to add to your personal contacts. Instead of transcribing all of their information into the **Add Contact** fields, you can add them as a contact directly from a message

To Create a New Contact from an Email Message:

1. Select a message from your list to view it in the Preview Pane
2. Hover your mouse over the contact's name to view their contact card *(see Image 6)*
3. In the contact card, click the ellipsis in the lower right and select Add to contacts
4. The Add Contact pane will open, and the contact's information is automatically added to the relevant fields. You can also add any additional information like other email addresses, phone numbers, and physical addresses.
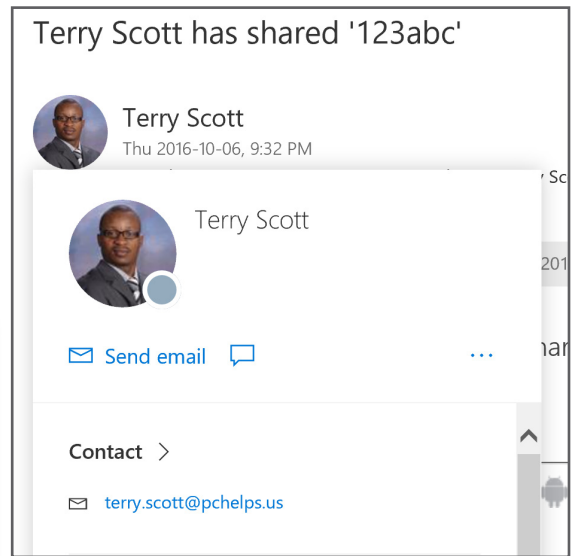5. Click Save and the contact is now added to your list.

Image 6. Contact Card in an Email

Contact Lists allow you to address multiple people at once, without needing to add each name individually or create separate emails for each contact.

To Create a new Contact List:

1. Click the New drop-down arrow and select Contact List *(see Image 7)*
2. Type a name for your list and then begin adding the names of individuals you want to include in the list *(see Image 8)*

   Outlook will suggest names as you type them. When you find a name you want to add to the list, select it. Continue this process until all of the contacts are added to the list.
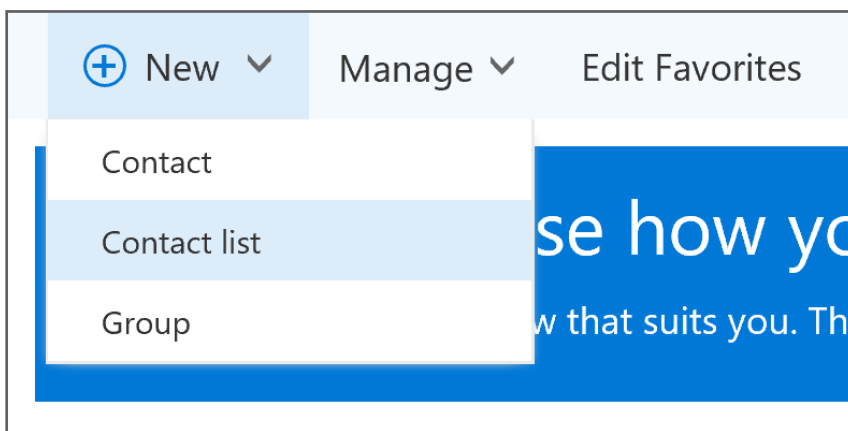3. When you have added the desired contacts to the Contact List, click Save
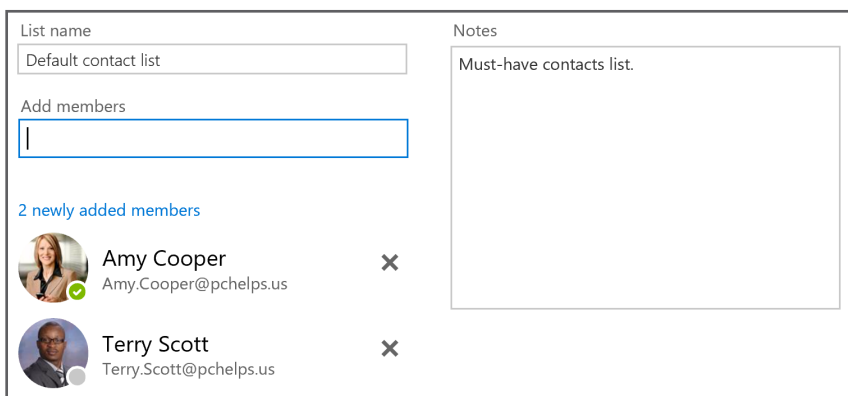

Image 7. New Contact Drop-Down options

When you want to send a message to the all the contacts on the list, simply type the list name into the To: field and Outlook takes care of the rest.

Vital Tip: Groups are a feature that was introduced with Office 365. Groups allow you to create an environment for a group of people where they can converse, plan meetings and share files right in Outlook Online.

Image 8. New Contact List Window

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TASKS AND FOLLOW-UP FLAGS

Tasks are a great way to keep track of different projects. To get to the **Task** section, click the **Task** tile, or use the Task option in the Navigation Pane.

💡 **To Create a New Task:**
1. In Tasks, click New on the Command Bar
2. A basic Task form will appear on the right. Fill out the subject, due date, and memo fields *(see Image 9)*
3. Click Save

If you want to add a few more details, click the **Show more details** button and more fields will appear, allowing you to set the start and complete by date for the task, add a reminder, set a repetition to the task, and other information about the task. Once all of your information is added, click **Save**.

Unlike the desktop version of Outlook, you cannot assign tasks to other in Outlook Online. If you need to assign a task to someone else, you can do so in Outlook 2016 and the recipient can view the task in both Outlook 2016 and Outlook Online.
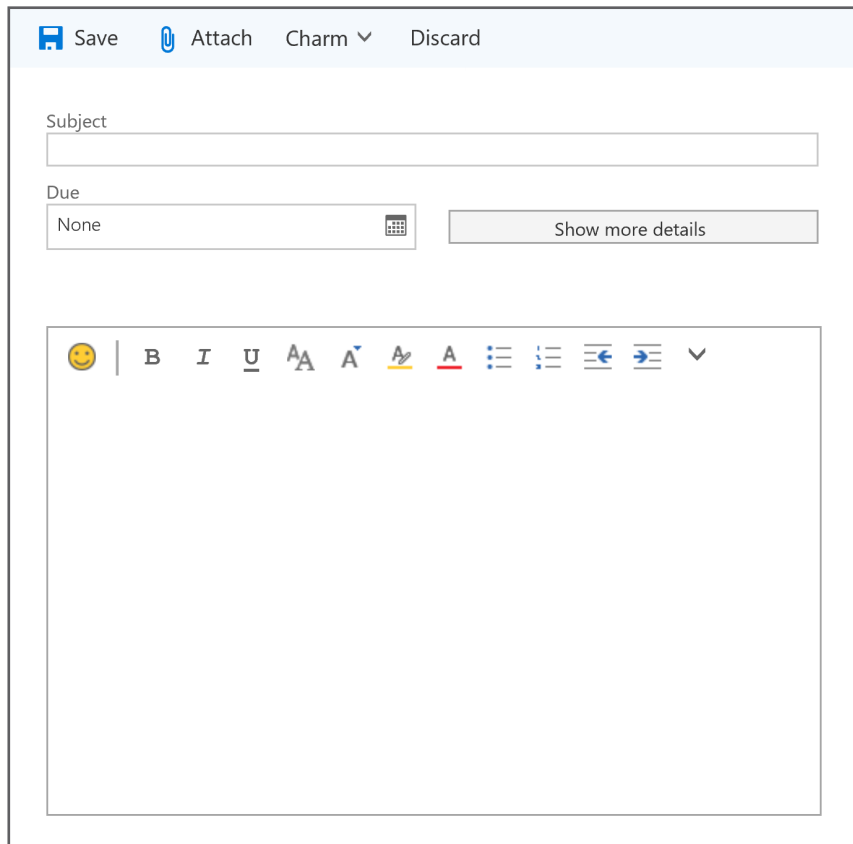
| 💾 Save | 📎 Attach | Charm ⌄ | Discard |

Subject

Due
None 📅 | Show more details

😊 | **B** *I* U AA A A A ☰ ☰ ☰ ☰ ⌄

Image 9. New Task Window

New tasks are a great way to keep track of a project's status, but you may receive a message that contains details of a task or that you simply want to follow up on at a later time. Instead of creating a new task from the message, you can mark a message for follow up with a flag *(see Image 10)*.

❗ **Vital Tip:** Hover your mouse over a message and you will see the associated inline options. Click the flag icon to add a Follow up Flag. This automatically creates a follow up flag for today. To change the due date, right-click the flag to see the other options *(see Image 10)*. After a flag has been applied to a message, you can see all of the tasks and items marked for follow up in the Task section of the Outlook Online app.
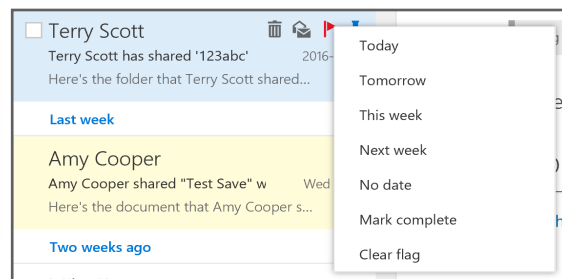
☐ Terry Scott 🗑 📧 🚩 ▾
Terry Scott has shared '123abc'   2016-
Here's the folder that Terry Scott shared...

Last week

Amy Cooper
Amy Cooper shared "Test Save" w   Wed
Here's the document that Amy Cooper s...

Two weeks ago

| Today |
| Tomorrow |
| This week |
| Next week |
| No date |
| Mark complete |
| Clear flag |

Image 10. Message with Flag and Flag Options

Function	Shortcut
New message	Ctrl+N
Send Message	Alt+S
Refresh email	F5

Function	Shortcut
Move around window	Tab
Move through lists	Arrow keys
Open duplicate Outlook	Ctrl+K

👤 For more information, visit us at **www.vitalyst.com**

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