

Office 365 Outlook


Quick Reference


Table of Contents

OFFICE 365 OUTLOOK	4
Sign In	4
Office 365 Outlook	4
Mail Settings	5
Mail	8
Menus	8
Folders Pane	9
Conversations (Messages)	10
Signature	11
Deleted Items	12
Rules (Filters)	13
Categories	15
People (Contacts)	16
My Contacts	16
Directory	21
Groups	21
Calendar	22
Calendar Setting	22
Create Event	23
Edit/Delete an Event	23
Create New Calendar	23
Share Calendar	24
Calendar Menu	24
Accept Calendar Share Request	25
Tasks	26
Create Task	26
Edit Task	26
Mark Task Complete	27
Delete Task	27
Tasks View	27
ADDITIONAL RESOURCES	27
Phone Numbers	27
Web Sites	27
Email Addresses	27
External Training	27

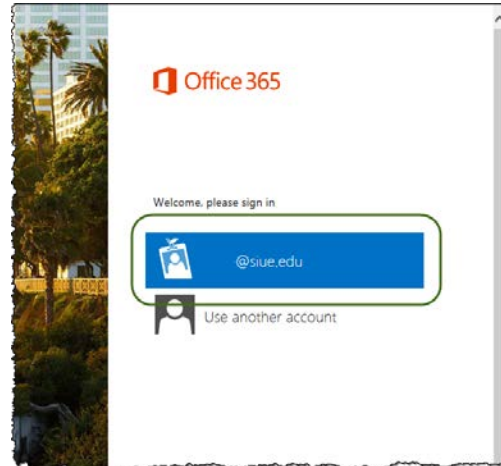
Office 365 Outlook

Sign In

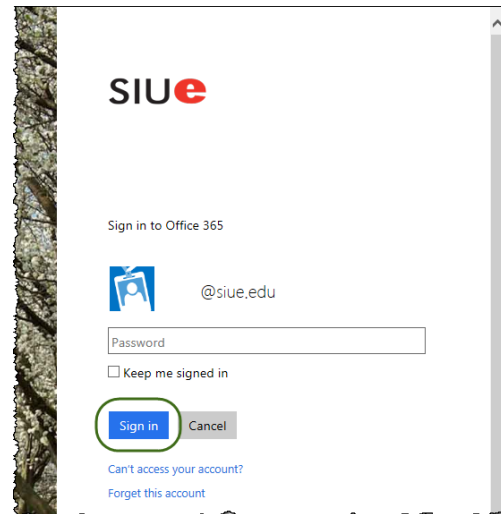
- Open browser
 - Internet Explorer is preferred
- In Address field enter the following URL:
<http://office365.siu.edu>
 - Will sign in to Office 365, which is where SharePoint Sites are located
- If prompted, select Work or school account
- Key in email address (if prompted) and password
 - **Username** – Key in your email address
OR click email address
 - **Password** – Key in e-id password
- Click 

Note: This document covers the basics of using Office 365 Outlook. For more information on additional features, click  for the current app you are using. Office.com has an Office 365 Learning Center that offers online training and tutorials (links available at end of document).

Sign In Prompt

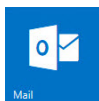


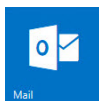

Sign In



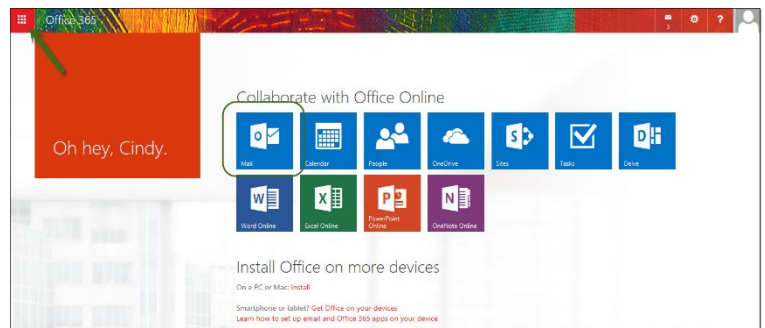
Office 365 Outlook

- Office 365 Outlook actually consist of apps
 - Mail
 - Calendar
 - People (Contacts)
 - Tasks
- Can have more than one tab open within a browser with Office 365
 - This allows using Mail and Word (or whatever app) at the same time
- Will open Office 365




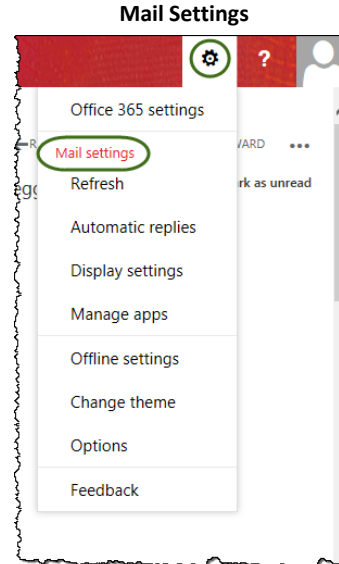
- To open Mail, select 
- If at another Office 365 app, click 
- Outlook Mail opens


Office 365 Main Page



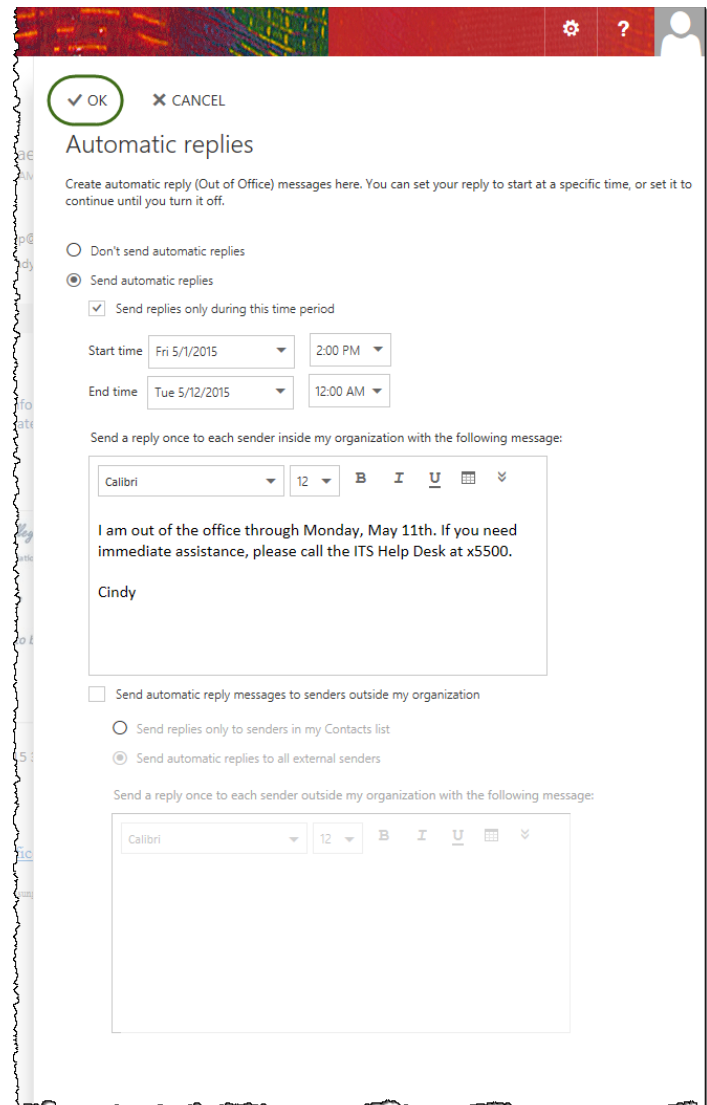
Mail Settings

- Click 
- Select Mail Setting to view/modify
- Refresh - Refreshes Inbox (looks for new mail)



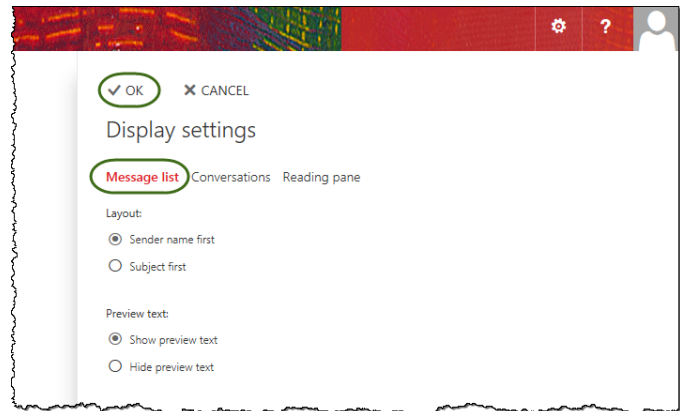
- Automatic replies – set up auto-replies for vacation, etc.
 - Select Automatic replies
 - Select to send
 - Check if only during specific time period
 - Set Start and End date/times
 - If reply is to SIUE contacts only; type in message of first box
 - If reply outside of SIUE contacts, check box and complete second box
 - Click  OK

Automatic Replies



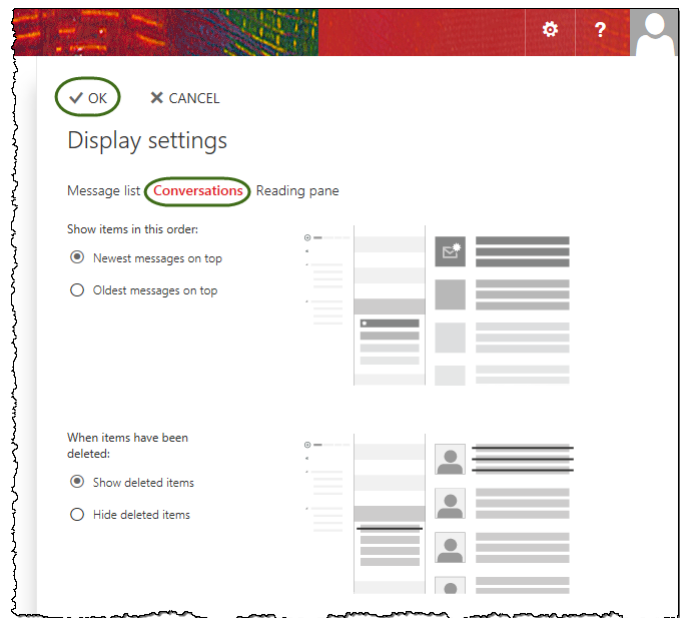
- Display settings
 - Message list
 - Conversations
 - Reading pane
- Message list:
 - Select preferred layout
 - Select whether to preview text of message
 - Click ✓ OK

Display Settings/Message List



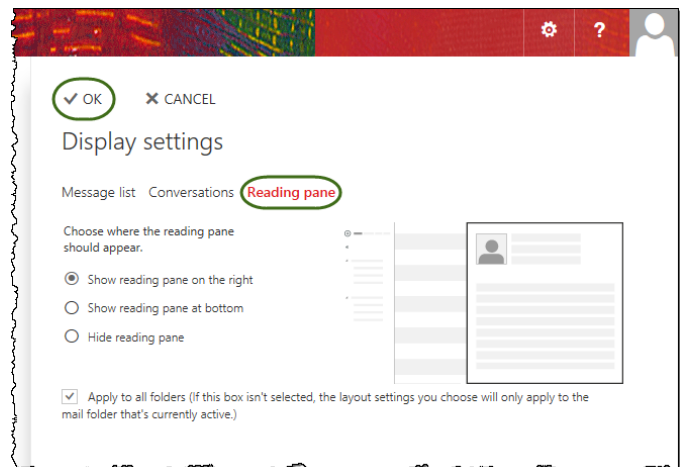
- Conversations:
 - Select order (new or old first)
 - Select whether deleted items show
 - Click ✓ OK

Display Settings/Conversations

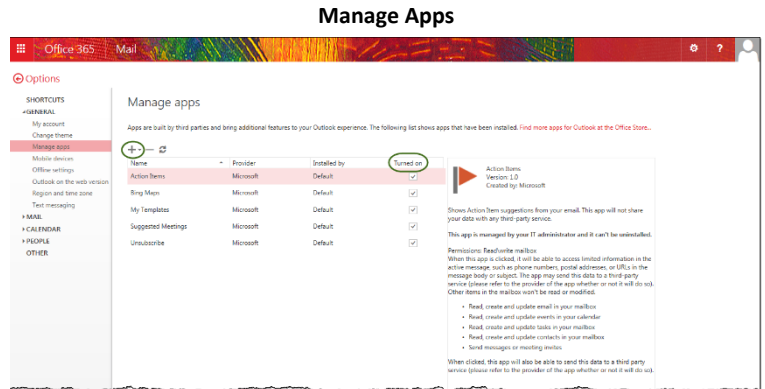


- Reading Pane:
 - Select where or if a reading pane is viewed
 - Check if this setting is to apply to all folders
 - Click ✓ OK

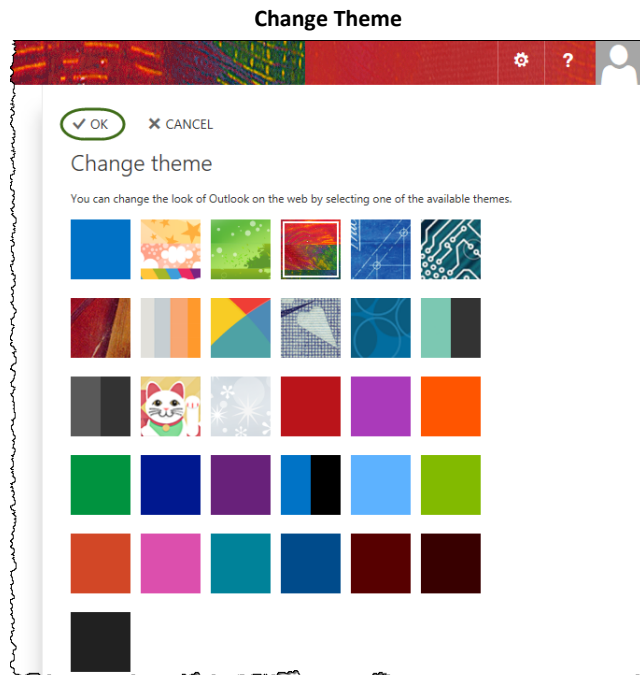
Display Settings/Reading Pane



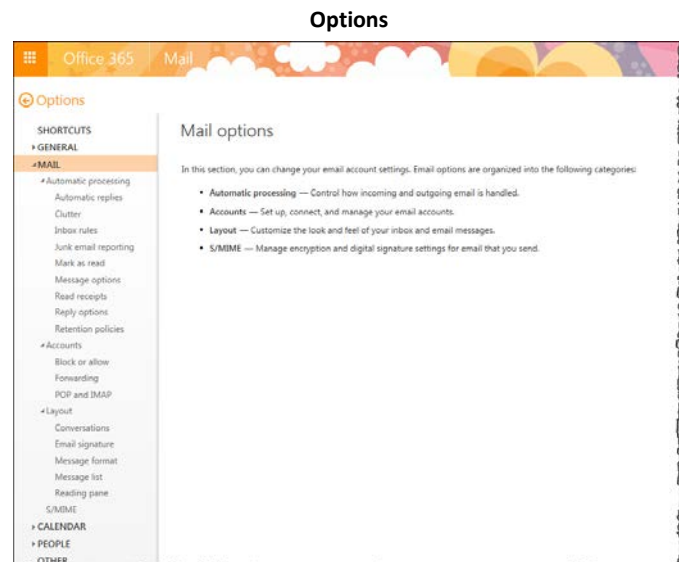
- Manage apps:
 - Check/uncheck to turn on/off apps
 - Select app and click minus sign to delete
 - o Default apps cannot be deleted, just turned off
 - Click the plus sign to add apps
 - Automatically saved



- Change theme:
 - Select theme
 - Click ✓ OK



- Options:
 - Opens Mail Options
 - o Some are shown on the drop down list
 - Select option to view/change
 - Main categories:
 - o Automatic processing
 - o Accounts
 - o Layout
 - o S/MIME
 - Can also get to other areas:
 - o General
 - o Calendar
 - o People
 - o Other

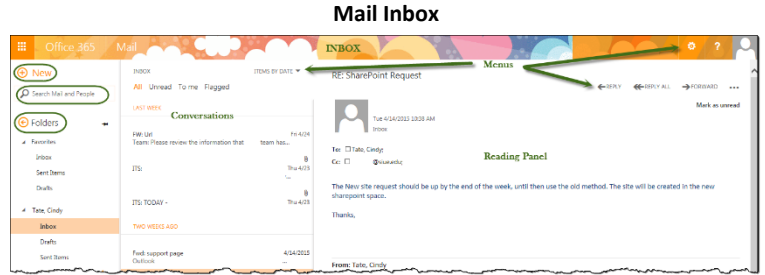


Mail

Mail is the app used to read, send and store conversations (email messages).

- Window consist of:

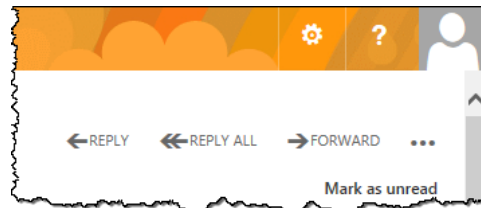
- Inbox
- Reading pane
- Folders
- Access to menus
- Search
- Create new conversation (message)



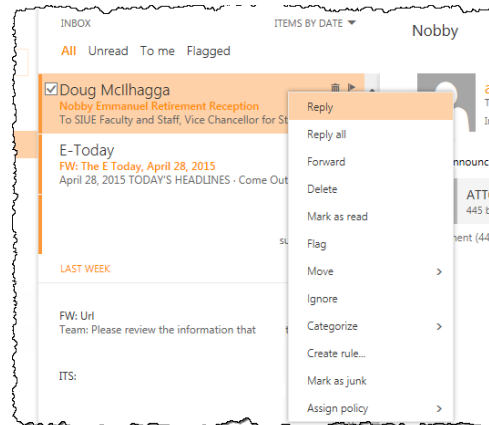
Menus

- There are 4 ways to access menus
 - Quick – Menu options available
 - Right Click – Select conversation and right click
 - Ellipsis – Click on ellipsis (***) to open additional menu options
 - o Will usually be seen in addition to Quick menu
 - Dropdown – Click down arrow (▼) to open menu options

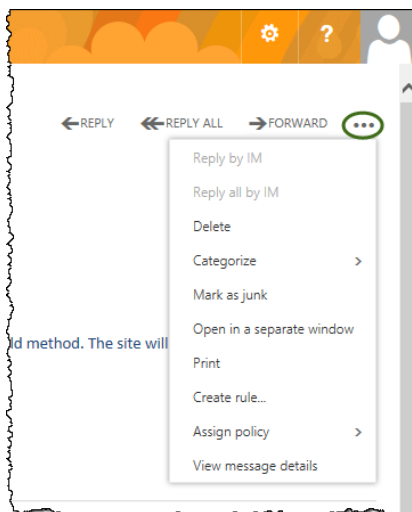
Quick Menu Example



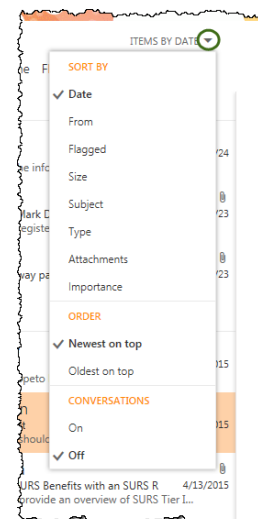
Right Click Menu Example









Ellipsis Menu Example



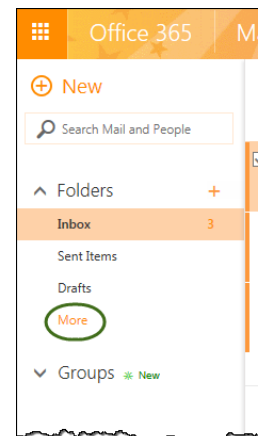
Dropdown Menu Example



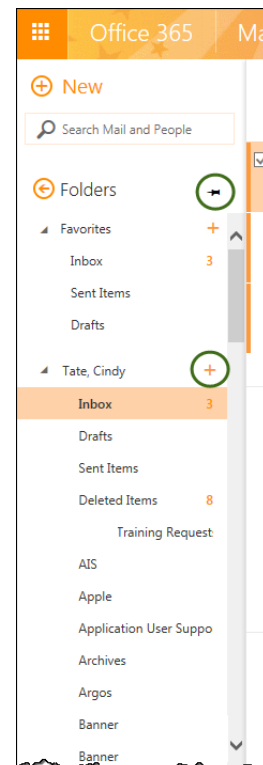
Folders Pane

- Consist of Favorites, all folders for an account
 - Numbers following folder name indicates how many unopened conversations (messages)
 - Click on folder to view list of conversations
 - Click  (expand) to view list
 - Click  (collapse) to close list
- Favorites – Place to put the most used folders
 - By default, contains Inbox, Sent Items and Drafts
 - Click  to add new folders that do NOT already exist in the All Folders list
 - Key in name
 - Press Enter
 - Click **More** to view full list of folders
 - Right click in Favorites area to view additional menu items
 - Rearrange order
 - Remove selected folder from Favorites list
 - Empty selected folder
 - Mark all conversations for selected folder as read
- All Folders list
 - Click  to have default view of Favorites only
 - Click  to add folders
 - Key in name
 - Press Enter
 - To add subfolder, use the right click menu
 - Right click in Folders area to view additional menu items (will be different from Favorites menu)
 - Create subfolder for selected folder
 - Rename folder
 - Delete folder (including all conversations stored there)
 - Add to Favorites list
 - Mark all conversations in selected folder as read
 - Assign policy (default is to use Parent Folder policies)
 - Permissions – Can give people within the SIUE organization various permissions to personal folder (click  add people and complete as required)

Favorites Only List



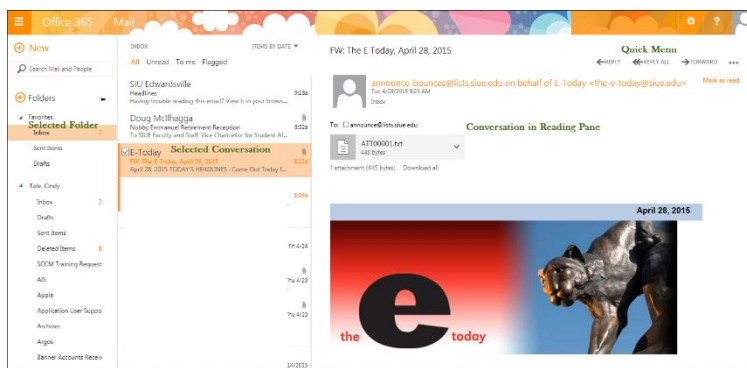
All Folders List



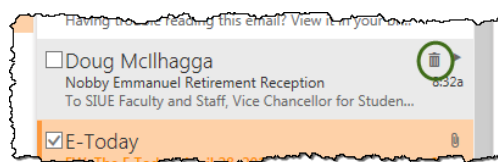
Conversations (Messages)

- All new conversations will be viewable in the Inbox
 - Unless a rule was created to automatically move it to another folder
- To read a conversation, click on it
 - Conversation will open in the reading pane
 - If reading pane has been hidden (see Mail Settings/Reading Pane, page 6), double click on conversation and a popup window will open
- To reply (reply all):
 - Select from quick menu
 - Enter additional email addresses if needed
 - Enter message
 - Click SEND
- To delete conversation:
 - Conversation will be moved to Deleted Items folder
 - Click on (trash can) for selected conversation in conversation list
 - **Or** right click on conversation to delete and select Delete from menu
 - Delete multiple conversations:
 - Check box for each conversation (hover over conversation)
 - Click (trash can) from menu

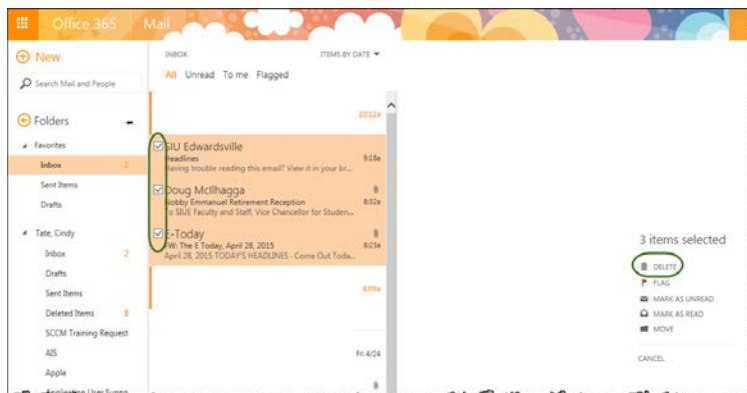
Conversation



Conversation Quick Delete

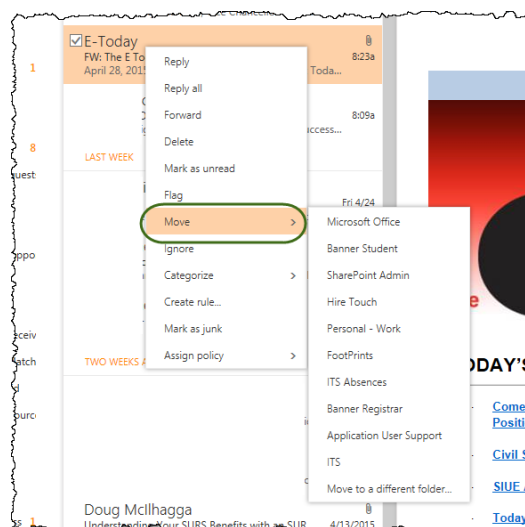


Multiple Conversations Delete



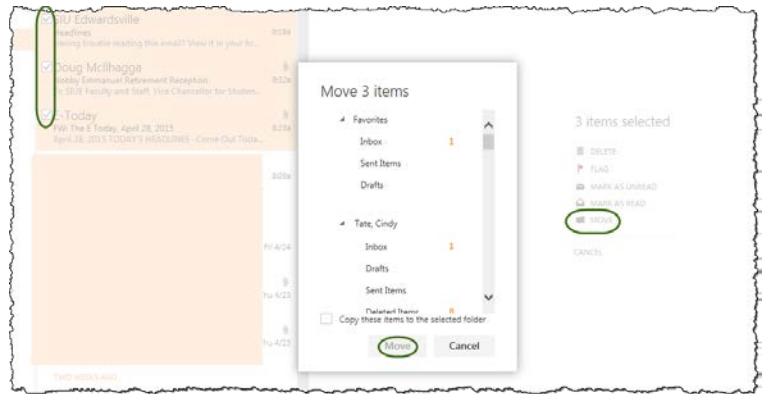
- To move conversation(s):
 - Select conversation
 - Right click
 - Select Move
 - Select destination folder

Conversation – Move to Another Folder



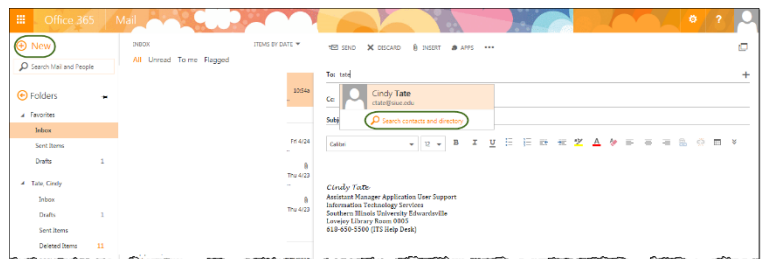
- Move multiple conversations:
 - o Must be moving to the same destination folder
 - o Check box for each conversation (hover over conversation)
 - o Click Move from menu
 - o Select destination folder
 - o Click Move

Multiple Conversations – Move to Another Folder



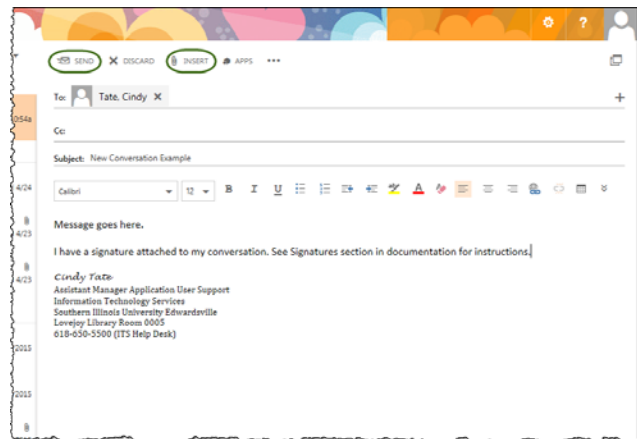
- To create a new conversation:
 - Click **New**
 - Key in e-id or last name or first name or group name
 - If recognized, will show options
 - o Click on name
 - If no options shown, click **Search contacts and directory**
 - o Will search contacts (SIUE & non-SIUE) and directory (SIUE, does not have to be in your contacts)
 - o Click on name

New Conversation



OR

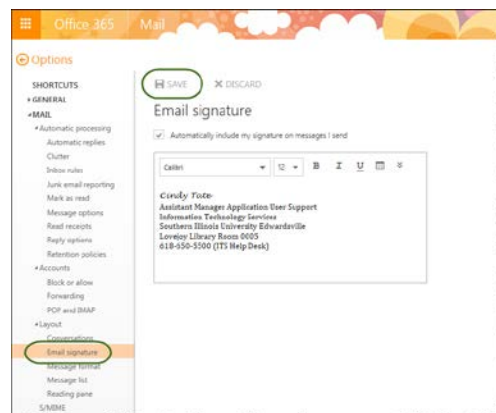
- o Key in complete email address and accept address as is
- Add more email addresses as needed
- Key in Subject
- Key in message
 - o Format as needed
- Click **INSERT** to include attachments
- Click **SEND**



Signature

- To automatically attach a signature to outgoing conversations:
 - Click
 - Options will open
 - Expand Mail, if needed
 - Expand Layout, if needed
 - Select Email signature
 - Check box if signature is to be used on all messages you send
 - Create signature
 - Click **SAVE**

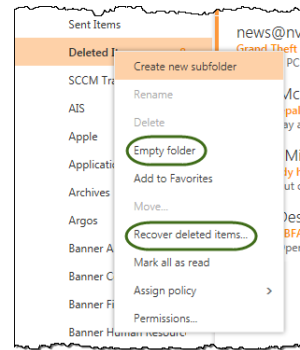
Options/Signature



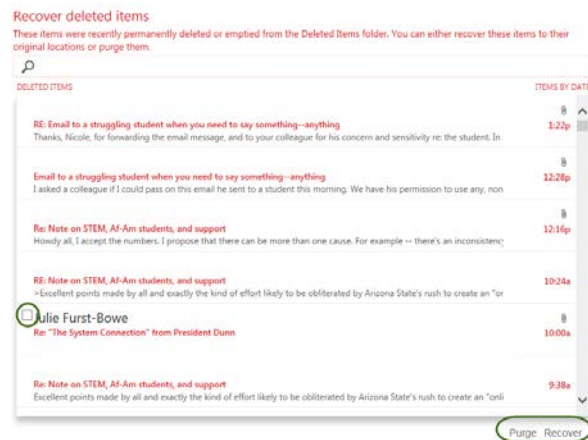
Deleted Items

- Conversations that deleted are moved to the Deleted Items folder
- To empty folder:
 - Select Deleted Items folder
 - Right click
 - Select Empty folder
- To recover items emptied from Deleted Items folder:
 - Conversations can be recovered up to 30 days after being deleted
 - Select Deleted Items folder
 - Right click
 - Select Recover deleted items ...
 - Popup of deleted items (conversations) will open
 - Select conversation(s) to be recovered
 - Click Recover
 - If Purge selected, purged conversations cannot be recovered at a later date; even if less than 30 days from initial emptying of Deleted Items folder









Deleted Items Folder – Right Click Menu



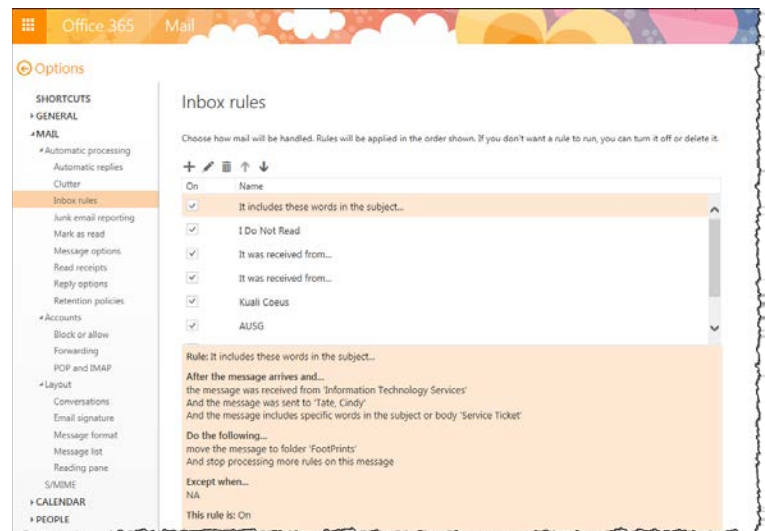
Recover Deleted Items (Conversations)



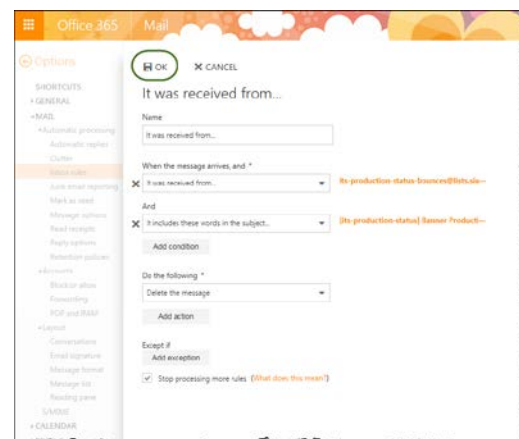
Rules (Filters)

- Rules are set up to filter incoming conversations
 - Conversations can be marked as read
 - Moved to another folder to be read later
 - Moved to the Deleted Items folder
- Rules can be created two ways:
 - Right click menu for selected conversation
 - Rule will auto-populate with items from conversation
 - Options menu
 - Will enter all parameters for rule
- To view/manage current list of rules:
 - Click  (settings)
 - Options menu will open
 - Expand Mail
 - Select Inbox rules
 - Very important to name rules
 - Unnamed rules will show as the first criteria: i.e.: It was received from..., It includes these words in the subject...
 - Can turn rules on and off
 - Do not have to delete rules, can turn off
 - Uncheck/check box for On
 - Checked box is On, meaning rule will run
 - Can change order:
 - Select (highlight) rule to be moved
 - Use   to move rules within list
 - To delete rule:
 - Select (highlight) rule to be deleted
 - Click 
- To edit existing rule:
 - Open Inbox rules (See view/manage current list)
 - Select (highlight) rule to be edited
 - Click  to edit
 - Rule will open
 - Make required changes
 - Click 
- To create a new rule from the Options Menu
 - Open Inbox rules (same as viewing list)
 - Click  to add new rule
 - New inbox rule opens, complete fields:
 - Enter rule name
 - Enter criteria (when message arrives)
 - Add condition if additional criteria apply
 - Complete action (do the following)
 - Add action if additional actions apply
 - Add exceptions if needed
 - Check to stop processing rules (If additional rules can apply to a conversation, do not check)
 - Click 
 - Rule will only apply to new inbox conversations received after rule was created and saved

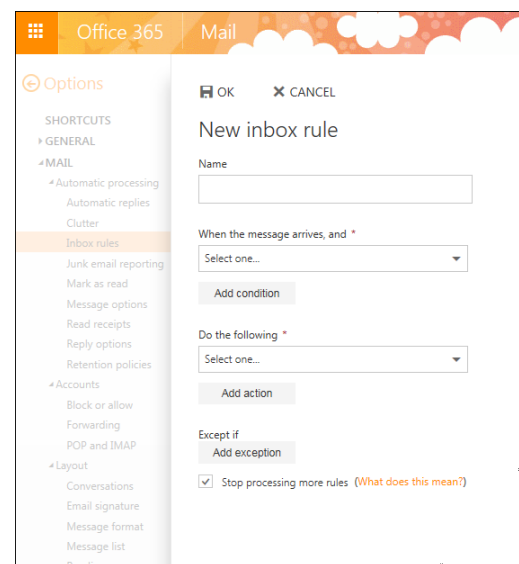
Inbox Rules



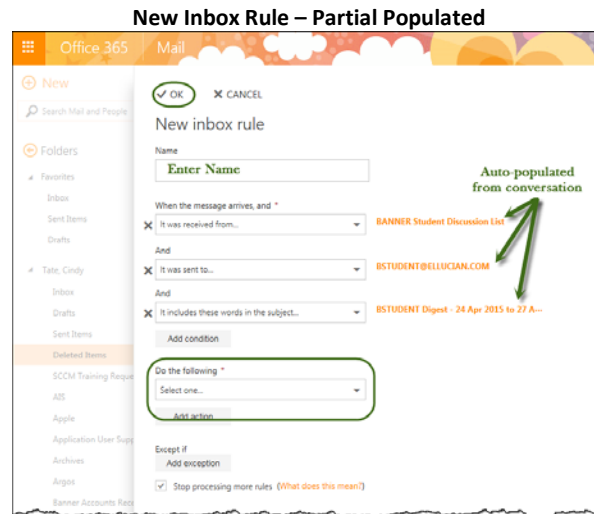
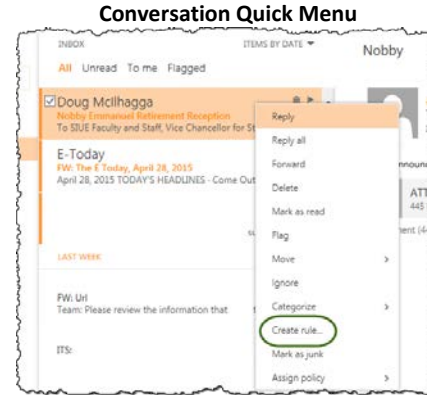
Edit Inbox Rule



New Inbox Rule



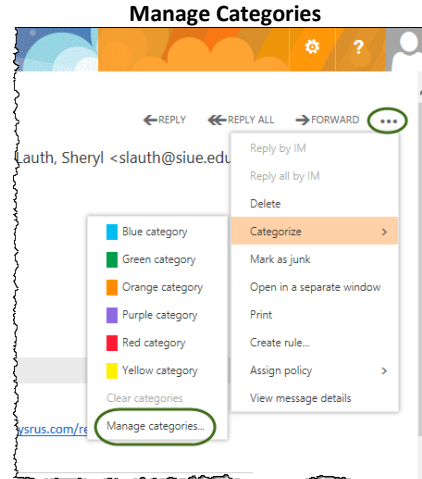
- To create a new rule from Quick Menu
 - Select conversation to create rule for
 - Right click
 - Select Create rule...
 - New inbox rule opens, complete fields:
 - o Enter rule name
 - o Criteria (when message arrives) auto-populated from selected conversation, can be changed
 - o Add condition if additional criteria apply
 - o Complete action (do the following)
 - o Add action if additional actions apply
 - o Add exceptions if needed
 - o Check to stop processing rules (If additional rules can apply to a conversation, do not check)
 - o Click **OK**
 - Rule will only apply to new inbox conversations received after rule was created and saved



Categories

Categories can be used in Mail, Calendar and Tasks apps. Categories can be managed from Mail or Calendar apps. By default categories are assigned a color and the name is the color.

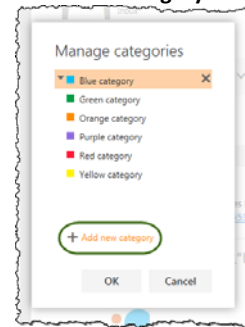
- To manage the Categories:
 - Click **...**
 - Select **Categorize**
 - Select **Manage categories...**



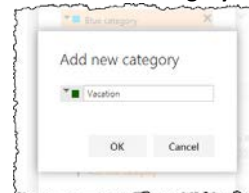
- To add category:
 - Click **+ Add new category**
 - Select color from dropdown menu
 - Key in category
 - Click **OK** twice

Note: Can change color of a category but cannot change text.

Add Category

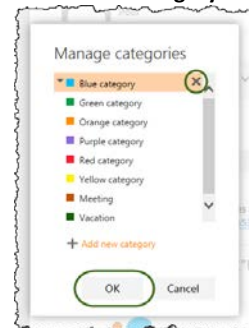


Add New Category

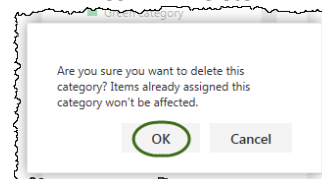


- To delete category:
 - From Manage categories, select category
 - Click **X**
 - Click **OK** twice

Delete Category



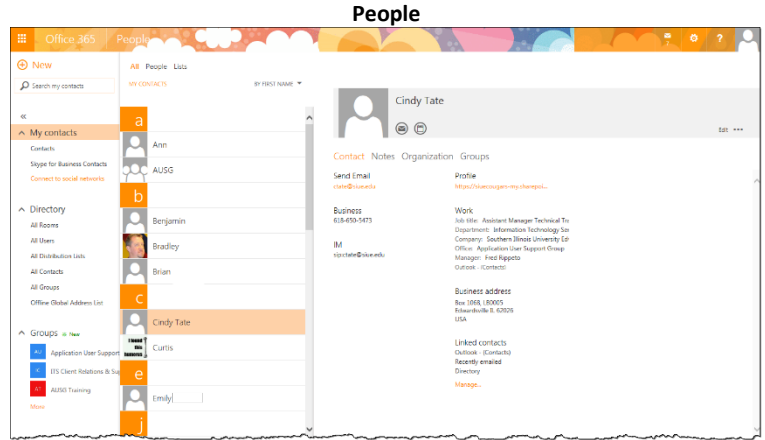
Confirm Delete






People (Contacts)

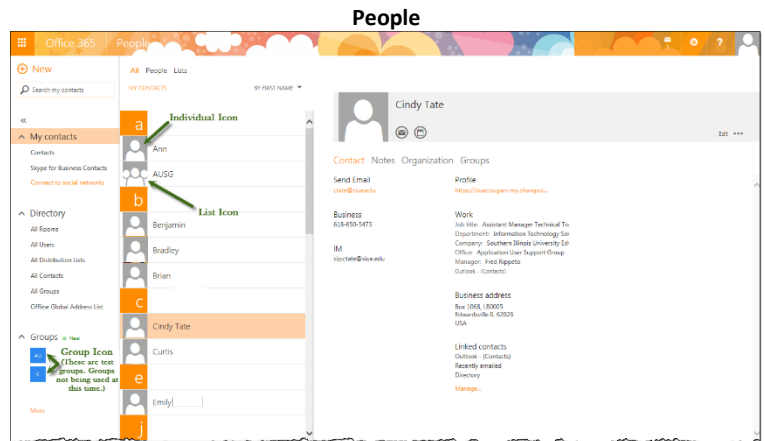
- People consist of 3 categories:
 - My contacts
 - Displayed FirstName LastName
 - Can select sort order
 - Directory
 - Displayed LastName, FirstName
 - By default, sorted by last name
 - Groups – Not being activated at this time
- All faculty, staff, students and retirees will be listed in the directory
 - When students leave the University, their listing will be removed
 - For faculty and staff that leave the University prior to retirement, their listing will be removed

Please note that only those people that have had their mail moved to Office 365 Mail will appear in the directory. Over a period of time, all mail will eventually be moved to Office 365 Mail.



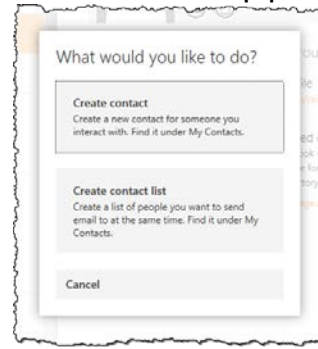
My Contacts

- After signing into Office 365, to open People, select
 -  People
 - If at another Office 365 app, click 
- Outlook People opens
- Click  to expand My Contacts menu
- My contacts contains people and lists for Contacts and Skype for Business Contacts.
- Contacts can contain people that are not in the Directory (non-SIUE)

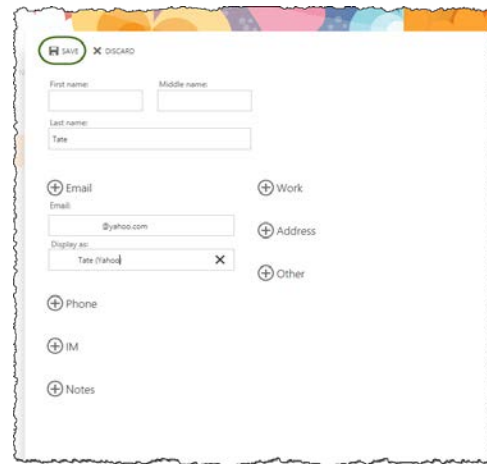


- To add a contact that is **not** in the Directory:
 - Click **New**
 - Popup will open
 - Select *Create contact*
 - Enter name, email address and any other information that you want entered
 - o Click **+** to add other information or to add multiples (i.e.; more than one email address)
 - Click **SAVE**

Create Contact Popup

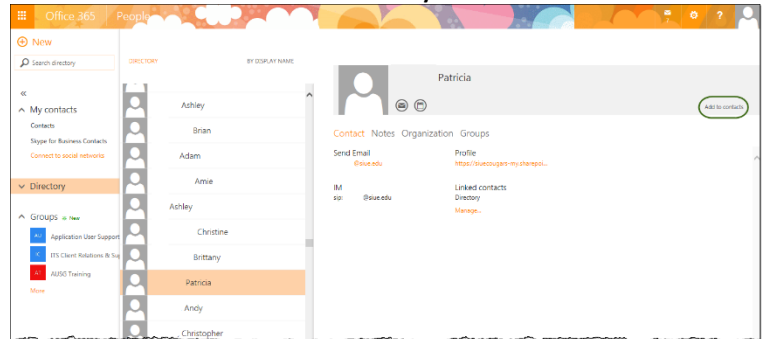


Create Contact

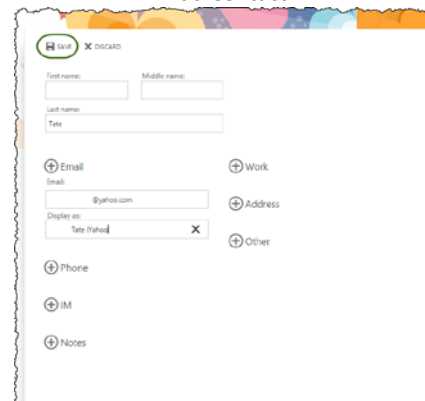


- To add a contact from the Directory:
 - Select Directory from menu
 - Locate and select person
 - Click Add to contacts
 - Make any additions
 - o Click **+** to add other information or to add multiples (i.e.; more than one email address)
 - Click **SAVE**

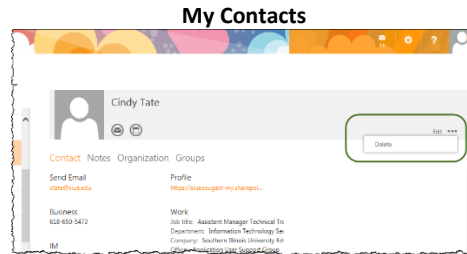
Directory



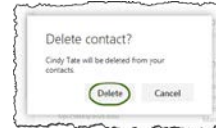
Add Contact



- To edit a contact, select contact
 - To remove contact from My contacts:
 - Click **...** to open Delete option
 - Click Delete
 - Click Delete
 - Deletes without saving
 - To edit contact information:
 - Click Edit
 - Change or add name, email address and any other information that you want entered
 - Click **+** to add other information or to add multiples (i.e.; more than one email address)
 - Click **SAVE**



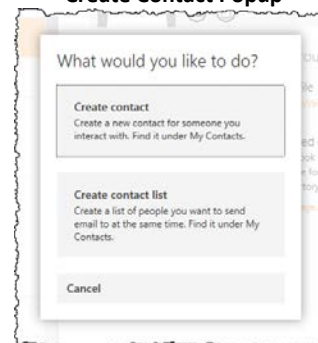
Delete Popup



Edit Contact



Create Contact Popup

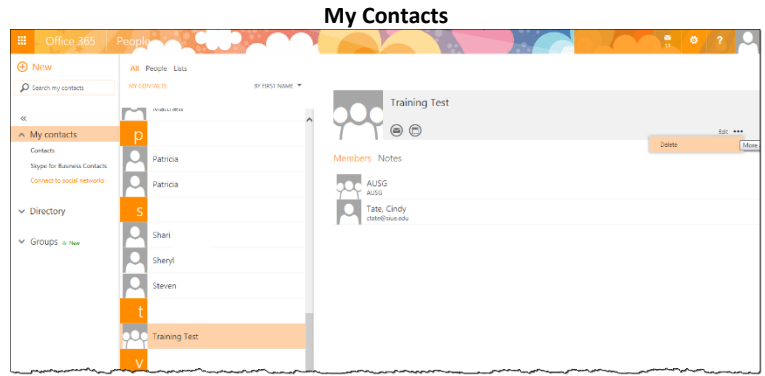


Create Contact List

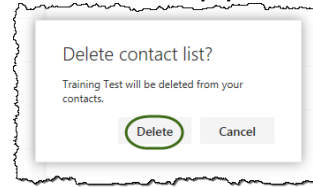


- To create a list:
 - A list is a collection of contacts that allows the user to send an email to all contacts within a list by using the list name
 - This is a personal list, not one shared with other contacts
 - Click **+** **New**
 - Popup will open
 - Select *Create contact list*
 - Key in List name
 - Add Members:
 - Key in part or full first name or last name or e-id
 - If found in My contacts, will show suggestion
 - If person shown is not correct, click **+** **Search contacts and directory**
 - Click on name
 - If only one match, will auto-add to members list (if not correct click **X** to remove)
 - Repeat process until all members are added
 - Can also add other list; but it does not show the individuals within the added list
 - Add notes as needed
 - Click **SAVE**

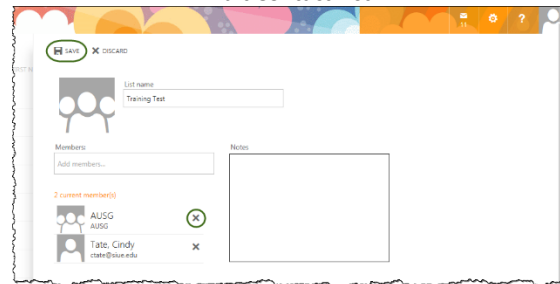
- To edit contact list, select list
 - To delete entire list:
 - o Click **...** to open Delete option
 - o Click Delete
 - o Click Delete
 - o Deletes without saving
 - To add/remove members:
 - o Click Edit
 - o To add a member; key in part or full first name or last name or e-id
 - o If found in My contacts, will show suggestion
 - o If person shown is not correct, click Search contacts and directory
 - o Click on name
 - o To remove a member; click **X** to remove
 - o Click SAVE



Delete Popup

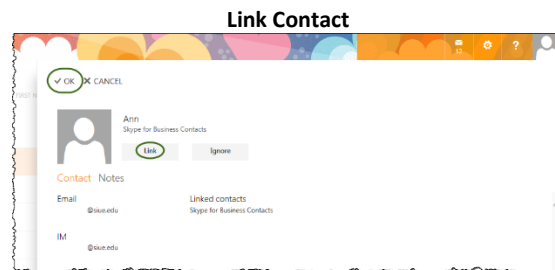
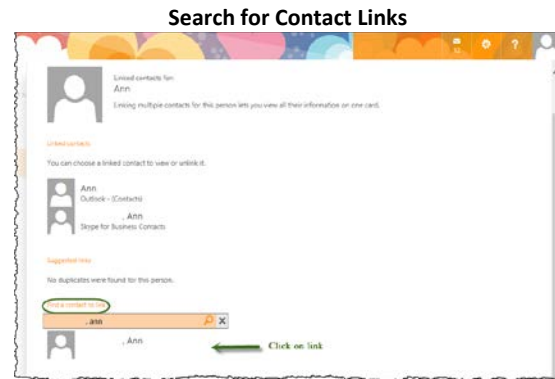
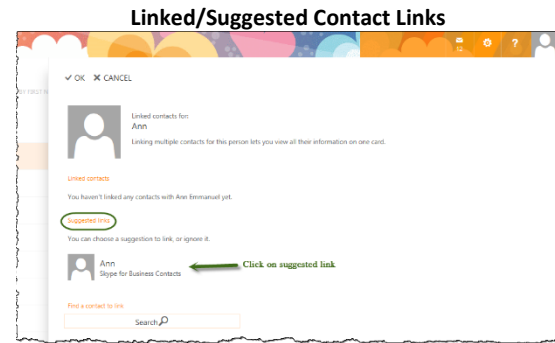
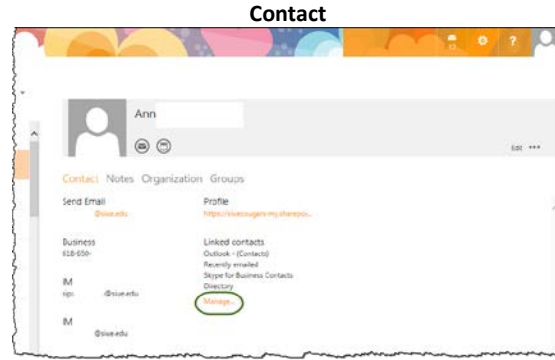


Edit Contact List



- To combine linked contacts (exist as an Outlook contact, in recently emailed, Skype, Directory, etc.)
 - Select member
 - Click Manage
 - If suggested link available and a valid link, select the link
- OR**
- Enter contact name to search for other links
- Click Link to accept
- Click OK
- Repeat for each contact link to combine

Note: Combining multiple contact links for a person but all the information on one card



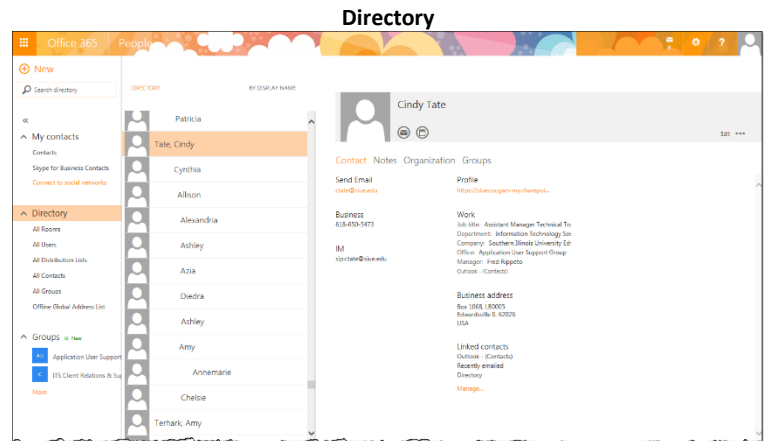
- To search for a contact:
 - Select My contacts or Directory
 - Click
 - Key in name
 - o List name
 - o First name
 - o Last name
 - o FirstName LastName
 - o LastName, FirstName
 - Click
 - Can change or expand search area
 - Click to cancel search



Directory

Directory is populated with all users from SIUE that have an active email address. This includes current employees (faculty & staff), students and retirees. At the time this document was created, this is a work in progress. It will take time as everyone's mail is moved to Office 365 Outlook. So, for the time being, only users that have had their mail moved will be viewable in the Directory.

As noted in My Contacts section, a contact in the Directory can be added to My contacts. Also, the search function is the same. Contact information cannot be edited in the Directory; they must be added and edited in My contacts.

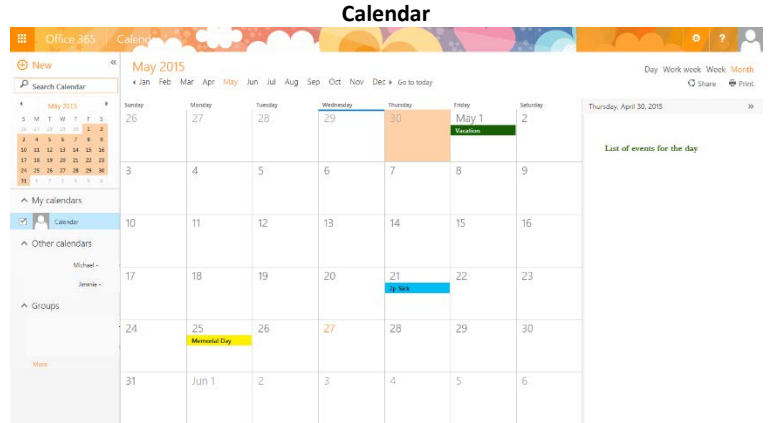


Groups

Groups is not being activated at this time. Groups shown are test groups.

Calendar

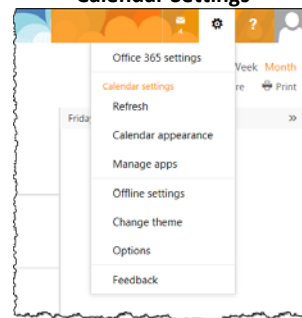
Calendars can be shared. New calendars can be created. Calendar can utilize categories, see Mail/Categories on how to manage.



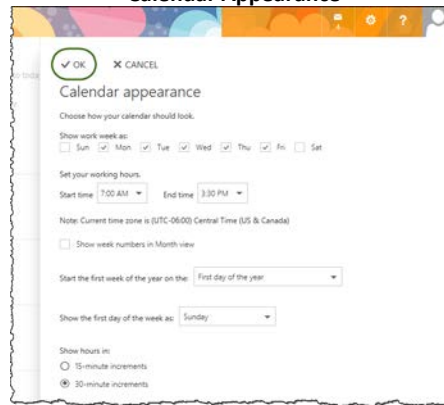
Calendar Setting

- Click
- Select setting to change
- Select Calendar appearance
 - Make changes to how to view calendar
 - Work week
 - Working hours
 - Start of year
 - Start of week
 - Hours increments
- Click OK

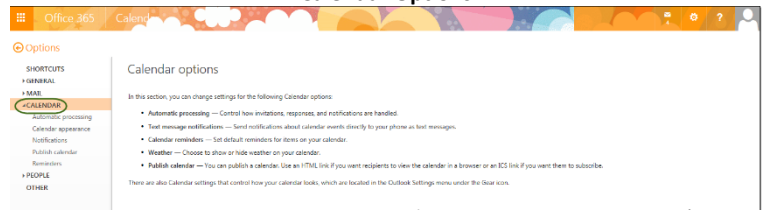
Calendar Settings



Calendar Appearance



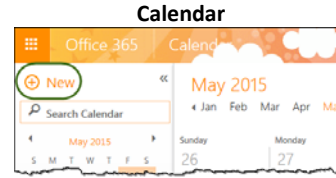
Calendar Options



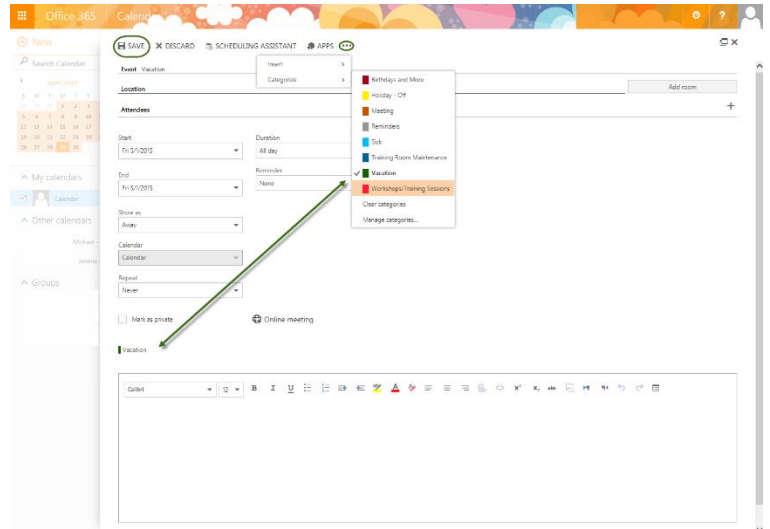
- Select Calendar options to view additional options
 - Automatic processing
 - Notifications
 - Publish calendar
 - Reminders

Create Event

- To create event:
 - Click **New**
 - Key information as needed
 - o Event
 - o Location
 - o Attendees – click **+** to open Directory
 - o Notes
 - Make changes as needed
 - o Start date/time
 - o End date/time
 - o Duration
 - o Show as
 - o Calendar
 - o Repeat
 - o Reminder
 - Add/Insert
 - o Add category
 - o Add attachments/pictures/OneDrive files
 - Click **SAVE**



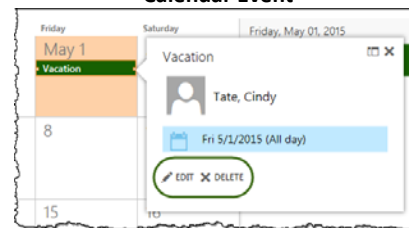
Create Event



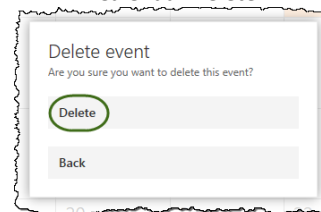
Edit/Delete an Event

- To edit event:
 - Select **edit** icon
 - Event window opens (same as new event)
 - Make necessary changes
 - Click **SAVE**
- To delete an event:
 - Select **delete** icon
 - Click Delete

Calendar Event



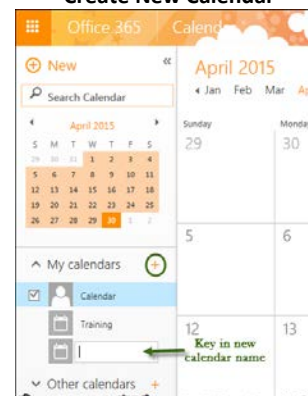
Calendar Delete





Create New Calendar

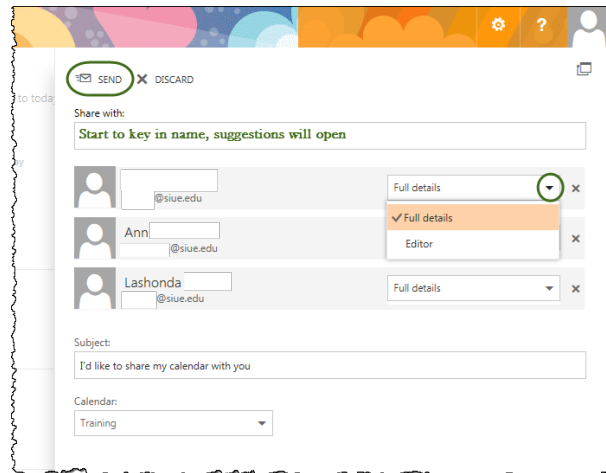
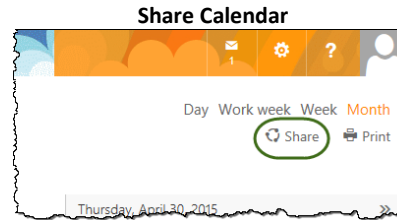
- To create a new calendar:
 - Click **+** next to My calendars
 - Enter name of calendar

Create New Calendar



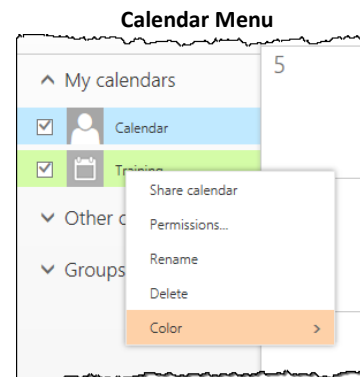
Share Calendar

- To share a calendar:
 - View calendar to share
 - Click  Share
 - Start to key in name or e-id
 - Will offer suggestions from contacts
 - Accept suggestion or key in full email address
 - From dropdown, select access
 - Full details – can view all details of events and all events on calendar
 - Editor – can modify/delete/create events on shared calendar
 - Click  SEND
 - Invitation will be emailed to those selected to share the calendar
 - It is then the decision of the recipient to accept or not



Calendar Menu

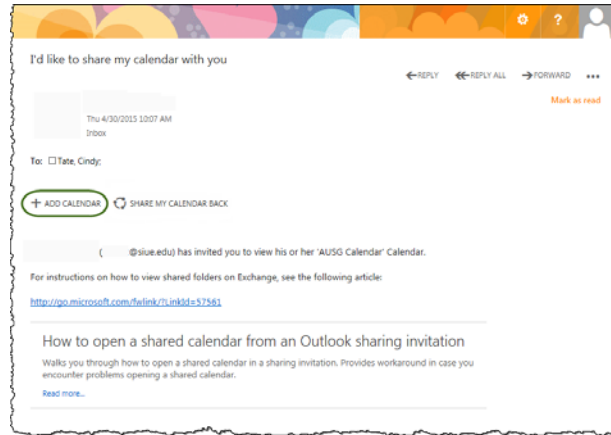
- Right click on the selected calendar to view menu
- Available menu changes with calendar selected
 - My calendars: Default calendar – Share, Permissions & Color
 - My calendars: Other calendars (created) – Share, Permissions, Rename, Delete, Color
 - Other calendars (shared with you) – Rename, Remove, Color
- Share – Share your calendar(s) with others
- Permissions – Created calendars are public
 - By default, not shared (not the same as sharing a calendar with individuals)
 - Availability only – Any person can view your availability; time only
 - Limited details – Any person can view limited details of events; subject & location
 - Full details – Any person can view all details of events not marked private
- Rename – Rename a calendar created or accepted from someone else
- Delete – Delete a calendar created by you
- Remove – Remove an accepted calendar (does not delete it; just removes your access)
- Color – Select color for calendar



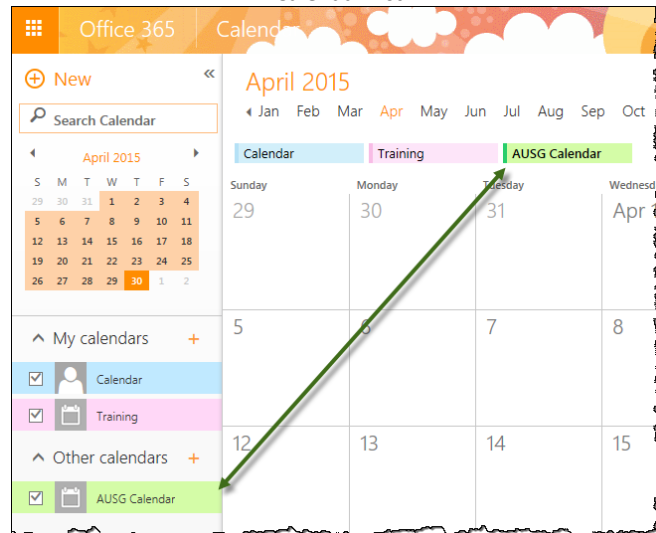
Accept Calendar Share Request

- An email will be sent to you to accept a request to share another person's calendar
- Click **+ ADD CALENDAR**
- After a short time, your calendar will open with the new accepted shared calendar in Others

Email to Share Calendar



Calendar List

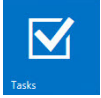


Tasks

Tasks is a place to track items/projects that you do not necessarily want on your calendar.

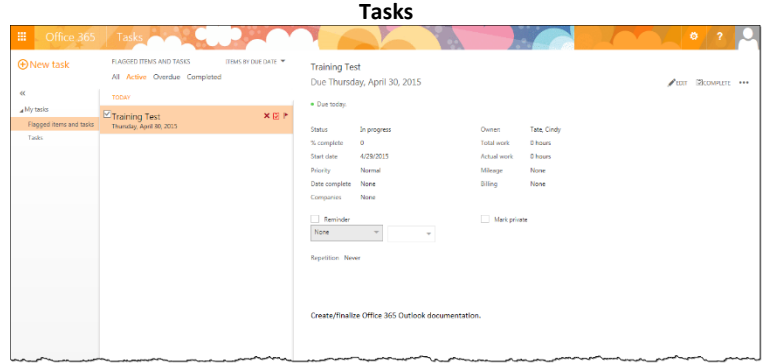
Create Task

- After signing into Office 365, to open Tasks, select

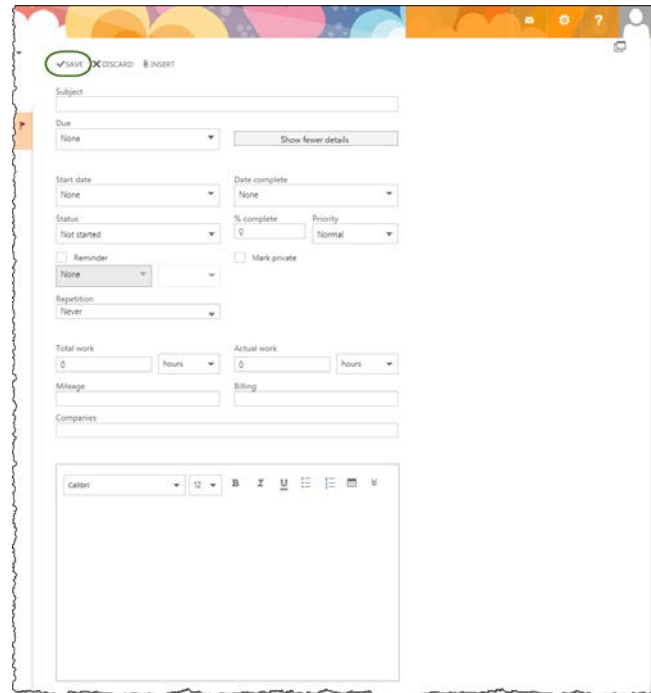


– If at another Office 365 app, click

- Click New task
- Complete fields as needed
- Click INSERT to attach files
- Click SAVE



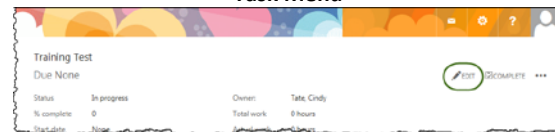
Create Task



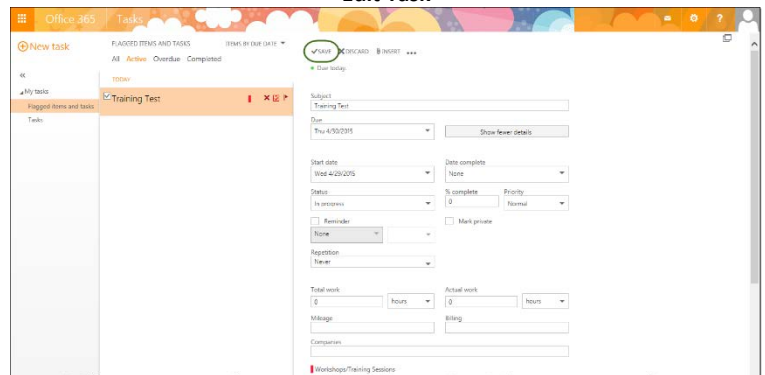
Edit Task

- Select task to edit
- Click to edit
- Make changes as needed
- Click SAVE


Task Menu




Edit Task



Mark Task Complete

- Select task
- Click 
- Task is marked as complete with the current date

Delete Task

- Select task
- Click 
- Task is deleted
- There is NO undo, once deleted task is gone

Tasks View

- Select which tasks lists to view:
 - Select from My tasks
 - To further expand or contract the list, select which items
 - All – All tasks will be listed
 - Active – Only active tasks will be listed
 - Overdue – Only tasks that have passes the deadline will be listed
 - Completed – Only tasks that have been marked as complete will be listed

Additional Resources

Phone Numbers

- ITS Help Desk: 650-5500

Websites

- ITS: <http://www.siu.edu/its>
- ITS e-ID Maintenance: <http://www.siu.edu/eid>
- ITS Training: http://www.siu.edu/its/fac_staff/training

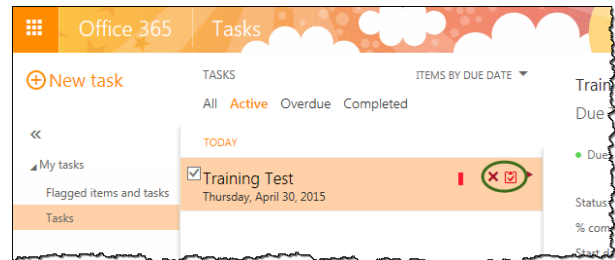
Email Addresses

- ITS Help Desk: help@siue.edu

External Training

- Microsoft: <http://office.microsoft.com/en-us/training>
- Microsoft Office 365 Training and Tutorials: <https://support.office.com/en-us/article/Office-training-and-tutorials-B8F02F81-EC85-4493-A39B-4C48E6BC4BFB?ui=en-US&rs=en-US&ad=US>
- Microsoft Office 365 Learning Center (scroll to bottom for using services): <https://support.office.com/en-us/learn/office365-for-business>

Task Actions



Tasks View

