MICROSOFT 365 Email

USER GUIDE

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## **Frequently Asked Questions**

### What is Outlook Web/O365?

**Outlook? O365? What is the difference?**

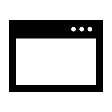
Microsoft’s Office 365 is a subscription service offering an array of Office apps (Word, Excel, PowerPoint, Outlook) and Cloud storage. SD28 is decommissioning GroupWise for mail, calendars & contacts and migrating to Microsoft Outlook (part of the O365 Suite). Phase 1 of the migration will be to the Web version of Outlook.

**Why are we migrating from GroupWise to Outlook?**

School District #28 (Quesnel) is migrating to Outlook from GroupWise to move away from an unsupported platform and move into the future with a highly functional email platform.

### Accessing Outlook Web

**How do I access Microsoft Outlook on the Web?**

1. Open your web browser and navigate to <https://outlook.office365.com/>
2. Enter your email address and click **Next**
3. Enter your password and click **Sign in**

A picture containing icon

Description automatically generated**Can I access Outlook Web on my mobile device?**

Yes; by following the same 3 steps above

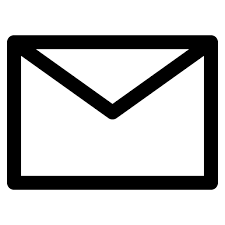
### Overview

**What can I do with Outlook Web?**

Outlook web is comprised of 4 main functions:

1. Mail (Email)
2. Calendar
3. People (Contacts)
4. To-Do (Tasks)

#### [**Mail (Email)**](#_Outlook_Mail)

******Send and receive email from personal and shared mailboxes. You can draft a new message, reply to a message and delete a message. You can view your Inbox, folders, Sent Items, Drafts and Deleted Items.

#### [**Calendar**](#_Calendar)

***Icon

Description automatically generated***View your personal and shared calendars. This includes appointments booked by you or meetings that others have invited you to.  
[**People (Contacts)**](#_People_(Contacts))

******Directory for personal and company contacts. Add your own contacts to a personal list or browse the company directory.

[**To-Do (Tasks)**](#_To-Do_(Tasks))

Microsoft To Do App Icon - Lade PNG und Vektor kostenlos herunterTo-do list, complete with notes, reminders, attachments, and the ability to share lists with others

### What Else do I Need to Know About the Migration?

**Mail Archives from GroupWise**

**Icon

Description automatically generated**For Phase 1 of the Migration, email archives will continue to be viewed through the GroupWise application

**Booking Resources (meeting rooms)**

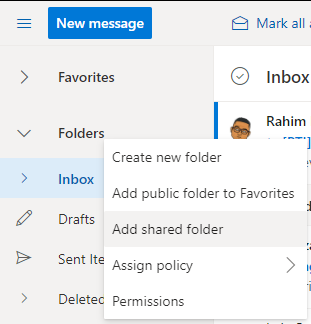
For Phase 1 of the migration, meeting rooms will continue to be booked through the current process

**Icon

Description automatically generatedShared Mailboxes**

To add a shared mailbox:

1. Right-click the **Folders** button and select **Add shared folder**



1. Start typing the mailbox name or address. You may type the full email or select it from the list

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1. Click **Add**

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1. You will now see it listed in the Folder pane. Click to view the Inbox and other mail folders for the shared mailbox

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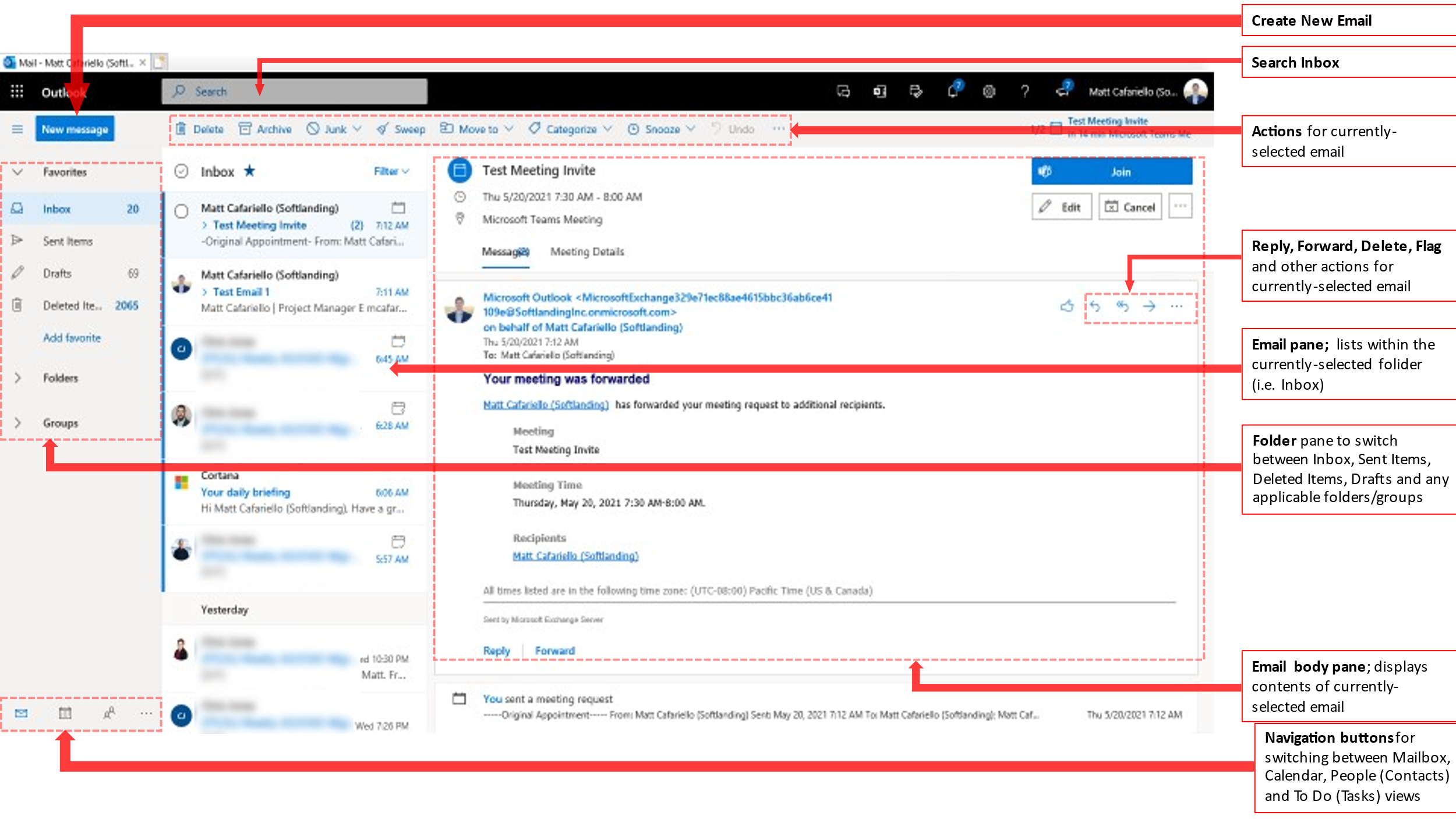
*Please note, if you encounter the following error, you will need to reach out to the mailbox owner or IT support*

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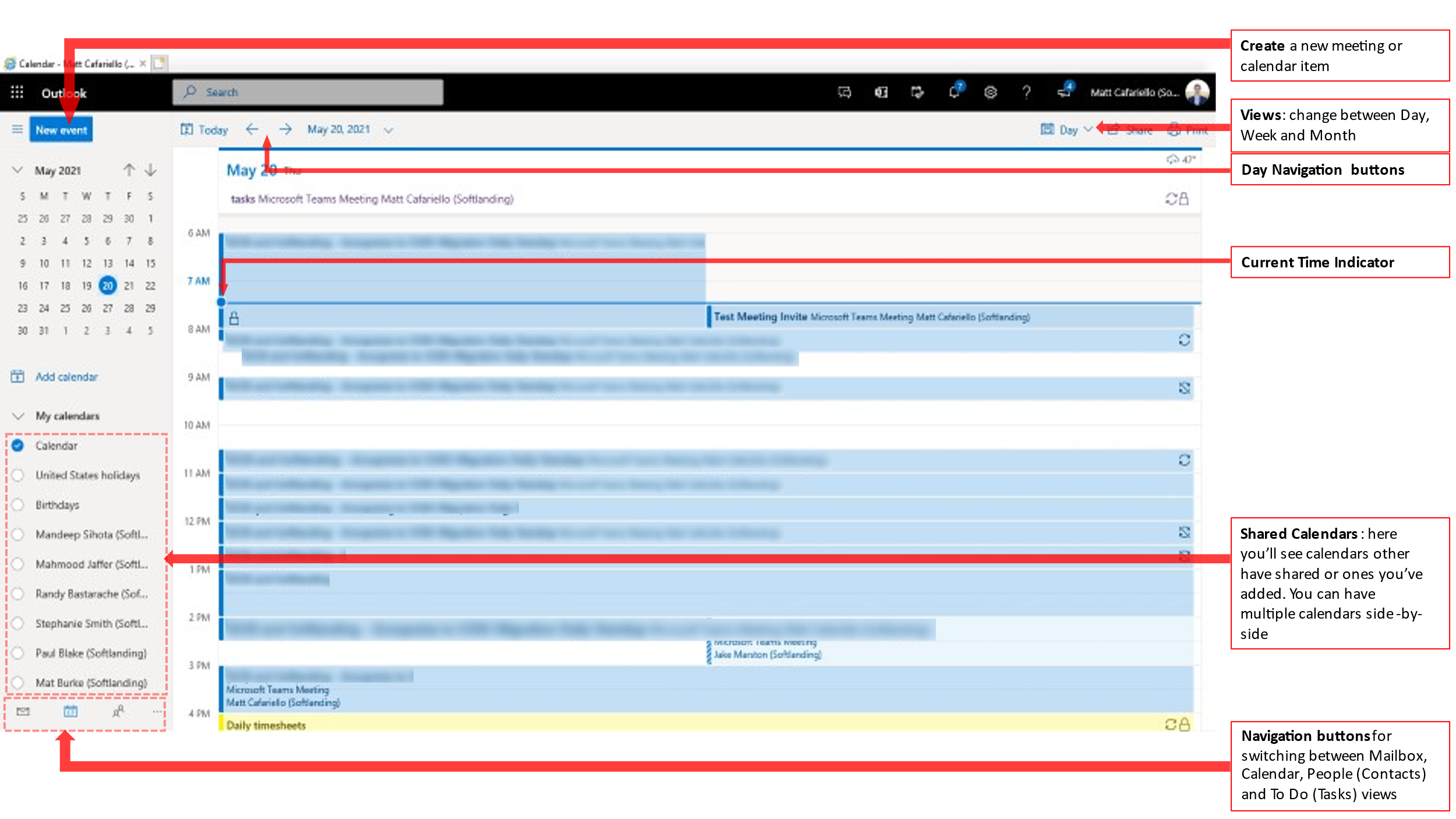
## **Page Layout Overview**

### Outlook Mail



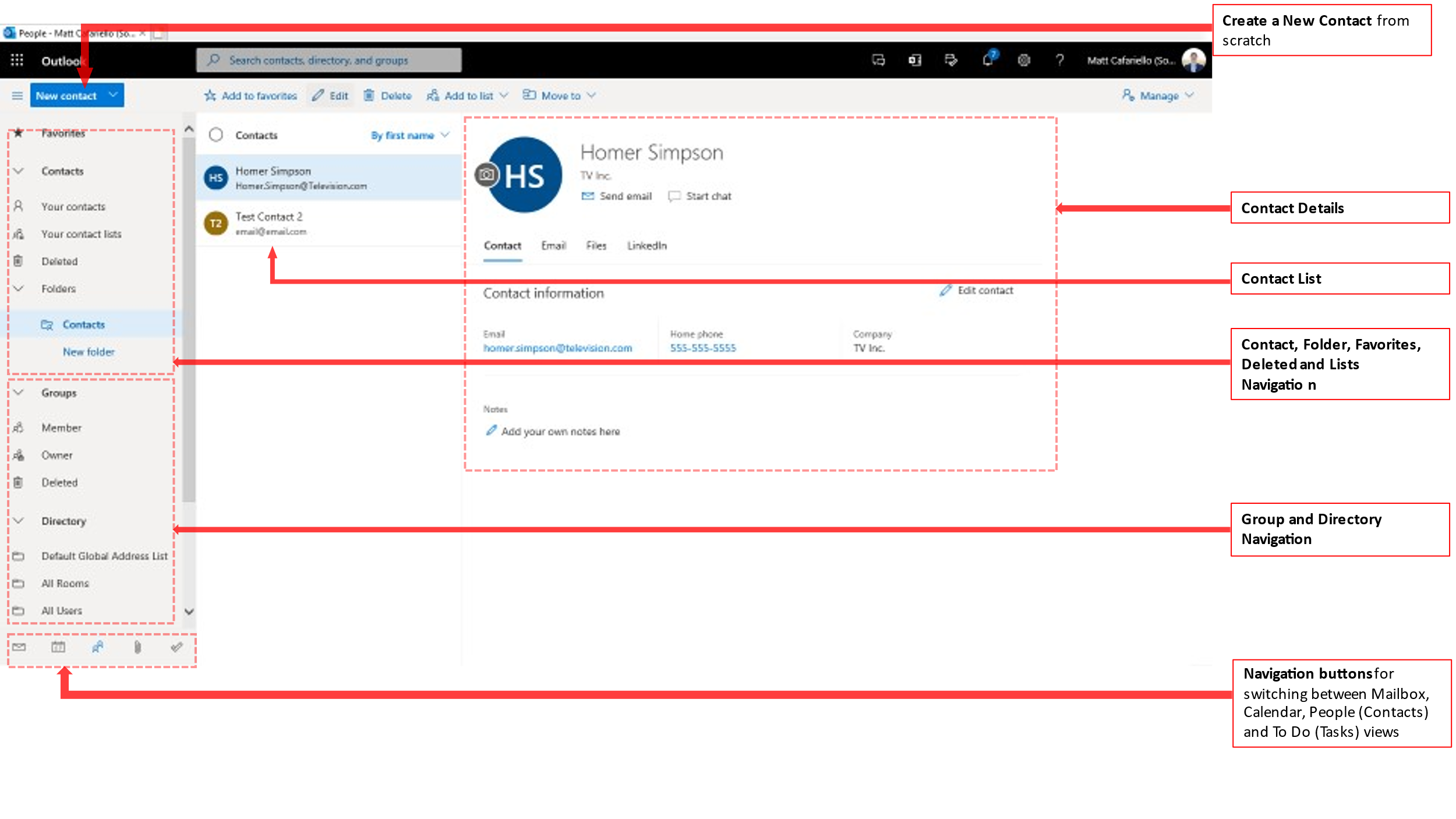
* The **Mail** page will be the initial view upon logging in to Outlook Web Mail.
* If you end up on the **Calendar, People or To-Do** pages and would like to return to **Mail**, simply click the  button in the bottom left **navigation button** group
* A new email can be created by clicking **New Message** in the top left of the page.
* You can navigate between your personal mail folders and shared mailbox folders via the **Folder pane** on the left of the page.
* The **middle Email pane** displays the messages in your currently selected folder. In the screenshot above, the **Inbox** folder is selected.
* The **Email body pane** displays the currently selected email. In the screenshot above, this is the first email in the list on the **Email pane.** You can also reply, reply-all or forward an email by clicking the buttons in the top right of the message

### Calendar



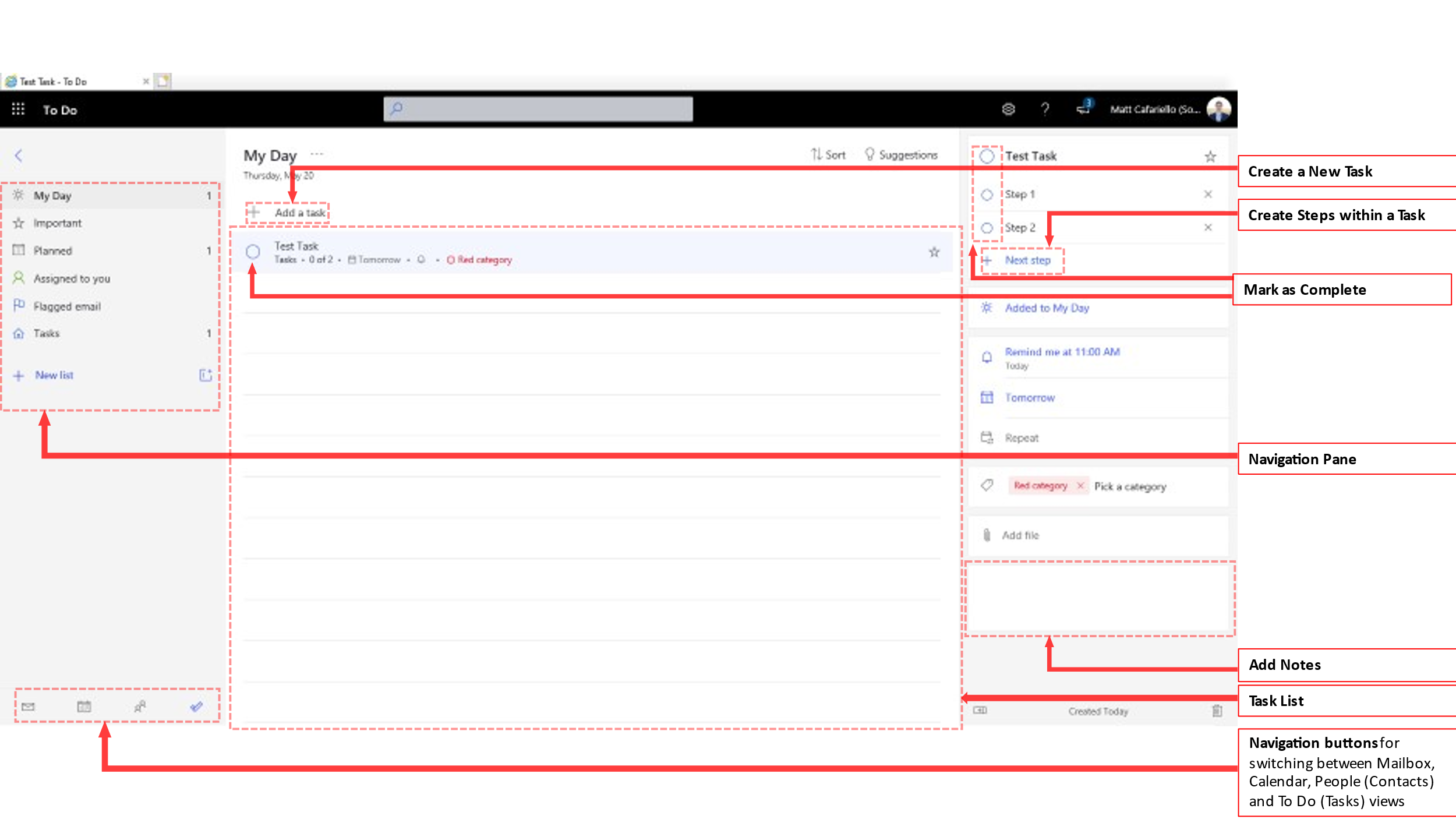
* The **Calendar** page can be accessed from any page by clicking the  button in the bottom left **navigation button** group
* Meeting invites from colleagues and external contacts will automatically populate in your calendar. Unwanted calendar entries can be Declined and will be removed.
* Shared calendars can be accessed via the **Add calendar** button in the left pane.
* You can create a personal calendar entry or meeting invite by clicking the **New event** button in the top left of the page.
* Individual calendar entries can be double-clicked to see additional information (attendees, description, etc.).

### People (Contacts)



* The **People** page can be accessed from any other page by clicking the  button in the bottom left **navigation button** group
* New People or Contacts can be added by clicking the **New contact** button on the top left of the page.
* People and Contacts from the currently-selected folder are listed in the middle pane.
* Click on a user in the middle pane to see their details in the right pane

### To-Do (Tasks)



* The **To-Do** page can be accessed from any other page by clicking the  button and then  in the bottom left **navigation button** group.
* A new task or to-do item can be added by clicking the **Add a task** button in the top left of the page.
* Steps within the task can be created by clicking **Next step** in the top right of the page.
* Task reminders can be set via the middle section of the pane on the right of the page (i.e. **Remind me at…**)
* File attachments and additional notes can be added in the area on the bottom right of the page.

## **Commonly Used Functions**

### Creating your email signature

1. From any page within Outlook Web, click the  button in the top-right of the page
2. Type ‘signature’ in the search box and click **Email signature**

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Description automatically generated

1. Type and format your email signature in the box that appears. Select the check-boxes and settings that you would like to apply to your signature.
2. When complete, click **Save** at the bottom right of the page.

Graphical user interface, text, application, email

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### Creating rules

1. From any page within Outlook Web, click the  button in the top-right of the page
2. Type ‘inbox rules’ in the search box and click **Inbox rules** in the list below

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1. The next screen will display all current rules and allow you to create new ones

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1. To add a new rule, click 
2. Type a name for the rule



1. Click the drop-down to add a condition

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1. Click the drop-down to add an action

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1. Some options will create additional menus if applicable. For example, clicking ‘Move to’ will then add an additional box to specify which folder to move the email to

Graphical user interface, application

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1. Multiple Conditions and Actions can be applied to the rule via the **Add another condition** and **Add another action** buttons
2. Exceptions to the rule can also be configured by clicking **Add an exception**
3. Check or un-check the box to **Stop processing more rules** as appropriate. Please click the  button to view a detailed description of this function from Microsoft



1. Click **Save**

### Sending a new email

1. Ensure you are on the Mail page by clicking the  button on the bottom left of the page
2. Click  on the top left of the page
3. The new email window will appear in the right pane

Graphical user interface, text, application, email

Description automatically generated

1. If desired, the new email can be opened in a new window by clicking the  button in the top right of the page
2. Add the recipients to the **To** and **Cc** fields as appropriate.
   1. **Bcc** is also possible by clicking the **Bcc** button in the top right of the window
3. Type a subject in to the **Add a subject** field.
4. Type your message in the large message body box below the subject field.
5. Text formatting can be applied via the bar below the message body (similar functionality to other Microsoft Office applications)
6. Attachments, photos and emojis can be inserted via the buttons on the bottom bar 
7. When you are ready to send your message, click **Send**

### Creating a calendar item or meeting

1. Ensure you are on the Calendar page by clicking the  button on the bottom left of the page
2. Click the  button

Graphical user interface, text, application, email

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1. Enter a title for the meeting in the **Add a title** field
2. Enter invitees in the **Invite attendees** field if applicable.
   1. This is optional. Leave this blank if you are just creating an item for your personal calendar
   2. If you are inviting others, you can quickly see their availability via the  button

Graphical user interface, application

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1. Select the date and time of the meeting via the drop-down menus
   1. If this is an all-day meeting, click the  slider
2. Set recurrence if applicable by clicking the **Repeat** dropdown

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1. Enter the location (this can simply be entered as free text)
2. Select when you would like Outlook to remind you of the event via the **Remind me** drop-down
3. Add a description, attachments, photos or emojis via the **Add a description or attach documents** box.
4. Click  or 
   1. The **Save** button will appear if you have not invited anyone to the meeting (step 4)
   2. The **Send** button will appear if you have invited others to the meeting (step 4)

### Creating a new contact

1. Ensure you are on the People page by clicking the  button on the bottom left of the page
2. To manually create a new contact:
   1. Click 
   2. Enter the person’s information in the window that appears

Graphical user interface, application

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* 1. Additional data fields can be added by clicking the  button

Table

Description automatically generated

* 1. Click  to finish

1. To add a contact via your company directory:
   1. Select the appropriate list from the **Directory** drop-down on the left pane

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* 1. Select the contact from the list to view their details

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* 1. Click the button to the right of the contact details
  2. Modify or add detail as required. Any changes will only apply to your personal contact list
  3. Click **Create**

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### Creating a To-Do task

1. Ensure you are on the To-Do page by clicking the  button on the bottom left of the page
   1. This button may be hidden. If so, first click the ellipses 
2. Click **Add a task**

****

1. Type the task title

Text

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1. Press **Enter** on your keyboard
2. Click on your new task to view additional data fields on the right of the page

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1. Click the applicable fields to add Steps, reminders, due dates, categories, file attachments and notes as required.
2. A task can be flagged as important by clicking the  button
3. Lists and tasks assigned to you can be viewed via the left navigation pane

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### Attaching documents, files and other emails

1. Ensure you are on the Mail page by clicking the  button on the bottom left of the page
2. Create a new message or open an existing message from your inbox and select either reply, reply-all or forward 
3. An attachment, including a document, email or any other type of file, can simply be ‘dragged and dropped’ into the email message
   1. To attach another email:
      1. Click and drag the email from your inbox to your message

Graphical user interface, text, application

Description automatically generated

* + 1. You will now see it attached just below the recipient name

Graphical user interface, text, application, email

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* 1. To attach a file or document:
     1. Click the  button
     2. Click **Browse this computer**

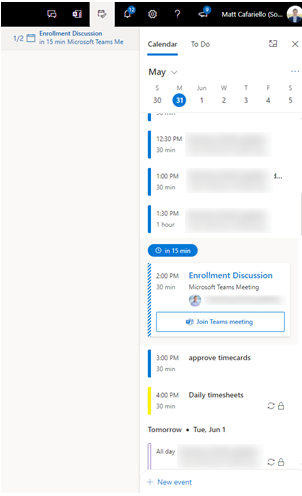
Graphical user interface, application

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* + 1. Navigate to the file that you would like to attach
    2. Double-click the file or click the file and click **Open**
    3. You will now see it attached just below the recipient name

### Viewing your calendar in the right pane

1. Please note that these steps can be completed from either the **Mail**, **Calendar** or **People** pages.
2. In the top-right of the page, click the  button
3. Your calendar will now appear in the pane to the right of the page



**Note: To pop out the calendar from the side pane to full screen, click the  button in the top-right**

### Create a group or distribution list

1. Ensure you are on the Mail page by clicking the  button on the bottom left of the page
2. In the left pane, right-click on **Groups**
3. Select **New Group**

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1. Enter a name, email address and description for your new group

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1. To modify the permissions, click 
   1. Select the options applicable to your new group

Text

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1. Click 
2. Type in the names or emails of colleagues that you would like to add to the group. Depending on your organization’s IT policy, some types of addresses may be restricted

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