OUTLOOK: OFFICE 365 VERSION

Information Technology Department

DIOCESE OF ROCHESTER Created: March 2017

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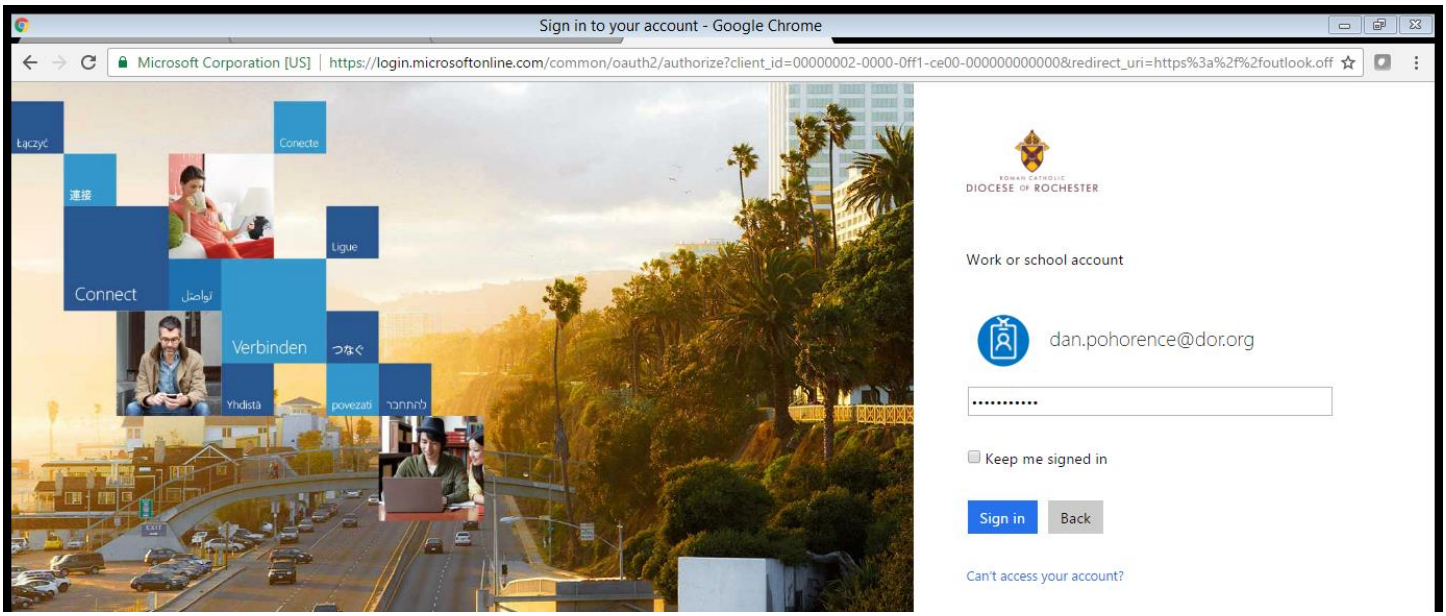
Logging onto Outlook

To log onto Outlook, open a web-browser and enter the following web address: outlook.office.com.

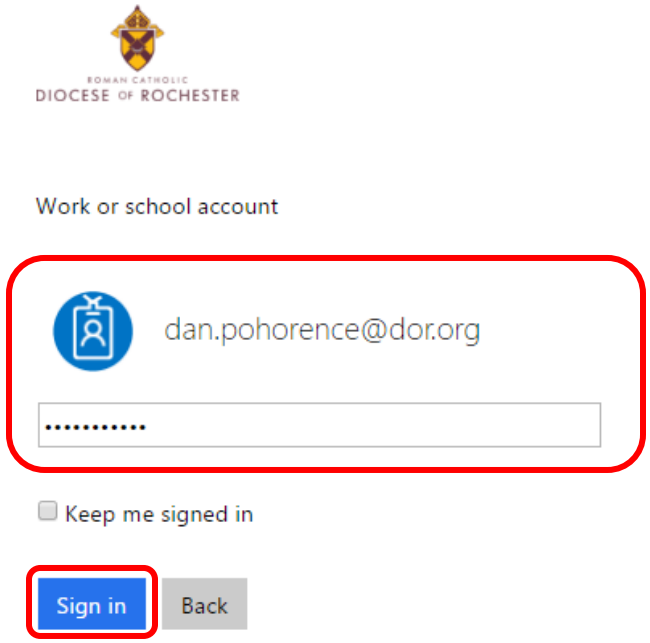


Type in your username and password to access your account.

Remember your username is ***firstname.lastname@dor.org***

Use your password to log onto the network / computer.

Click **Sign in** to proceed.

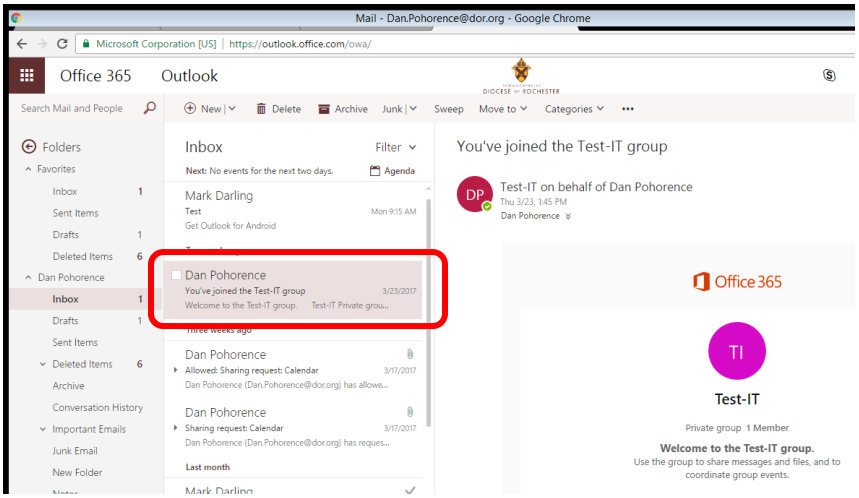


Viewing, Opening and Replying to an Email

How do I View and Open an Email?

Single clicking on the email will display the email in the preview section.

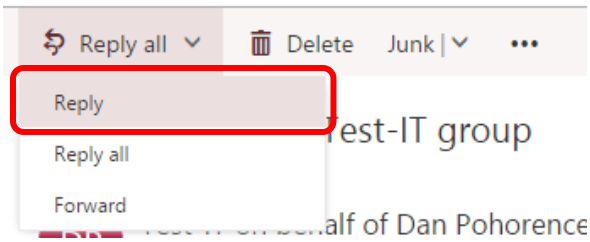
To open the email in a separate screen, double click on the email.



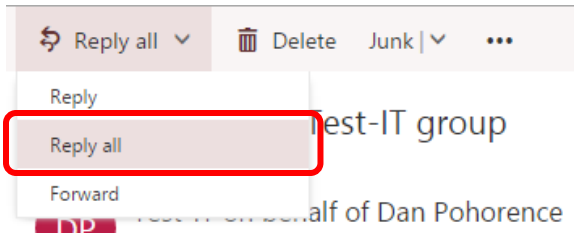
How do I Reply to an Email?

Once the email is opened, you have the option to select Reply, Reply to All, Forward, etc.

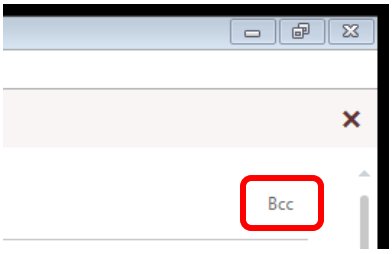
To reply to an email, click on the arrow next to Reply all to expand the menu. Click **Reply** to reply to the original sender of the email.



Clicking **Reply All** will send a reply to the email to the original sender plus any additional addresses found in the CC and BCC fields.



If the Bcc box isn't visible when you create a message, you can add it by clicking on the **Bcc** label located to the far right side of the To: field text box.



Think Before You Reply!

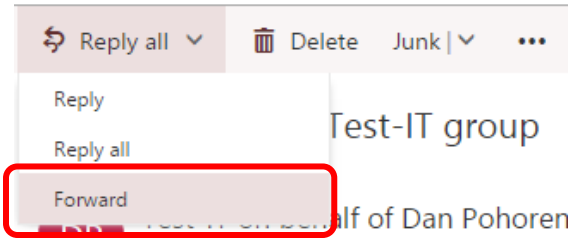
If you are replying to an email and asking a question that only pertains to the original sender, please click Reply.

If you click Reply All, everyone listed in the email will see your reply to the original sender.

How Do I Forward an Email?

Forwarding a message allows you to transfer a message to another address.

To forward a message, click on arrow to the right of Reply all to expand the menu. Once the menu expands, click **Forward**.

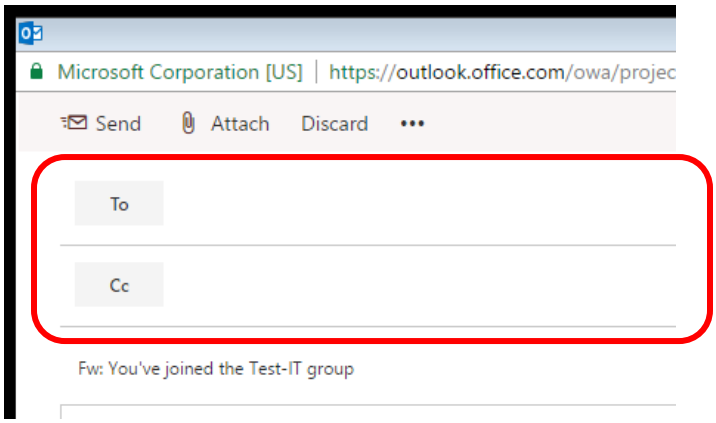


When you click on **Forward**, you will need to enter in the recipients email address in the To: field.

Note: more than one email address can be entered into the To: field. *

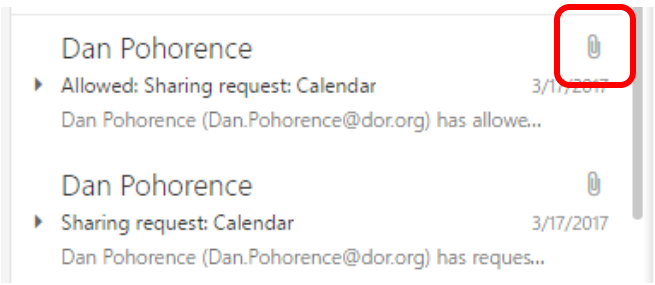
Use the Cc: and Bcc: field as you would if you were sending a new email message.

Click **Send** when finished.



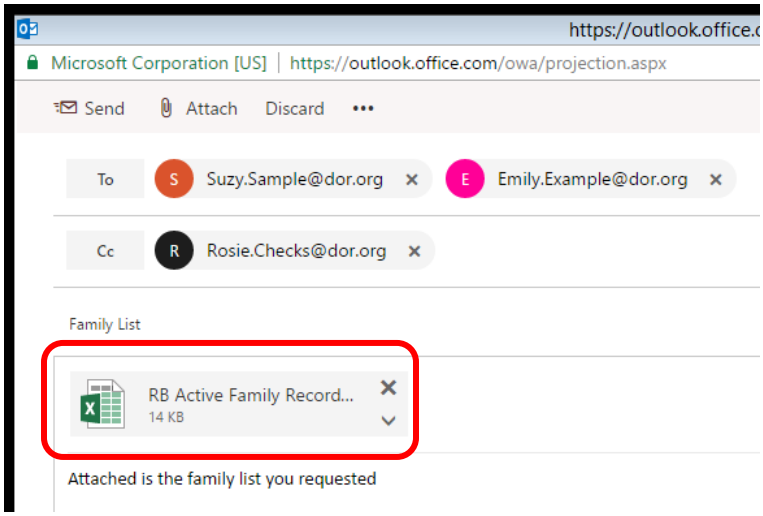
How Do I Open Email Attachments?

Messages that include attachments are identified by a paper clip icon in the message list.



Depending on the format of the message that you receive, attachments appear in one of two locations in the message.

- If the message format is HTML or plain text, attachments will appear in the attachment box under the Subject line.
- If the message format is the less-common Rich Text Format (RTF), attachments will appear in the body of the message. Even though the file appears in the message body, it actually remains a separate attachment.

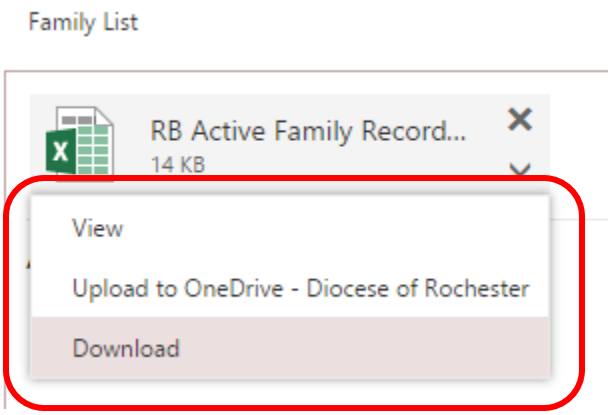


You can open an attachment from the Reading Pane or from an open message by double-clicking the attachment to open it.

You can also open an attachment by clicking on the drop-down menu next to the attachment, and then click **View**.

This action will open the attachment in the appropriate supported program.

After opening the attachment, most supporting program will allow you to save the attachment.

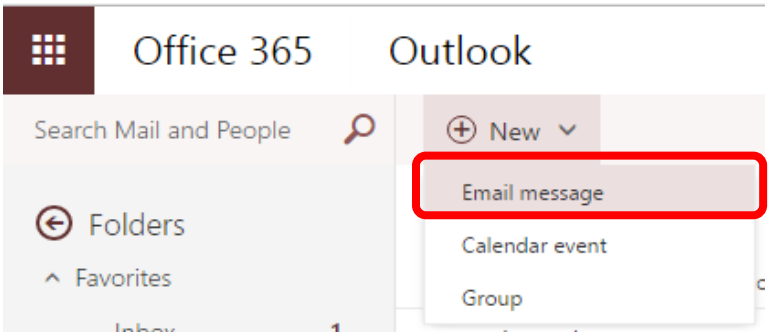


You also have the option to **download** the attachment

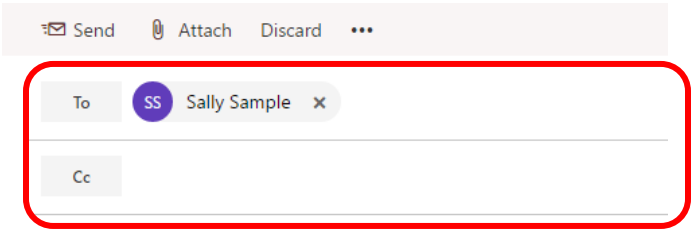
Creating a New Email

To create a new email message, expand the New menu by click on the drop down arrow.

When the menu expands, click **E-mail message**.



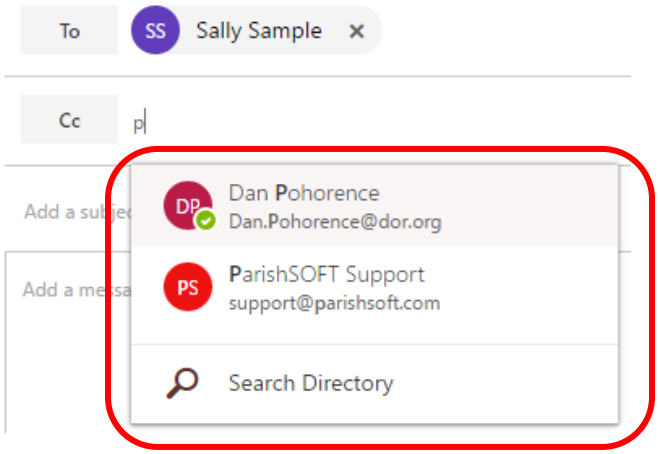
Enter the recipients' email addresses or names in the To, Cc, or Bcc box.



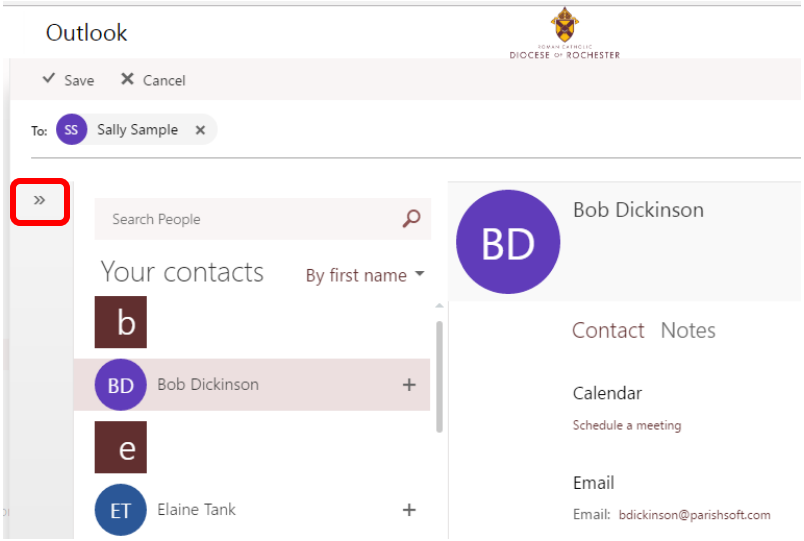
As you start to type in email addresses / a contact name, previously emailed people will start to appear as results that match what you are starting to type.

If the desired recipient appears in the list, click on their name.

If the name does not appear, click on Search Directory. Your results will expand to include results from the Diocesan Directory.

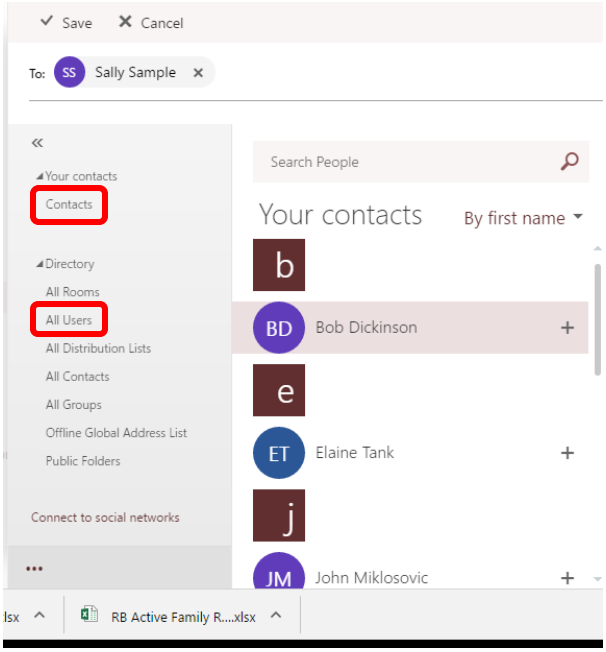


Additionally you can search your contacts or the Diocesan Directory by clicking on either To... or Cc...



To change the contact directory to search, click >> to expand the directory list.

Click on **All Users** to change to the Diocesan Directory or **Contacts** to change to your personal contacts.

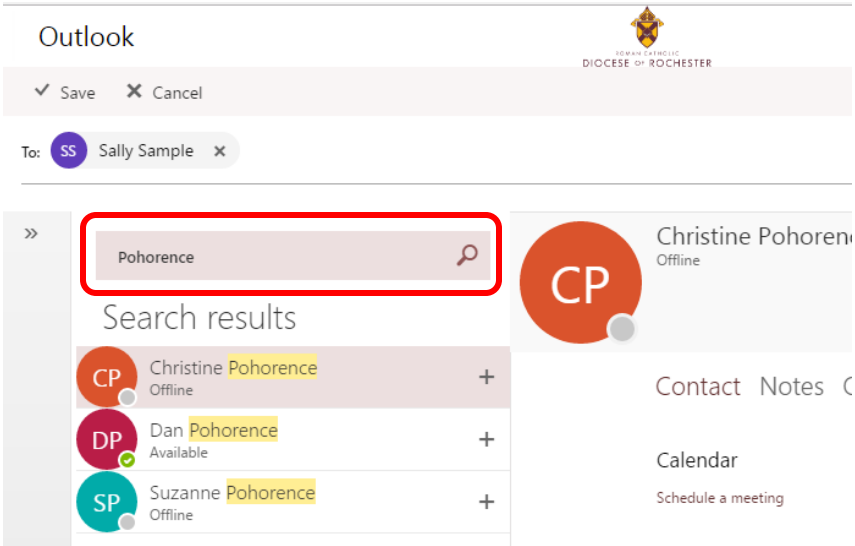


In the search field, enter the first or last name of the person you wish to locate.

Click on the magnify glass to display your search results.

Double click on the name or click on the plus sign to add the person to the To: or Cc: field.

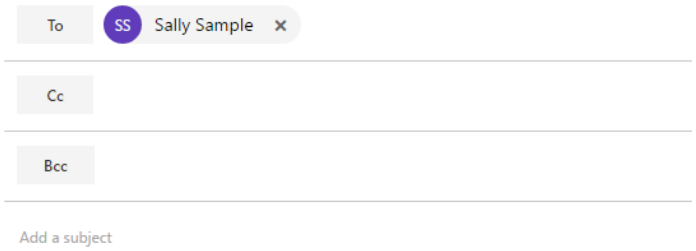
Click **Save** to return to your email message.



How do I add the Bcc Field?

If the Bcc box isn't visible when you create a message, you can add it by clicking on Bcc, located to the right of the To: field.

The Bcc field will now appear in the email message.



What does cc or bcc mean?

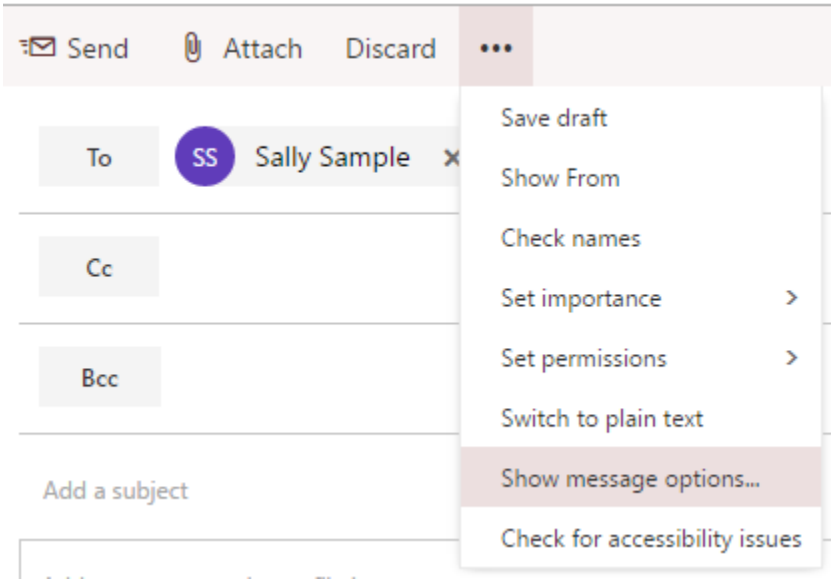
The Cc: field is used to send a copy of the message to another recipient. All recipients of the message can see the email address of the person you are providing a copy of the message to.

The Bcc: field is used to send a copy of the message to another recipient but the email address will not be visible to the recipients found in the To: and Cc: fields.

How Do I Request a Delivery and Read Receipt?

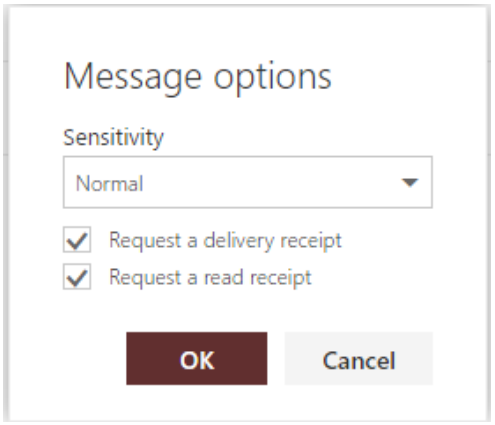
If you wish to receive a delivery and read receipt for this message, click on the three dots to expand the options menu.

When the menu expands, click on **Show message options**.



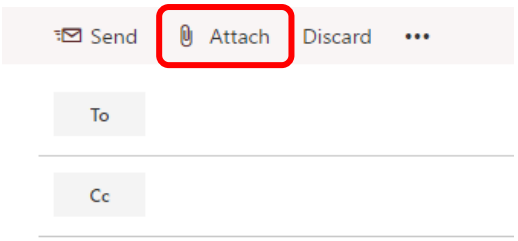
When the Message options window appears, check off the boxes next to **Request a Delivery Receipt** and **Request a Read Receipt**.

Click **OK** to return to the message.



How Do I Add an Attachment to an Email?

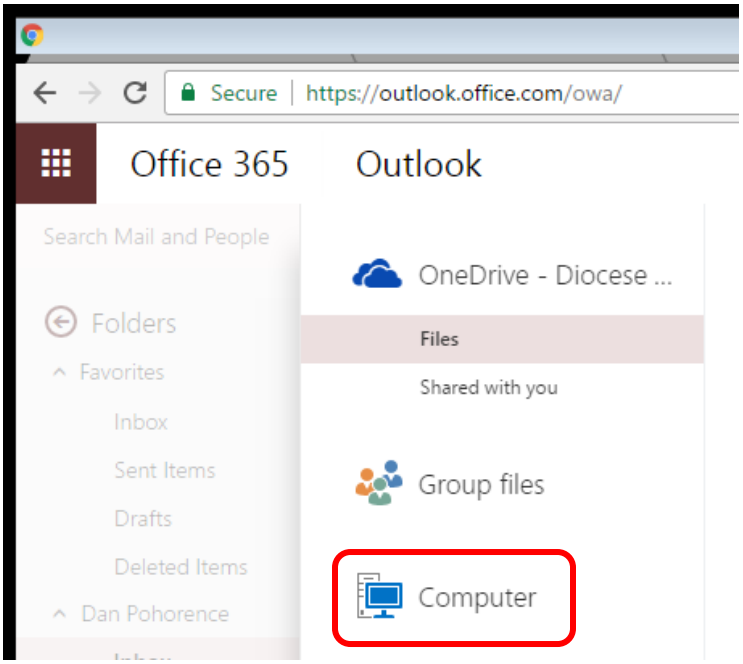
In the message window, click **Attach**.



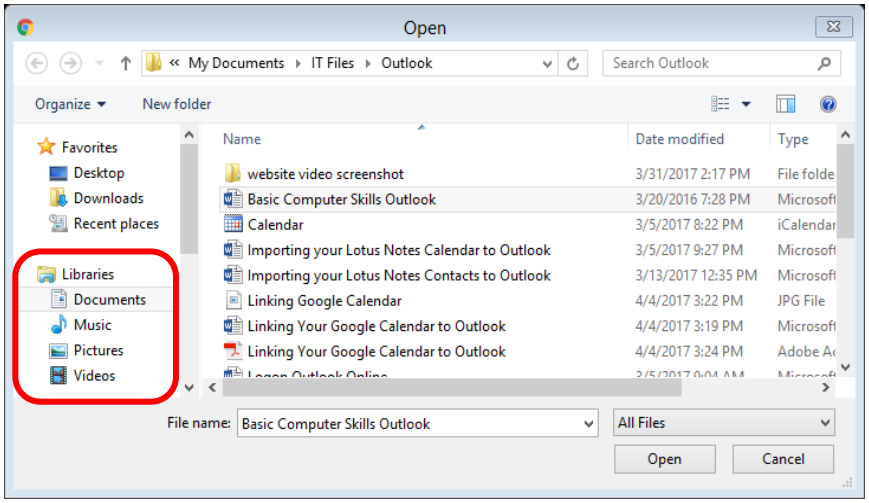
Select the location to locate the file you wish to attach.

Note: OneDrive is a cloud-based file storage site managed by Mircosoft.

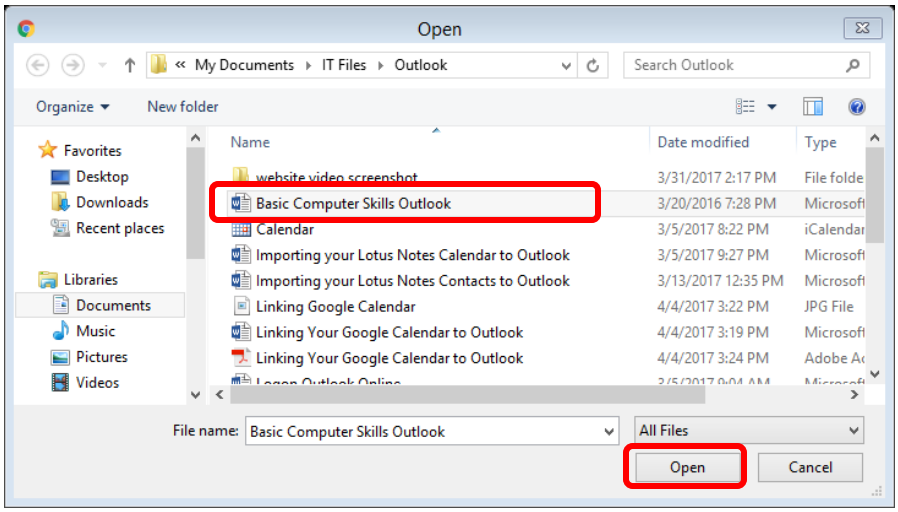
If you saved the file to the local network server, click on Computer to search the local network.



You will be able to select your Documents Library or a location on the PC / Network to search for the save document.

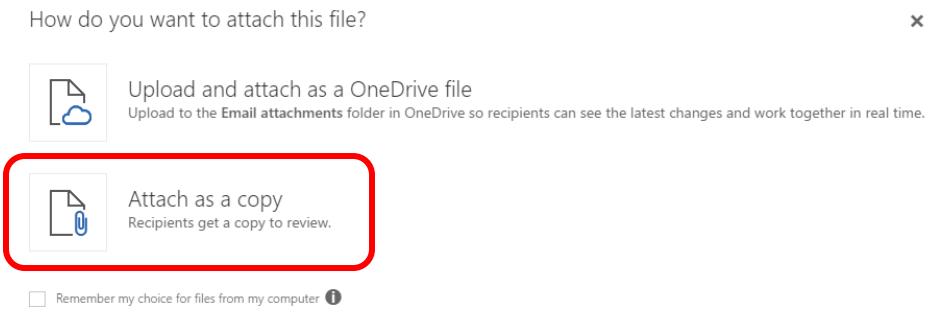


Once you have selected the document, click **Open** to attach the file to the message.



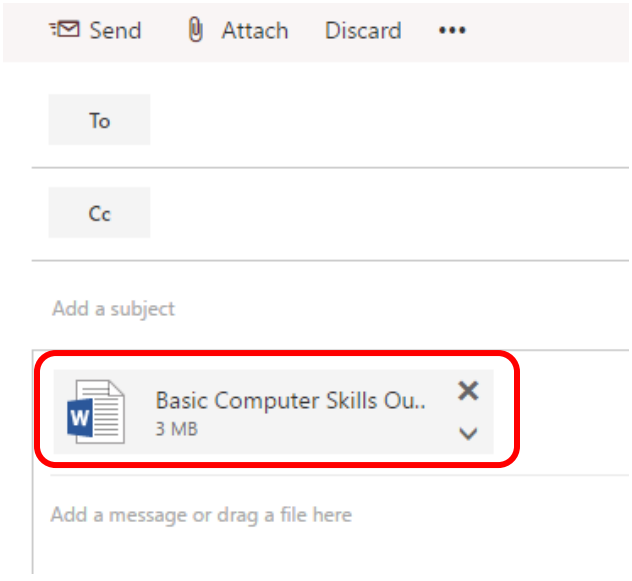
You will now be asked How do you want to attach this file.

To attach the file as a copy to the message, select **Attach as a copy** option.



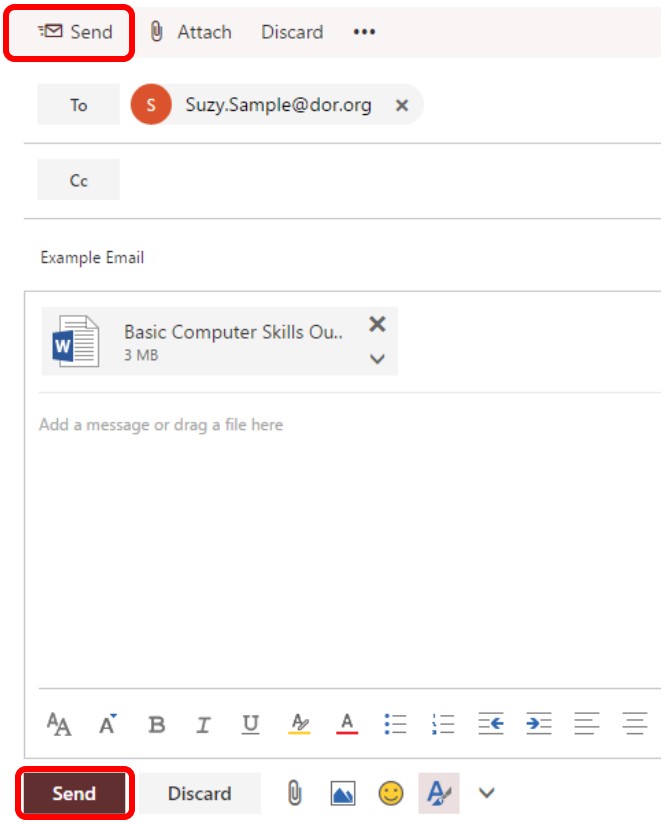
Your attached file will appear underneath the subject line.

Repeat the process to attach additional files.



How do I Send the email?

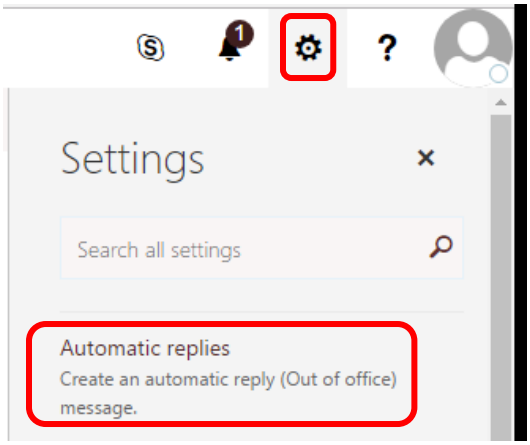
Once you have type out your email and it is ready to send, click **Send**



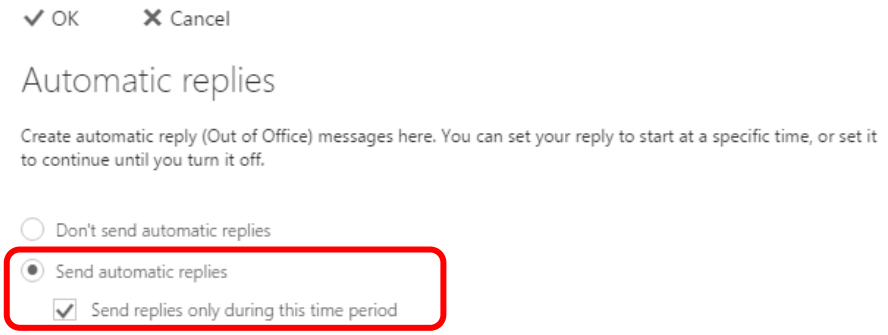
How Do I Send / Set up an Automatic Reply Email?

Located at the upper right corner of the screen, click on the gear symbol to expand the Settings Menu.

Click on **Automatic Replies (Out of Office).**



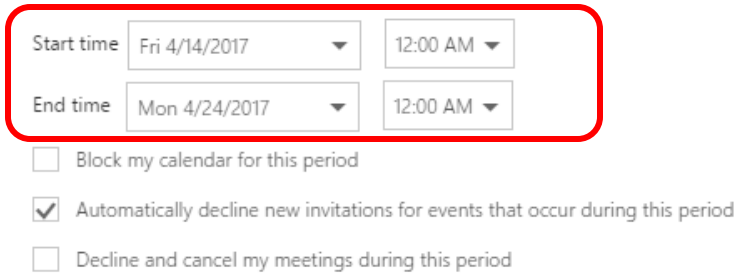
On the Automatic Replies window, click on **Send Automatic Replies** and check box next to **Send replies only during this time period**.



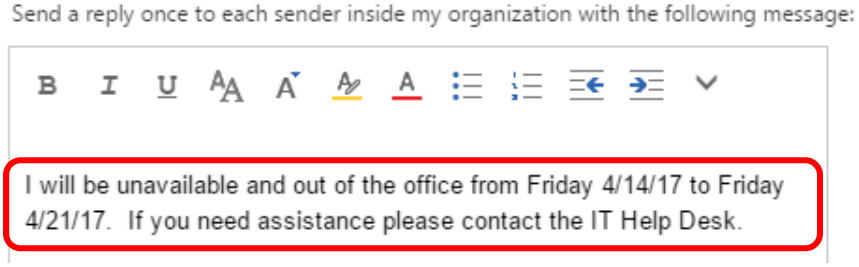
Specify a start and end time for the reply to activate and deactivate using the Start time and End time fields.

There are also options ***to Block my calendar for this period***, ***Automatically decline new invitations for events***, and ***Decline and cancel meeting during this period***.

If any of these apply, check off to active.



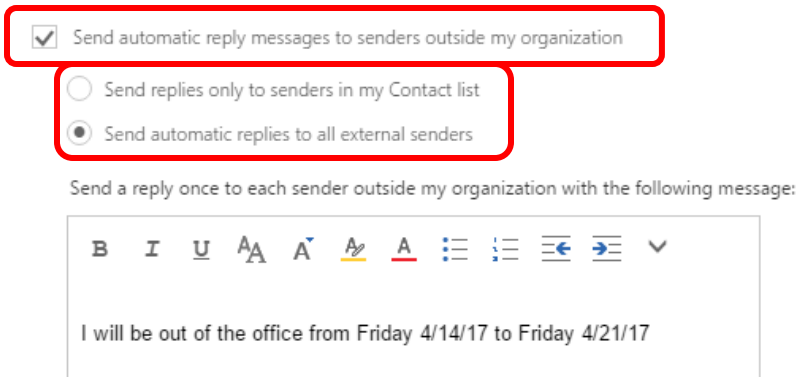
Enter a message you wish to send as a reply to senders inside my organization.



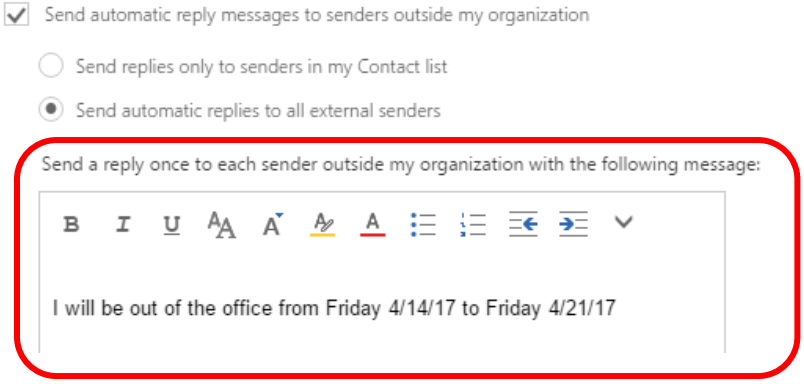
For senders with external email addresses

Check box next to ***Send automatic reply messages to senders outside my organization***.

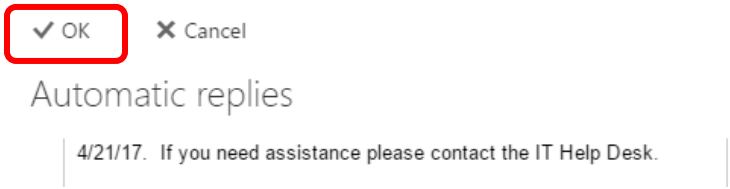
You have the option to ***Send replies only to senders in my Contact list*** or ***Send automatic replies to all external senders***.



Enter the message that will be sent to external (non-dor.org) email addresses.



When you have finished entering your automatic reply, click **OK**.

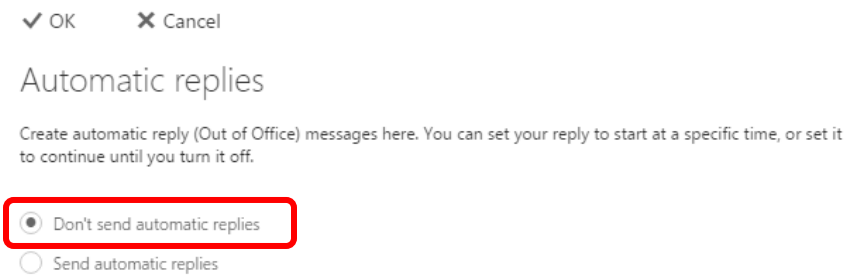


To manually deactivate the Out-of-Office message.

Return to Automatic Replies (Click on gear, then select Automatic Replies on settings menu).

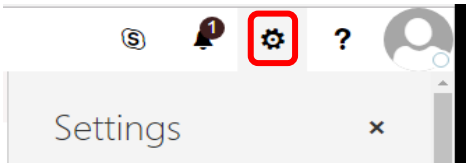
Click **Don't send automatic replies**.

Click **OK**.



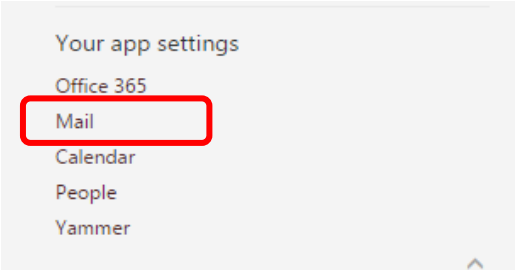
How Do I Create an Email Signature?

To create an email signature, click on the Gear icon to open the Settings menu.



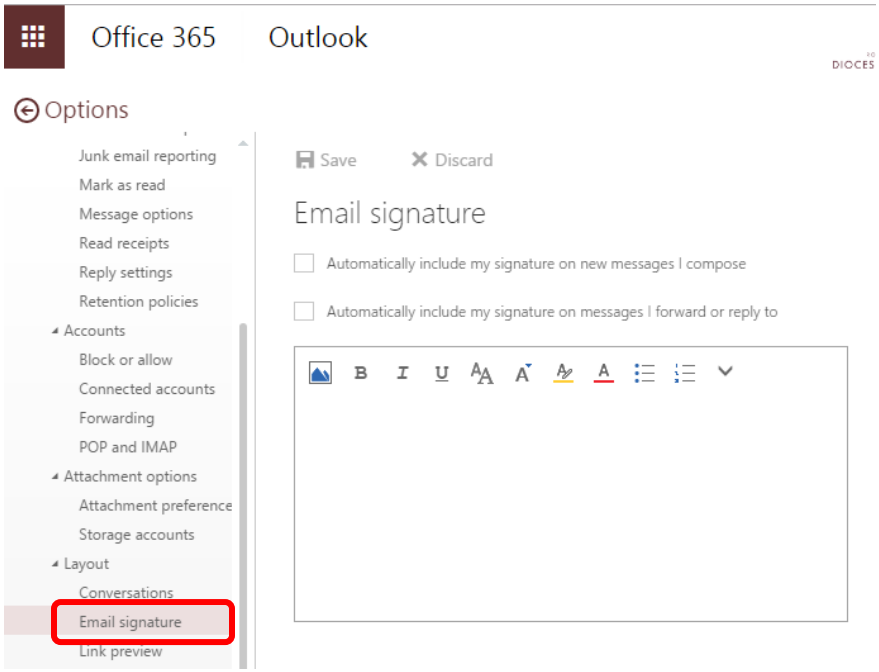
Scroll to the bottom of the Settings menu.

Under Your app settings, click on **Mail**.



In the Outlook Options sidebar, scroll to the bottom of the sidebar and look for the section labeled Layout.

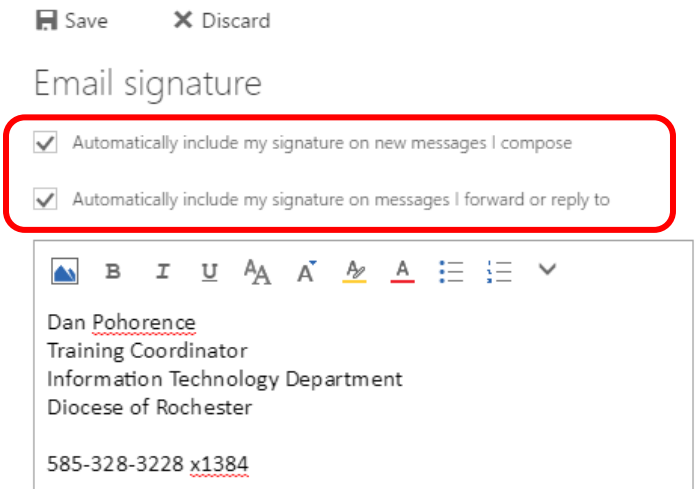
Click on **Email Signature**.



Check the boxes **to Automatically include my signature on new messages I compose** and **Automatically include my signature on messages I forward or reply to**.

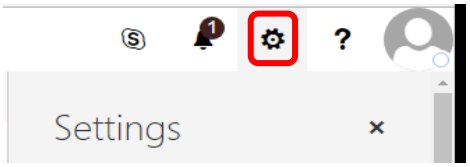
In the text box, type in the information you wish to include on the signature.

When complete, click **Save**.



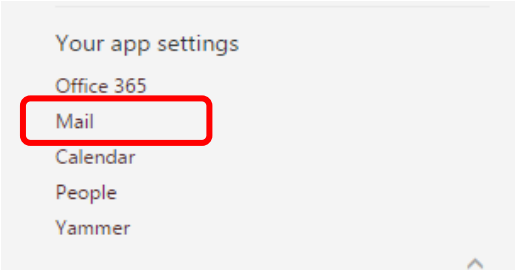
How Do I Edit an Email Signature?

To edit an email signature, click on the Gear icon to open the Settings menu.



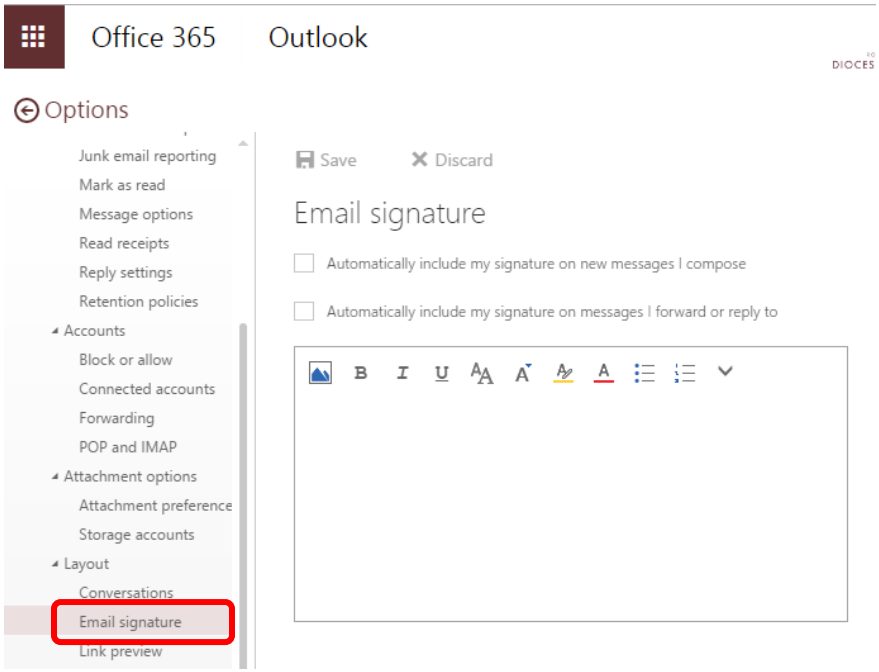
Scroll to the bottom of the Settings menu.

Under Your app settings, click on **Mail**.



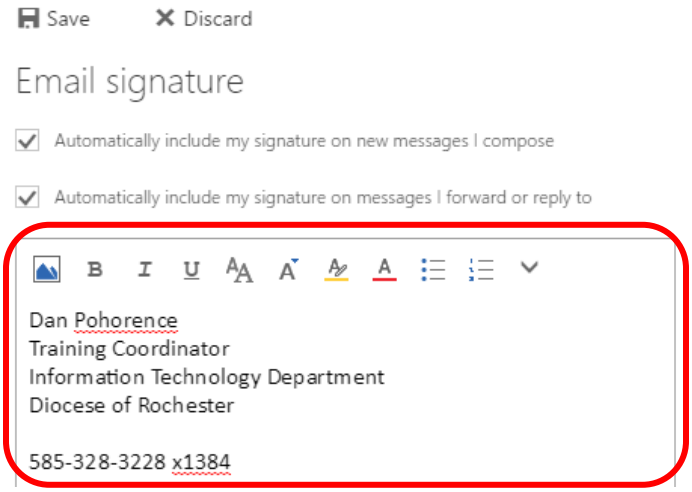
In the Outlook Options sidebar, scroll to the bottom of the sidebar and look for the section labeled Layout.

Click on **Email Signature**.



In the text box, make the necessary changes to the information you wish to include on the signature.

When you have made all the changes, click **Save**.



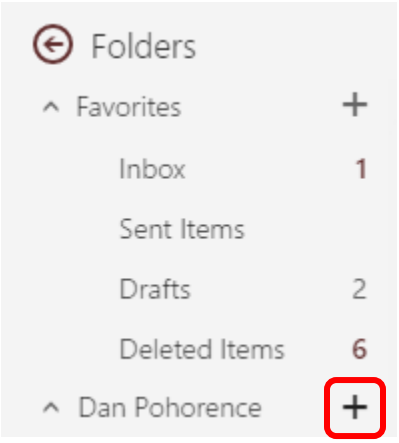
Organizing Your Emails

How Do I Organize Email By Using Folders?

From time to time, emails in your inbox that are worth keeping should be sent to a specific folder to view later on.

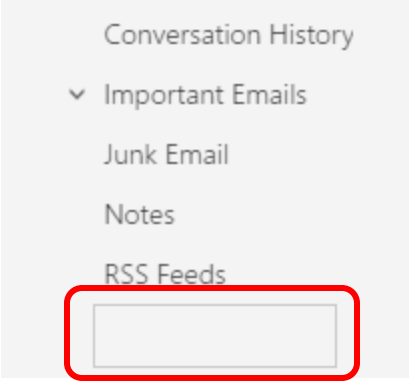
Before moving the email, you will need to create a folder to store your emails.

In the navigation pane (located far left), hover over your name. A plus sign will appear. Click on the plus sign to create a new folder.



A blank text box will appear towards the bottom of the list. Type in the name you wish to call the new folder.

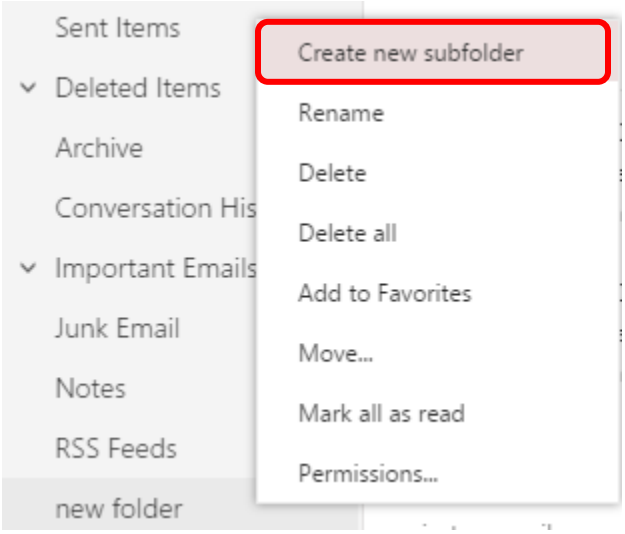
Press Enter when you are done typing in the name of the new folder.



How Do I Create a Subfolder?

We can also create another folder (a subfolder) within the folder you just created.

Right click on the folder just created and select **Create new subfolder** from the menu.

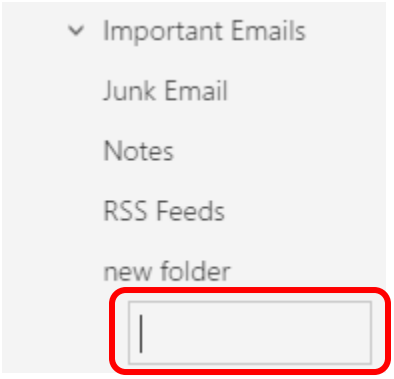


A new blank text box will appear under the selected folder.

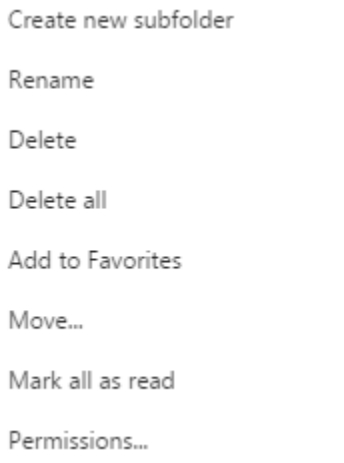
Type in a name for the new folder.

Press Enter when completed.

Now we will have a subfolder within the folder we just created.

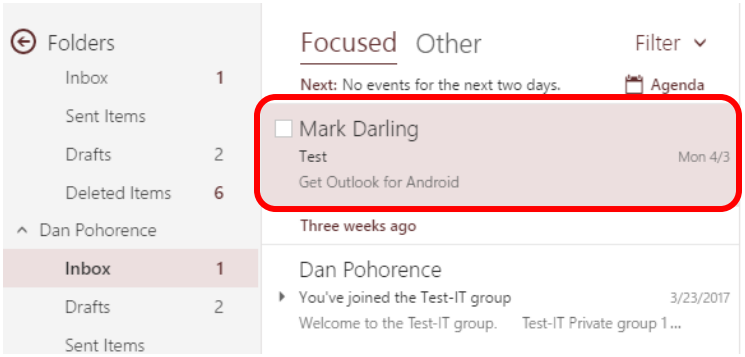


Also notice when you right click on a folder you have the option of renaming, copying, moving, or deleting the folder.



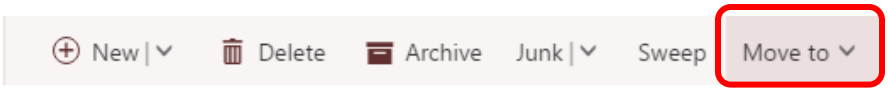
How Do I Move an Email to a Folder?

Once your folders have been created, you can now move emails into one of the folders created.



To move an email, single click on the email you wish to move.

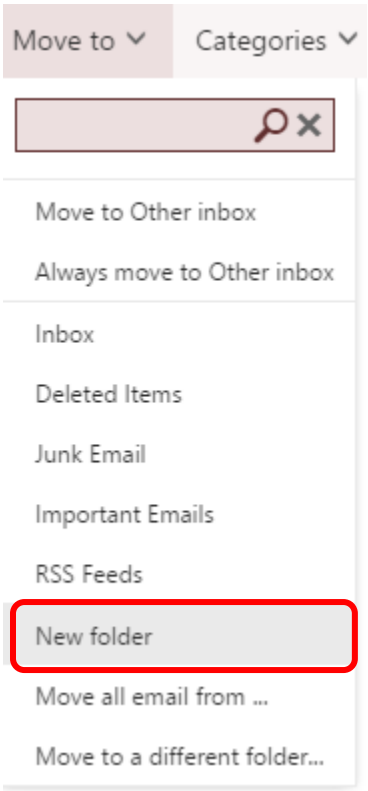
On the toolbar, click on the drop down arrow next to **Move to**.



When the menu expands, select the folder you would like to move the email to. (New created folders or most used folders will appear at the top of the menu.)

If the folder does not appear, click **Move to a different folder**. This will allow you to locate the folder.

The email will now automatically move from your inbox to the folder you selected.

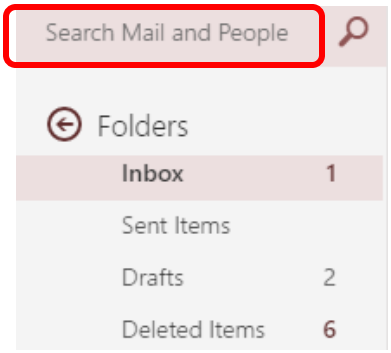


Emails can also be moved to folders by clicking and dragging the email over the folder you wish to send the mail to.

Once over the folder, unclick and the email will transfer to that folder.

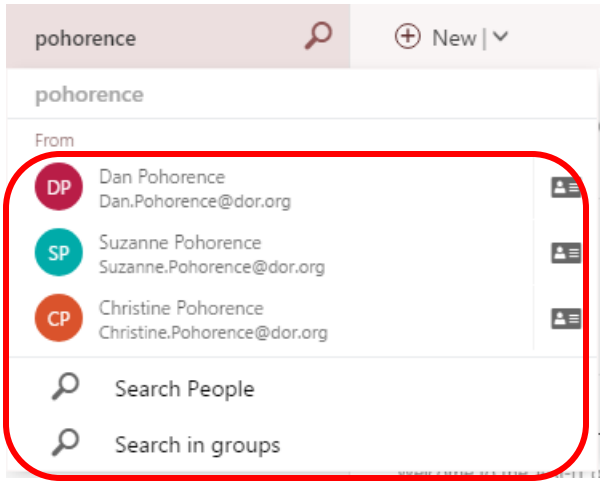
How Do I Search and Filter My Email?

In the search bar above your list of email folders, type in a name, subject, or phrase which is contained in the desired email message.



As you start typing into the search box, possible sender names start to appear as results.

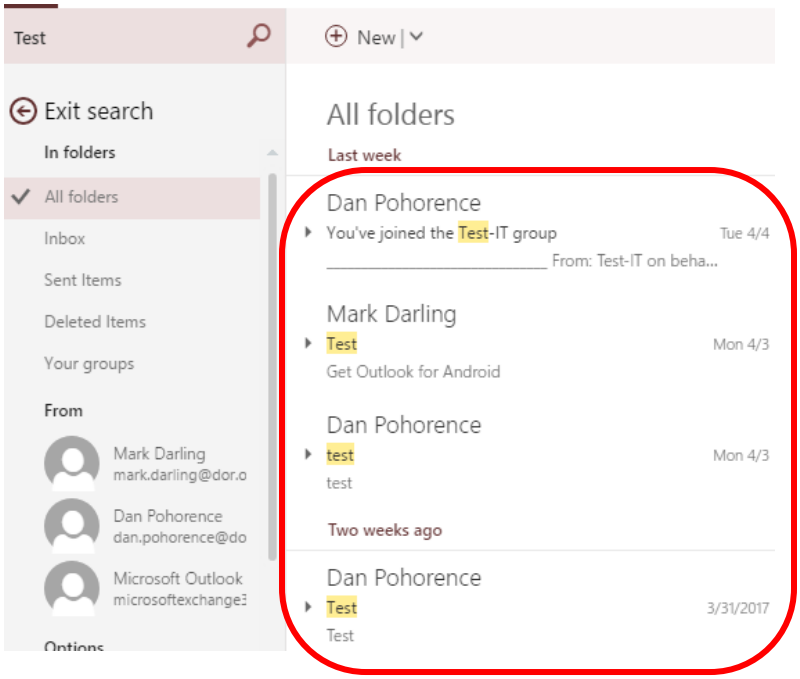
You can click on the name to select or additional searches can be done to search for people (your contacts) or in groups.

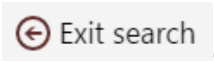


Once you have finished typing in a name or keyword, press enter

Results will start to filter based on matching senders or keywords found in the subject lines of the emails.

In the navigation bar you have the ability to filter these results by selecting the appropriate folder, sender, and dates.



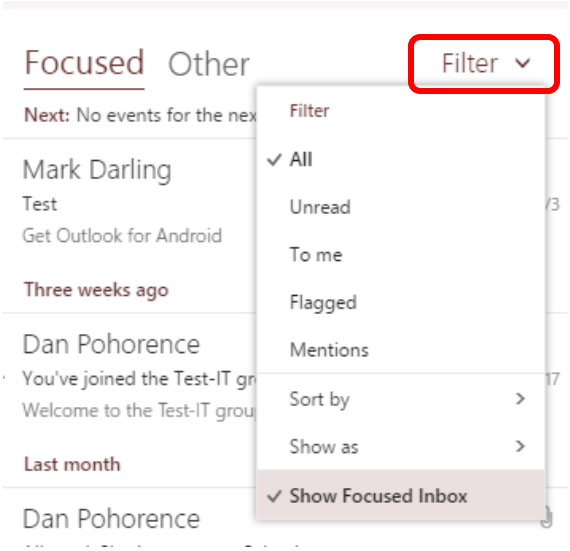
To return to view all messages in the inbox, click 

on the navigation side bar.

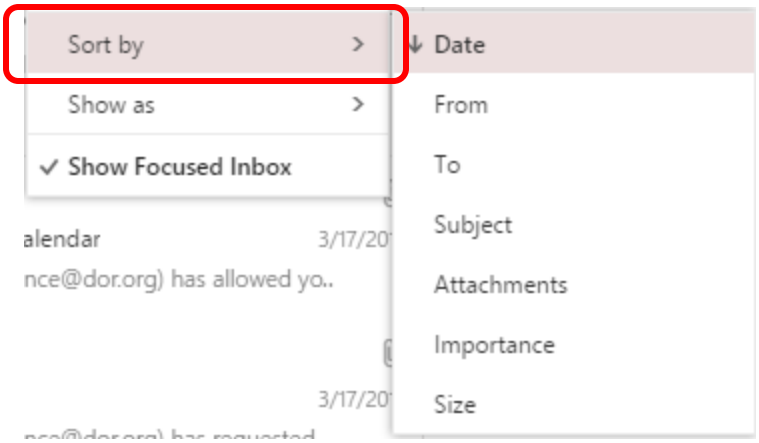
In addition to searching by sender or keyword, there is a filter option located above your email list.

Click on the drop down arrow to expand the menu.

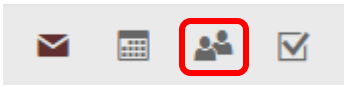
This allows you to filter unread or flagged messages.



Expanding the Sort by menu allows you to order the messages by Dates, Sender, Subject, Messages with Attachments, etc.

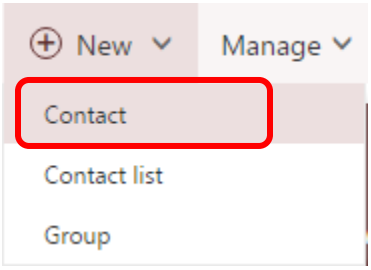


Personal Contacts

To access your personal contacts, click on located at the bottom of the left sidebar. 

How Do I Create a New Contact?

To create a new contact, expand the drop down menu next to New. When the menu appears, click on **Contact**.



Complete the following contact form, typing in the First and Last Name, Email address, Company, Contact Address, Job Title, and various phone numbers.

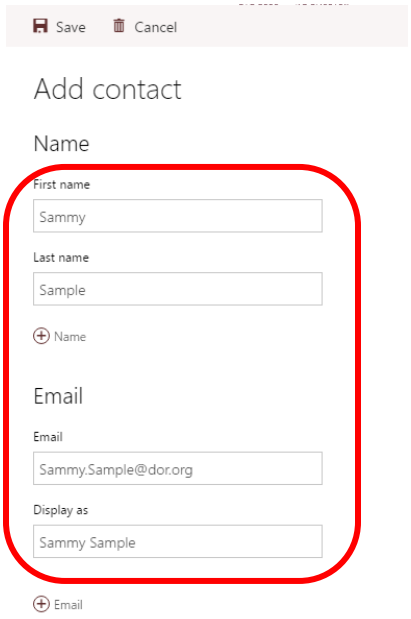
Name

To add additional fields to the name section, click on

This will expand to provide you with options to add additional fields.

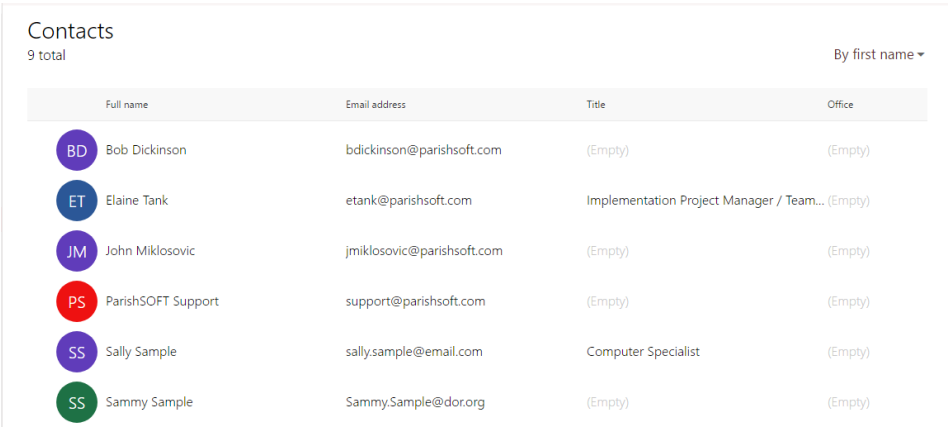
Each section listed has additional fields to add by clicking on the corresponding

Email



When you have finished, Click **Save**.

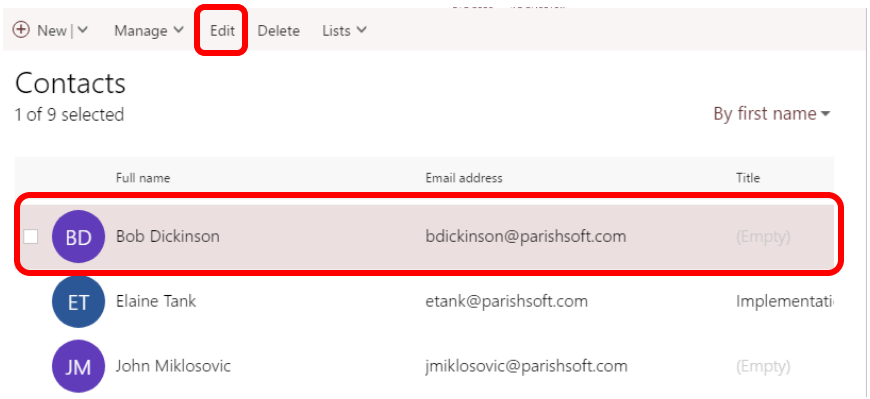
The newly created contact will appear in your personal contacts list.



How Do I Edit a Contact?

Single click on the contact you wish to edit.

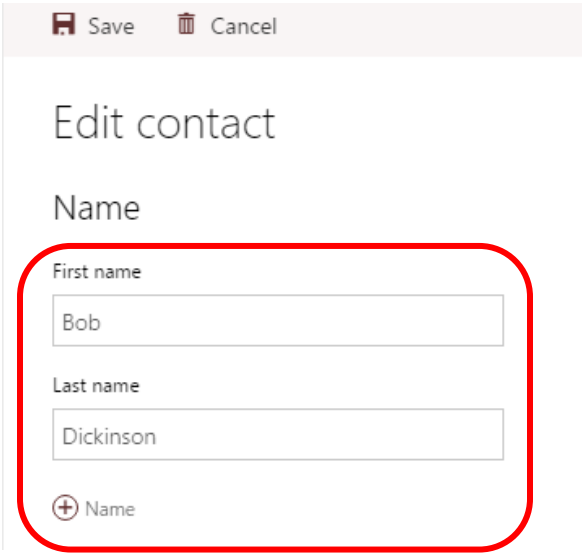
On the toolbar, click on **Edit**.



The contact fields will now become editable and changes can now be made.

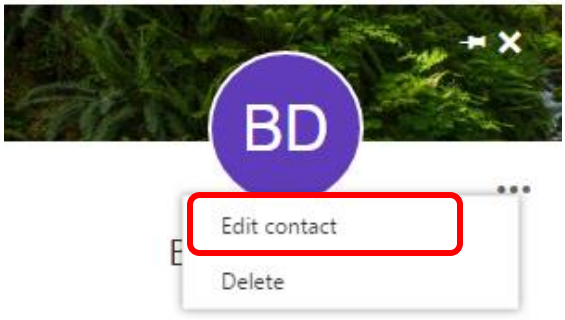
Clicking ⊕ will allow you to add an additional field to the email, phone, etc. to enter in an additional email, phone number, etc.

Click Save when you are done editing the information.



Additionally, you can edit the contact information by clicking on the ••• on the right side bar.

The options menu will display and option to **Edit Contact**.

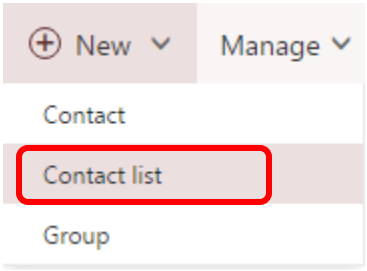


How Do I Create a Contact List?

A Contact List is a grouping of email addresses collected under one name. A message sent to a Contact List goes to all recipients that are listed. You can include Contact List in messages, task requests, meeting requests, and in other Contact List.

On the toolbar, expand the New menu by clicking on the drop-down arrow.

When the menu expands, click **Contact List**.

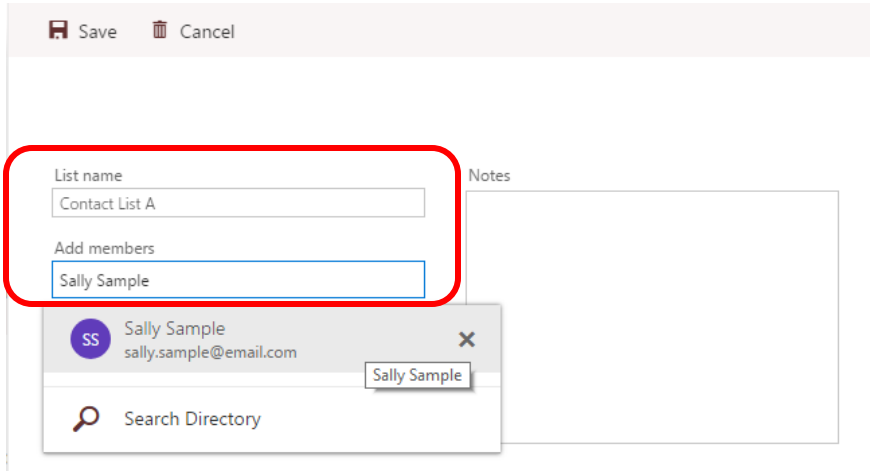


In the List Name text box, type a name for the Contact List.

In the Add Members text box, type in the name or email address of the person you wish to add to the Contact List.

As you start to type, results from your contacts or the directory will start to appear.

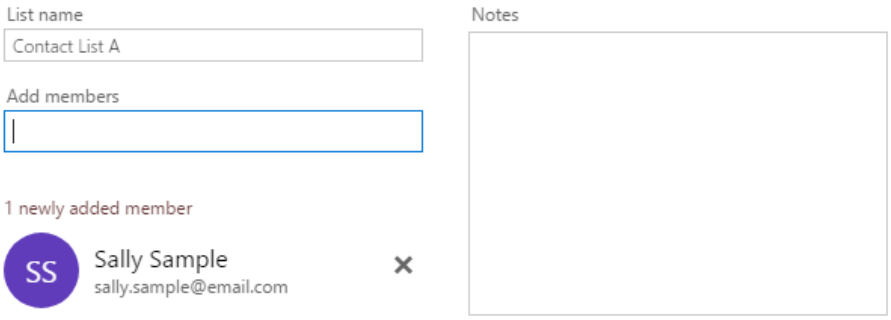
You can click on the contact from the results to add the person to the list.



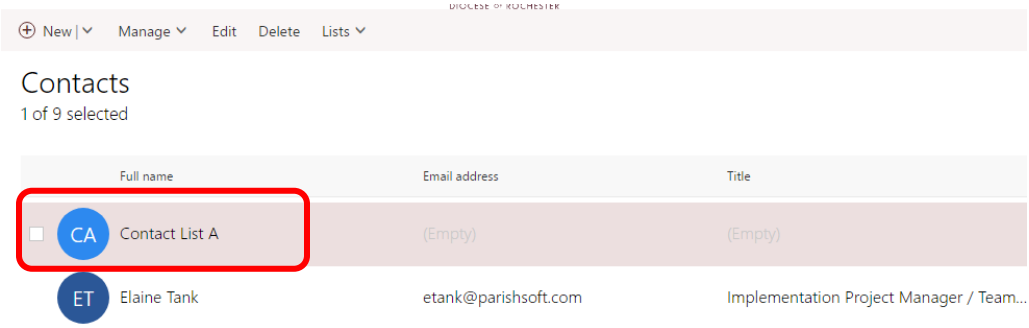
When the contact has been selected, it will appear below the Add members text box.

Repeat the process by entering additional names in the Add members field.

When completed, click **Save**.



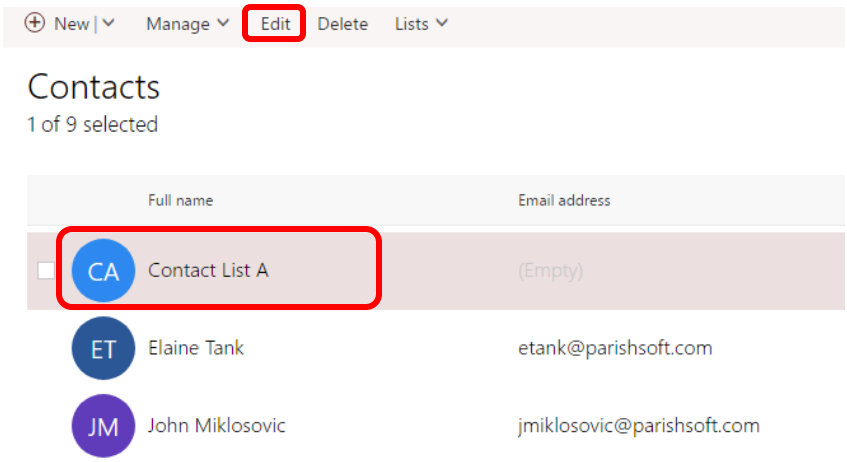
The newly created team will now appear in Your Contacts.



How Do I Edit a Contact List?

To edit the contact list, go to your contacts and single click on the contact list you wish to edit.

On the toolbar, click on **Edit**.

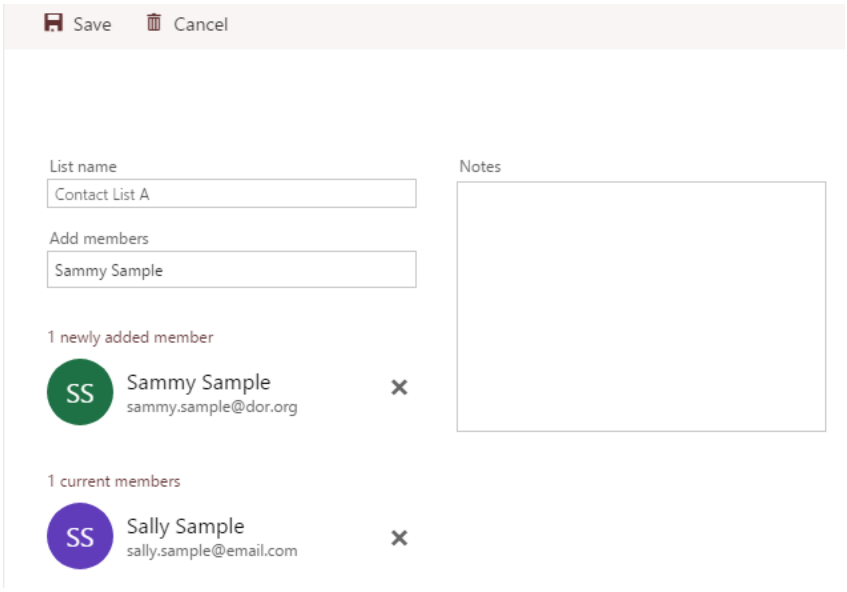


The contact list will appear in a new window.

To add a member, type in a name or email address in the Add Members text box. If the name appears in the directory, click on the name to add it.

To remove a member, click on the X located to the right of the member's name.

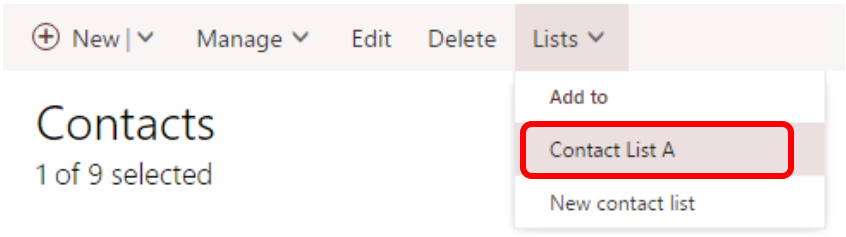
When completed, click **Save**.



New members can also be added to a contact list by single clicking on the desired contact.

On the toolbar, expand the list menu by clicking on the drop-down.

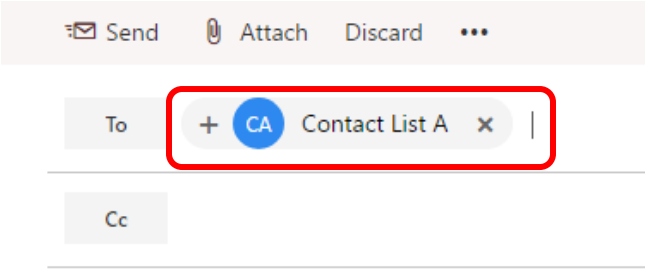
When the menu expands, click on the list you wish to add the contact to.



If the contact does not exist, click on **New contact list** to create a new contact list.

Using Your Contact List

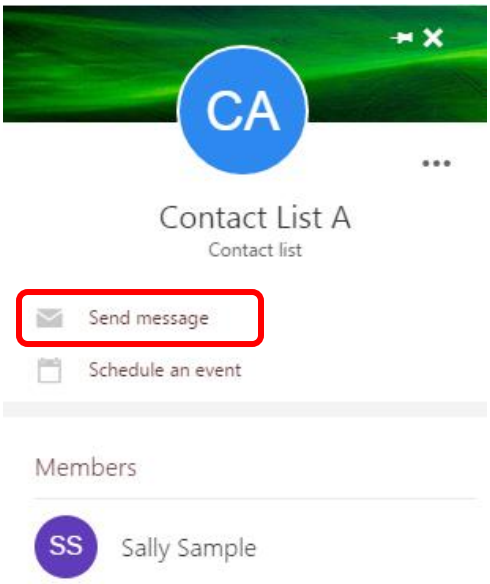
When sending an email out to all members of the list, in the To… field, type in the contact list name.



Clicking + will expand the group name to display all the members email addresses assigned to the group.

Complete your email and click **Send**.

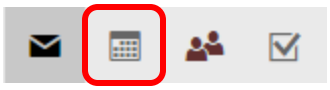
In the contact list, you can also send an email to your contact list by single clicking on the contact.



The right side bar will expand and by clicking on **Send Message**.

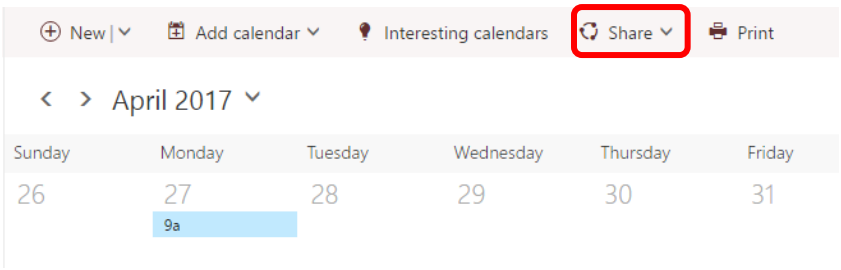
Calendar

To access your personal calendar, click on located at the bottom of the left sidebar.

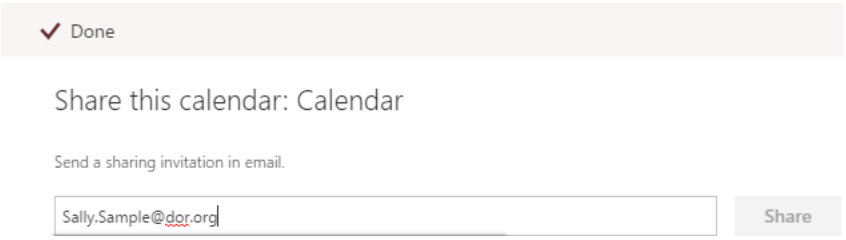


How Do I Share My Calendars?

To share your calendar with others, click on **Share**.



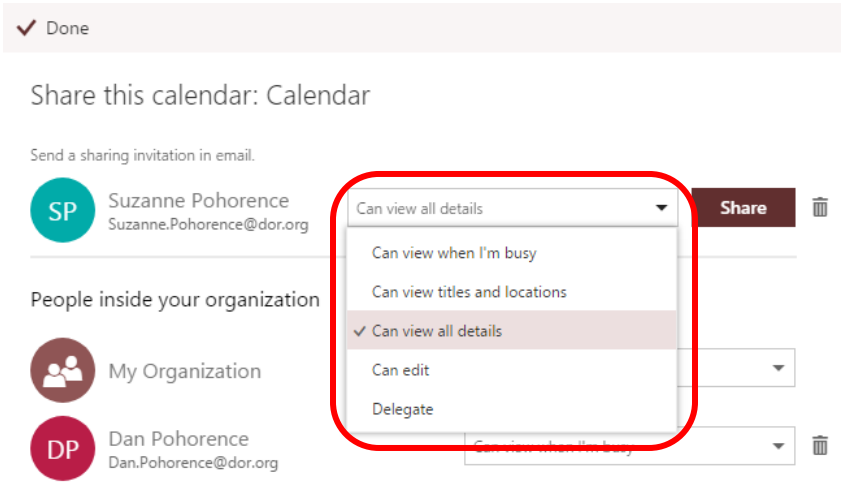
Type in the email address of the person you wish to send an invitation to share your calendar.



Once the email address has been validated, select the permission level you wish to grant.

Options include:

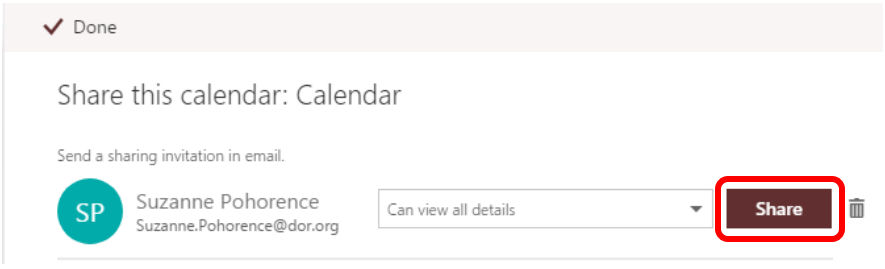
- **Can view when I'm busy**
- **Can view titles and locations**
- **Can view all details**
- **Can edit**
- **Delegate**



Note: Selecting delegate allows one to read, create, and modify your calendar entries.

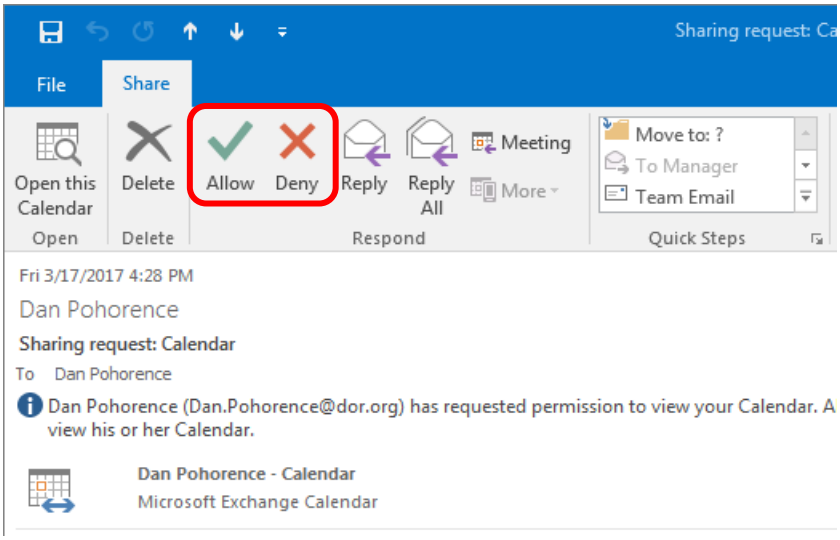
Once you have selected the individual to share your calendar and set the permissions, click **Share**.

This will create an email informing the recipient you wish to share your calendar.



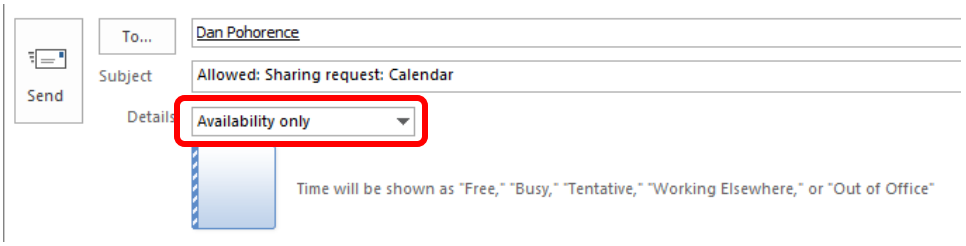
The recipient will receive the following email.

If you have requested the recipient to share their calendar with you, the recipient will respond to the request by click on **Allow** or **Deny** in the Respond section of the Share tab.

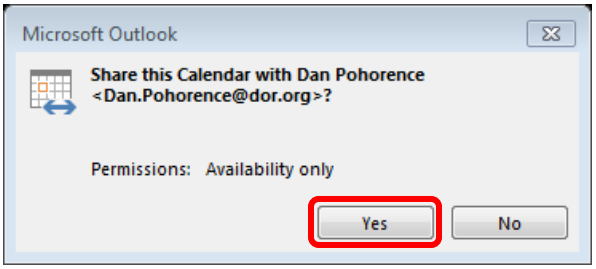


An email reply with appear allowing you to select the level of detail you wish to share with the other user.

Click **Send**

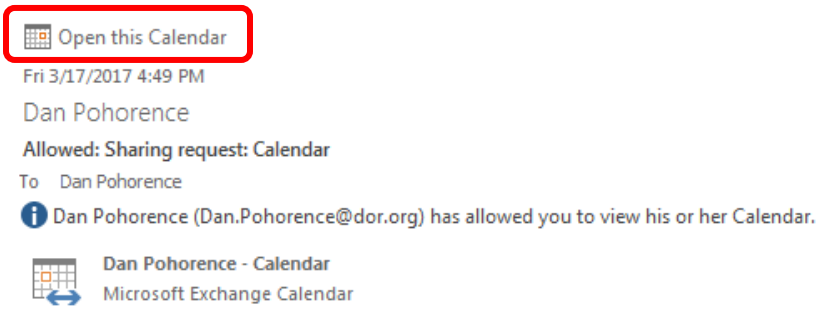


A confirmation message will appear asking to verify the permissions you selected. Click **Yes** to verify.



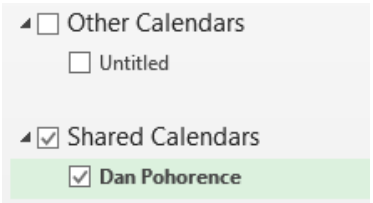
You will receive an email with a link to access the shared calendar.

Click on the **Open this Calendar** link to access the calendar.



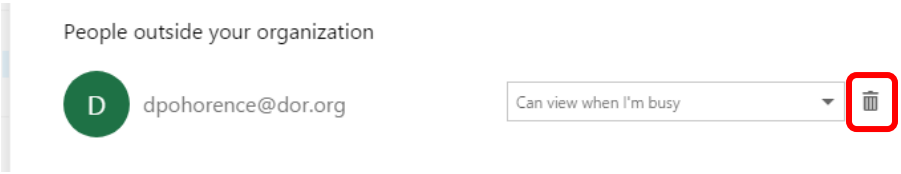
In the calendar view, a Shared Calendar section will appear on the navigation pane on the left side.

To view a share calendar along the right side of your calendar, click the box next to the person's calendar you wish to view.



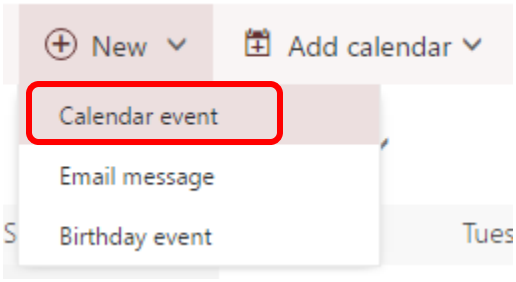
If you need to discontinue the permission to share your calendar with an individual, on the toolbar, click **Share**.

When the list of individuals you are sharing your calendar with appears, click on to delete the permission.

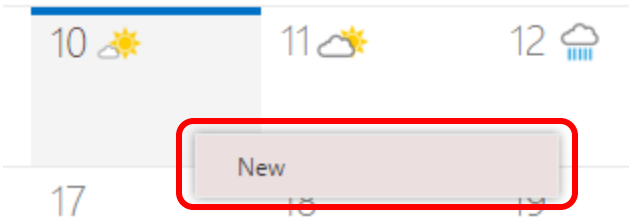


How Do I Create an Appointment / Meeting?

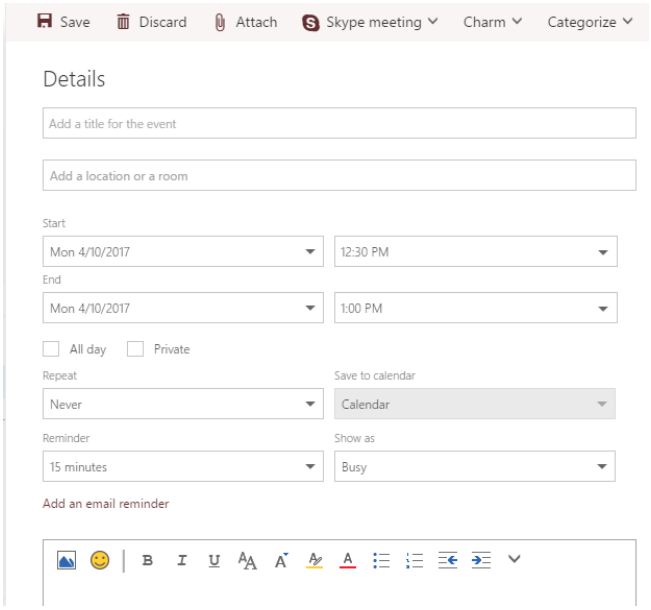
In Calendar on the toolbar, expand the New Menu and click on **Calendar Event**.



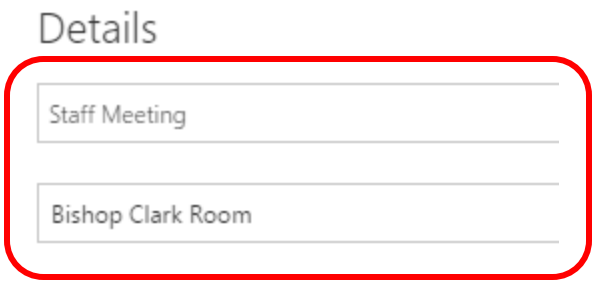
Alternately, you can right-click a time block in your calendar grid and click **New**.



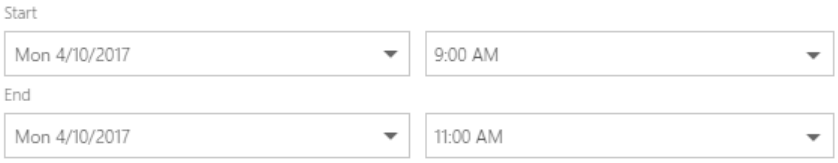
The Details window will open, allowing you to enter the appointment / meeting information.



Type a description and location for the event.

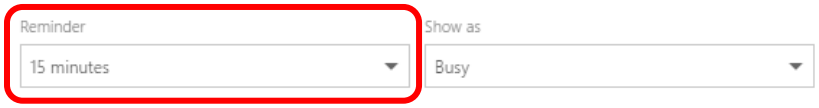


Enter the start and end times.

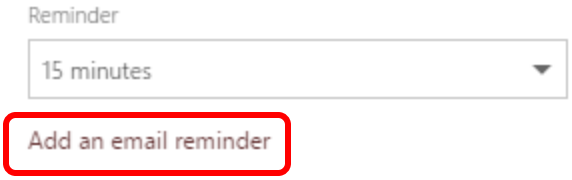


If the event is All Day or you need to mark the event Private, check off the desired options.

If you need to set a reminder, select when you wish to receive the reminder from the drop-down box.



If you need to create an email reminder, click the **Add an email reminder** link.

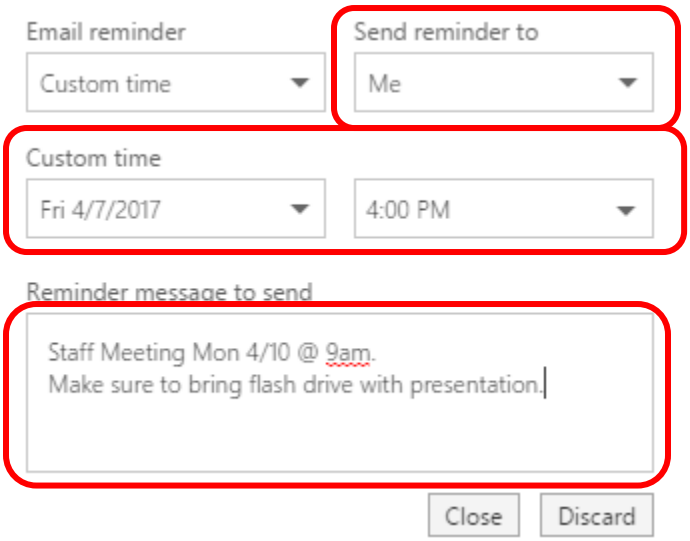


The email reminder box will appear. You have the option to send the reminder to all attendees or to yourself.

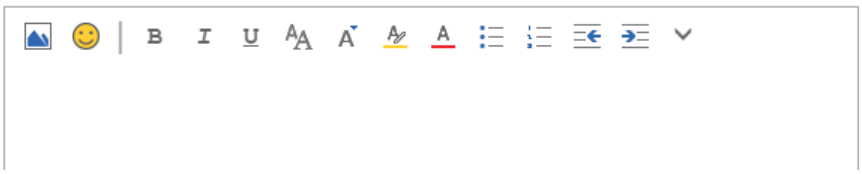
Set the date and time you wish to send and receive the reminder mail.

Also type in the desired details you wish to include in the reminder message that will be sent to you.

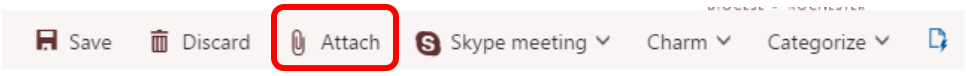
When completed with the reminder, click **Close**.



Details regarding the appointment / meeting can be typed into the text box and the bottom of the screen.

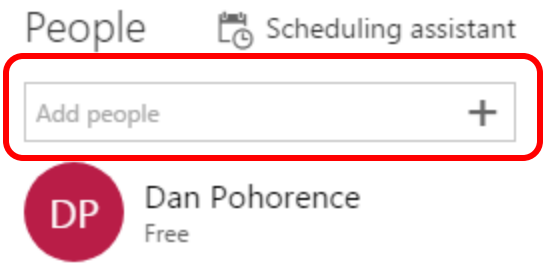


Files can also be attached to the event. On the toolbar, click on the **Attach** to attach an item.

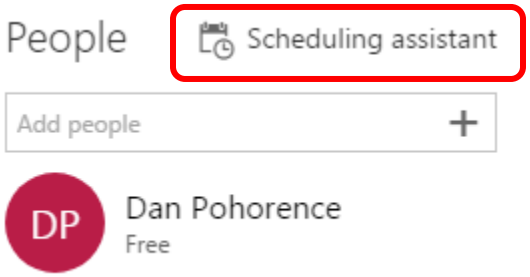


To the right of the Details section, you are able to add people to attend the event. An invitation will be emailed to those you add in the people section.

Type in the name or email address of the person you wish to invite. Click on the name or plus sign to add the name.



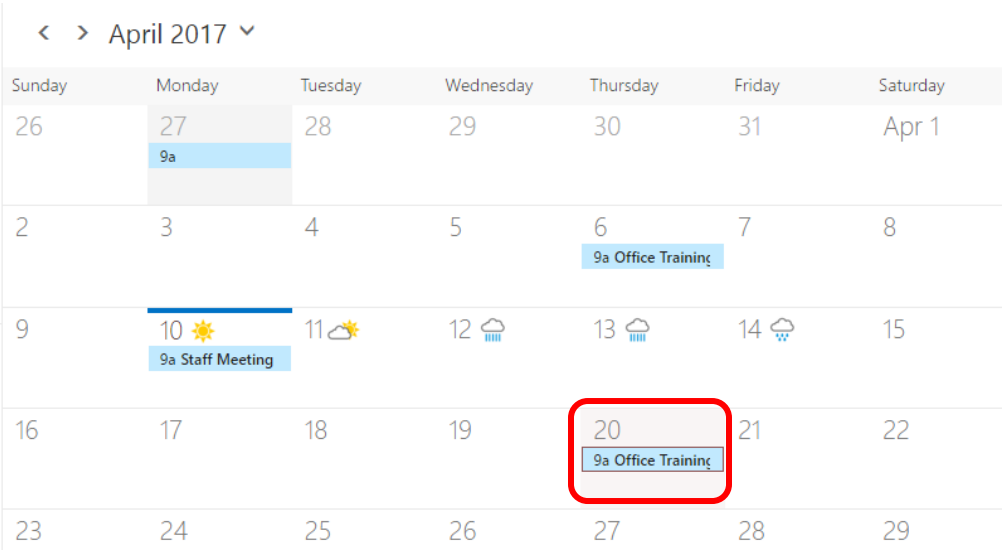
After typing all of the names / email addresses of the people you wish to invite to the meeting, clicking on **Scheduling Assistant** to compare to calendars to ensure you are minimizing any potential conflicts when proposing a meeting time.



When you are finished setting up the appointment, click **Save**.

How Do I Change / Edit a Calendar Event?

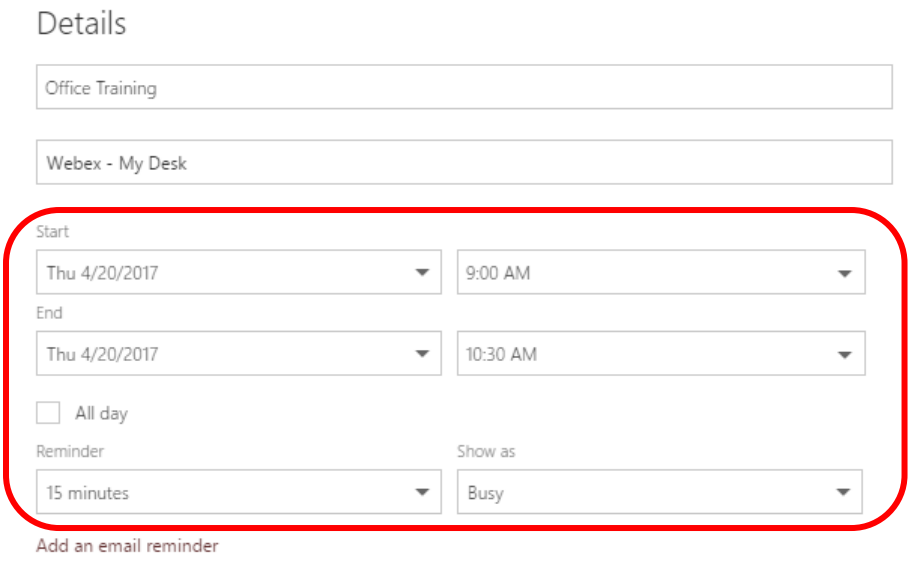
Open the calendar event that you want to change / edit by double clicking on that event.



The Details window will appear.

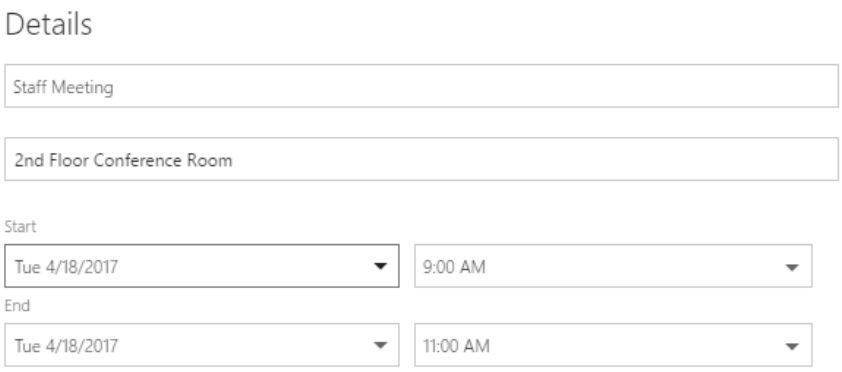
Make adjustments to the location, dates, or the Start and End Times.

When complete, click **Save**.

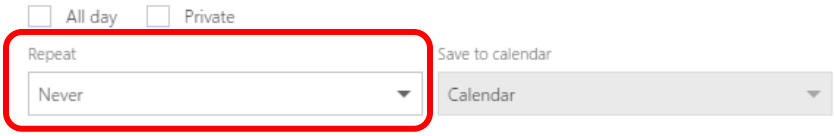


How Do I Make a Recurring Event?

Create a new calendar event, with a subject, location, and a start and end time.



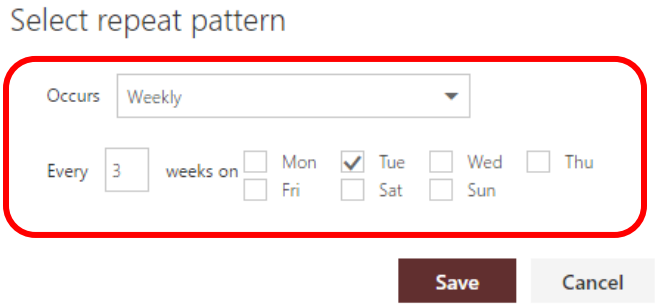
If you want to make an event recurring, click on the Repeat drop-down menu to select how the event will repeat.



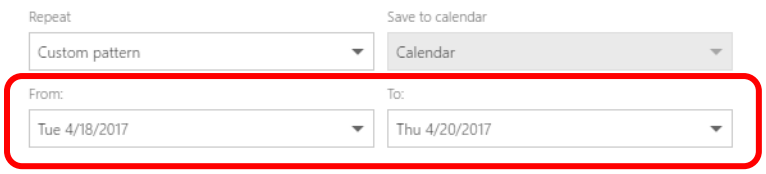
Some available frequencies will display. If you do not see the desired frequency, click **Other…**

Other allows you to customize a repeat pattern.

Once you have set the pattern, click **Save.**



You also have the ability to set the From and To dates the recurrence will take place on.

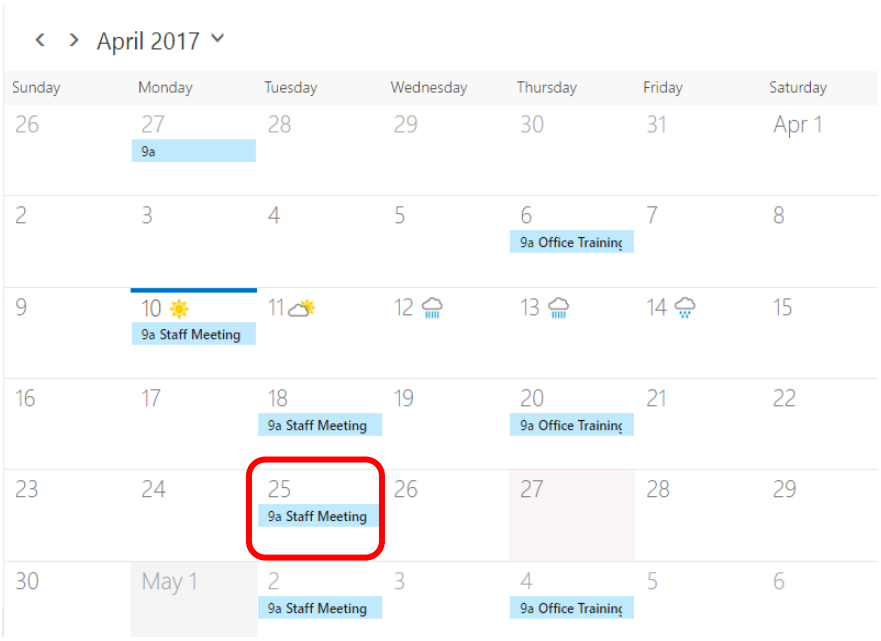


When complete, click **Save**.

How Do I Change / Edit a Recurring Event?

Suppose one of the recurring meeting dates is cancelled and needs to be rescheduled. We only want to change one of the dates within the series of dates that have been scheduled.

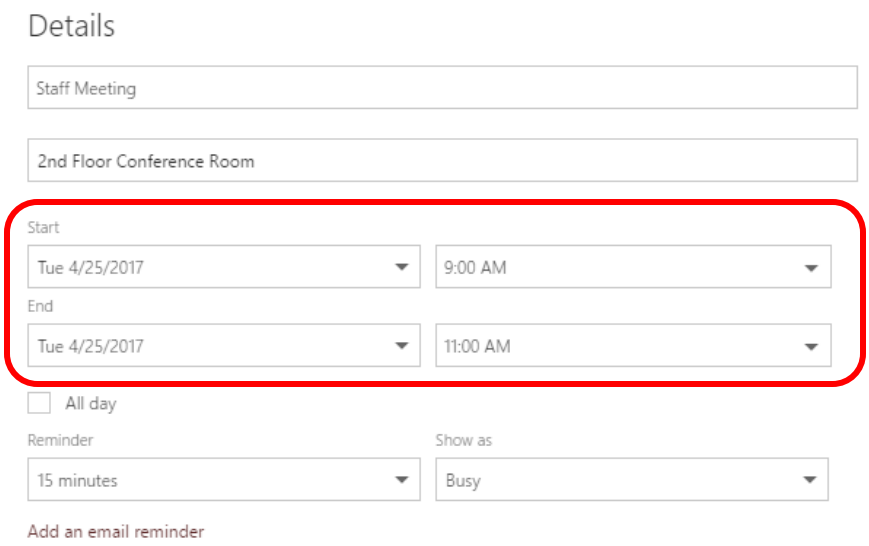
To reschedule this event, go to your calendar and double click on the event that needs to be rescheduled.



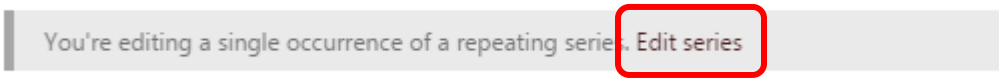
Take notice to the message that appears above the Details section. Only this single occurrence will be edited.

If you just want to edit this single date, select the new Start and End date and time.

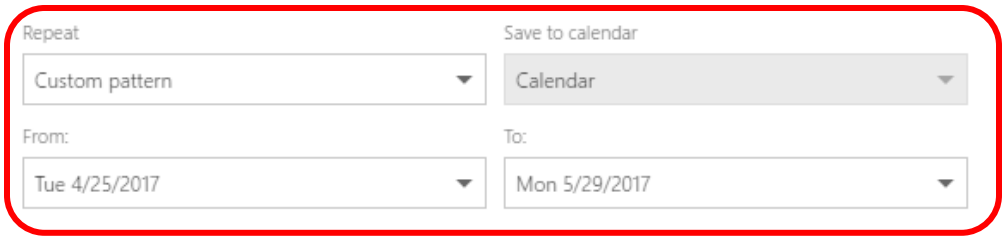
When complete, click **Save**.



If you need to make adjustments to the recurrence of the event, click on the **Edit Series** link.



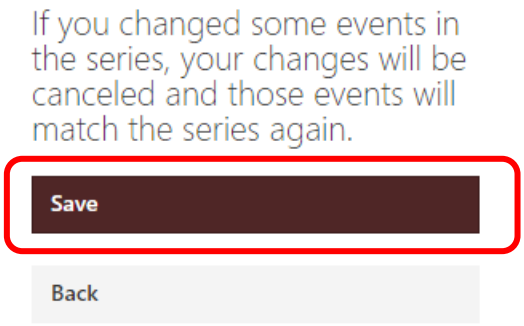
Change the repeat selection and the Start and End dates to reflect the new recurrence period.



When complete, click **Save**

You will receive a message ***If you changed some events in the series, your changes will be canceled and those events will match the series again***.

Click **Save** to continue to calendar overview.

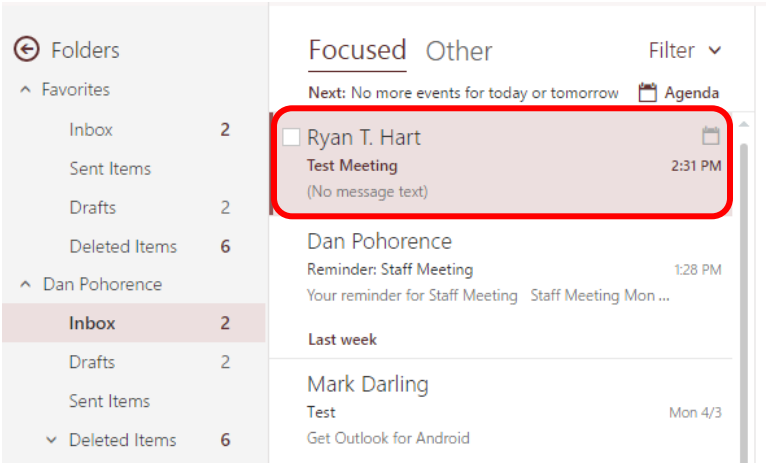


How Do I Respond to a Meeting Request?

When invited to a meeting, there are four actions you can take: **Accept**, **Decline**, **Tentative**, and **Propose New Time**. Until you act on the on a meeting invitation, Outlook automatically sets your reply as Tentative and the date/time in your calendar is also marked as Tentative.

Go to your mail and the meeting request will appear in your inbox.

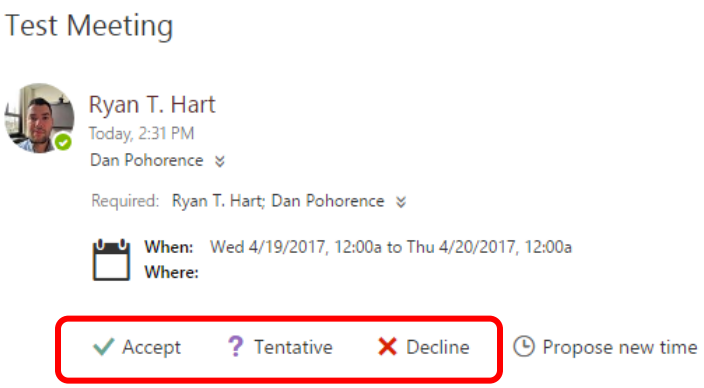
Click on the email to view the contents in your preview screen.



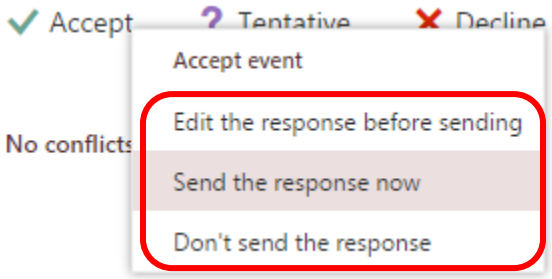
To accept a meeting request, click **Accept**.

To tentatively accept the request, click **Tentative**.

To decline the request, click **Decline**.



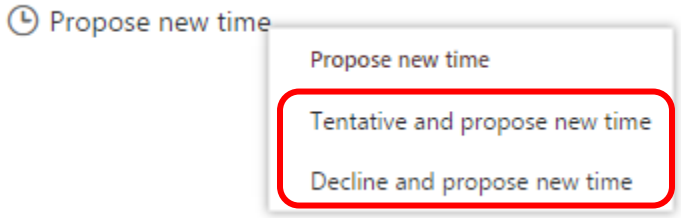
Whether you click Accept, Tentative, or Decline; you will be asked if you want to send a response or not.



Note: If your Out of Office Assistant has been activated, the meeting organizer will receive an Out of Office reply indicating Tentative as the default status.

To propose new time, click on Propose new time.

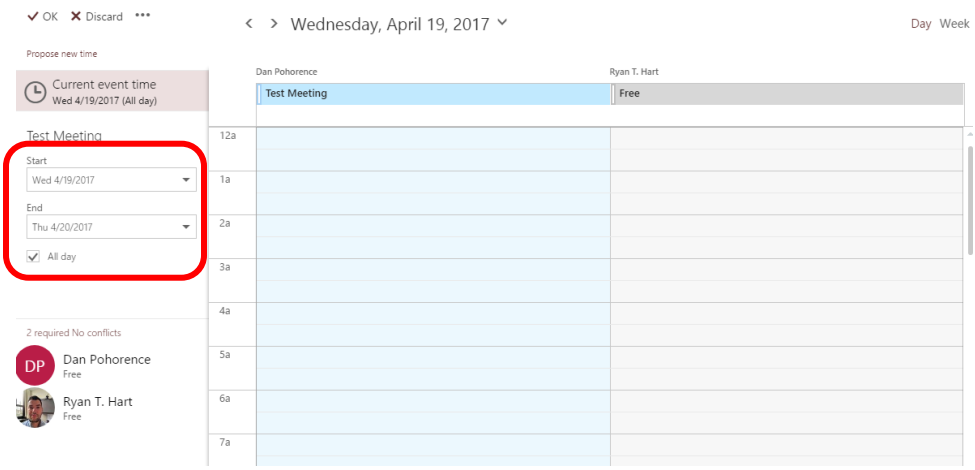
You have the option on sending a reply to the organizer to Accept Tentatively and propose a new time, or Decline and propose a new time.



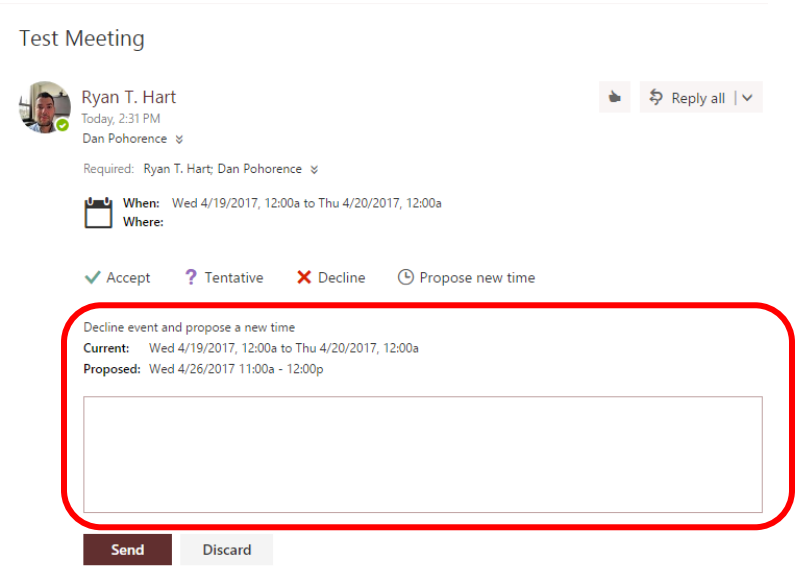
Click **Tentative and propose new time** or **Decline and propose new time**.

A dialog window will open allowing you to select an alternate date and time.

When you are finished choosing your desired time, click on **OK**.

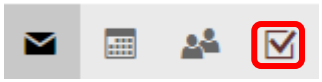


A message window addressed to the meeting organizer will automatically open, and you will also see the current meeting time and time you are proposing for the meeting. Type a message or comment in the field provided and click **Send**.

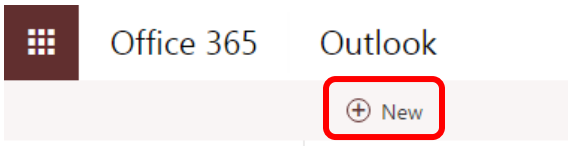


Task

To access your personal To – Do List, click on located at the bottom of the left sidebar.



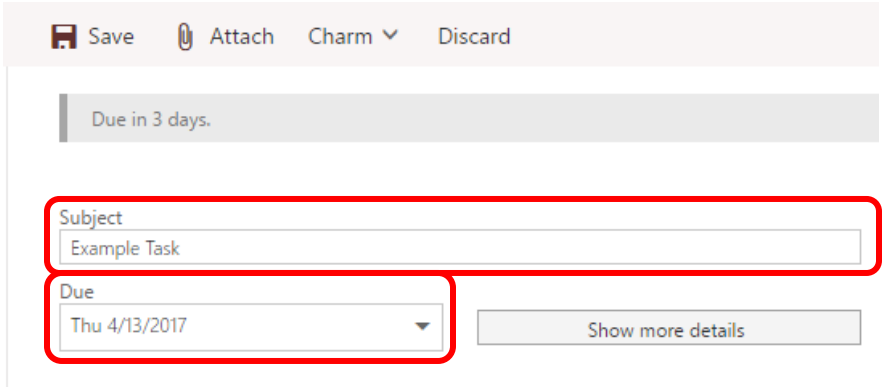
To create a new task, click on **New**.



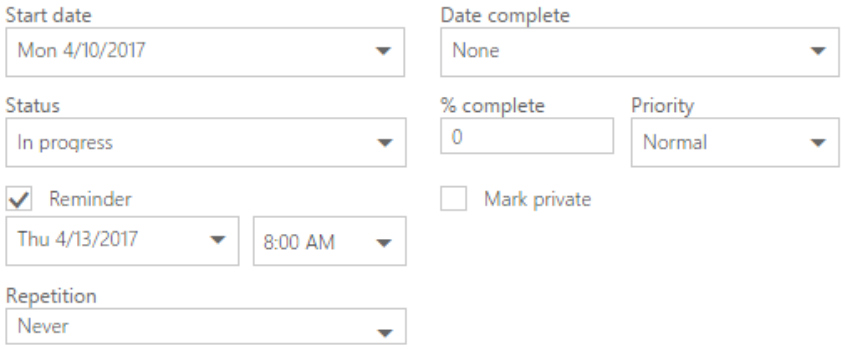
In the subject line, type in the subject for the task you which to perform.

Set a Due Date.

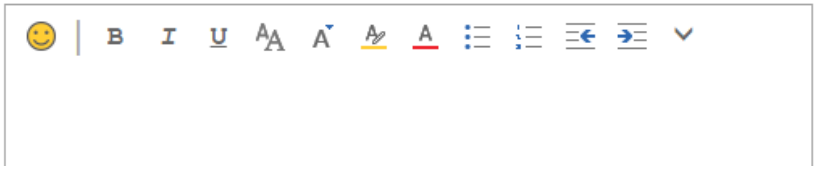
If you wish to set the task as a recurring event or set a reminder, click **Show more details**.



Once you have clicked Show more details, additional fields will appear to set the start date of the task, reminders, and if the task repeats.



Notes regarding the task can be entered at the bottom of the task screen.



When complete, click **Save**.

If the task needs to be edited, click on **Edit**, located on the task preview pane.

Note: If you want to assign a task to an individual, you have that option in the full, office suite version of Outlook.