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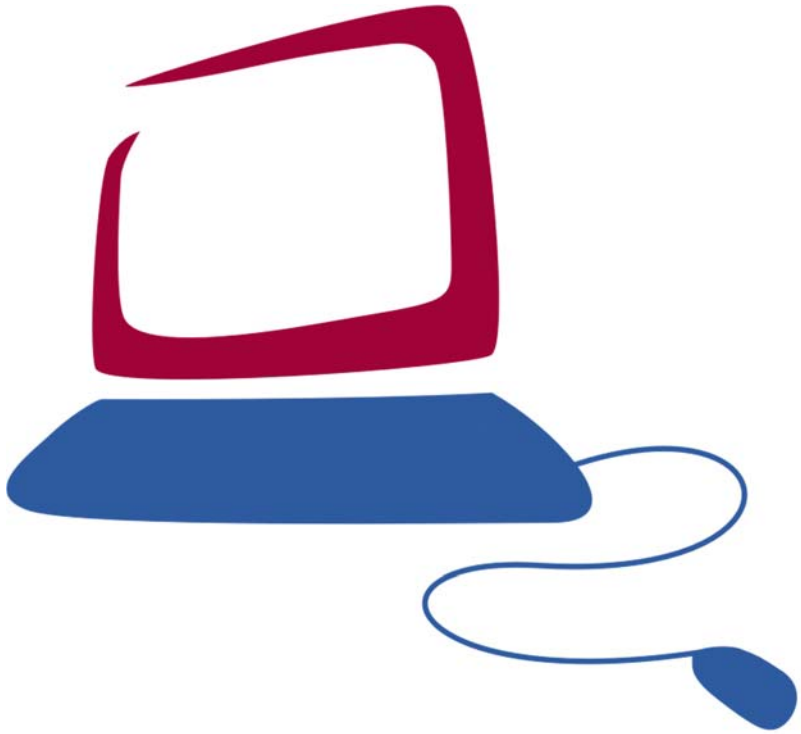
# Information Technology Services



# Quick Start Guide for Office 365 Outlook Web App

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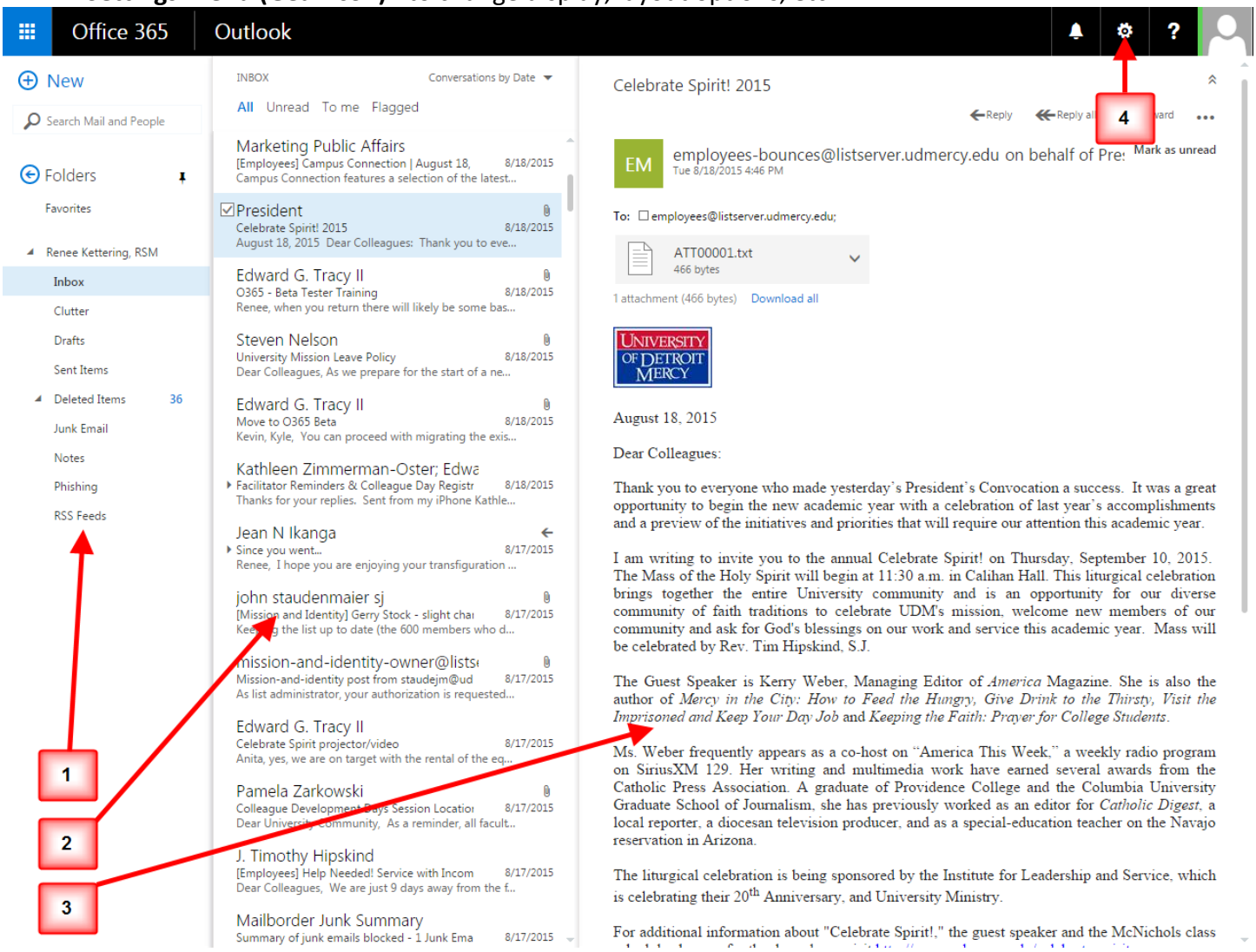
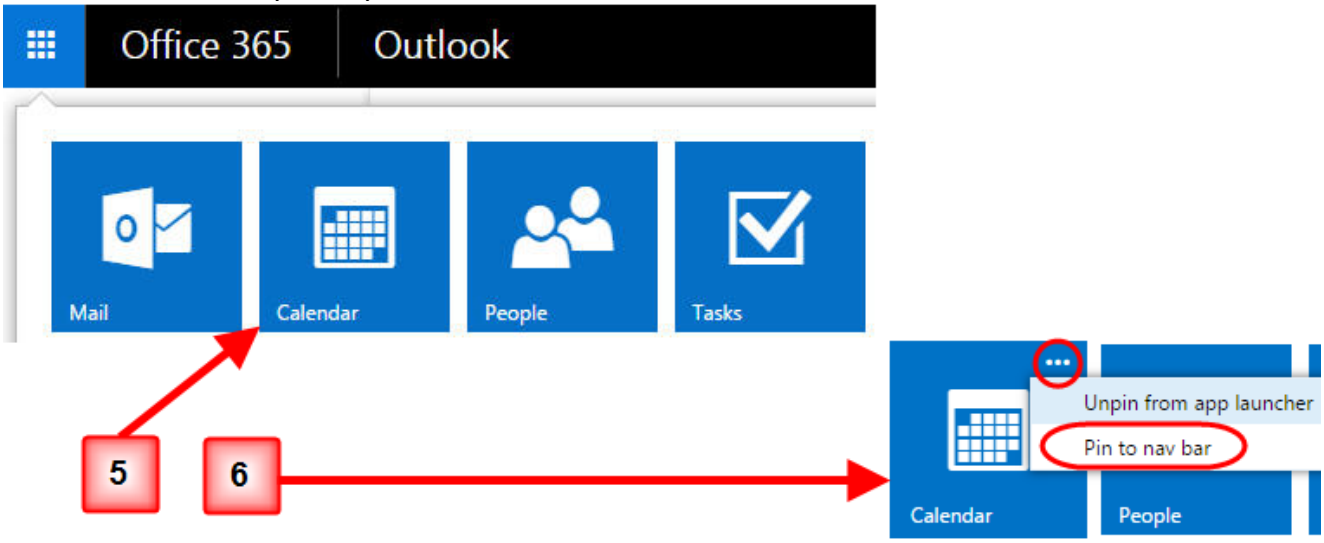
# Outlook Overview (Email)

1. **Navigation Pane** - contains shortcuts to folders and locations, as well as a hierarchical list of all folders. **Tip**: Click on **More** to display your entire list of email folders.
2. **View Pane** - displays the contents of the selected folder.
3. **Reading Pane** - displays the contents of the selected email message.
4. **Settings Menu (Gear Icon)** - to change display, layout options, etc.



5. Click on the **App Launcher** icon to display a menu of applications, such as Outlook, Calendar, People and Tasks.
    - **Outlook** - takes you to your Mail in Office 365 Outlook Web App
    - **Calendar** - takes you to your Calendar in Office 365 Outlook Web App
    - **People** - takes you to your Outlook contacts
    - **Tasks** - takes you to your tasks in Outlook

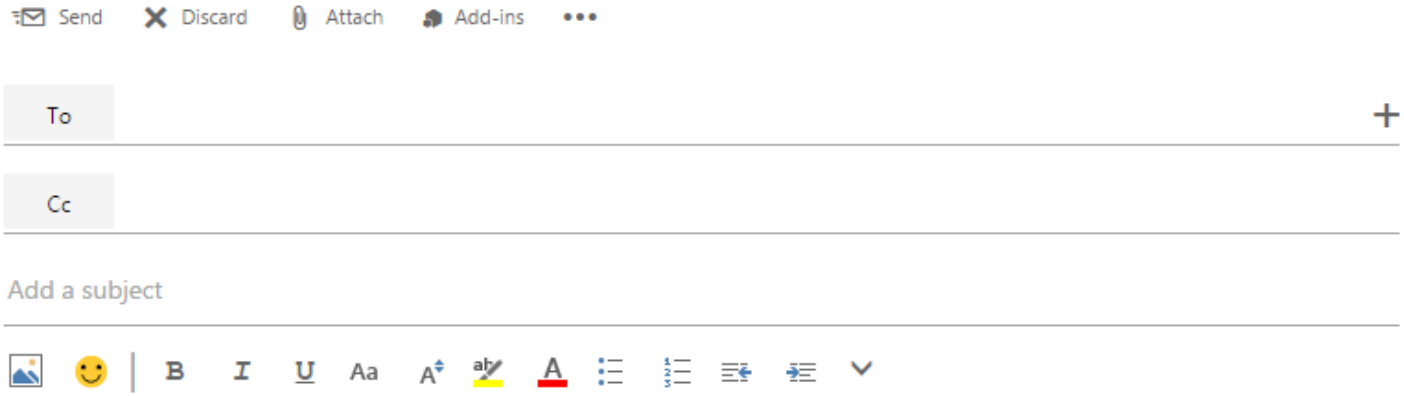



6. Pin up to 3 applications (e.g. Outlook, Calendar, People) to the right side of your top navigation bar (Optional)
    - From the menu of applications, hover on the desired app so that an ellipsis (**...**) displays in the right hand corner of the app name.
    - Click on the ellipsis (**...**) to display a quick menu of more options
    - From the quick menu, choose **Pin to nav bar**
    - Applications you pin to the navigation bar display as icons on the right of your top navigation bar. This gives you direct access to your most frequently used applications (see below).

# Mail Messages

## *Create New Message*

1. In Outlook, click *+New* in the upper left. A new message form will appear in the reading pane.
2. Enter the e-mail address and type the message. To add an attachment, click *Insert* (paperclip icon) *Total message size is limited to 25 MB including attachments.*
3. When finished, click *Send*.




## *Open or Save an E-mail Attachment*

1. Select the email with the attachment.
2. Tap or click the icon for the attachment to open it or to select the *Save* option.

## *Add a Signature to Message*

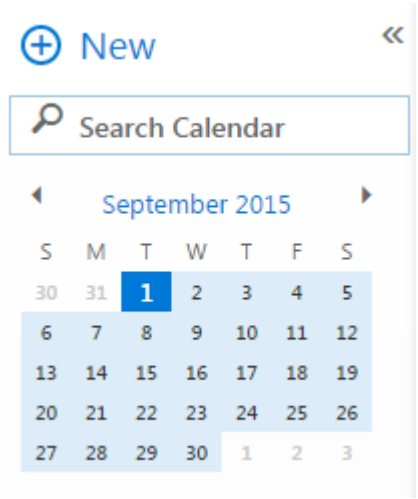
1. From the top navigation bar, click the gear icon, then select *Options*.
2. In the left-hand panel, select "*Mail > Layout > Email signature*".
3. Type and format your signature block under the "*email signature*" section.
4. To automatically apply the signature to each outgoing email message, place a check in the checkbox "*Automatically include my signature on messages I send*".
5. When finished, click *Save*.

## *Automatic Replies - Out of Office*

1. From the top navigation bar, click the gear icon, then select *Automatic replies*.
2. Select the "*Send automatic replies*" radio button, as well as setting a date range for the message to send.
3. You can specify messages for Inside My Organization (UDM Office 365) and Outside My Organization (non-Office 365).
4. Enter your message details.
5. When finished, click *Save*.

# Calendar

## *New Meeting*



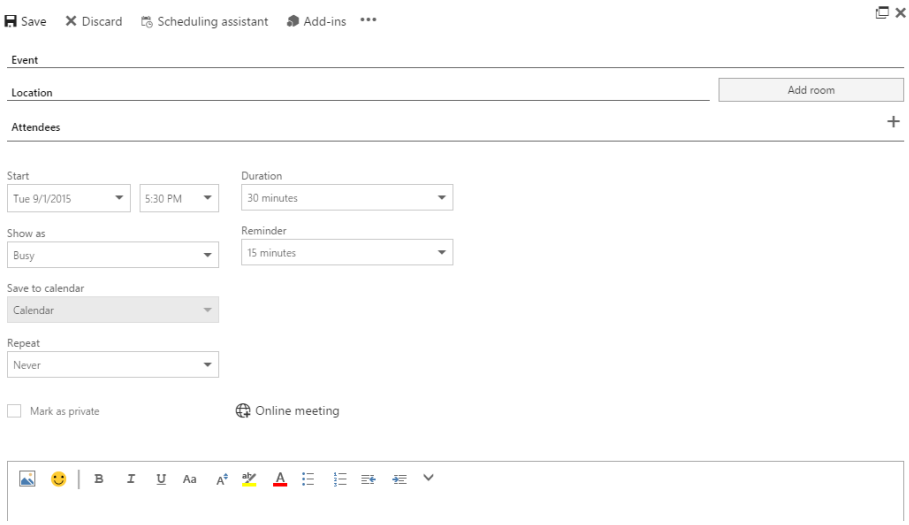

1. Select *Calendar* from the app launcher or navigation bar.
2. Click *+New* or double-click a date on the calendar to open a new calendar item form.
3. Enter the event/appointment details including entering the names of the people you want to invite in the Attendees field. (Event description, location, attendees, date, etc).
4. Select the *Scheduling Assistant* to show the availability of invited attendees.
5. When finished, click *Send* (Note: the *Save* icon changes to *Send* if you have an attendee).

## *Manage Events/Appointments/Meetings*

- **Edit/Change** - double click the event you wish to change, and click the pen/pencil icon to *Edit*. Amend any dates, times, etc and then click *Send*.
- **Delete** - select the appointment on the calendar view and click the pen/pencil icon to Edit.

## *New Event/Appointment (Just Yourself)*

1. Select *Calendar* from the app launcher or navigation bar.
2. Click *+New* or double-click the calendar to open a new calendar item form.
3. Enter the event/appointment details (Event description, location, date, etc).
4. When finished, click *Save*.




## *Calendar Settings Menu*

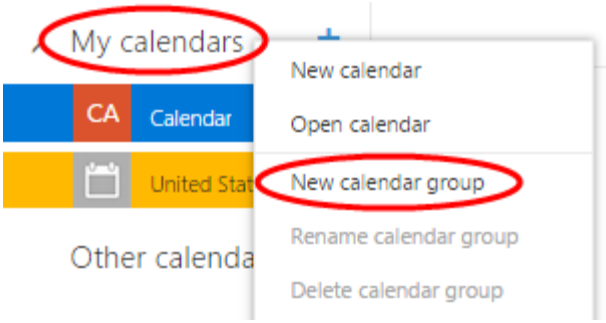
- In *Calendar*, click on the gear icon to change calendar appearance, options, etc. **Note:** If you can't find an option, select **Other** to view earlier versions of Outlook Web App.

## *Track Meeting Responses*

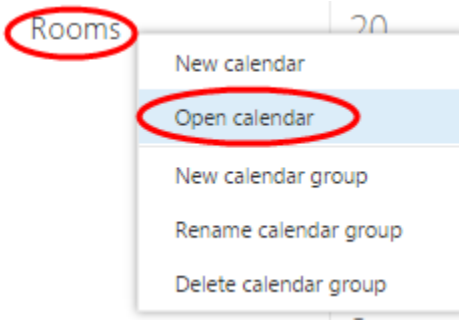
Meeting organizers can track accepted and declined responses.

1. Double click on the *Event/Appointment/Meeting*.
2. Select the **Attendees** option to view responses.

## *Add a Meeting Room to your Calendar*



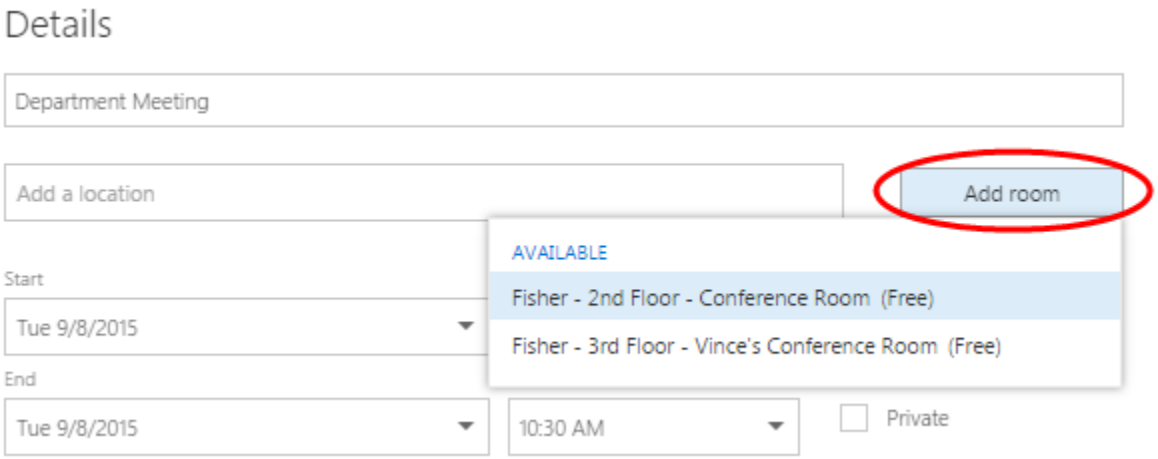

1. Select *Calendar* from the app launcher or navigation bar.
2. Right-click on *My calendars* in the left navigation bar and select *New calendar group* from the dropdown menu.
3. In the newly opened textbox, type in the word **Rooms**. Press enter.
4. Right-click on the Rooms calendar group and select *Open calendar* from the dropdown menu.



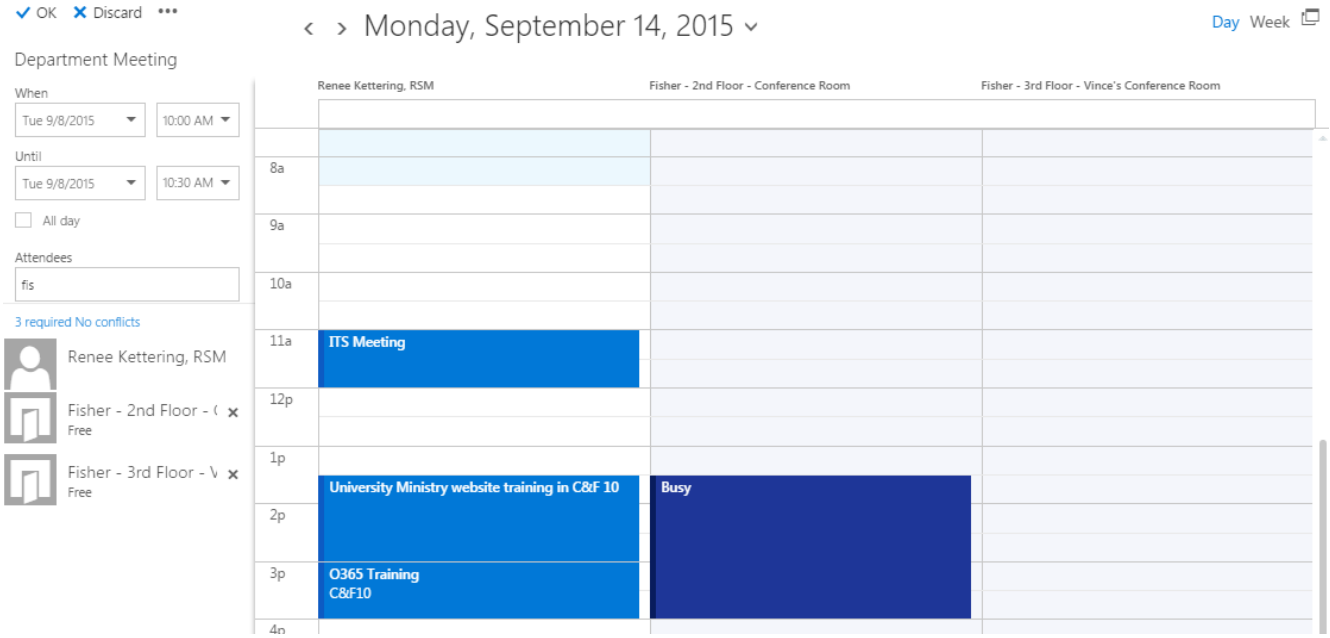

5. In the *From directory* field, type in the name (or part of the name) of the calendar that you would like to add. Click on *Search Directory*. After selecting the calendar, click the **Open** button.
    - To request a new room, please create a Help Desk ticket at [hd.udmercy.edu](hd.udmercy.edu). If the room requires a booking delegate, or an individual who approves room requests, please state this request along with the individual's name in the ticket.

## *Reserve a Meeting Room*

1. Click *+New* or double-click the calendar to open a new calendar item form.
2. Select the date and time of your meeting. Click on *Add room*. All rooms that are available and have been added to your calendar will be displayed in the dropdown menu.



3. You may also click on the Scheduling assistant button to see the availability of each conference room.
4. Add rooms by typing in and selecting the name of the room under **Attendees**. The availability of each attendee and each possible conference room will be displayed.




5. After choosing one conference room, remove any unneeded room by clicking on the **X** next to the room name.

# Contacts

## *Create a New Contact*

1. Select *People* from the app launcher or navigation bar.
2. Select *+New* and select *Create Contact*.
3. Add the Contact information for your contact (e.g. Name, Display Name, Email, etc).
4. When finished, click *Save*.

## *Edit or Delete Contact/Group Contact List*

1. Select *People* from the app launcher or navigation bar.
2. Select the Contact or Contact List to be edited.
3. Select the "*Edit*" option from the far right park of the screen and make your changes.
4. To delete, click on the ellipsis (...) icon.
5. When finished, click *Save* (or *Delete*).

## *Create a Group Contact List*

1. Select *People* from the app launcher or navigation bar.
2. Select *+New* and select *Create Contact List*.
3. Enter the desired contact list name (e.g. *Coffee Club*)
4. Add members by entering their name or email address.
5. Outlook Web App will search for a match in your Contacts and in UDM's address book. If a match isn't found, you can search for that person. You can also type an email address directly in Members.
6. When finished, click *Save*.

# Flags

## *Add a Flag to a Message*

- When you flag a message, the current date is automatically assigned as the follow-up date. To set a different followup date, right-click the flag icon.
- To mark a flagged item as complete, click the flag icon and it changes to a check mark.
- To change a completed item back to not finished, click the check mark icon and it reverts to a flag.
- To remove the flag, right-click the flag icon and select *Clear flag*.

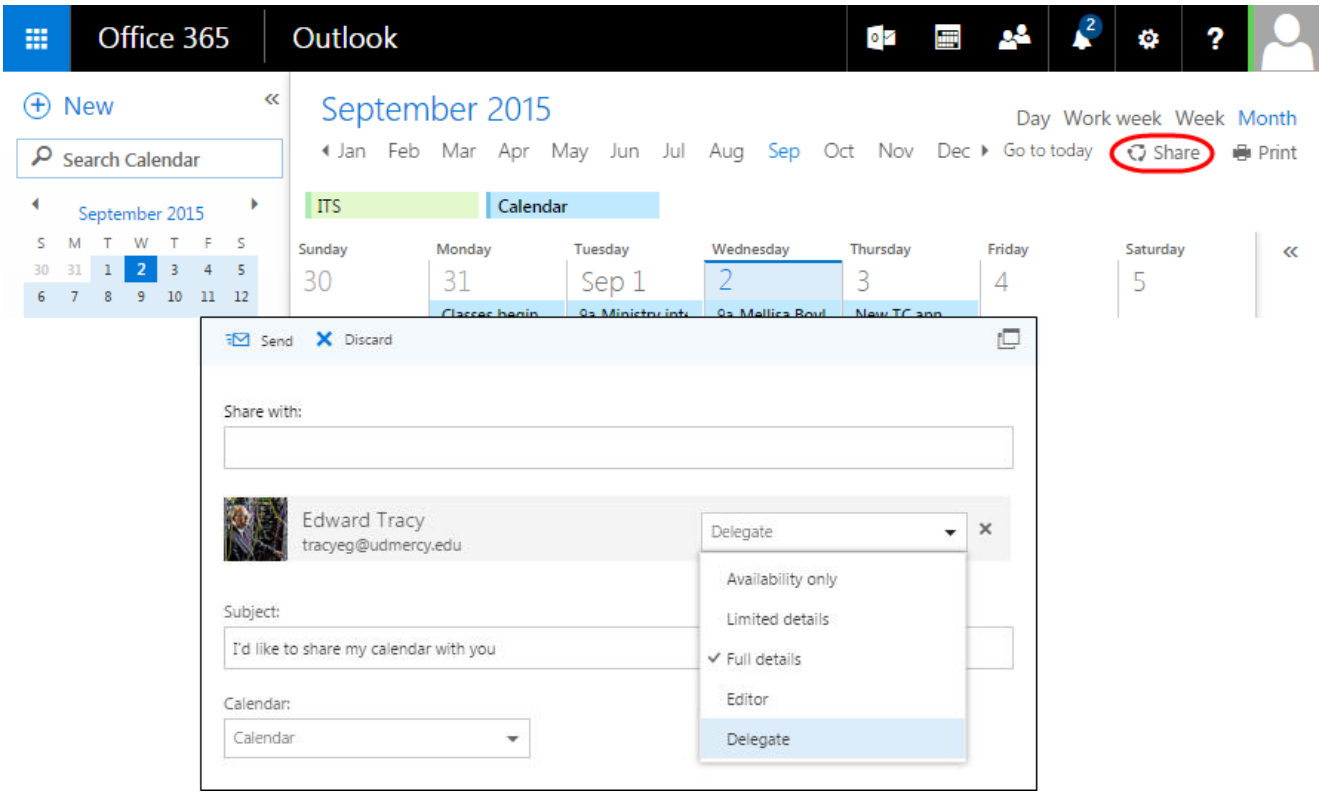
## *Categorize (color code) a Message*

- Right-click a message, and select *Categorize*> to display extended menu.
- Select a color category or choose *Manage categories* to create your own.

# Sharing and Delegation Tools

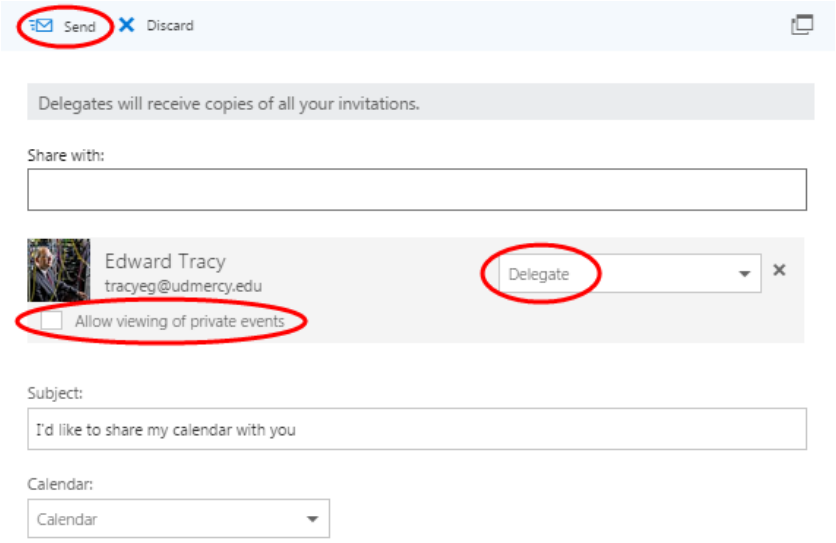
## *Share Your Calendar*

1. In Outlook Web App, select **Calendar** from the app launcher icon or from the Calendar icon on the navigation bar.
2. Click the **Share** icon at the top right of the Calendar window, next to the **Print** icon.
3. A *Share request form* appears. In the **Share with**: field, enter the name or email address of the person you want to share your calendar with. **Note:** Outlook Web App will search for a match in your Contacts and UDM's address book. If a match isn't found, you can search for that person. You can repeat this process for as many people on campus, as needed.
4. Next to the person's name, **Full details** shows as the default permission level. **Full details** allows someone to view your Subject, Location, Attendees, and Description. However, any calendar event you marked as **Private** displays simply as *Private Appointment*.
5. To select a different permission level of access to your calendar, click on the drop-down arrow.
    - **Availability only:** allows someone to view blocks of time as Free, Busy, Tentative, Away.
    - **Limited details:** allows someone to view your Subject and Location.
    - **Editor**: gives someone permission to read, write and modify your calendar.
    - **Delegate**: gives someone permission to act on your behalf, such as an assistant on behalf of a supervisor. (Refer to Delegate Your Calendar section below).
6. Change the default **Subject** to something more descriptive, to let the person know what permission level you are granting them. (e.g. *Granting you full details to view my calendar*).
7. If you have more than one calendar, you will see a drop-down arrow next to the **Calendar** field. Choose the desired calendar to share. **Note:** Your Office 365 calendar is labeled simply, *Calendar*.
8. To send the calendar sharing invitation, click **Send,** located at the top, left corner of the Share request form.



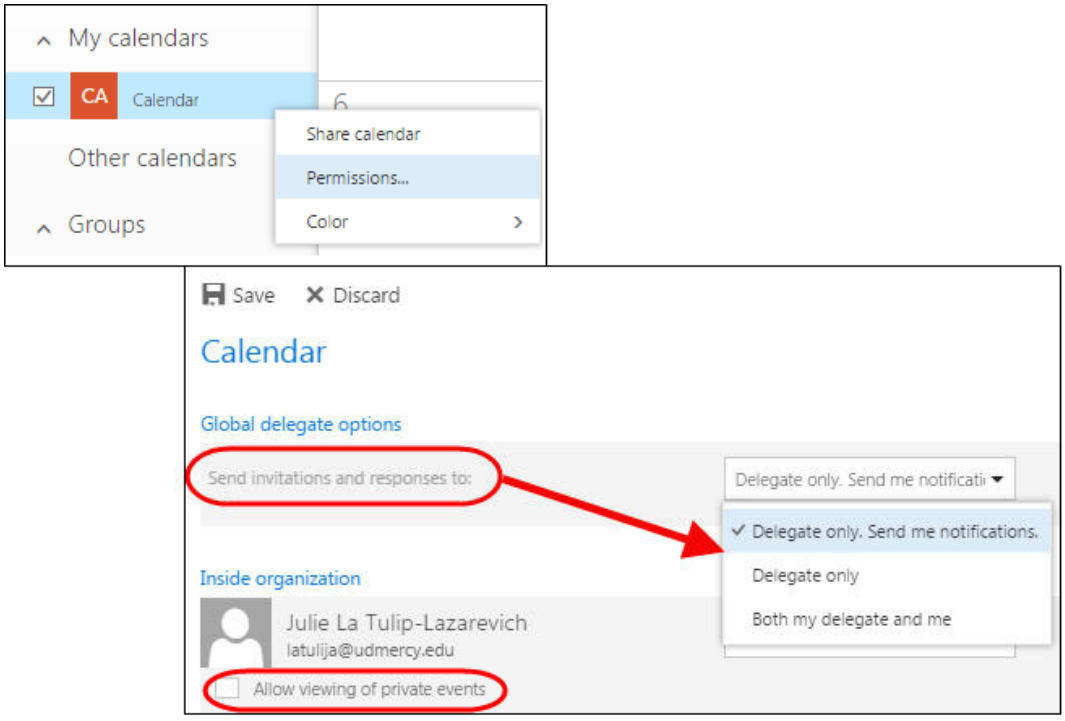
## *Delegate Your Calendar*

- If you grant someone Delegate access to your calendar, that person will also get email copies of any calendar invitations you receive.
- You can also allow your Delegate to view private events on your calendar, by selecting the box, "Allow viewing of private events."



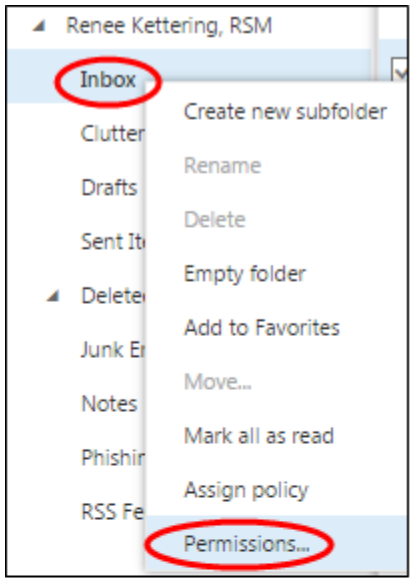

After delegating your calendar to someone, you must also specify permissions for how your meeting requests and response messages will be handled.

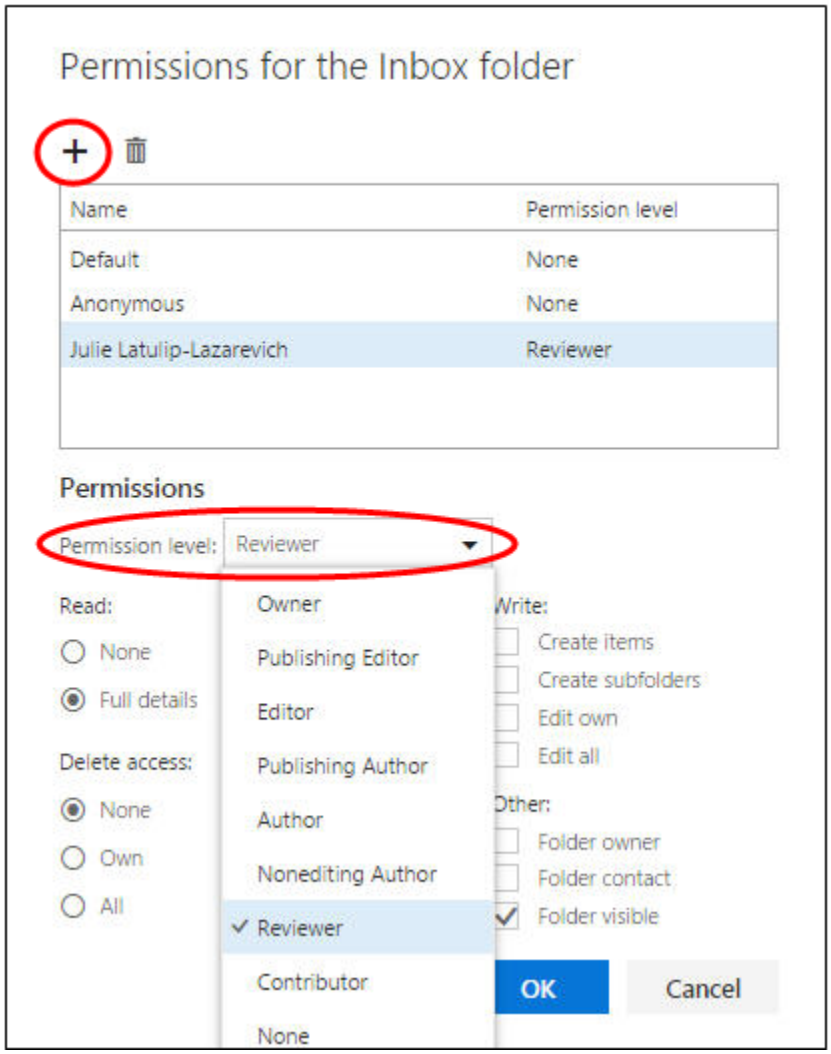
1. Under *My calendars,* **right-click** the calendar for which you assigned a delegate **(**e.g. **Calendar**).
2. A quick menu appears. From the quick menu, select **Permissions**.
3. A *Global Delegate Options* window displays. By default, your Delegate will receive your meeting requests, while you only receive a notification of a meeting request or response. To select a different notification setting, select the desired Delegate option:
    - **Delegate only**: Only your Delegate will receive meeting requests and notifications. You can only see these items by checking your calendar.
    - **Both my delegate and me**: Both your Delegate and you will receive meeting requests and notifications.
4. To save your Delegate notification options, click **Save**. (*Your calendar screen displays*).



## *Share and Delegate a Folder in your Mailbox*

1. Select **Outlook** from the app launcher icon or from the Email icon on the navigation bar.
2. In Outlook, **right-click** on the folder that you would like to share under your name (*not under Favorites*), and from the quick menu, select **Permissions.**
3. In the window labeled *Permissions for the Inbox Folder,* click the Plus icon (+) to display an Add Permissions pop-up window. **Note**: To remove access, click the Garbage can icon.
    - In the **Add Permissions** pop-up window, enter the name or email address of the person you wish to share your email Inbox with. You can enter as many names as desired.
    - When finished, click **Add**.
4. In the *Permissions for the Inbox* folder window, click on the drop-down arrow next to the **Permission level**, and select the desired level of access (*e.g. Reviewer*) to grant the individual(s).
5. When finished, click **OK**.



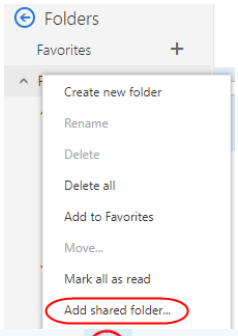




6. The person receiving the share will need to add the shared folder to their account. After logging in, he/she will need to right-click on their name in the left menu and select **Add shared folder…**
7. Type in the email address of the mailbox sharing a folder and click **Add**.
8. The email account with the shared folder will display in the left menu.

## *Using a Shared Mailbox*

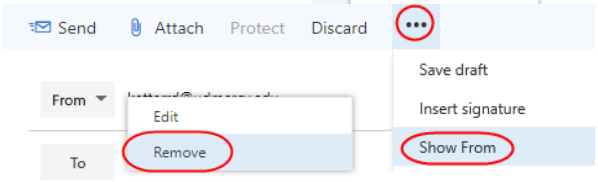
A shared mailbox is a mailbox that multiple users can use to read and send email messages. Shared mailboxes can also be used to provide a common calendar, allowing multiple users to schedule and view appointments or vacation time.

A shared mailbox does not have its own username and password like a user mailbox does. The users must first be granted permissions to the shared mailbox and then access it by using the Outlook Web App.



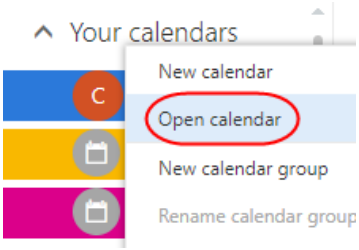

Once permission has been granted, follow the steps below to access the shared mailbox:

1. Select **Mail** from the app launcher icon.
2. Right-click on your name in the left menu and select **Add shared folder…**
3. Type in the email address of the shared mailbox and click **Add**.
4. The shared mailbox will display in the left menu.




To send email using the shared mailbox address:

1. Click on **New** to write a new email message.
2. If you do not see the **From** field, click on the ellipse button and select **Show From**.
3. Right-click on your email address in the From field.
4. Select **Remove**.
5. Type in the email address of the shared mailbox. Finally, write and send the message.




To add the calendar from the shared mailbox:

1. Open the calendar app.
2. Right-click on **Your calendars** and select **Open calendar**.
3. Under **From directory**, type in the email address of the Shared Mailbox. Click **Open**.

To request a shared mailbox or to add people to an existing shared mailbox, please submit an account application.

*Please note: Shared mailboxes are not supported on mobile devices.*