

Office 365 for End Users

Terence Rabe



TERENCE RABE

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ABOUT TERENCE RABE



Figure 01

Terence started his Information Technology career in 1997, building PCs and networks for small businesses. Over the next two years, he earned several Microsoft Certified Professional certifications, culminating in the Microsoft Certified Systems Engineer accreditation in 1999. In the same year, he was awarded the Microsoft Certified Trainer certification and worked as a staff and freelance trainer for various training organisations in South Africa.

In 2001 Terence emigrated to the United Kingdom and continued to deliver technical training on Microsoft operating systems and server products. It was during this time that he first encountered SharePoint and BPOS, the forerunner to Office 365, and saw the potential these tools have for transforming the way people work.

In 2011 he started his own company with a goal to become a trusted independent provider of consultancy and training services on SharePoint, Office 365, and other cloud-based Microsoft technologies.

To find out more about Terence, look him up on LinkedIn at <https://uk.linkedin.com/in/terencerabe>.

ABOUT OFFICE 365 FOR END USERS

OBJECTIVE

This user guide will enable you to communicate and collaborate with co-workers using Office 365.

You will learn how to:

- Sign into Office 365 and personalise your profile.
- Send, receive, and manage e-mail with Outlook Mail.
- Communicate with co-workers using Skype instant messaging.
- Manage your diary with Outlook Calendar.
- Maintain a contacts list with Outlook People.
- Manage tasks with Outlook Tasks.
- Use OneDrive to store and share files.

ENVIRONMENT

This guide was produced for users of Microsoft operating systems, including Windows 7, 8, 8.1 and 10.

The instructions and illustrations were created on a computer running Windows 10, using the Google Chrome web browser and Microsoft Office 2016. Users of other supported web browsers may experience minor cosmetic differences.

1 GETTING STARTED

1.1 WHAT IS CLOUD COMPUTING?

Traditional IT systems consist of networked computers known as *servers*. Physically located on the organisation's premises, they provide services like email, databases, and file storage. This is known as *on-premises* computing.

Cloud computing uses servers which are not on-premises but which are owned and operated by a service provider. Cloud services are accessed via the Internet.

1.2 WHAT IS OFFICE 365?

Office 365 is a cloud computing service offered by Microsoft. Organisations pay a monthly subscription fee for their users to access email, voice and video communication services, as well as file storage and collaboration tools.

1.3 SIGNING IN

1.3.1 FIRST-TIME SIGN IN

When an Office 365 user account is created, a message containing the username and a temporary password will be sent to the administrator who created the account. The administrator will then pass them on to the user.



A user account has been created or modified

You can now distribute this information to your user

The following list contains temporary passwords for newly created or modified user accounts.

Please note:

- When distributing IDs and passwords to individual users, be sure to do so in a safe and secure manner.
- Temporary passwords are valid for 90 days

User Name: rabet@raven-its.co.uk

Temporary Password: Xocu8363

Once your end users have successfully signed in with their temporary passwords, they can create new passwords by following the instructions on the sign in page.

Figure 1-1 Username and temporary password.

Once you receive your credentials, you should sign in as follows:

1. Open a web browser and type **portal.office.com** in the address bar.
2. Press **Enter** to load the sign in page.

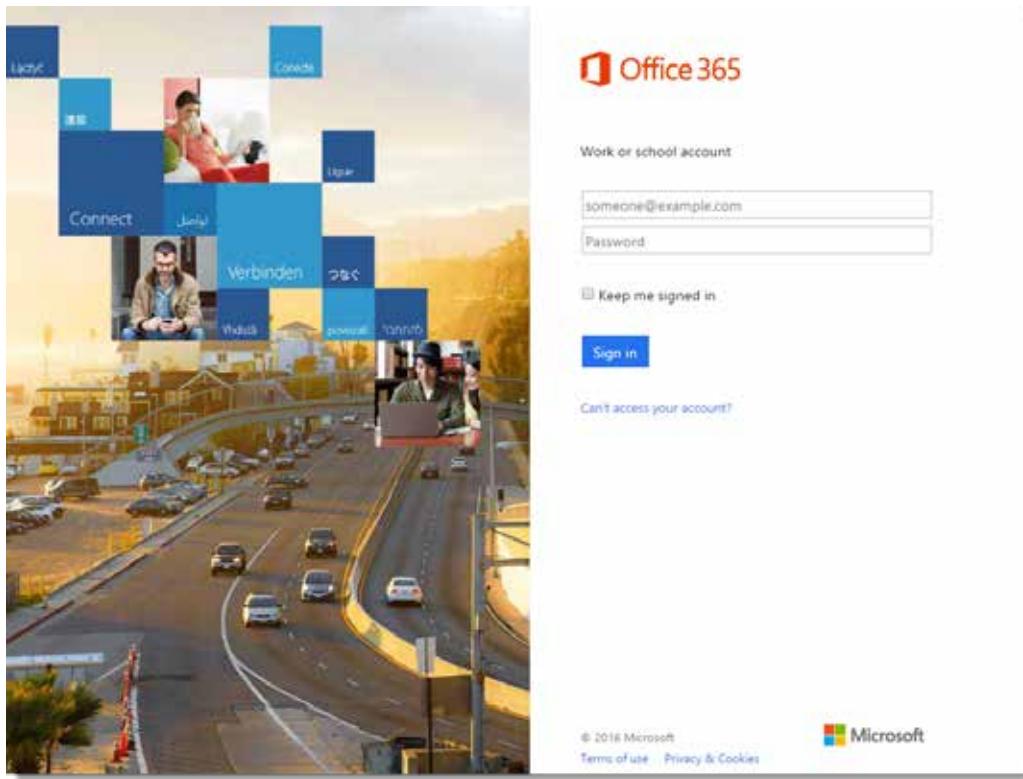


Figure 1-2 The Office 365 sign in page.

3. Type in your username and temporary password and click **Sign in**.

A close-up screenshot of the Microsoft sign-in form. It shows two input fields: one for 'username' containing 'rabet@raven-its.co.uk' and another for 'password' containing '*****'. Below the fields are a 'Keep me signed in' checkbox and a 'Sign in' button. The 'Sign in' button is highlighted with a thick red circle.

Figure 1-3 Username and password.

4. The *Update your password* page will load.
5. On the *Update your password* page, retype your temporary password, enter and confirm your new password, and then click **Update password and sign in**.

Update your password

You need to update your password because this is the first time you are signing in, or because your password has expired.

The screenshot shows a web-based password reset interface. At the top, there is a text input field containing the email address "rabet@raven-its.co.uk". Below it are four password input fields, each showing a series of dots (*****). At the bottom of the form is a blue rectangular button with white text that reads "Update password and sign in". This button is highlighted with a thick red oval border.

Figure 1-4 The “Update your password” page.

6. The Office 365 *home page* will load.

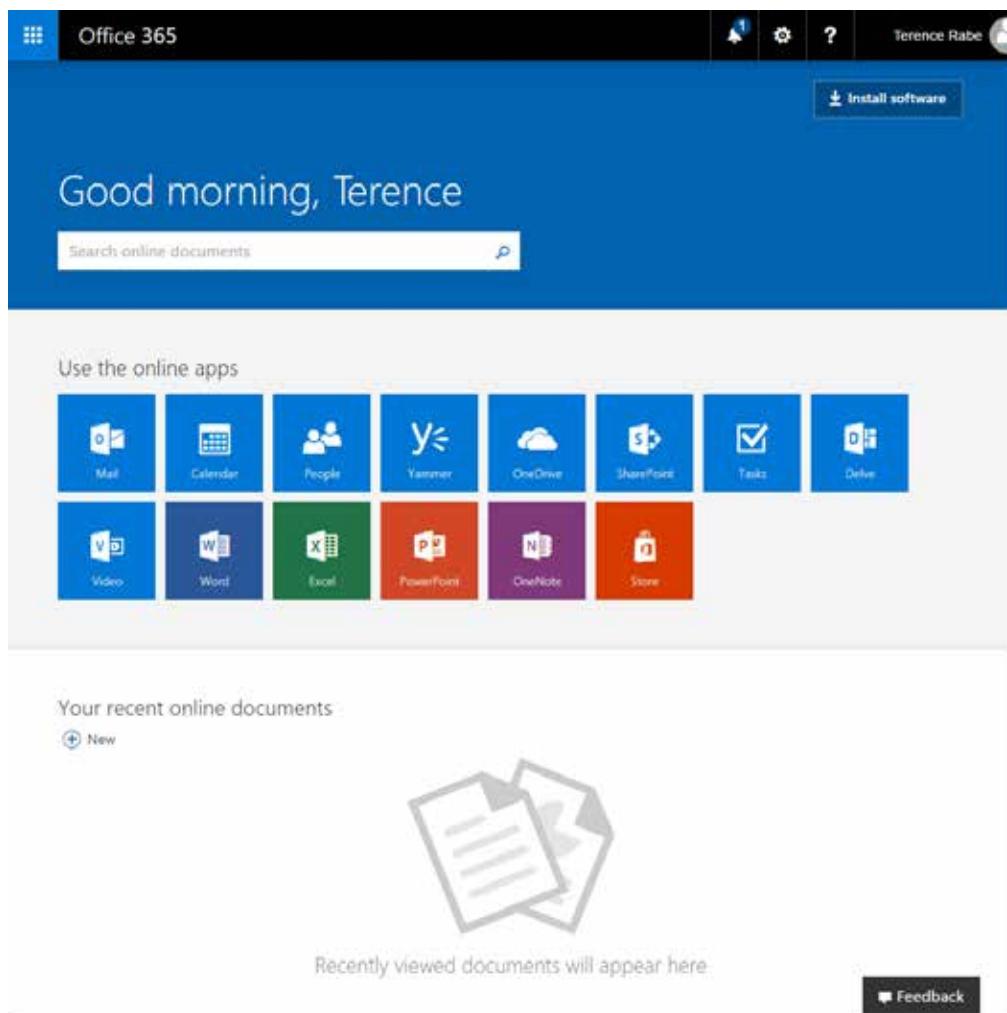


Figure 1-5 The Office 365 Home page.

7. When you sign in to Office 365 for the first time, you may see a warning pop-up requesting that you set your time zone; this step will be covered in a later chapter, so you can dismiss the prompt for now.

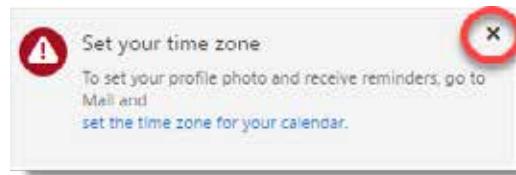


Figure 1-6 The time zone prompt.

1.4 THE OFFICE 365 HOME PAGE

The Office 365 Home page is made up of the following elements:

1.4.1. APP LAUNCHER BUTTON

The App Launcher button should be displayed in the top left corner of the page.

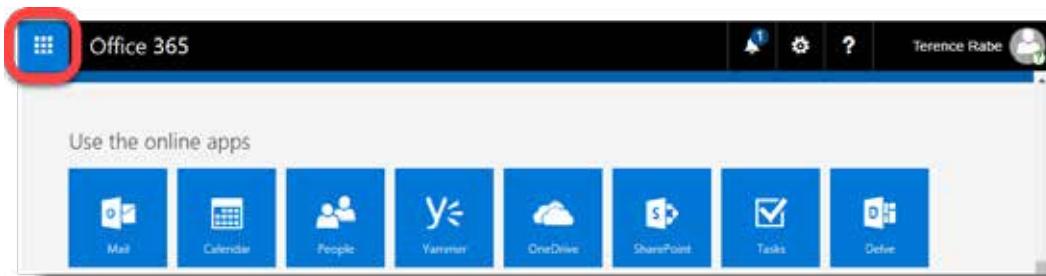


Figure 1-7 The App launcher button.

On smaller screens, the button will be displayed as the leftmost button on the top right area of the page, as shown below.

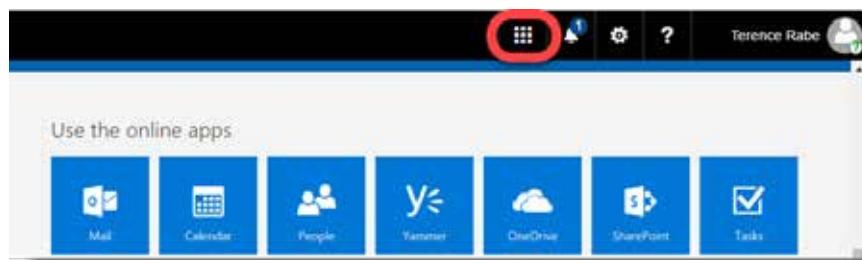


Figure 1-8 App launcher position on small screens.

1.4.2 APP TILES

Click the **App Launcher** button to see the *tiles* that represent your available apps.

The apps displayed on your app list may differ from the figure shown in this guide, depending on your Office 365 subscription.

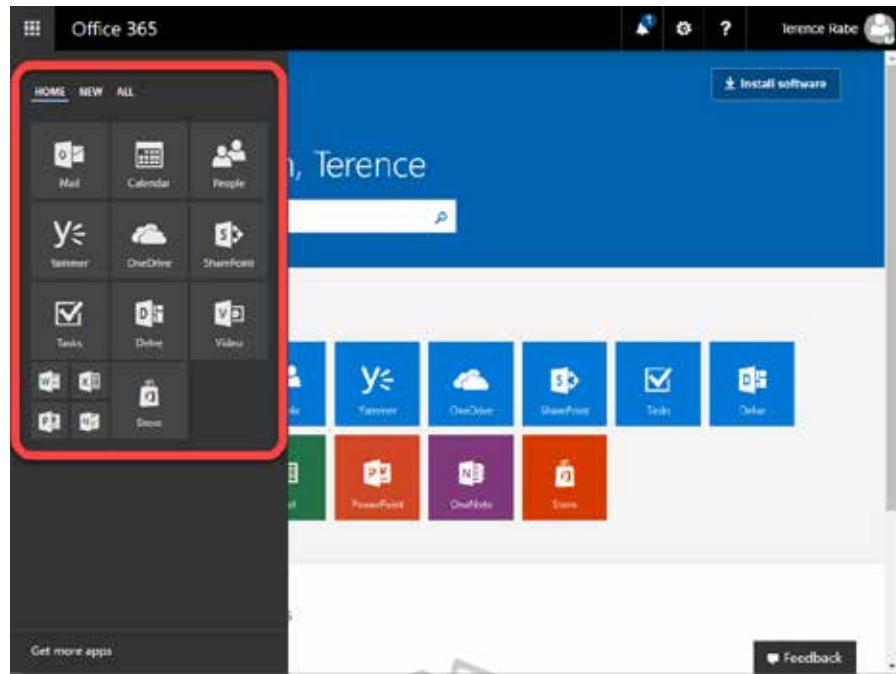


Figure 1-9 App Tiles on the App launcher menu.

NOTE: The layout and colour scheme of the App Launcher menu may differ in your Office 365 account.

An advertisement for MT Højgaard. On the left, a woman with long blonde hair, wearing a blue tank top, is smiling and wearing a black HTC Vive VR headset. On the right, there is a red graphic element containing the company's logo and text. The logo consists of a stylized 'M' icon followed by the company name 'MT Højgaard'. Below the logo, the text 'BEDRE LØSNINGER' is displayed in large, bold, white letters. Underneath this, there is a paragraph of Danish text: 'I MT Højgaard insisterer vi på, at der findes en bedre løsning. Vi udvikler og anvender metoder og teknologier, der sætter nye standarder for bygge- og anlægsbranchen. Vi har fokus på hele tiden at videreudvikle vores medarbejdere, så vi gennem nye teknologier og nye samarbejdsformer kan transformere bygge- og anlægsbranchen. Vil du med på holdet?' At the bottom of the red section, the website 'mth.dk/vorestilgang' is listed. A green button at the bottom right with the text 'Click on the ad to read more' has a white hand cursor icon pointing to it.

1.4.3 OFFICE 365 HOME PAGE LINK

The *home page link*, shown in the figure below, is always displayed regardless of which app is currently being used. This creates a persistent navigation link to take you back to the Office 365 home page.

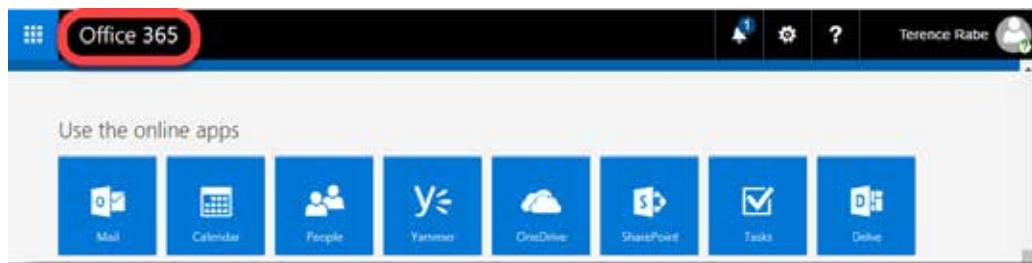


Figure 1-10 The Office 365 Home page link.

1.4.4 NOTIFICATIONS BUTTON

Office 365 *notifications* are messages from the system that remind you of upcoming meetings, missed conversations, and tasks.

The Notifications button will display a number in a circle indicating how many notifications are waiting to be read, as seen in the figure below.



Figure 1-11 The Notifications button.

1. Click the Notification button to display the notifications pane.

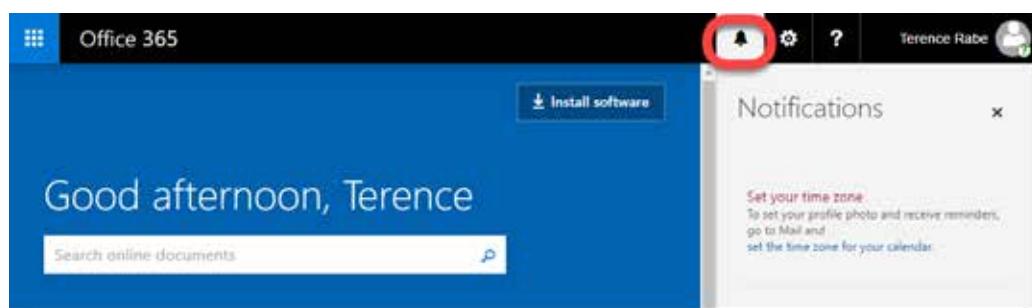


Figure 1-12 The Notifications list.

NOTE: Clicking on the message in the notification list will take you to the page where the task needs to be performed.

1.4.5 SETTINGS BUTTON

The Settings button is *context sensitive*. This means it will display different options depending on what app you are using.

When signing in to Office 365 for the first time, you should attend to the settings on the home page as described in the **Getting started** section.

1.4.6 HELP BUTTON

Clicking on the **Help** button will display the *Help* pane. This section contains links to the following resources:

- *Help* – Links to the official Microsoft Office help and training resources page.
- *Feedback* – Allows you to rate and leave feedback on your Office 365 experience.
- *Community* – Gives you access the Office 365 community where you can read forums and ask questions.
- *Legal* – Links to various legal statements including the acceptable use policy.
- *Privacy and cookies* – Links to privacy policies.

1.4.7 USERNAME AND IMAGE

The top right corner of each Office 365 page will display your username, profile picture, and availability status.

Clicking on your name will display the *My accounts* pane, which allows you to:

- Click **About me** to edit your profile.
- Click **View account** to view details of your Office 365 subscription.
- Click **Sign out** to sign out of Office 365.

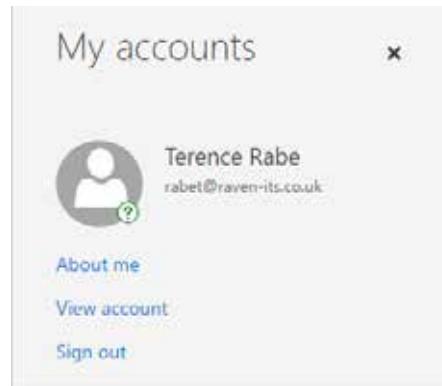


Figure 1-13 The My accounts pane.

NOTE: Updating your profile is covered in more detail in a later section of this chapter.

1.4.8 USER GREETING AND SEARCH

The Office 365 home page displays a greeting message and a search field below the top toolbar.

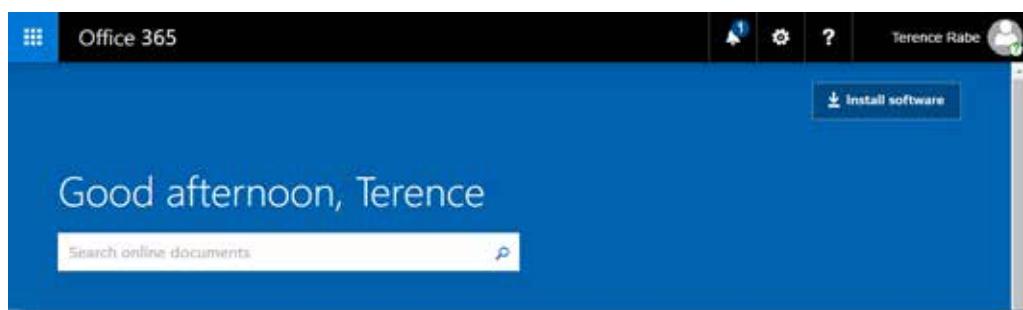


Figure 1-14 Greeting and Search field.

You may also see an **Install software** button. This can be used to install Microsoft Office products like Outlook, Word, Excel, PowerPoint, and OneNote on your computer.

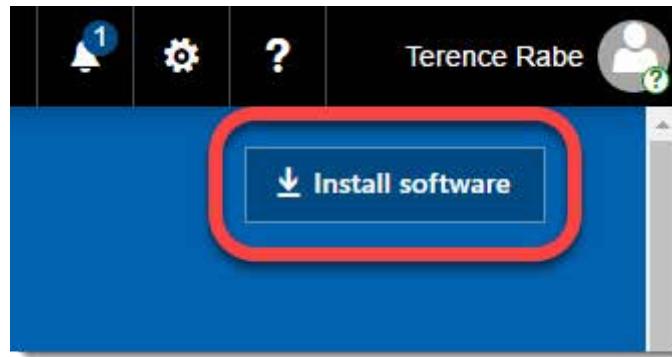


Figure 1-15 Install software button.

NOTE: You may be entitled to install these applications on up to five computers, (personal laptop, home computer, etc.), depending on your Office 365 subscription. Please ask your IT department for more information.

1.4.9 APP TILES

The home page displays app tiles below the user greeting. These tiles enable quick access to the apps without having to click the *App Launcher* button.

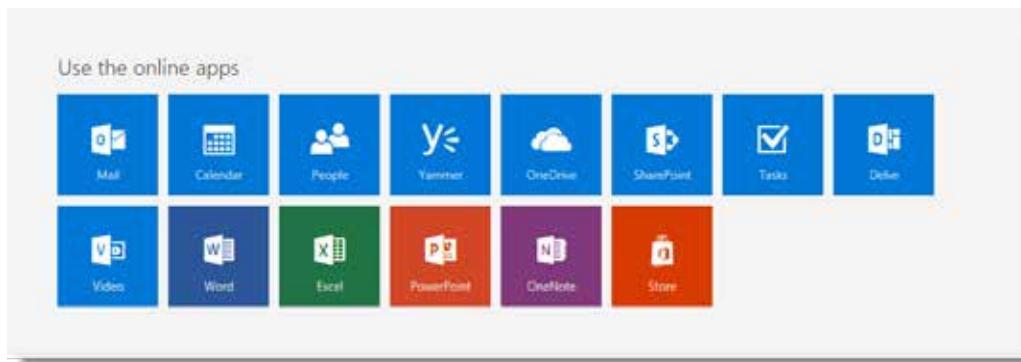


Figure 1-16 App tiles.

1.4.10 RECENT DOCUMENTS AND FOLDERS

The bottom section of the home page displays the most recently accessed documents and OneDrive folders, which includes documents created or opened from OneDrive and SharePoint sites in Office 365.

The screenshot shows the Office 365 Home page. At the top, it displays 'Your recent online documents' with a '+ New' button and a link to 'Benefits of Office 365'. Below this, it shows 'Your recent OneDrive folders' with a 'Documents' folder listed. Both sections include a 'LAST OPENED' timestamp.

Figure 1-17 Recent documents and OneDrive folders.

NOTE: Documents accessed while offline will not be displayed.

1.5 SET UP YOUR ACCOUNT

After signing in, setting your password, and getting to know the layout of the Office 365 Home page, you should review the tasks described below.

1.5.1 SET A THEME

1. Ensure that you are on the Office 365 Home page and click the **Settings** button to display the settings menu.

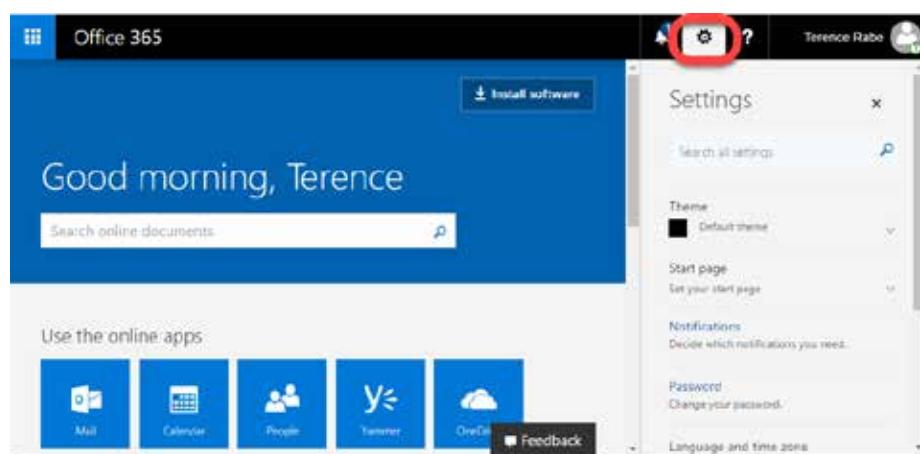


Figure 1-18 Home page settings options.

2. Click the drop-down arrow next to *Theme*.

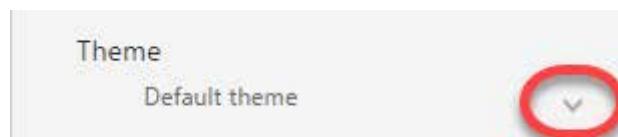


Figure 1-19 Theme menu drop down.

3. Select a theme to preview it.

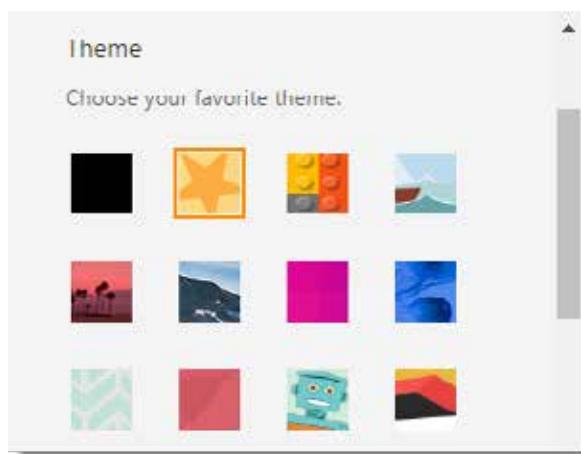


Figure 1-20 Select a Theme.

4. If you are satisfied with the theme, scroll down to the bottom of the list and click the **Save** button to use your chosen theme, or click **Cancel** to revert to the current theme.

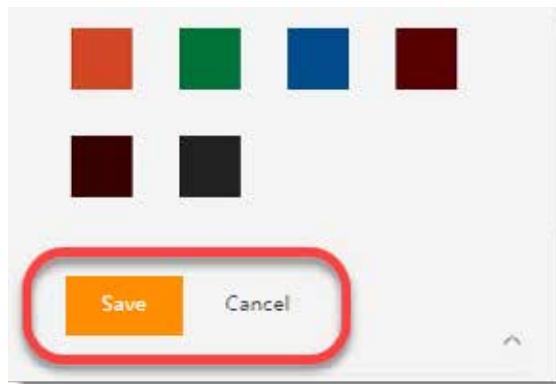


Figure 1-21 Save or cancel theme selection.

1.5.2 SET THE START PAGE

1. Click **Settings**.

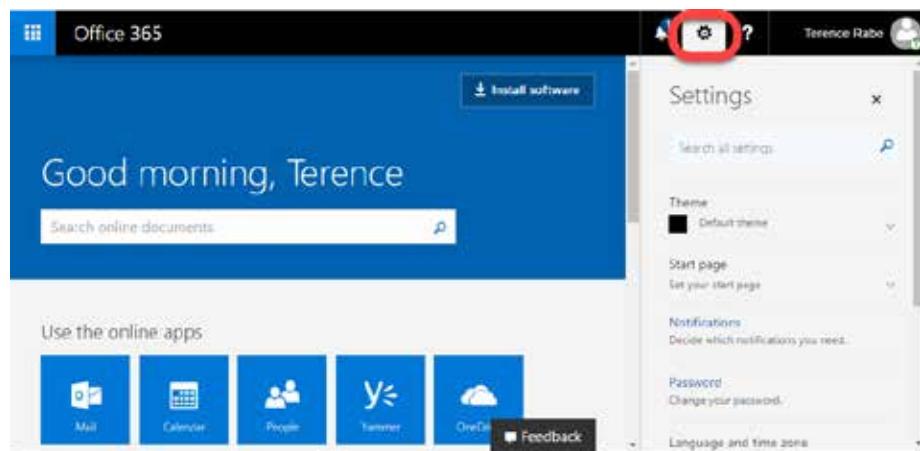


Figure 1-22 Home page settings options.

2. Click the drop-down arrow next to *Start page* to display the start page options selector.

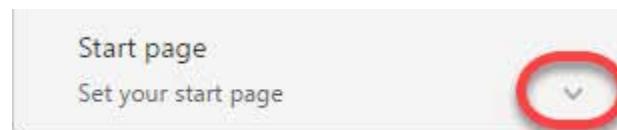


Figure 1-23 Start page menu drop down.

3. Click the drop-down arrow to show the list of start page options.

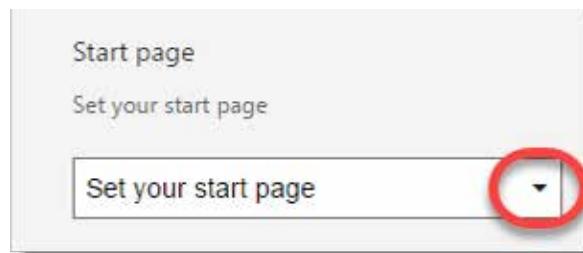


Figure 1-24 Start page options drop down.

4. Select an Office 365 app to use as your home page.

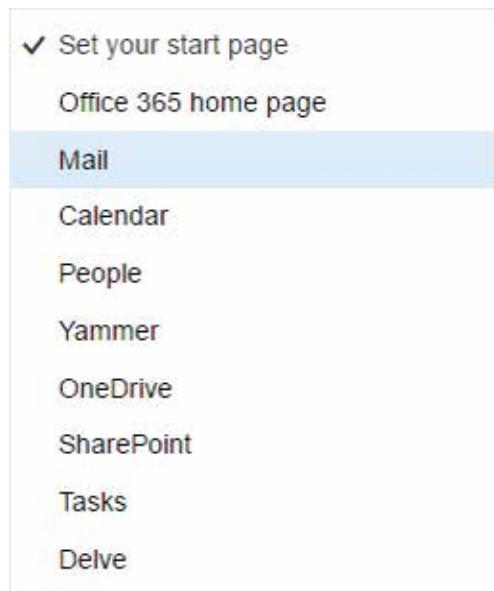


Figure 1-25 Start page options.

5. Click the **Save** button to set the new start page or click **Cancel** to retain the current setting.

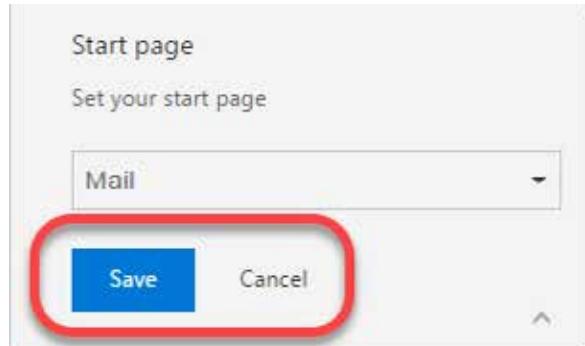


Figure 1-26 Save or cancel changes.

1.5.3 NOTIFICATIONS

1. Click **Settings**.

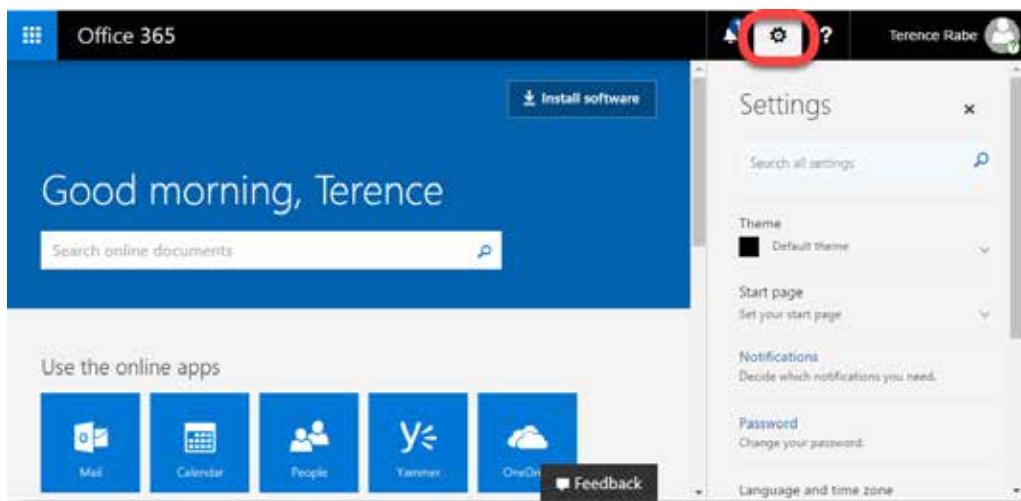


Figure 1-27 Home page settings options.

2. Click on the **Notifications** drop-down arrow.

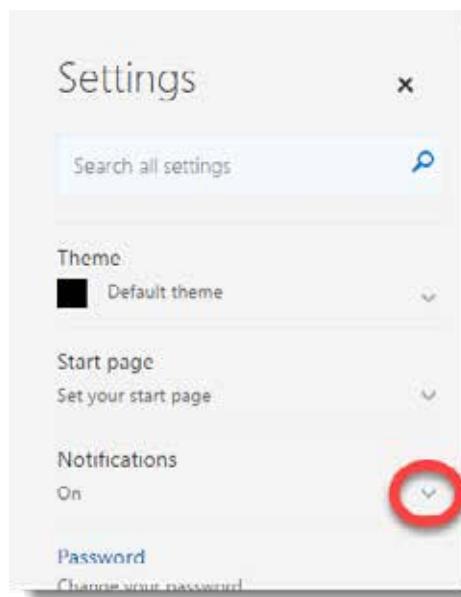


Figure 1-28 The Notifications drop-down arrow.

3. Check the boxes to select which types of notifications you will receive and click **Save**.

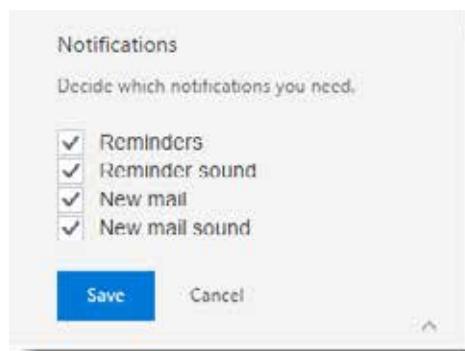


Figure 1-29 Notification options.

1.5.4 UPDATE YOUR PASSWORD

Your Office 365 password is set to expire every 90 days unless your organisation has set a different expiration value. If you are prompted to change your password, or if you suspect that your password is no longer a secret, you should update it as follows:

1. From the Office 365 Home page, click the **Settings** button.

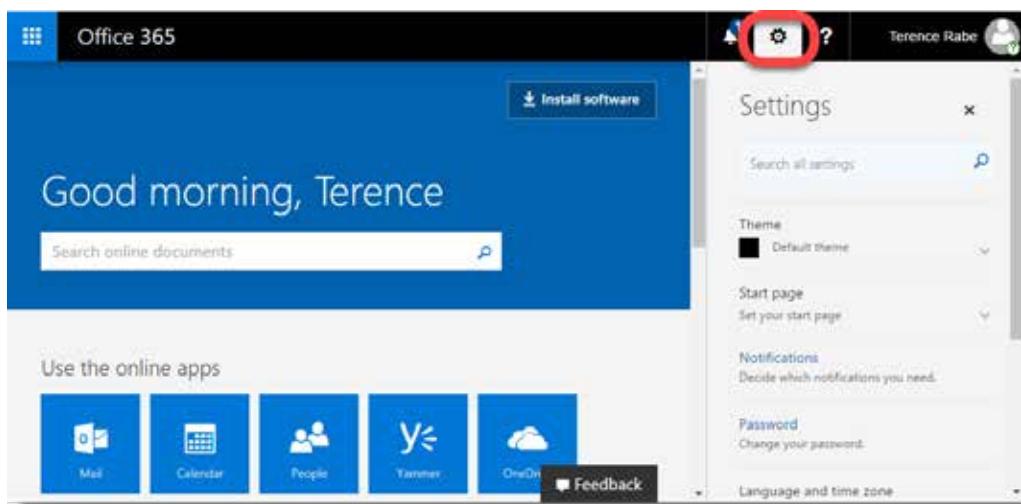


Figure 1-30 Home page settings menu.

2. Click on **Password**.

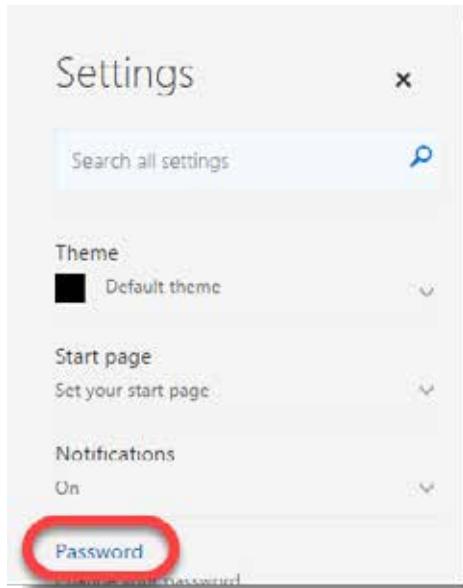


Figure 1-31 The Password link.

3. When the *change password* form loads, complete the required fields and click **Submit**.

A screenshot of the "change password" form. At the top, it says "change password". Below that is a note: "Strong password required. Enter 8-16 characters. Do not include common words or names. Combine uppercase letters, lowercase letters, numbers and symbols." The form has four input fields: "User ID" (rabet@raven-its.co.uk), "Old password" (an empty blue-bordered field), "Create new password" (an empty grey-bordered field), and "Confirm new password" (an empty grey-bordered field). At the bottom are two buttons: a green "submit" button and a blue "cancel" button.

Figure 1-32 The change password form.

NOTE: After the password update succeeds you will need to update your Office 365 password on any desktop or mobile applications where it has been saved.

1.5.5 LANGUAGE AND TIME ZONE

To ensure that your language and time zone are correct, you should review these settings when you first sign on.

1. Click the **Settings** button while viewing the Office 365 home page.

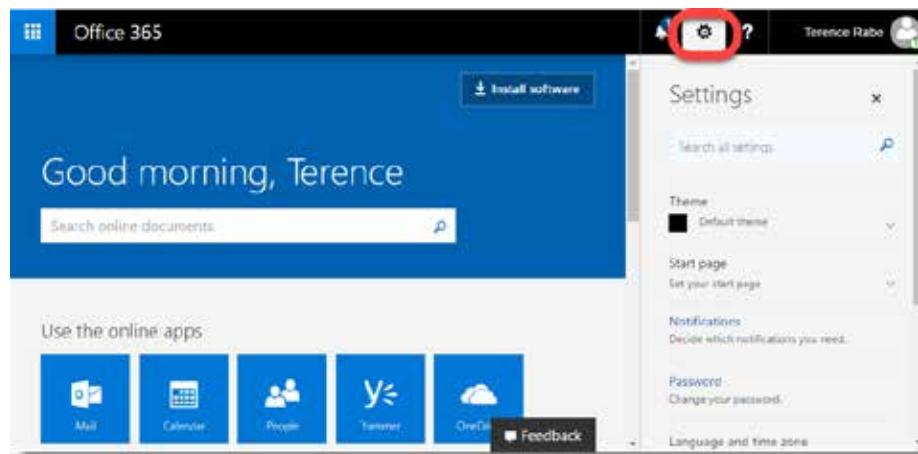


Figure 1-33 Home page settings options.

2. Click the drop-down arrow next to *Language and time zone*.



Figure 1-34 Language and time zone menu drop-down.

3. Use the drop-down menus to select the correct Language, time zone, date format and time format; then click the **Save** button to save the changes or click **Cancel** to retain the current settings.

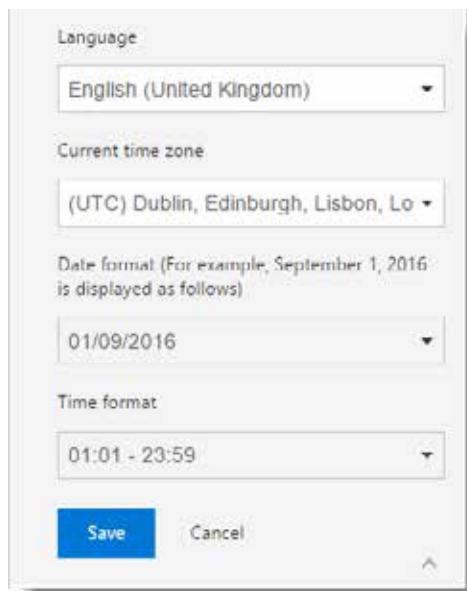


Figure 1-35 Language and time zone settings.

1.6 UPDATE YOUR PROFILE

The final task to complete during your first sign in is to review and update your profile information. Your profile forms part of the searchable directory of colleagues and skills within your organisation.

1.6.1 ACCESS YOUR PROFILE

1. Click on your name in the top right area of the current page.

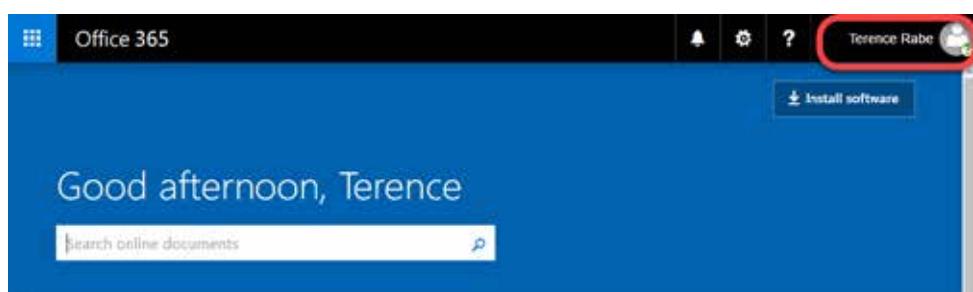


Figure 136 Username and profile picture.

2. Click **About me**.

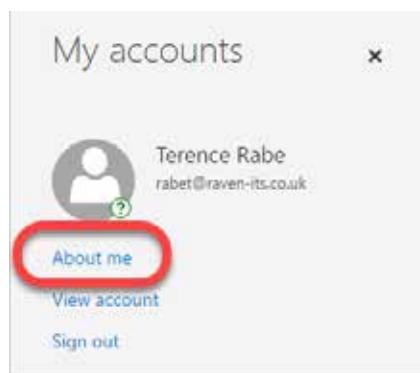


Figure 1-37 The "About me" link.

3. When the profile page loads, click **Update profile**.

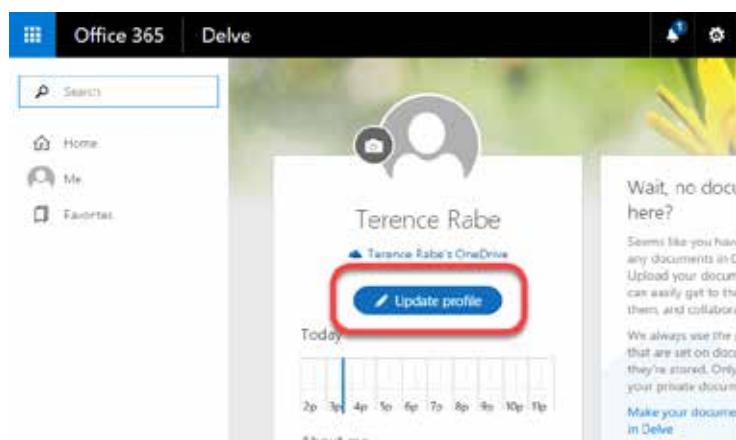


Figure 1-38 The Update profile button.

Once your profile is in edit mode, follow these steps to update the different sections of your profile.

1.6.2 CHANGE THE COVER PHOTO

1. Click on the **Change cover photo** button to open the *Choose a cover photo* pane.

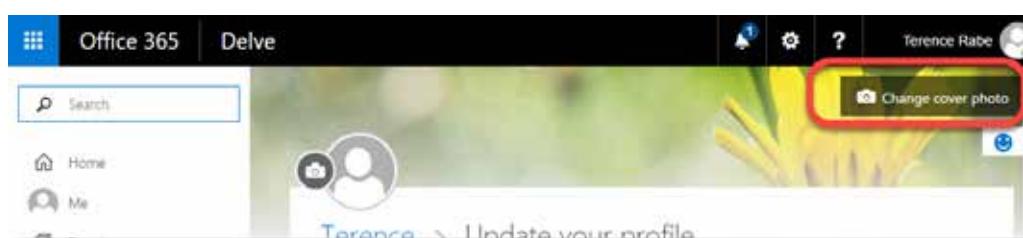


Figure 1-39 The Change cover photo button.

2. Select the desired cover photo from the *Choose a cover photo* pane; note that the photo updates immediately.

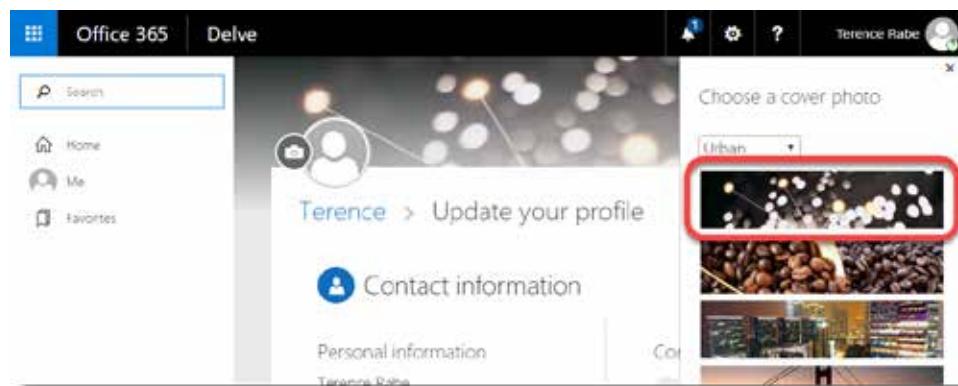


Figure 1-40 Available cover photos.

3. Close the *Choose a cover photo* pane.

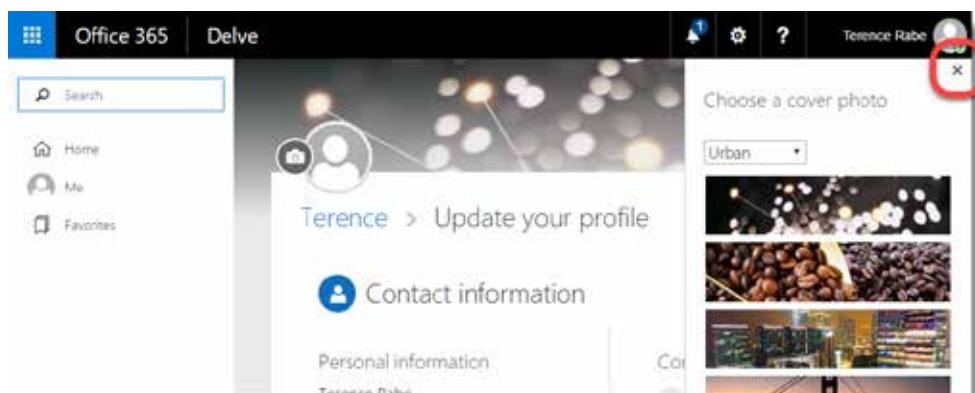


Figure 1-41 The close button.

1.6.3 UPLOAD A PROFILE PHOTO

If you have a suitable picture, you can upload it to your profile. Please check your organisation's policies for guidance on appropriate images if you're unsure about what image to use.

1. Click on the **camera icon**.

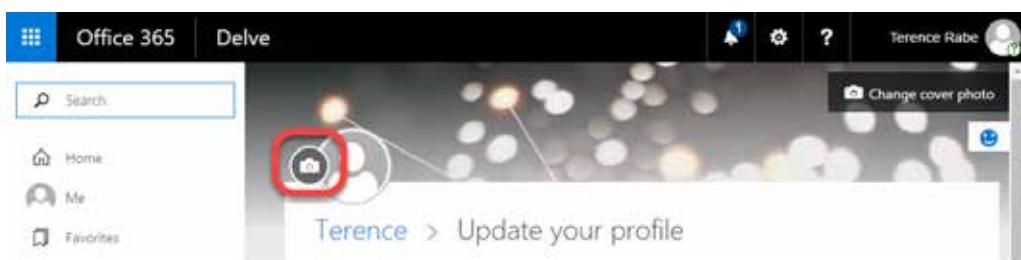


Figure 1-42 The camera icon.

2. The *Edit Details* page will open in a new browser tab or window.
3. Click **Change your photo**.

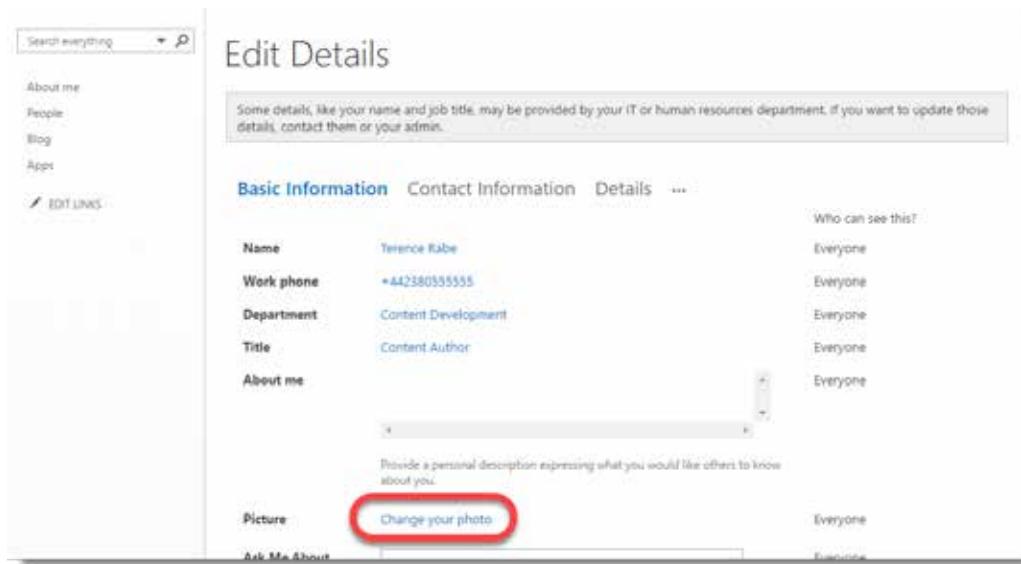


Figure 1-43 The Change your photo link.

4. A new web browser window will open to allow the photo upload.

NOTE: If you have not yet set the language and time zone settings for Outlook, you will be prompted to provide the information before you can upload a picture; verify that the language and time zone settings are correct and click **Save**.



Figure 1-44 Outlook language and time zone settings.

5. The **My account** page will be displayed with the photo pane already showing.

6. Click the **Upload photo** link.

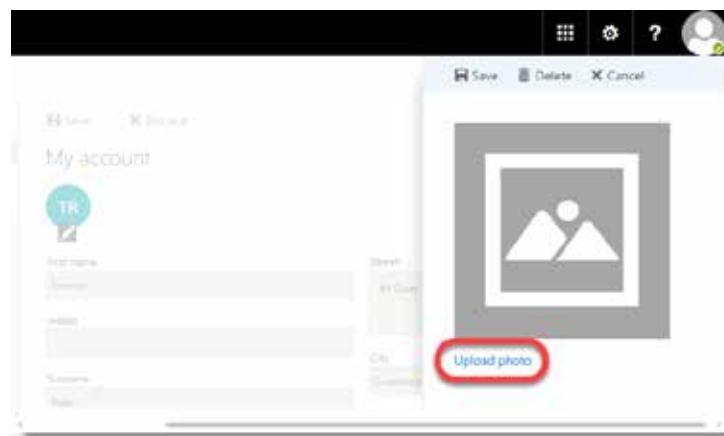


Figure 1-45 The Upload photo link.

7. Use the file browser to locate a picture.
8. Select the picture and click the **Open** button.

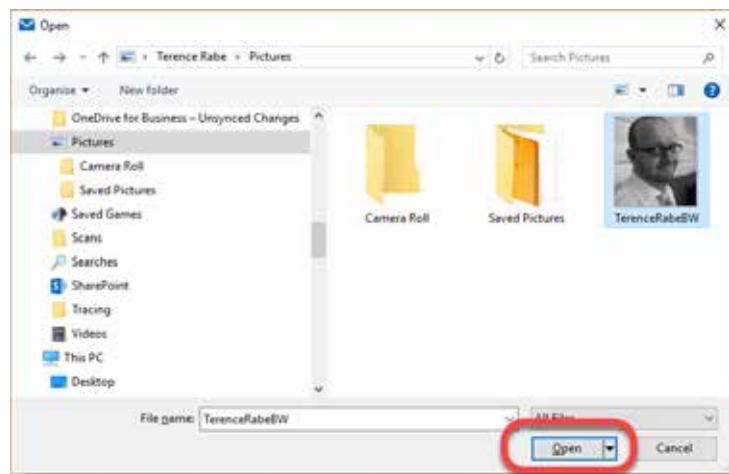


Figure 1-46 The file browser dialogue box.

9. Confirm that the picture displays correctly and click **Save**.

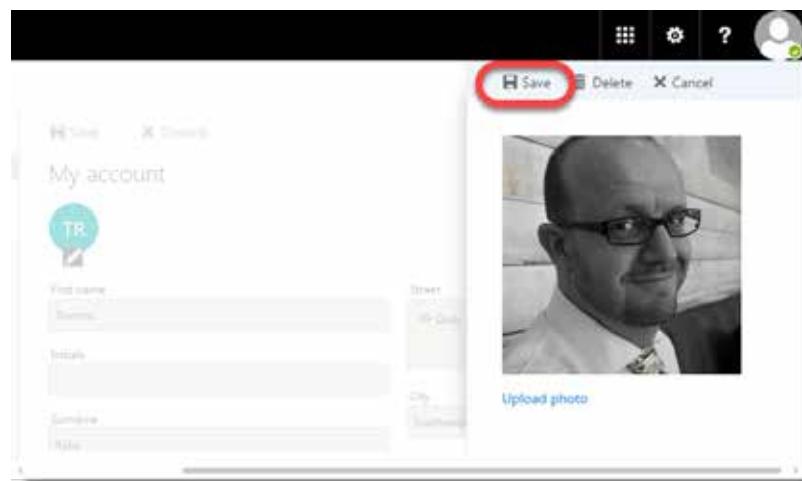


Figure 1-47 The Save photo changes button.

10. Close the *My account* page that was loaded in a separate browser window.

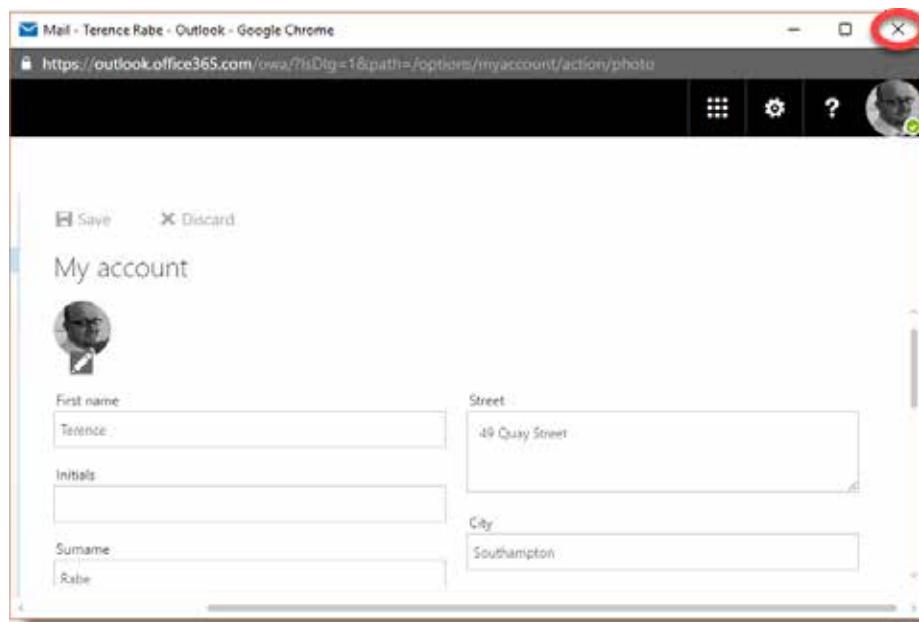


Figure 1-48 The "My account" page with updated photo.

11. Close the *Edit Details* browser tab or window.

NOTE: It may take a few minutes for the new photo to be displayed on your profile page.

1.6.4 REVIEW CONTACT INFORMATION

Your profile stores contact information to make it easier for colleagues to find and communicate with you. Some of the information is maintained by your IT department and should be checked for accuracy.

1. On your profile page, click **Contact information**.

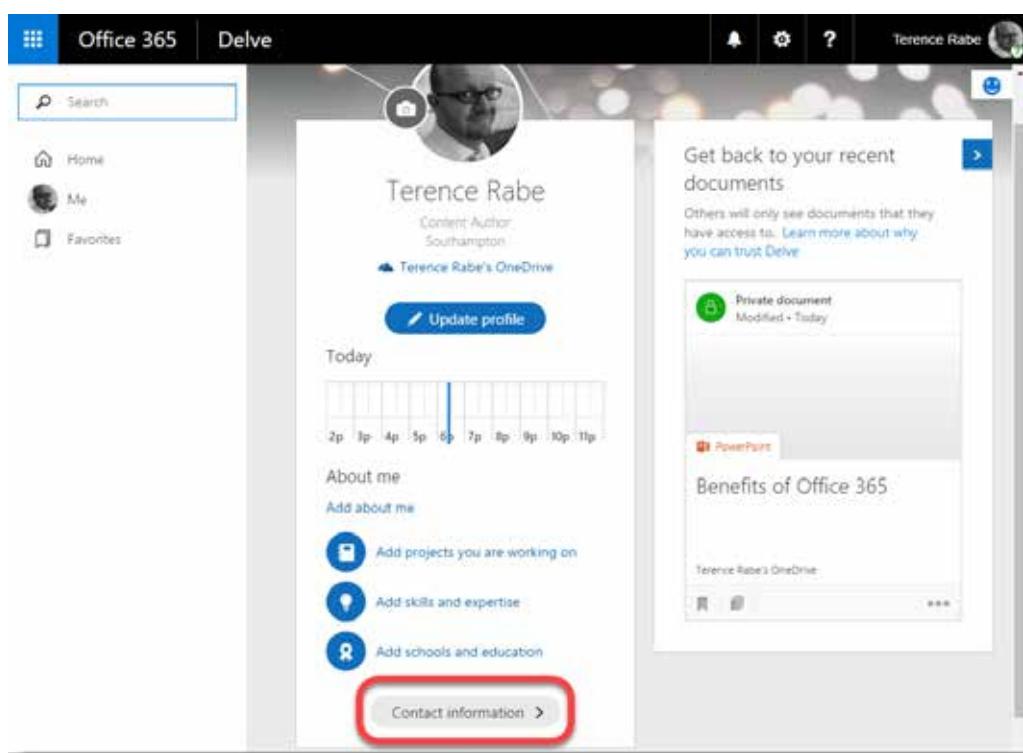


Figure 1-49 The Contact information button.

2. Review the information displayed; if there are any errors or omissions in your name, job role, department, or contact information, please notify your IT department

The screenshot shows the 'Contact information' page. At the top left is a blue circular icon with a white person symbol. To its right is the text 'Contact information'. Below this are two main sections, each enclosed in a red rounded rectangle. The first section is titled 'Personal information' and contains the following details:

- Terence Rabe
- Content Author
- Content Development

Below this section is a location pin icon followed by the text 'Southampton'. The second section is titled 'Contact me' and contains the following details:

- Email: rabet@raven-its.co.uk
- Email: rabet@raven-its.co.uk
- Phone: +442380555555

Below this section is a 'Web links' heading with a cloud icon, followed by a link to 'Terence Rabe's OneDrive'.

Figure 1-50 Contact information.

3. Return to your profile page by clicking on your **name**.

The screenshot shows the user profile page. At the top left is a circular profile picture of a man with glasses. To its right is the name 'Terence' in blue, which is highlighted with a red rounded rectangle. A right-pointing arrow follows the name, leading to the word 'Profile'. Below this is a blue circular icon with a white person symbol, followed by the text 'Contact information'. This section is identical to the one in Figure 1-50. At the bottom of the page, there is a horizontal navigation bar with several icons and labels, including 'Personal information', 'Terence Rabe', 'Content Author', 'Contact me', and email and phone icons.

Figure 1-51 The username link.

1.6.5 UPDATE PERSONAL INFORMATION

You have the option to provide additional personal information.

1. Click **Update profile**.

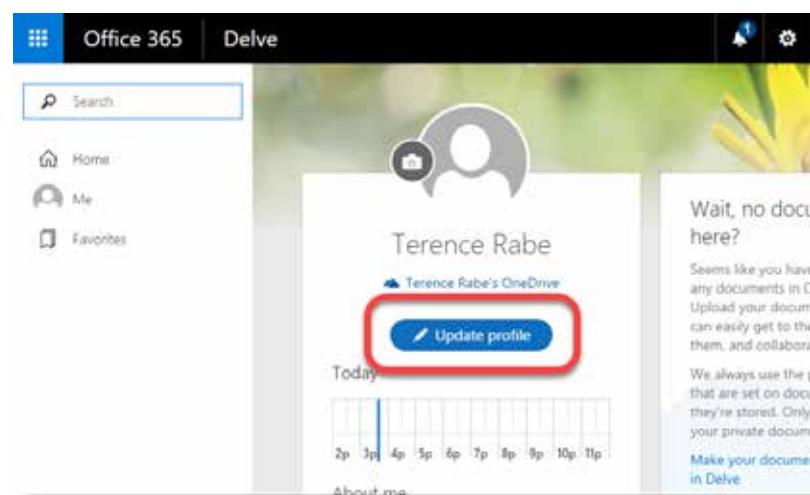


Figure 1-52 The Update profile button.

2. On the *Update your profile* page, click on the link for the information that you want to save.
3. Fill in the information and click the tick button to save the information.

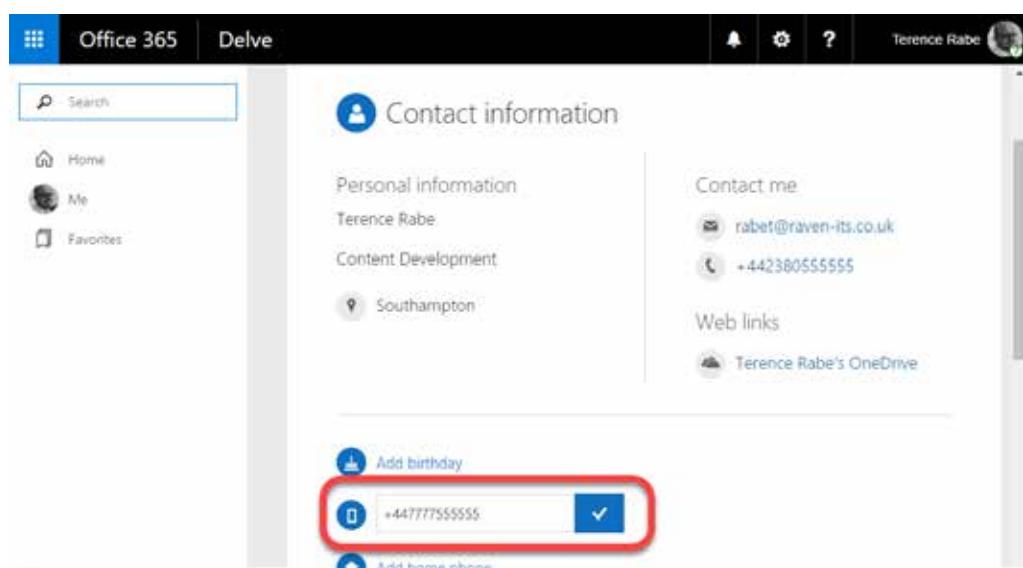


Figure 1-53 Update personal information.

4. Some information types have additional privacy controls your home telephone number, for example. you can use the privacy control to select who can see the information.

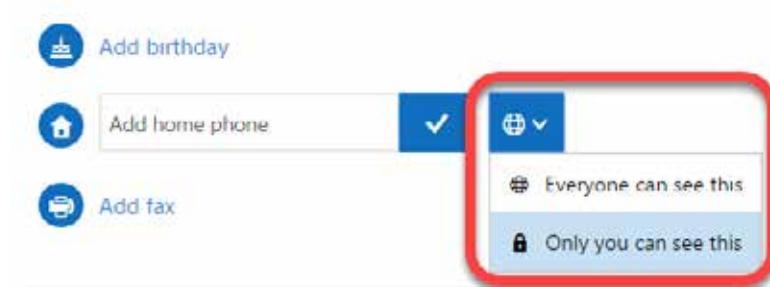


Figure 154 The privacy control button.

NOTE: Personal information is added directly to your profile when each item is saved; there is no need to save the profile again.

1.6.6 ABOUT ME

The *About me* field stores a short biography.

1. Scroll down to locate the *About me* text box.

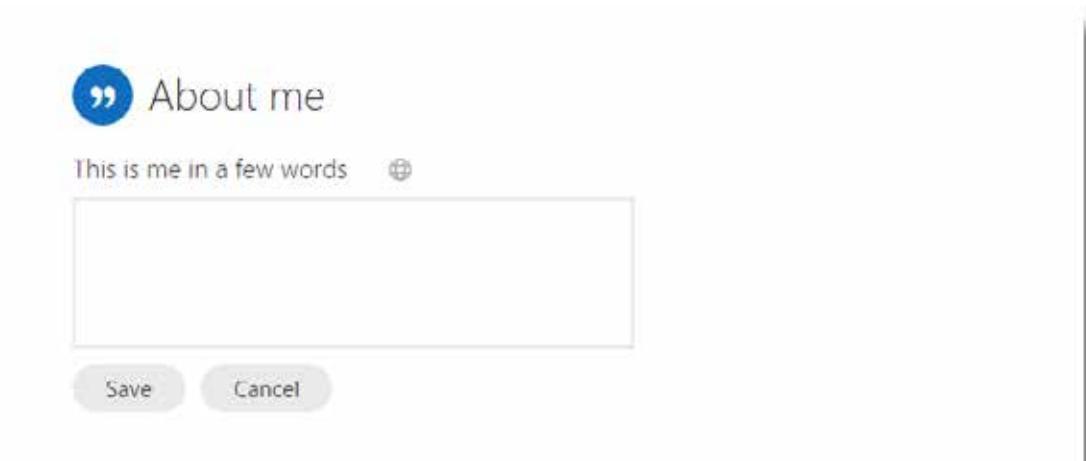


Figure 1-55 The About me text box.

2. Type a short biography.

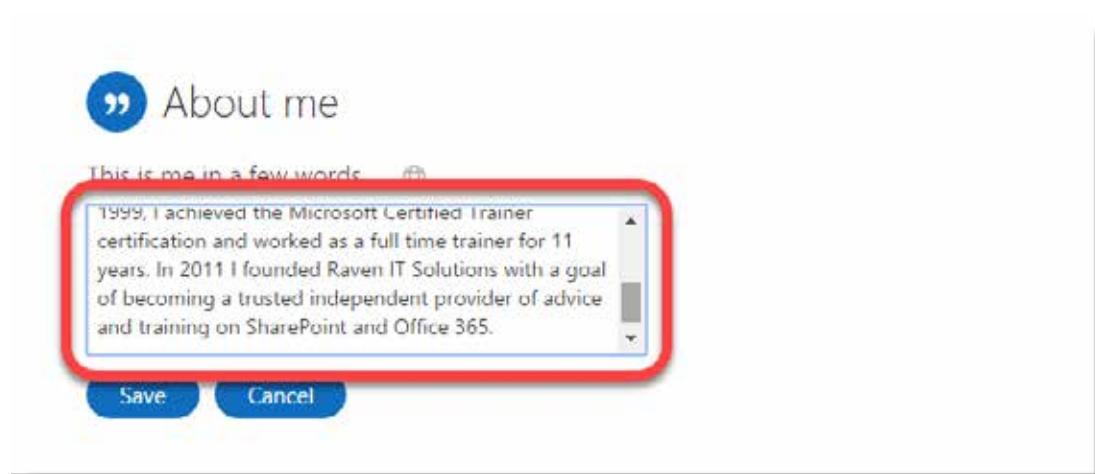


Figure 1-56 Type a short biography.

3. Click **Save** to update your profile.

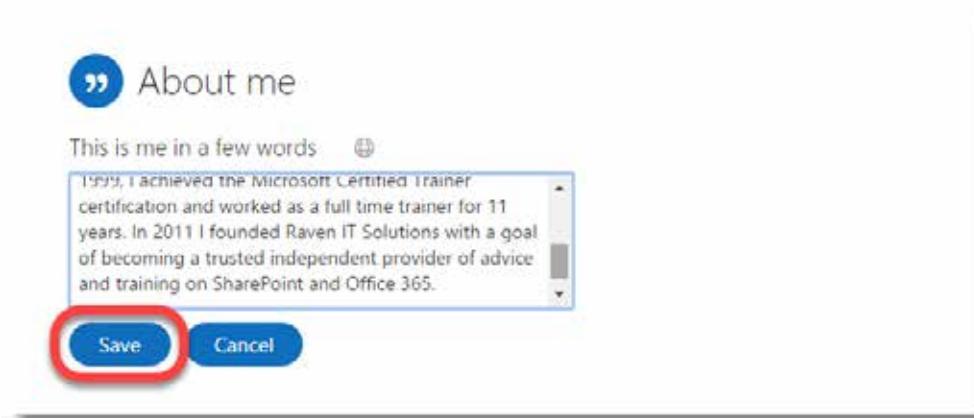


Figure 1-57 Click the Save button.

1.6.7 PROJECTS

The *Projects* section lets you select or add the name of any project you have worked on.

1. Scroll down to the *Project* section.

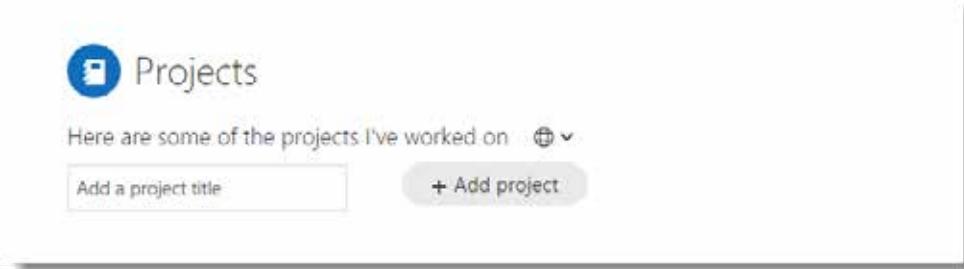


Figure 1-58 The Projects section.

2. Type in the name of the project; if it was added to the system by someone else, the name will appear as a suggestion.
3. Click the suggested project name.

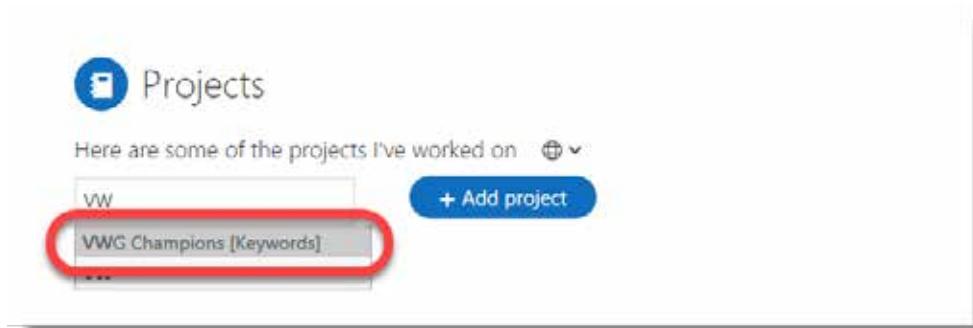


Figure 1-59 A previously entered project.

4. If the project name has not previously been entered, type the project name and click **Add project**

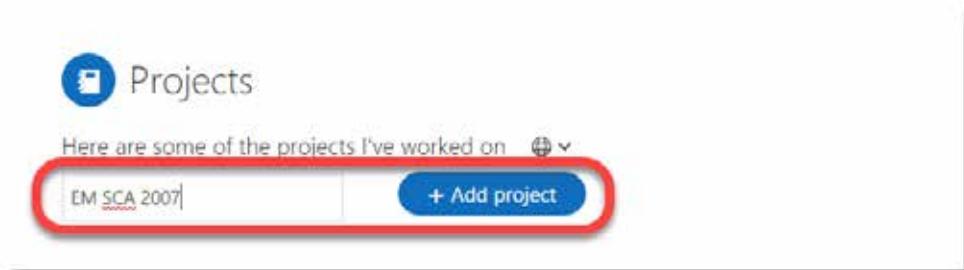


Figure 1-60 The Add project button.

1.6.8 SKILLS AND EXPERTISE

Skills are general terms that tell your colleagues about your competencies, whereas expertise is more specific to a product or system. For example, I could list “data analysis” as a skill but enter “Excel Pivot Tables” in the *Ask me about* section.

1. Scroll down to the *Skills and expertise* section.

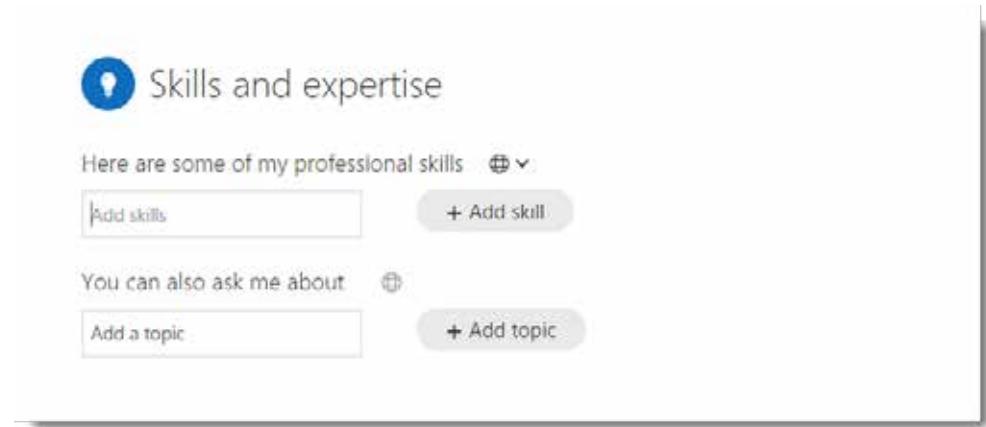


Figure 1-61 The Skills and expertise section.

2. Type in the name of the skill; if it was already added to the system by someone else, the keyword will appear as a suggestion.
3. Click the suggested skill keyword.

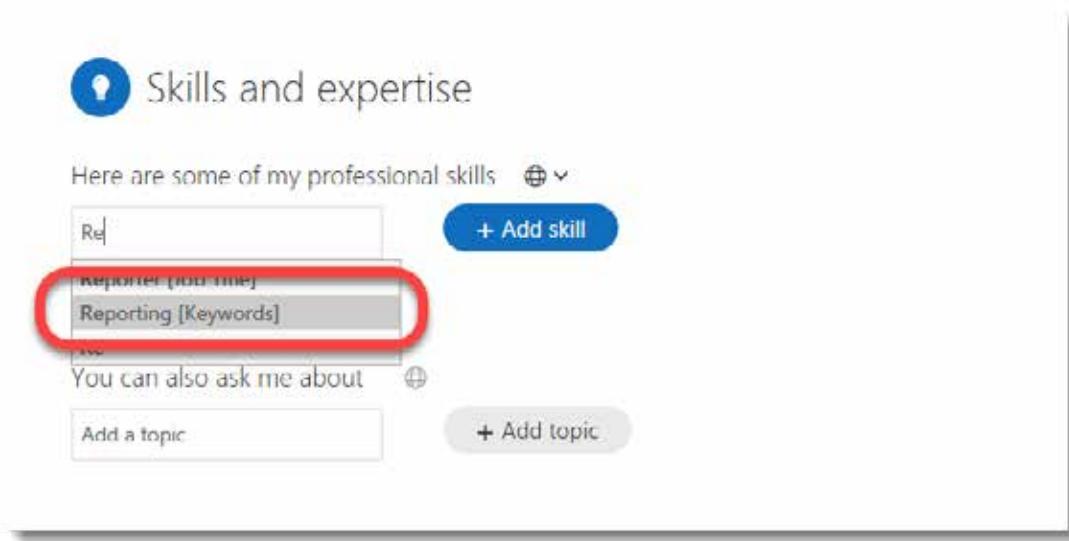


Figure 1-62 Skill keyword.

4. If the skill has not previously been entered, you can type the name and click the **Add skill** button.

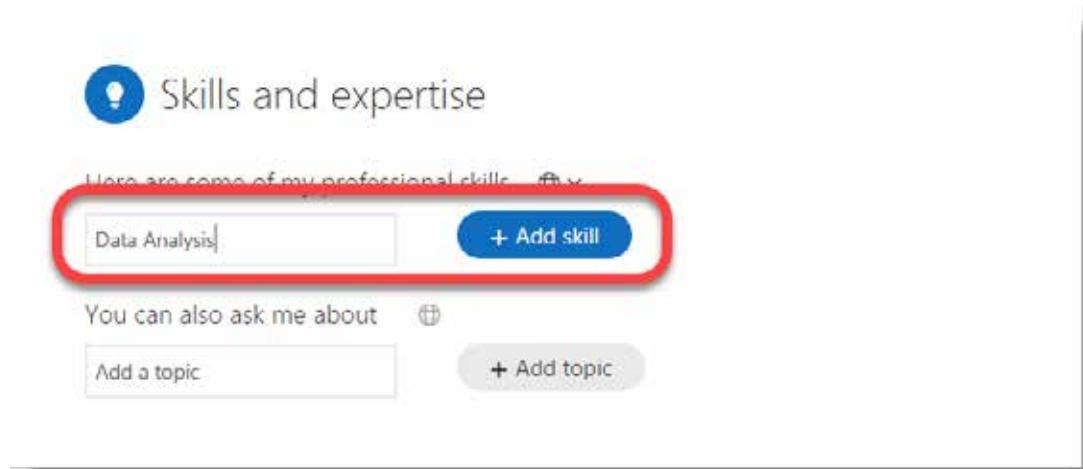


Figure 1-63 The Add skill button.

5. Use the same method to add topics to the *You can also ask me about* field.

1.6.9 SCHOOLS AND EDUCATION

Use the methods described in steps 1 to 4 in the previous sections to add the names of the school, college, or university that you have attended.

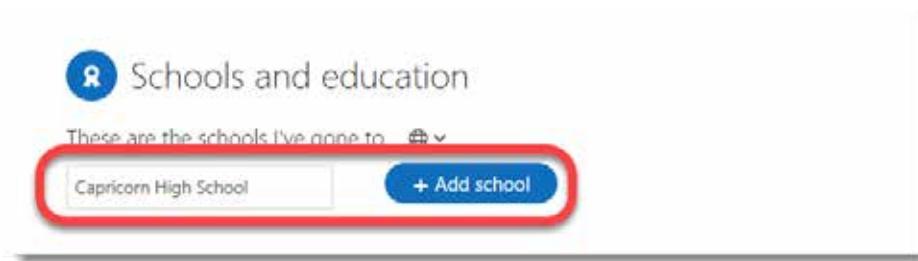


Figure 1-64 The Add school button.

1.6.10 INTERESTS AND HOBBIES

Use the methods described in steps 1 to 4 in the earlier sections to list your hobbies and interests.

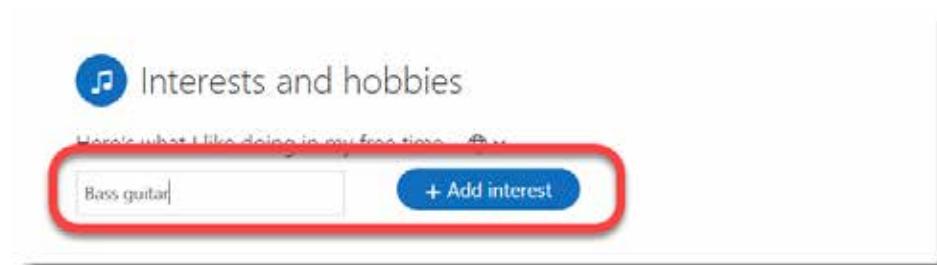


Figure 1-65 Add a hobby or interest.

1.7 PROFILE REVIEW

After you have updated your profile, you should confirm that the updates have been saved.

1. Scroll to the top of the *Update your profile* page.

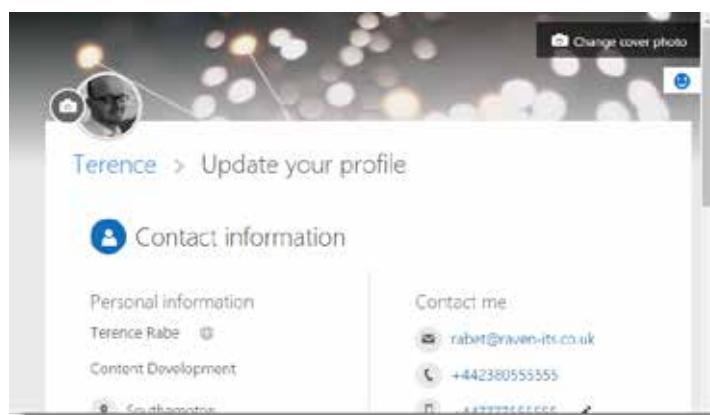


Figure 1-66 The "Update your profile" page.

2. Click on your **name** to load your profile page

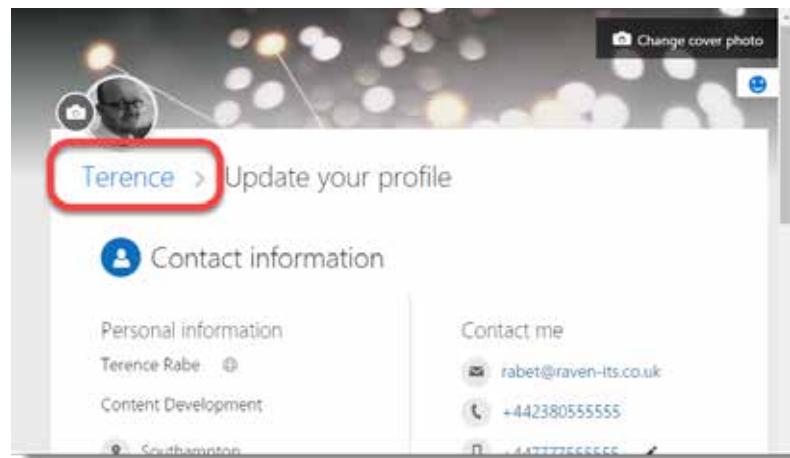


Figure 1-67 Your name link.

3. Review your profile to ensure that your information is up to date

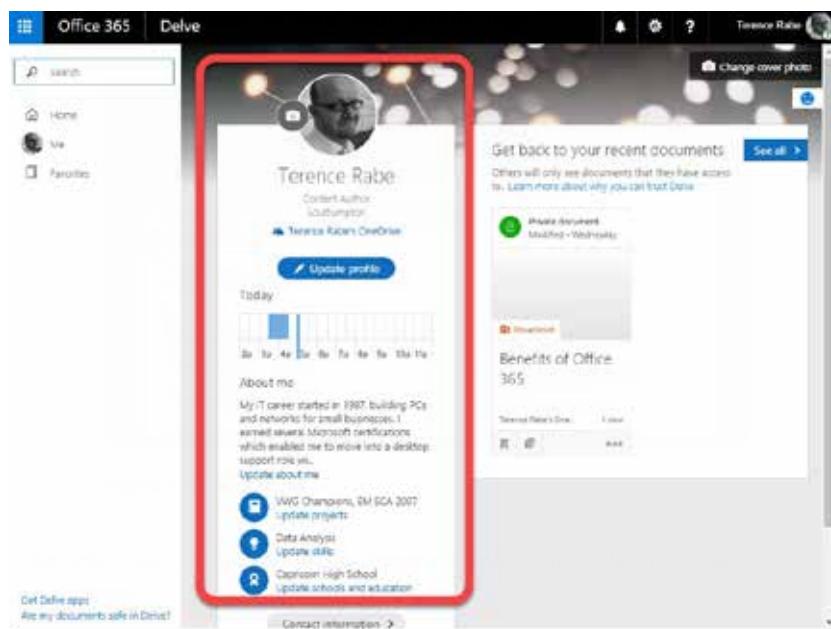


Figure 1-68 Updated profile information.

NOTE: You should remember to update your profile if anything changes, such as if you have for example, you have a new phone number or start a new project.

2 MAIL

2.1 THE OUTLOOK WEB APPS

2.1.1 WHAT ARE WEB APPS?

A *web app* is an application that runs in a web browser. Office 365 uses web apps to enable users to be productive on any device that has a supported web browser.

2.1.2 THE OUTLOOK WEB APP

The Outlook web app is designed to be a browser-based equivalent to the Microsoft Office Outlook desktop application. It provides four distinct functions; email, calendar, tasks, and contacts, which are accessed via the *Mail*, *Calendar*, *Tasks*, and *People* tiles on the App Launcher menu.

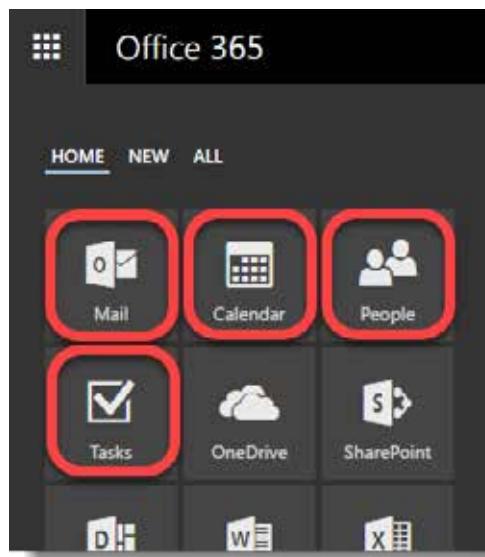


Figure 2-1 Outlook web app tiles on the app launcher.

NOTE: The desktop version of Outlook is not covered in this chapter. Please ask your IT department if you need help installing and configuring this and other desktop applications.

2.2 MAIL

2.2.1 OVERVIEW

Outlook Mail is divided into three sections:

- The *Folder list* on the left.
- The *Message list* in the middle.
- The *Reading pane* on the right.

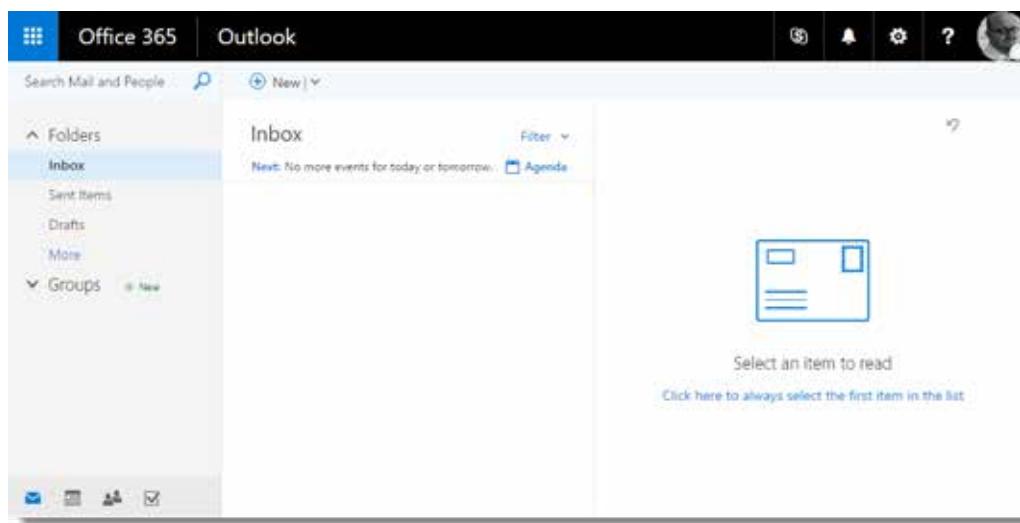


Figure 2-2 The Outlook web app.

2.2.2 ACCESSING MAIL FROM A NEW WEB BROWSER WINDOW

1. Open a web browser, type *outlook.office.com* in the address bar and press **Enter**.
2. Please sign in if you are prompted for a username and password.



Figure 2-3 The Outlook web app sign in page.

3. The Outlook Mail web app will be displayed.

2.2.3 ACCESSING MAIL FROM AN EXISTING OFFICE 365 SESSION

If you are already signed into Office 365, you can access *Mail* by clicking the app tile on the App Launcher menu.

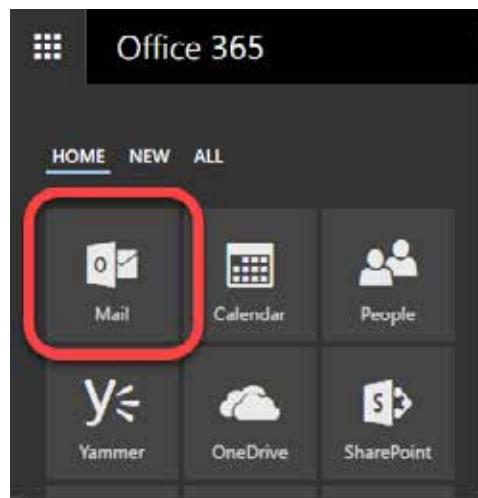


Figure 2-4 The Mail app tile on the App Launcher menu.

2.3 NEW MESSAGES

2.3.1 START A NEW MESSAGE

1. Click **New**.

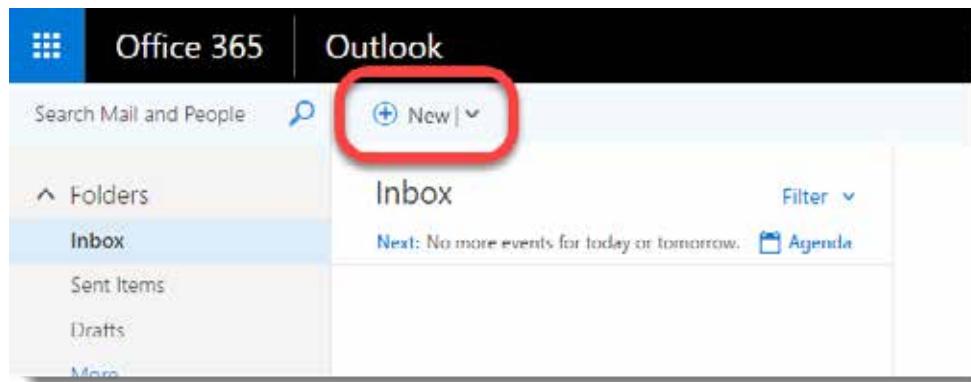


Figure 2-5 The New button.

2. A blank new message will be shown in the message pane.

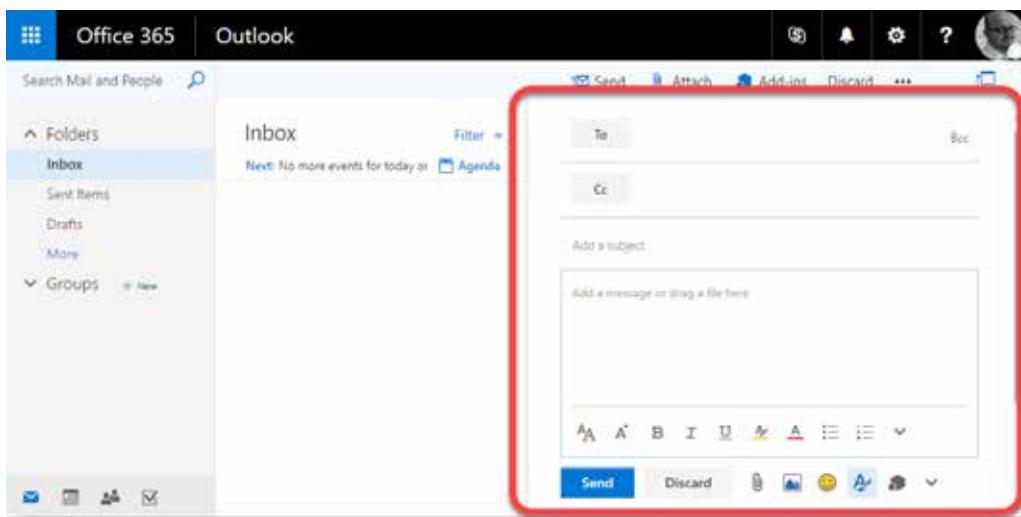


Figure 2-6 The Message pane.

2.3.2 SAVING DRAFTS

There is no need to save draft messages; messages are automatically saved in the Drafts folder as soon as you begin composing them.

2.3.3 ADD RECIPIENTS

A *recipient* is a person or group to whom you are sending a message.

1. Type the recipient's name or email address; previously used recipients may be shown as suggestions as you begin typing a name.

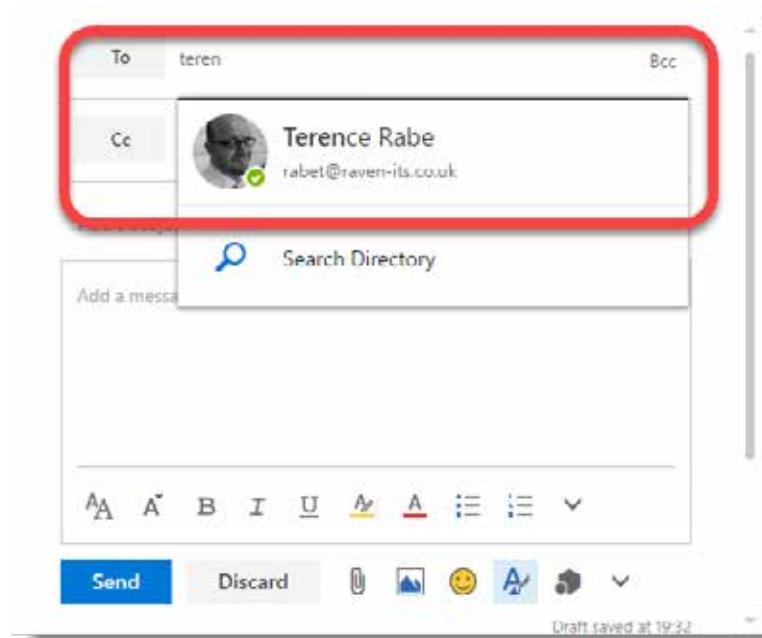


Figure 2-7 Suggested recipient.

2. If typing the recipient's name does not generate a suggestion you can either click Search Directory, or you can type the full email address.

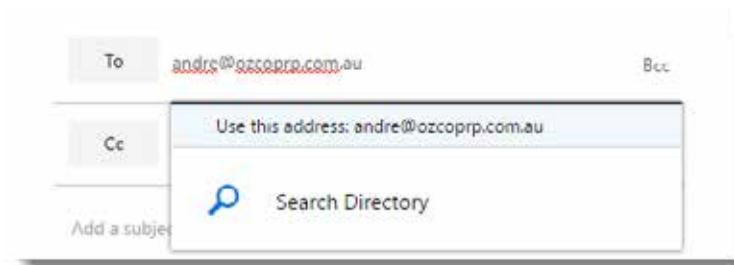


Figure 2-8 A correctly formatted email address.

NOTE: The *Search Directory* function will only search the Directory, which is a list of Office 365 user accounts held by the organisation; it does not search your contacts.

2.3.4 SEARCHING FOR CONTACTS

If the recipient is not found in the Directory, their email address might be saved in a contact stored in the Outlook *People* web app. You can look for contacts as follows:

1. Click **To**.



Figure 2-9 The To button.

2. On the *Your contacts* page, locate the contact and then click on the **plus button** to the right of their name.

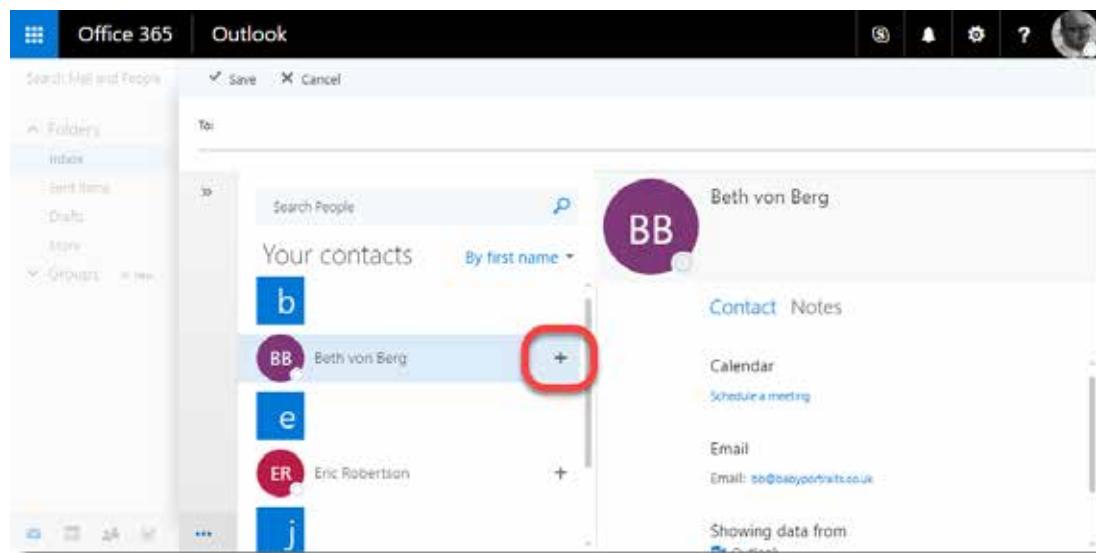


Figure 2-10 The plus button.

3. Click **Save** once you have added all the required recipients.

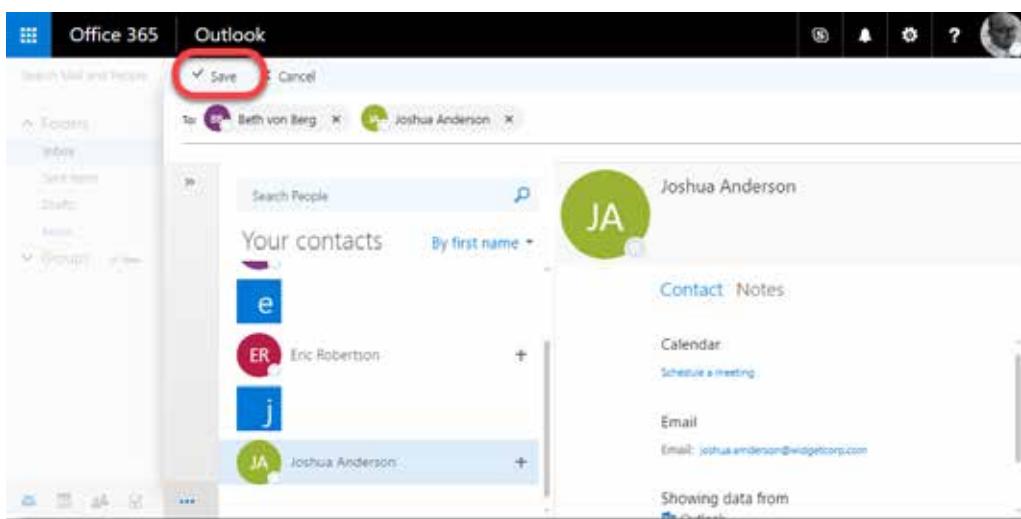


Figure 2-11 The Save button.

4. If you need to blind copy a recipient, click the **Bcc** link to add the *Bcc address field* to the message header.



Figure 2-12 The Bcc link.

5. Add recipients to the Bcc field using the methods previously described.



Figure 2-13 The Bcc field.

2.3.5 ADD A SUBJECT

The subject is typed in the *subject* field.

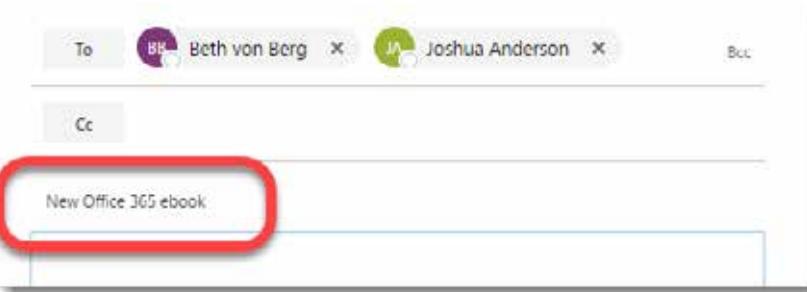


Figure 2-14 The Subject line.

2.3.6 MESSAGE

The message, also known as the *body* of the email, can contain plain text, formatted text, images, and emojis. Images and emojis are covered in a later topic.

1. Place the cursor in the message field.
2. Type the text of the message.

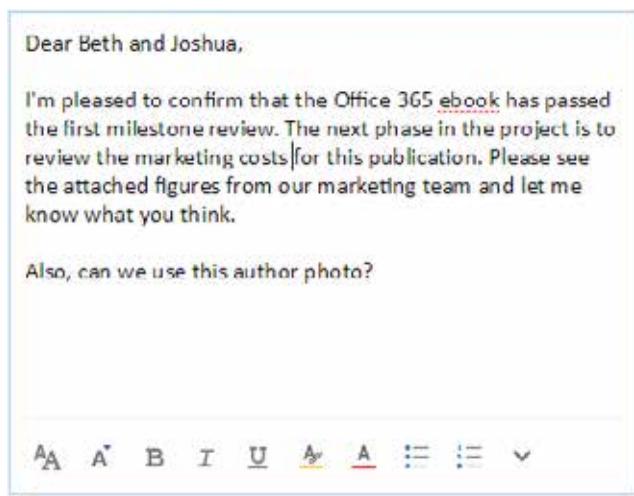


Figure 2-15 Text in the message field.

3. Use the buttons displayed below the message text to add formatting.

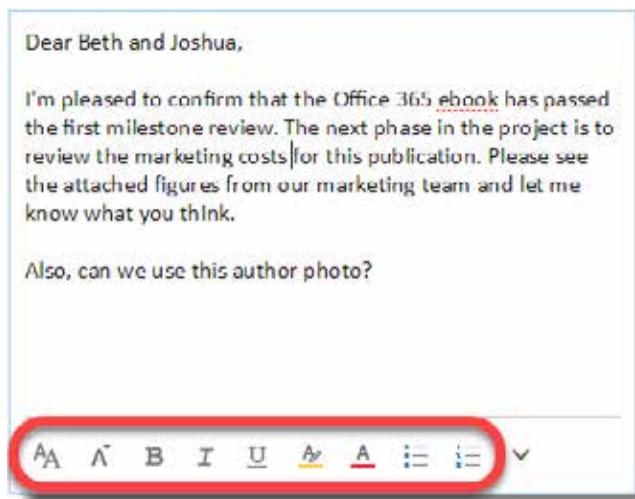


Figure 2-16 Text formatting controls.

NOTE: Spell-checking may be performed by your web browser. If spell check is not working as expected, please ask your IT department for help.

2.4 ATTACHMENTS

2.4.1 LIMITATIONS OF ATTACHMENTS

Email attachments are a popular method of sharing files, but there are limitations in their use. For example, the following may occur:

- The message fails to send because the attachment is too large.
- Anti-virus or firewall software deletes the attachment.
- Users can become confused over which version of a file to use.
- Collating changes from multiple attachments into one file is time-consuming and prone to error.

2.4.2 ATTACH AS A COPY

Office 365 supports the original method, which is to attach a copy of a file to the message.

1. Click on the **Attach** button below the message text field.

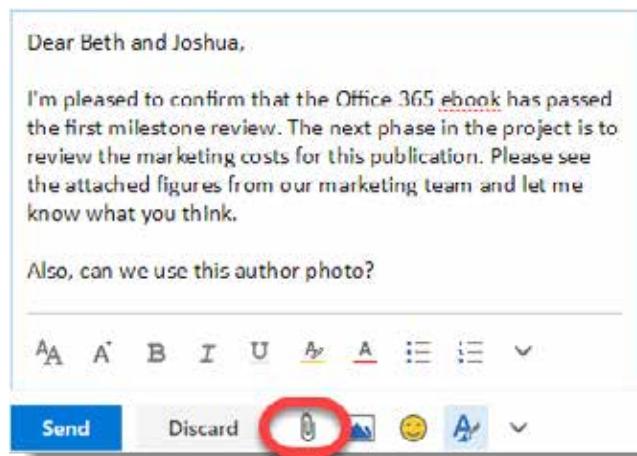


Figure 2-17 The Attach button.

2. Click on **Computer** on the list of locations.

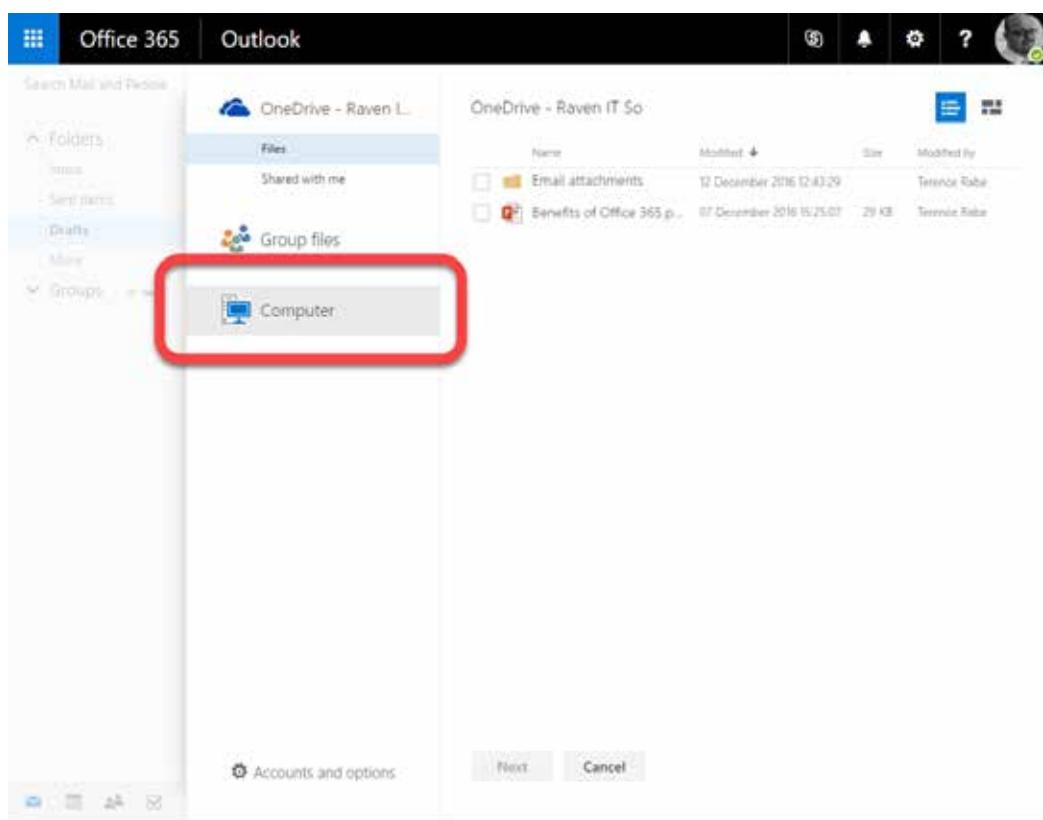


Figure 2-18 The Computer option.

3. Browse your computer to determine which file you would like to attach, then select Open once you have chosen a file.

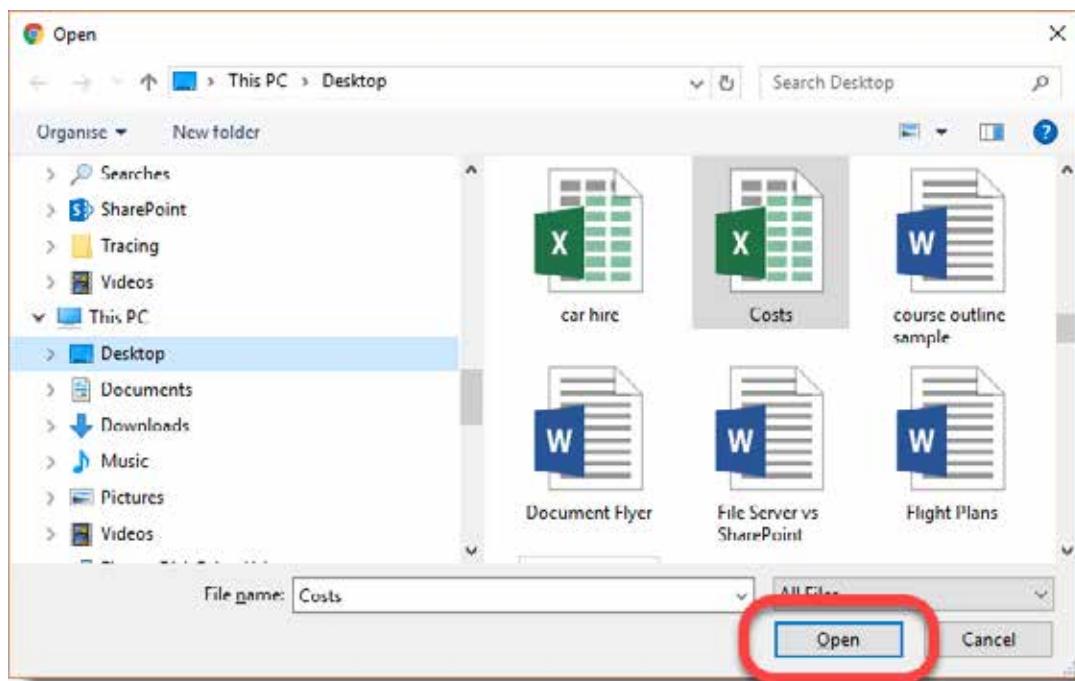


Figure 2-19 Select a file to attach.

4. Select **Attach as a copy** on the *How do you want to attach this file* prompt.

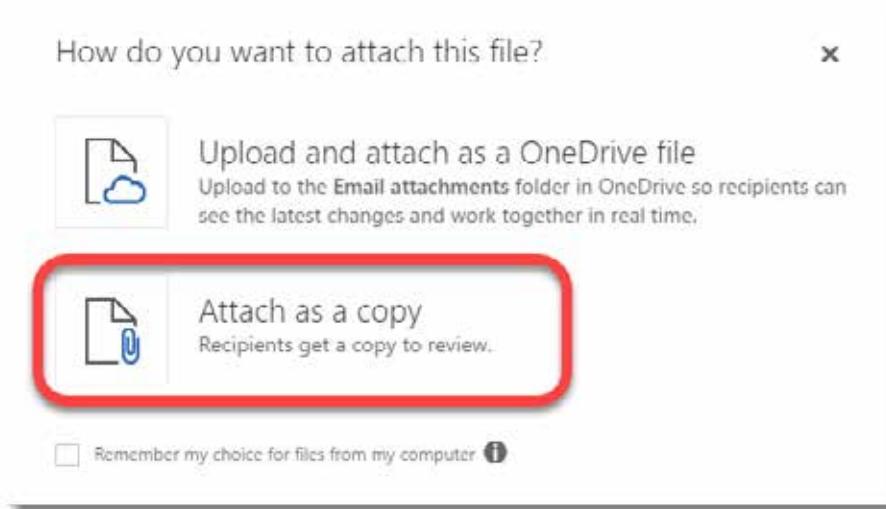


Figure 2-20 Attach as a copy.

5. Confirm that the attachment is successful.

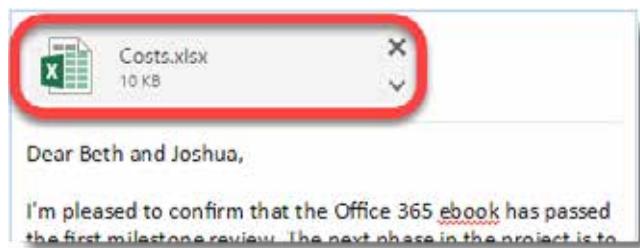


Figure 2-21 A copy attachment.

2.4.3 DRAG-AND-DROP ATTACHMENTS

You can also attach a copy of a file using *drag-and-drop* instead of browsing for it.

NOTE: The drag-and-drop method creates copy attachments by default.

1. Click on the file and hold the mouse button down while moving the mouse to **drag** the file.
2. Drag the file over the message body field and release the mouse button to **drop** the file when the *Drop files here* message appears.

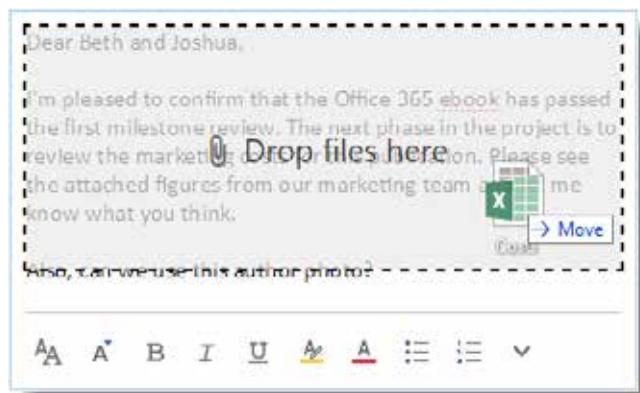


Figure 2-22 The “Drop files here” message.

3. The attachment will be shown as an icon above the message body to confirm that the attachment has been successful.



Figure 2-23 Attachment.

NOTE: The drag-and-drop attachment function may fail with some older operating systems or web browsers; please ask your IT department for help if it doesn't work as expected.

2.4.4 ATTACH AS A ONEDRIVE FILE

Office 365 introduces a new method of attaching files, known as *Attach as a OneDrive file*.

Using this method, the file is uploaded to the *Email attachments* folder in OneDrive, and a hyperlink is added to the message, instead of a copy of the file.

1. Click on the **Attach** button below the message text field.

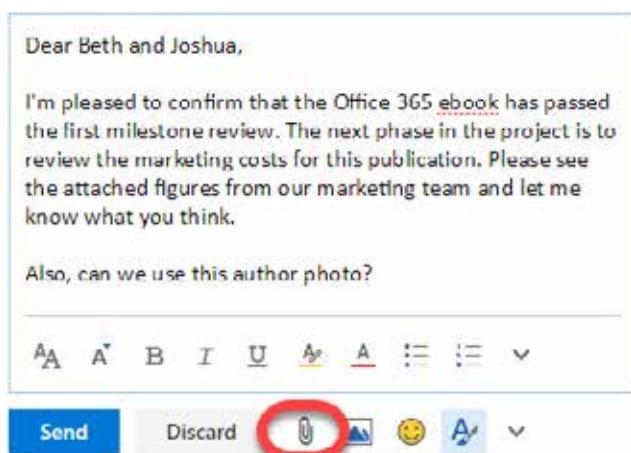


Figure 2-24 The Attach button.

2. Click on **Computer** on the list of locations.
3. Browse your computer to determine which file you would like to attach, then select **Open** once you have chosen a file.
4. Select **Upload and attach as a OneDrive file**.

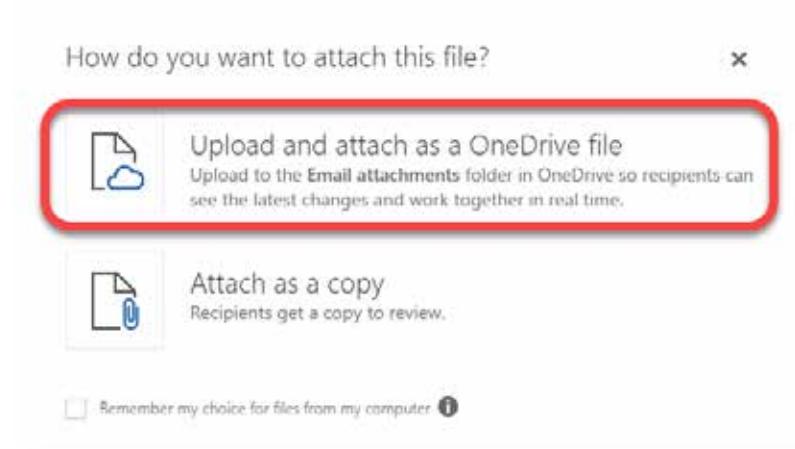


Figure 2-25 Attach as a OneDrive file.

5. Confirm that the attachment is successful.

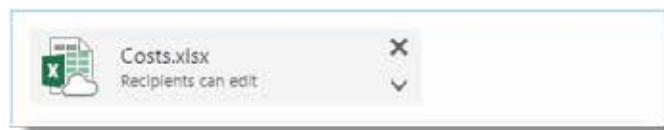


Figure 2-26 A OneDrive link attachment.

NOTE: The attachment icon has a small cloud graphic to indicate that it is a OneDrive attachment.

2.4.5 CONVERT ATTACHMENTS TO ONEDRIVE LINKS

A *file copy* attachment can be converted to a *OneDrive link* attachment.

1. Attach a file to a message using the *drag-and-drop* or *file copy* method.
2. Click on the attachment options arrow.

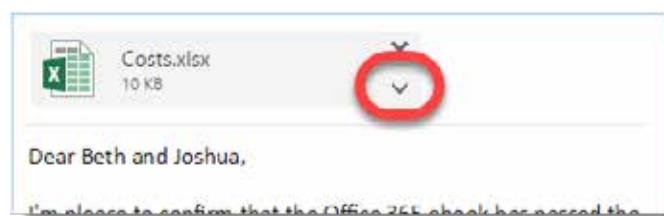


Figure 2-27 Attachment options drop-down.

3. Select **Upload to OneDrive – ...** from the options menu.

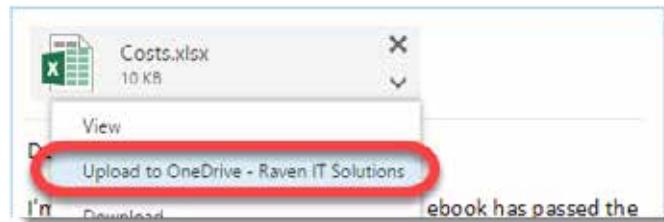


Figure 2-28 Upload to OneDrive option.

4. Wait while the file is uploaded to your OneDrive.

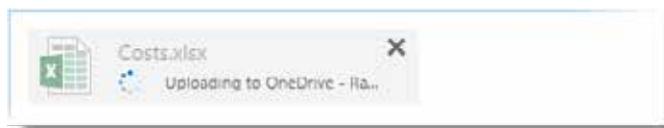


Figure 2-29 File uploading to OneDrive.

5. After a successful upload, the cloud symbol is shown on the attachment icon.



Figure 2-30 OneDrive attachment.

2.4.6 ONEDRIVE ATTACHMENT PERMISSIONS

You may have noticed that recipients can by default edit the file stored in OneDrive.



Figure 2-31 OneDrive attachment permission summary.

You should change the permissions before sending the message if this is not appropriate.

1. Click on the **drop-down arrow**.



Figure 2-32 Attachment options drop-down.

2. Select **Change permissions** from the options menu.

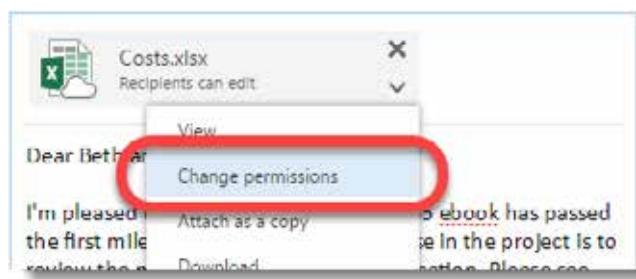


Figure 2-33 The Change permissions option.

3. Select the appropriate permissions and click **OK**.

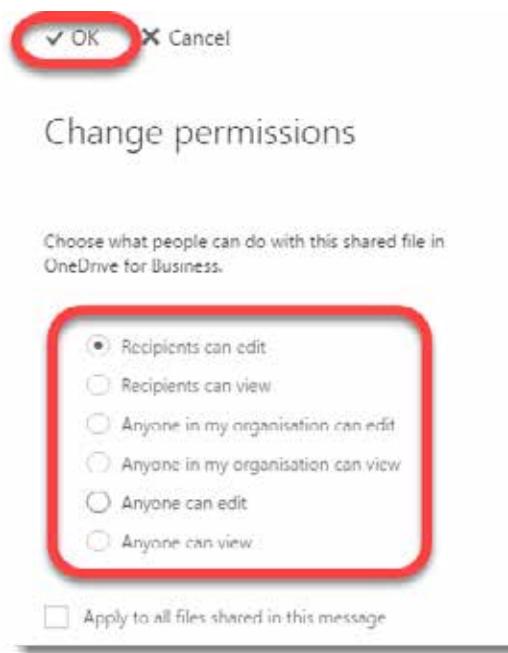


Figure 2-34 Attachment permission options.

2.4.7 UNDERSTANDING PERMISSION OPTIONS

Users who receive an email with a OneDrive link can potentially forward it to anyone, so it is important to understand how permissions can be used to control which *types* of users may use the link.

Please review the options below before setting permissions.

- Option 1 & 2: “*Recipients can edit/view*” includes only users who are specifically named, no other user can access it even if the message is forwarded to them.
- Option 3 & 4: “*Anyone in my organisation* can edit/view” means that any user who has an Office 365 account with your organisation can open the link if the message is forwarded to them.
- Option 5 & 6: “*Anyone* can edit/view” means any user on the Internet can open the link if they receive a copy of the message; this option should be used only for documents that are intended for public distribution.

If you are still unsure about which option to choose, please ask your IT department for advice.

2.4.8 REMOVE AN ATTACHMENT

1. Click the **cross icon** on the attachment to remove it.

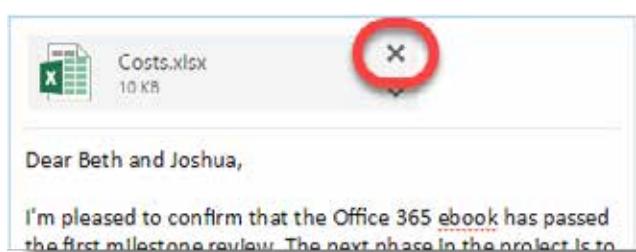


Figure 2-35 The cross icon.

2.4.9 ATTACH A FILE STORED IN ONEDRIVE

Files that are already stored in OneDrive can also be attached to new messages.

1. Click the **Attach** icon below the message body field.

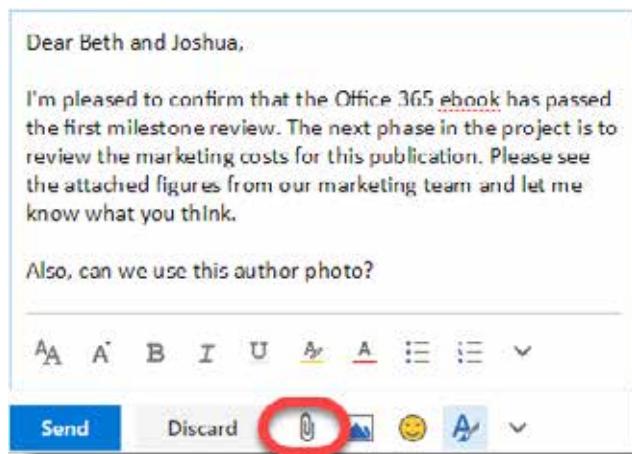


Figure 2-36 The Attach button.

2. Select **Files** under OneDrive... to see files in your OneDrive.

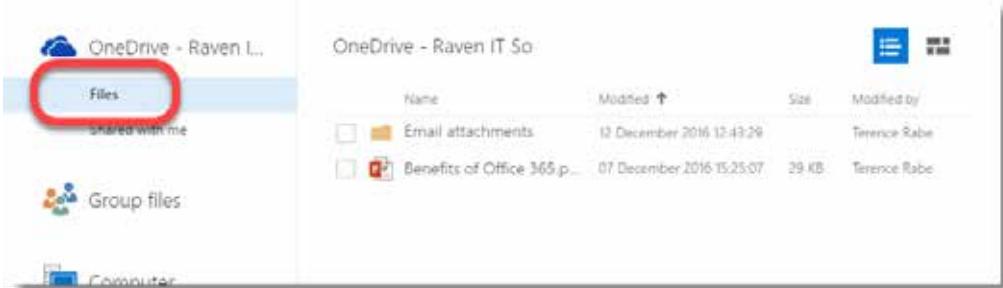


Figure 2-37 Files option on the locations list.

3. Check the box next to the file name and click **Next**; multiple boxes can be checked if more than one file needs to be attached.

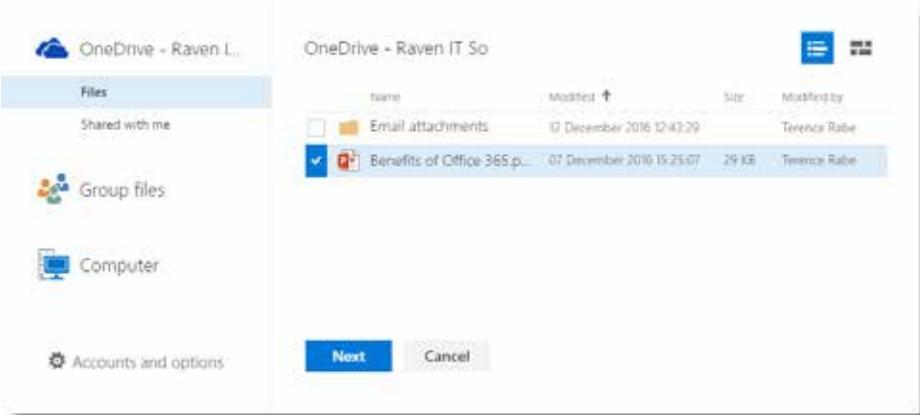


Figure 2-38 Select a file and click Next.

4. Select **Upload and attach as a OneDrive file** on the *How do you want to attach this file?* prompt.

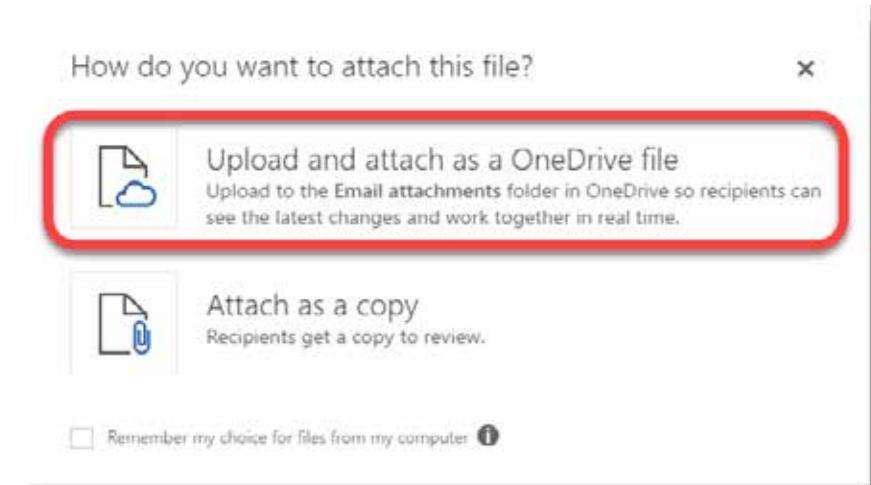


Figure 2-39 Upload and attach as a OneDrive file option.

NOTE: The file is already in OneDrive, so will not be uploaded again, which means it will not be stored in the Email Attachments folder in OneDrive but will remain in its original location.

5. Confirm that the cloud graphic appears on the attachment icon.

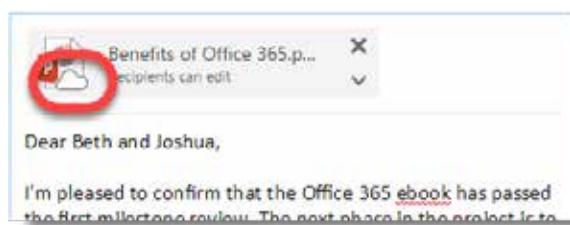


Figure 2-40 The cloud graphic indicating a OneDrive link.

2.5 INLINE IMAGES

Instead of attaching an image to your message, where it appears as an icon in the message header, you can use the *inline image* feature to embed the image in the message body. The image is still attached to the message, but if Outlook (desktop or web app) is used to read the message, the image will appear inline, as illustrated below.

2.5.1 INSERT AN INLINE IMAGE

1. Position the cursor at the point in the message body where the image should be added.

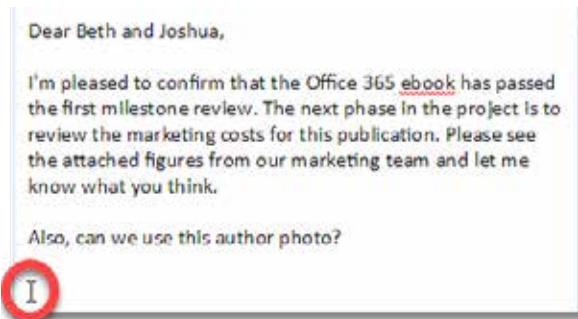


Figure 2-41 The cursor position.

2. Click the **Insert pictures inline** button.

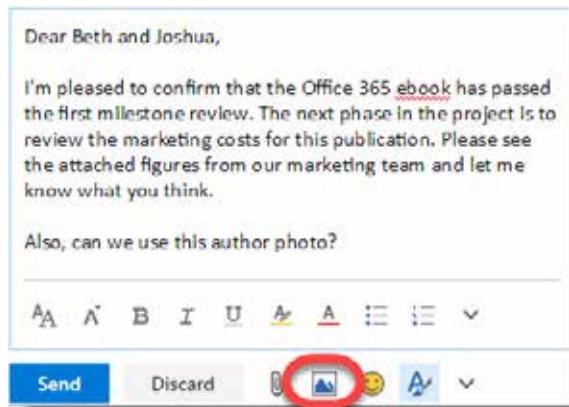


Figure 2-42 The "Insert pictures inline" button.

3. Browse your computer to determine which file you would like to attach, then select Open once you have chosen a file.

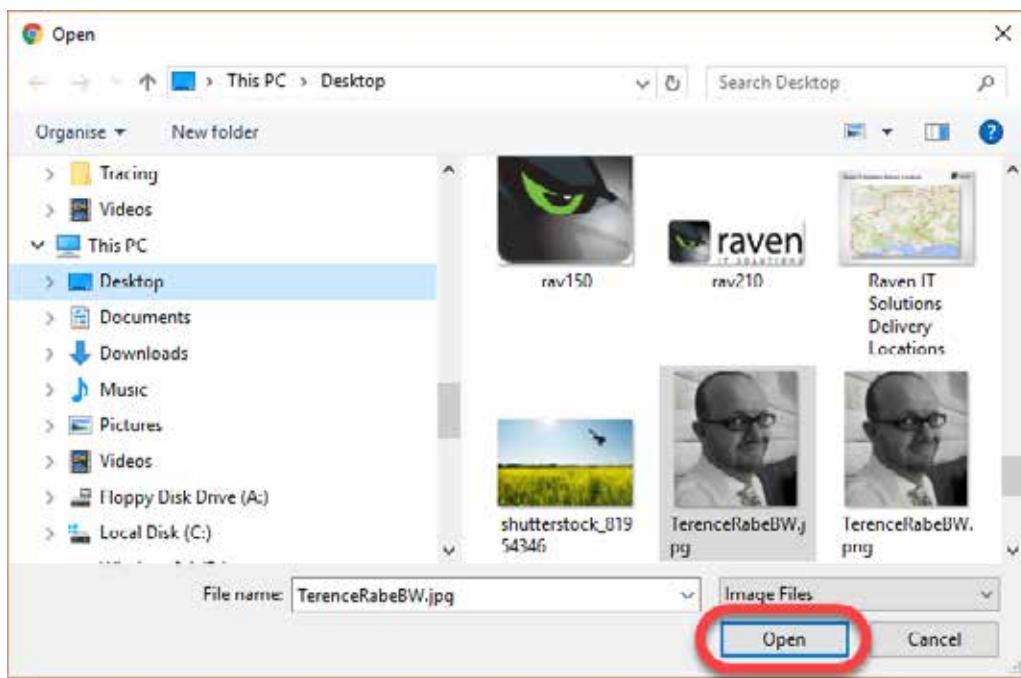


Figure 2-43 The Open dialogue box.

4. The image will be inserted into the email message.

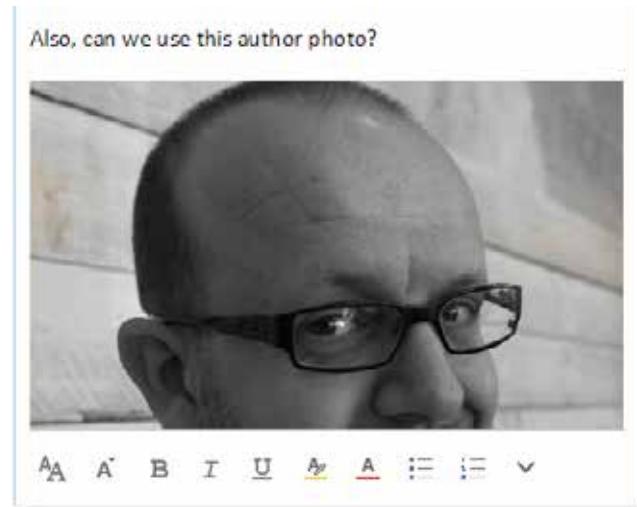


Figure 2-44 An inline image.

2.5.2 RESIZE AN IMAGE

1. If the image is too large, select the image and then use the drag handles to resize it.

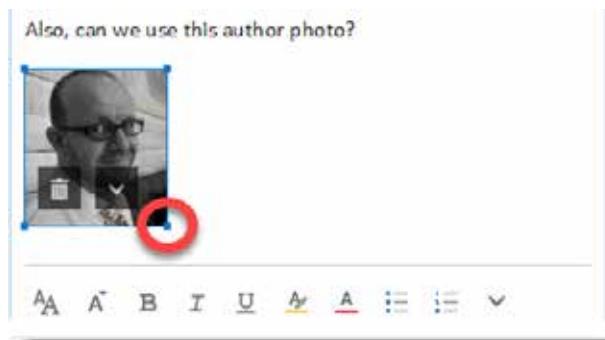


Figure 2-45 Image resizing drag handle.

2.5.3 REMOVE AN INLINE IMAGE

1. Click the **recycle bin icon** to remove an inline image.

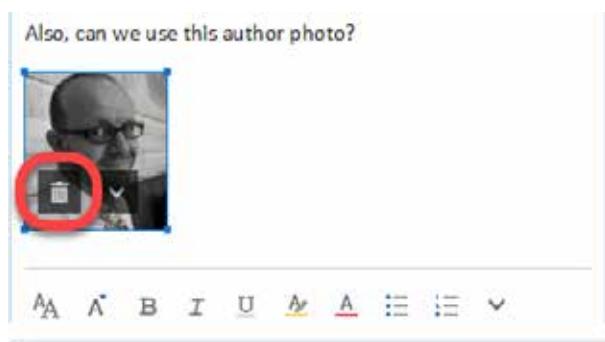


Figure 2-46 Recycle bin icon on an inline image.

2.5.4 INLINE IMAGE PICTURE TOOLS

Several image effects are available to customise your inline image.

1. Click on the image and then select the **Picture tools** button to open the options menu.

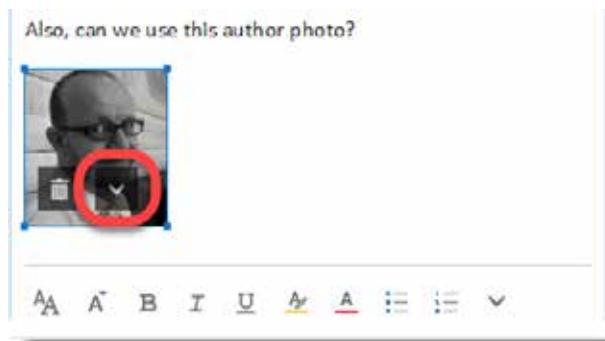


Figure 2-47 The Picture tools button.

2. Select the tool that you wish to use; for example, you can resize or rotate the image, apply borders or shadows, or reset the image, which removes all effects and resets the image to its original size



Figure 2-48 Picture tools options menu.

2.6 EMOJIS

Emojis (actual small, smiling face) can make messages more expressive but may be regarded as unprofessional and not suitable for business email. Please check your organisation's guidelines before using emojis.

1. Position the cursor at the point in the message body where the emoji should be added.

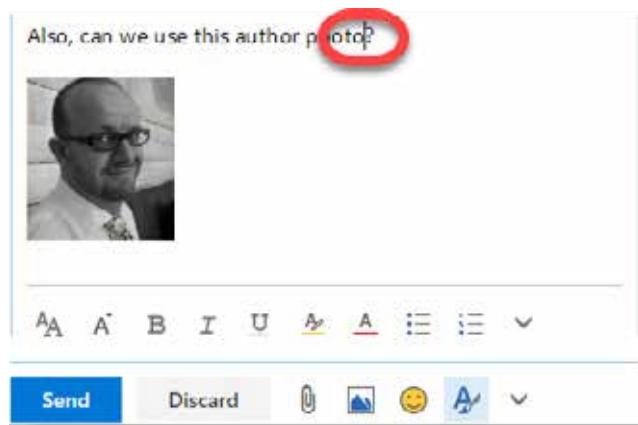


Figure 2-49 The cursor position.

2. Click the ☺ button.

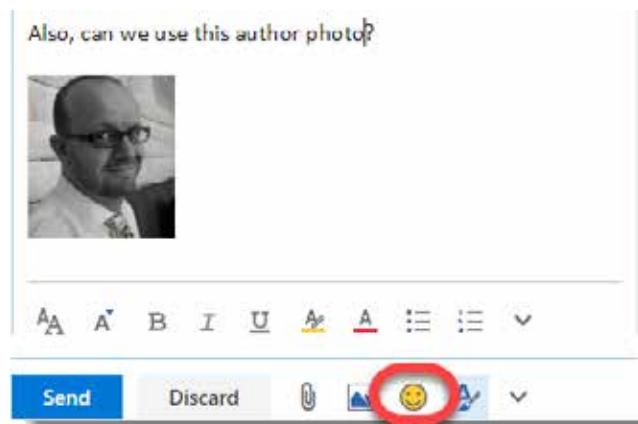


Figure 2-50 The Emoji button.

3. Choose the emoji category button from the pop-up list.

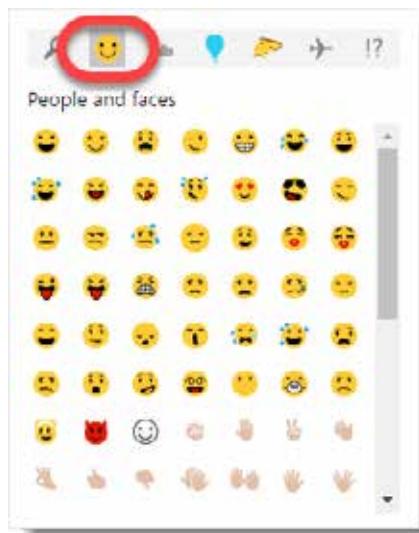


Figure 2-51 The emoji category button.

4. Click the emoji to insert it into the message.

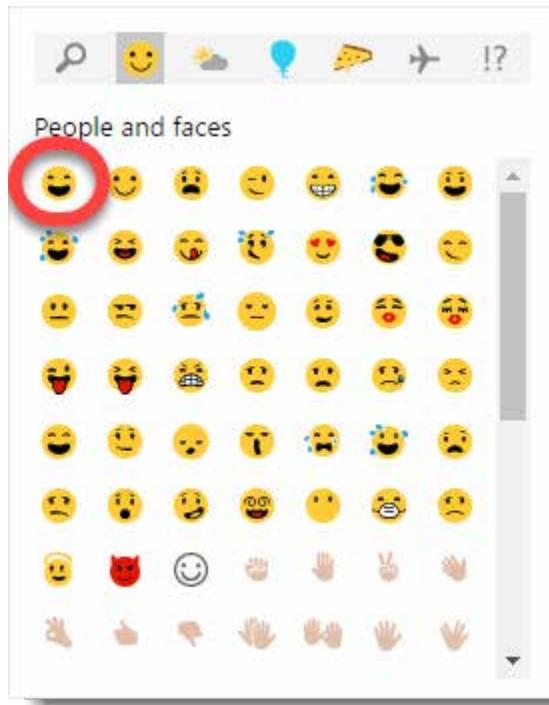


Figure 2-52 The Smiley emoji.

5. The emoji works like any other character in the message; it can be deleted or moved using cut and paste.

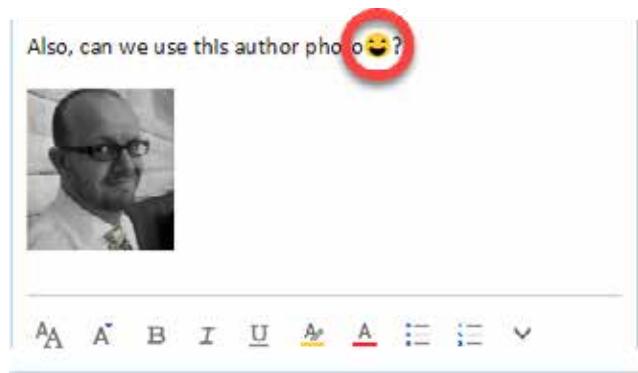


Figure 253 An emoji in the message body.

2.7 MORE ACTIONS

The *More actions* button enables you to perform message management functions and set message options.

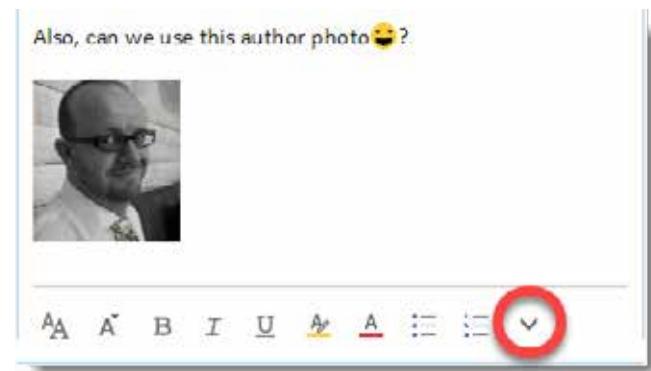


Figure 2-54 The More actions button.

2.7.1 SAVE DRAFT

If your internet connection or computer is unreliable or there is some other reason that the browser window might close before you can send the message, you may wish to manually save the message to the Drafts folder to reduce the risk of losing unsaved changes.

1. Click **More actions**.
2. Select **Save draft** from the pop-up menu.

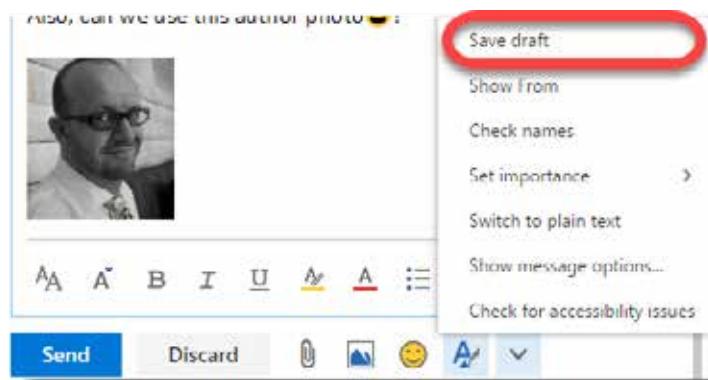


Figure 2-55 The Save draft option.

2.7.2 SHOW FROM

If you have been delegated permission to send messages *on behalf of* another user or to send messages *from* another user (i.e. impersonate another user), you may need to select from which address the message is being sent.

1. Click **More actions**.
2. Select **Show From**.
3. The *From* field will now be shown at the top of the new message.
4. Click the **From** button to show alternative sender addresses.

NOTE: Special permissions need to be set up before you can change sender addresses. Please ask your IT department for assistance.

2.7.3 CHECK NAMES

The check names feature is used to resolve an incomplete name, or email address, to a valid recipient.

1. Review the recipients in the message header; if the recipient name is shown with red text, it means that they are not recognised as a valid recipient.

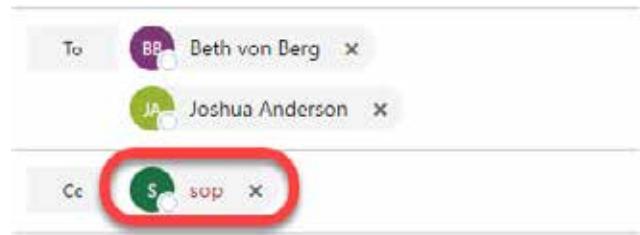


Figure 2-56 An invalid recipient.

2. Click **More actions**.
3. Select **Check names**.

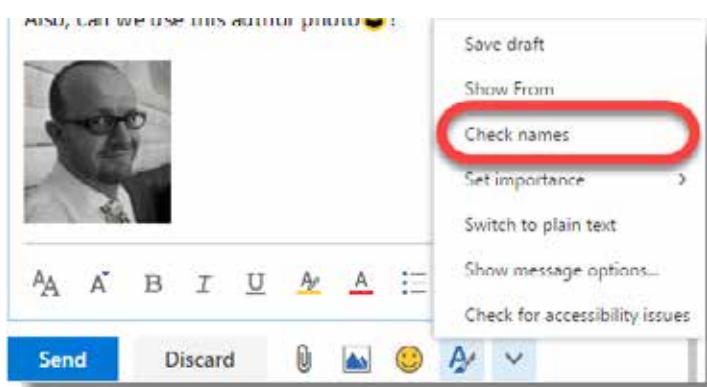


Figure 2-57 The Check names option.

4. The Mail app will search the *Directory* (users in your Office 365 organisation) and your contacts (users in the Outlook *People* app), and attempt to resolve the name.
5. If more than one name matches the partial entry, the list will display all matching options; click on the correct recipient to select it.

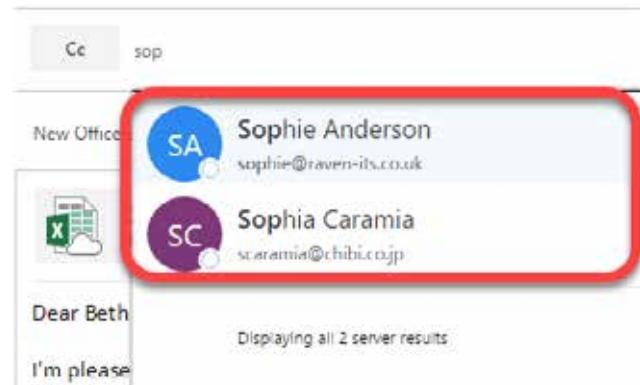


Figure 2-58 Multiple matching recipients.

6. If no match can be found, then the *No match was found* message will be displayed.



Figure 2-59 The No match was found message.

2.7.4 SET IMPORTANCE

Setting the importance of a message helps recipient classify and prioritise the message.

1. Click **More actions**.
2. Select **Set importance**.

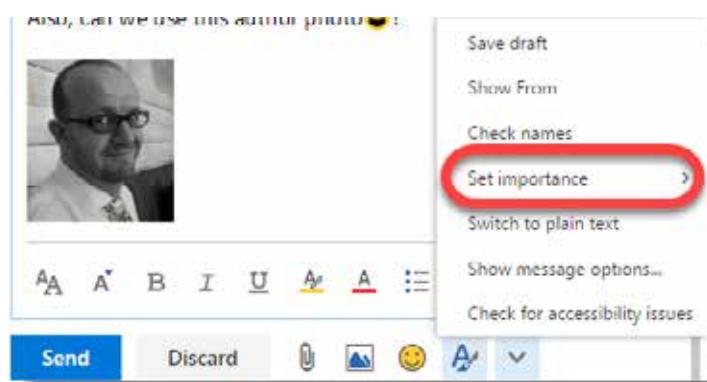


Figure 2-60 The Set importance option.

3. Select the level of importance.

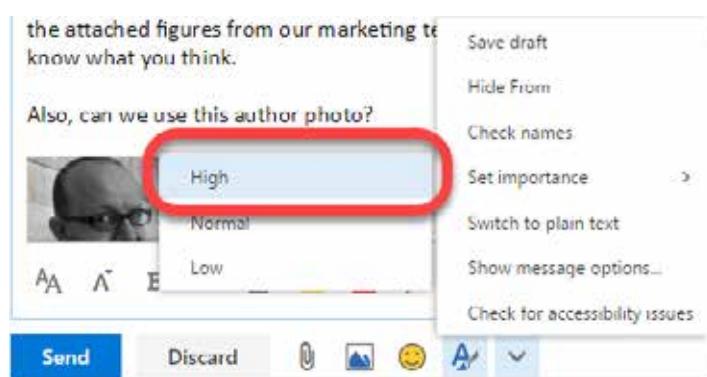


Figure 2-61 Setting High importance on a message.

4. An importance marker will be displayed in the subject field.

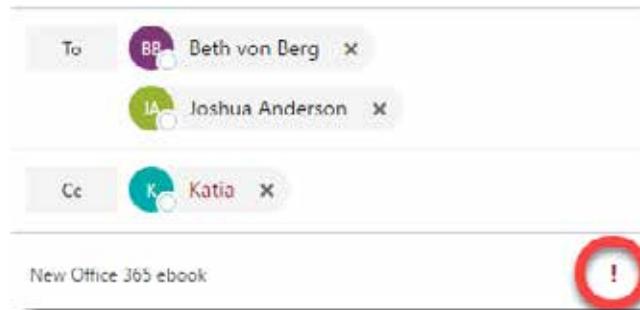


Figure 2-62 The High Importance marker in the subject field.

2.7.5 SWITCH TO PLAIN TEXT

Some e-mail applications are unable to display *rich text* formatting, such as coloured, bold, italicized, or underlined text. If a recipient is unable to read a message due to a text formatting error, you can resend the message in plain text format.

1. Click **More actions**.
2. Select **Switch to plain text**.

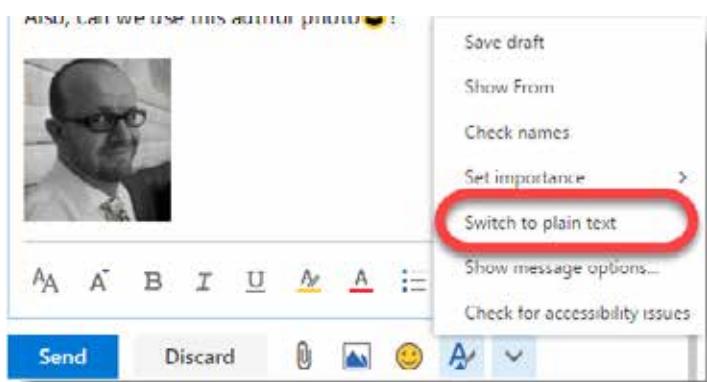


Figure 2-63 The Switch to plain text option.

3. If you have attachments linked from OneDrive, you will receive a warning that these attachments need to be removed before switching to plain text; click **OK** and remove the attachments, then repeat steps 1 and 2.

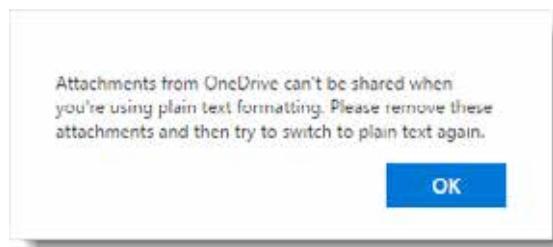


Figure 2-64 The OneDrive attachment warning.

4. You may receive a warning that formatting may be lost when switching to plain text; click **OK**.

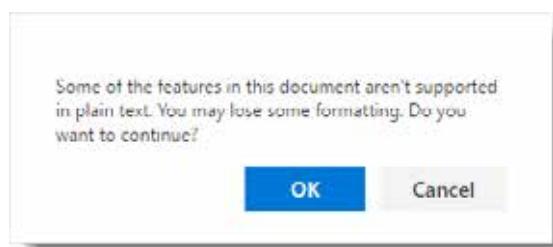


Figure 2-65 The loss of formatting warning.

NOTE: Inline images will be converted to attachments when switching to plain text. Emojis may be retained, but you will not be able to insert new emojis.

2.7.6 SENSITIVITY

Message sensitivity is a feature that classifies a message to help recipients understand how a message should be handled. The sensitivity doesn't add any security to a message; it serves only as a guideline to the recipient. Please refer to your organisation's guidelines on using sensitivity classifications if you are unsure of how to use them.

1. Click **More actions**.
2. Select **Show message** options.

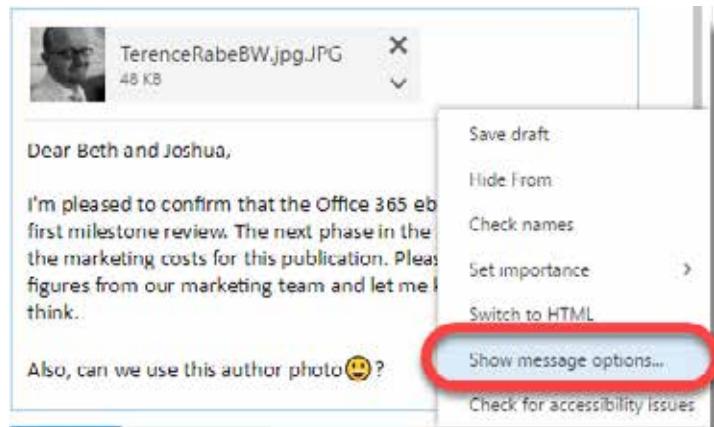


Figure 2-66 The “Show message options...” menu option.

3. On the *Message* options dialogue, click the **Sensitivity** drop-down arrow.



Figure 2-67 The Sensitivity drop-down arrow.

4. Choose a sensitivity classification.

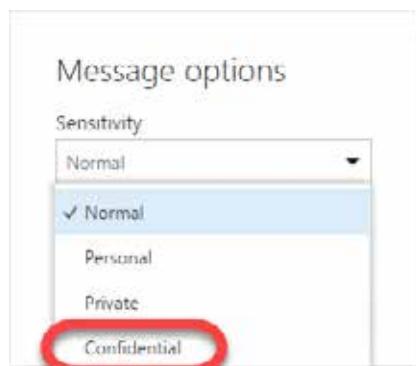


Figure 2-68 Sensitivity options menu.

5. Click **OK**.

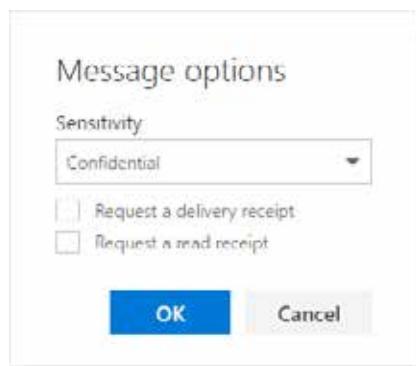


Figure 2-69 Message sensitivity set to Confidential.

6. Confirm that the sensitivity level is displayed at the top of the message.

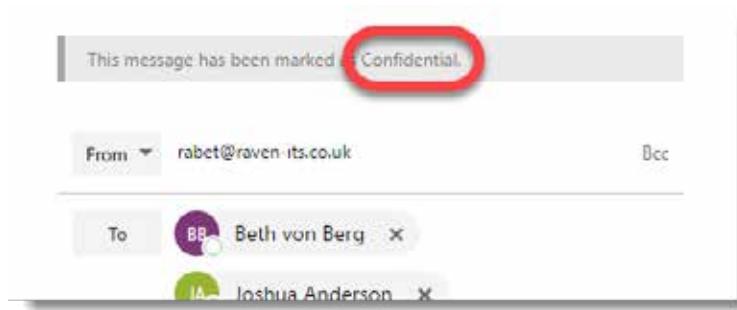


Figure 2-70 Message sensitivity marking.

2.7.7 DELIVERY RECEIPT

A *delivery receipt* is generated when your email server transfers the message to the recipient's email server. It is not proof that the message was read, simply that the message has been delivered to their organisation's email server. Delivery receipts can be used to prove that messages are delivered when the recipient or their organisation's IT department claims that they are not receiving your messages.

1. Click **More actions**.
2. Select **Show message options**.
3. On the *Message options* dialogue, **check** the box next to *Request a delivery receipt*.

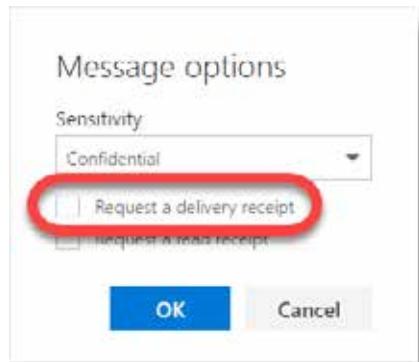


Figure 2-71 The delivery receipt checkbox.

2.7.8 READ RECEIPT

A read receipt is generated when the recipient reads your message. It can be set in conjunction with a delivery receipt or on its own.

NOTE: The recipient may be given the option to withhold the read receipt, or their organisation's email security settings might block the read receipt from being returned, so read receipts should be used only to confirm that message have been read.

1. Click **More actions**.
2. Select **Show message options**
3. On the *Message options* dialogue, click the **check box** next to *Request a read receipt*.

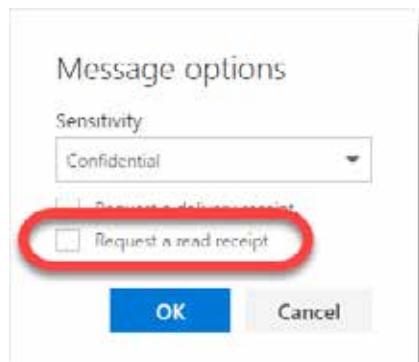


Figure 2-72 The read receipt checkbox.

2.7.9 CHECK FOR ACCESSIBILITY ISSUES

If the email messages that you send must comply with accessibility requirements, you can run the *Accessibility Checker*.

1. Click **More actions**.
2. Select **Check for accessibility issues**.



Figure 2-73 The "Check for accessibility issues" option.

3. The Accessibility Checker will analyse the message for possible accessibility issues; if any are found you can correct them and run the Accessibility Checker again.

NOTE: If your organisation needs to comply with a specific accessibility standard you should check with your IT department whether the Outlook Accessibility Checker meets those standards.

2.8 EMAIL SIGNATURES

2.8.1 CREATE A SIGNATURE

1. Click **Settings**.

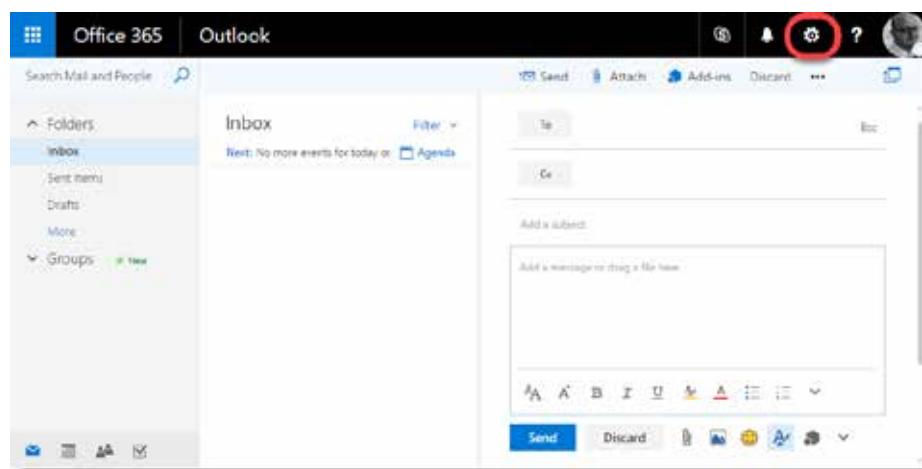


Figure 2-74 The Settings button.

2. Scroll down and locate the *Your app settings* area.

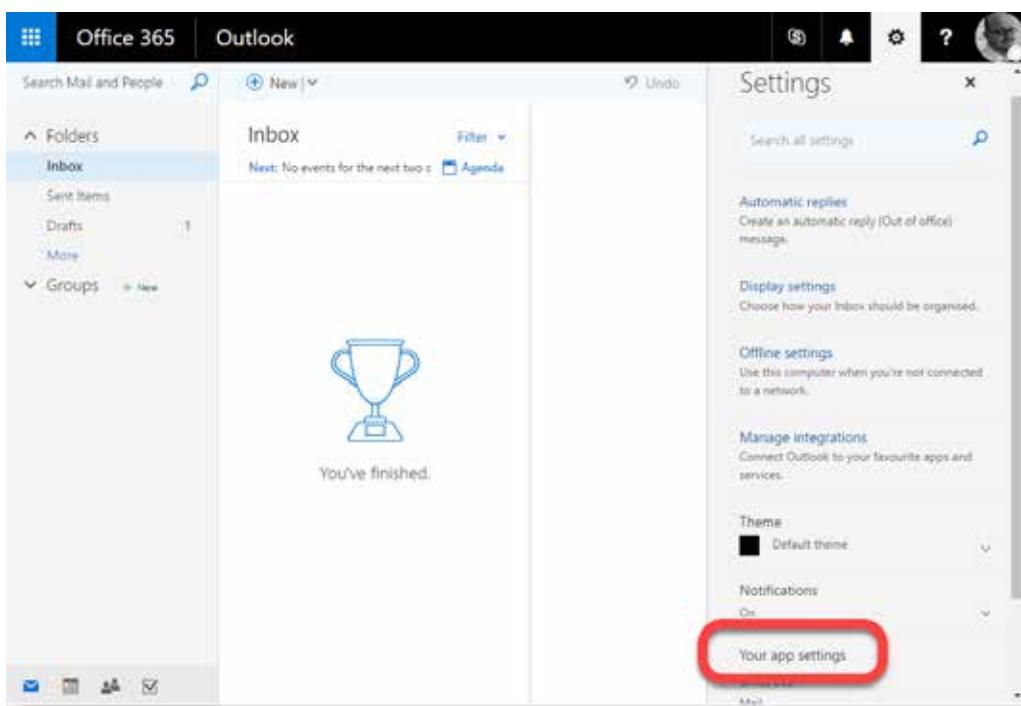


Figure 2-75 Your app settings.

3. Click the **Mail** link under *Your app settings*.

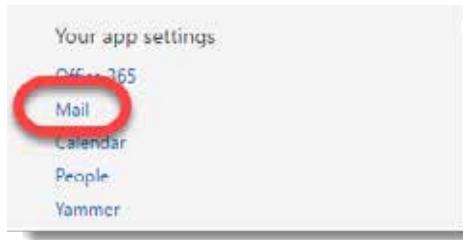


Figure 2-76 The Mail link.

4. On the *Options* screen, scroll down and find the **Layout** heading.

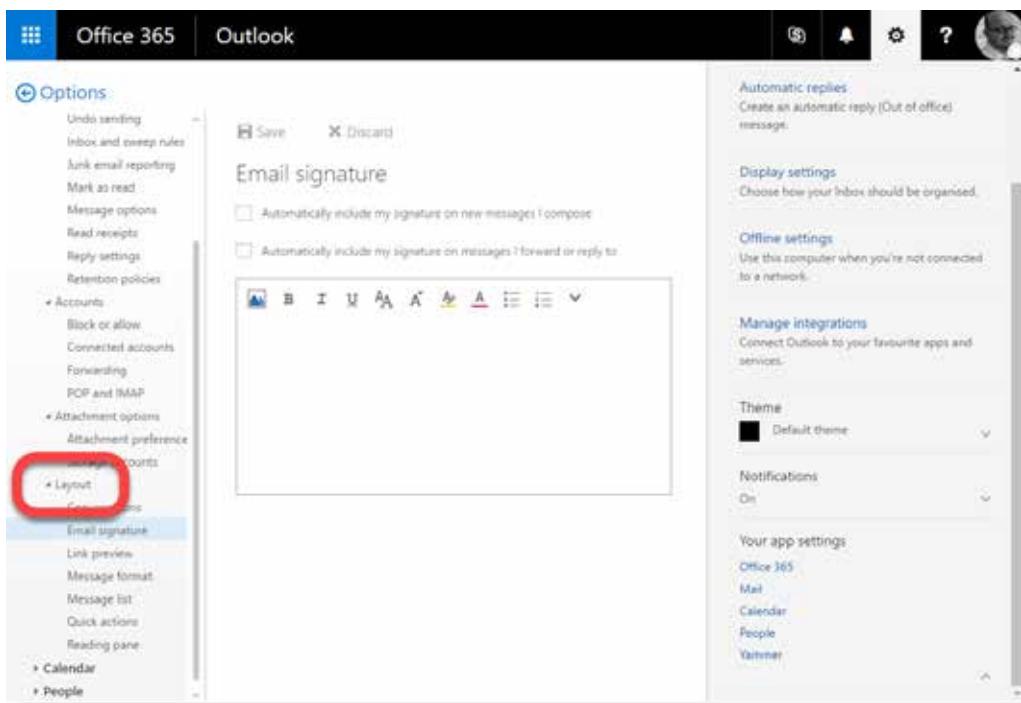


Figure 2-77 The Layout heading.

5. Under *Layout*, click **Email signature**.

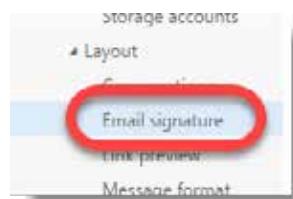


Figure 2-78 The Email signature link.

6. Type or copy & paste the email signature text into the text field.

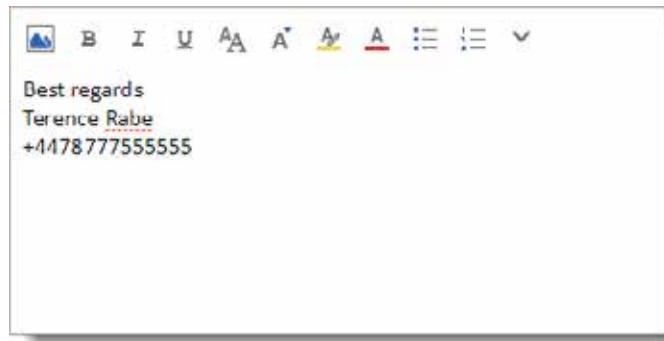


Figure 2-79 An email signature.

7. Add any formatting required using the formatting toolbar.

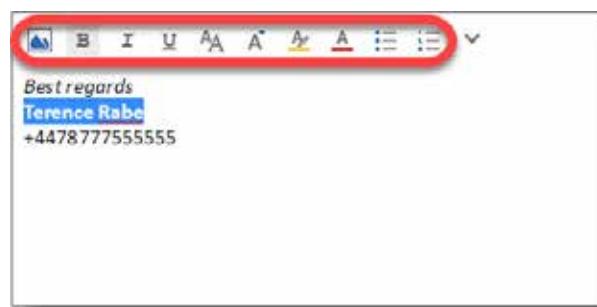


Figure 2-80 Formatted email signature.

8. Click **Save**.

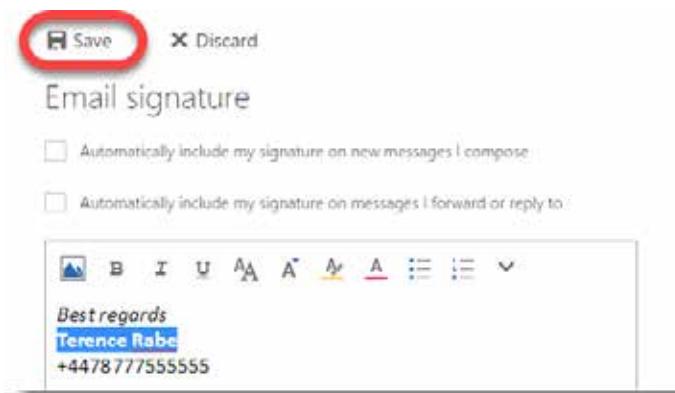


Figure 2-81 The Save button.

2.8.2 SIGNATURE OPTIONS

On the *Email signature* screen, you can also decide whether email signatures are automatically added to messages or not.

1. Fill in the appropriate check box to control whether your email signature is automatically added to new messages and/or message responses.

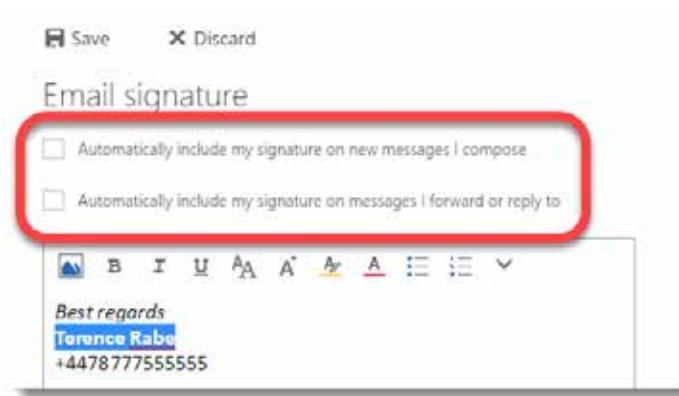


Figure 2-82 Automatic signature options.

2.8.3 ADD A SIGNATURE

If you do not select any automatic signature options, you will need to add the signature manually.

1. Start a new message.
2. Click the **ellipses** button.

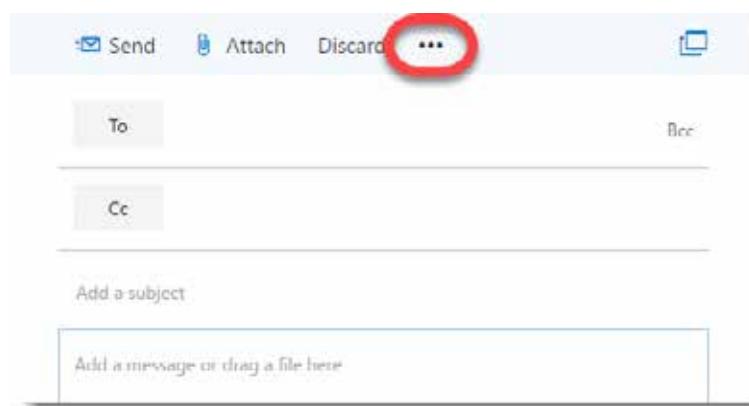


Figure 2-83 The ellipses button.

3. Click **Insert Signature**.

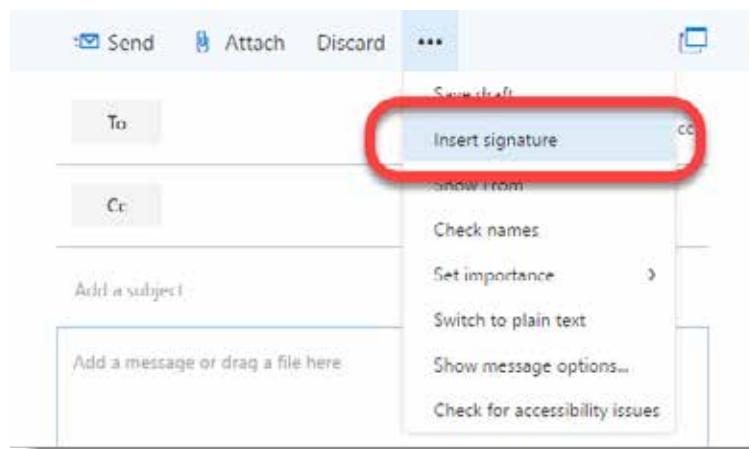


Figure 2-84 The “Insert signature” option.

2.9 RESPONDING TO MESSAGES

Messages are displayed in your inbox as soon as they are delivered. If you are signed into any Office 365 app in your web browser, you may see a notification displayed in the top-right corner of the browser window, depending on your notification settings.

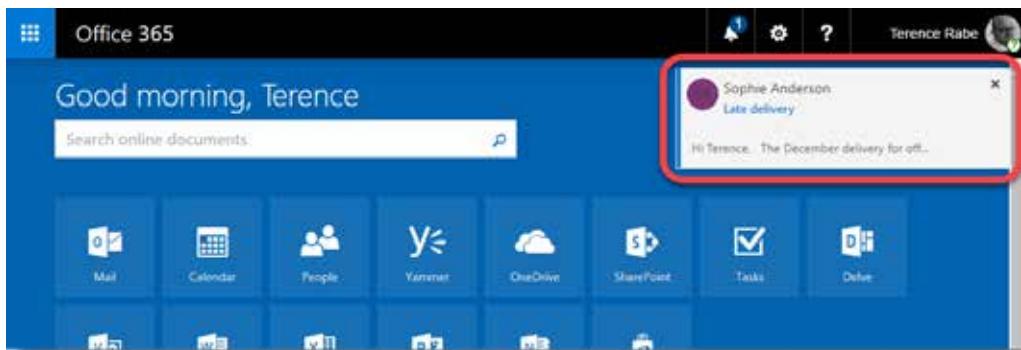


Figure 2-85 New message notification.

If your computer has sound enabled, you may also hear a notification sound played when a message arrives.

2.9.1 READ A MESSAGE

Unread messages have a coloured bar on the left of the message preview and the subject is displayed in coloured text.

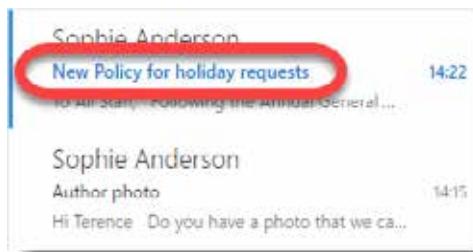


Figure 2-86 An unread message.

1. Click on the message preview in the message list.

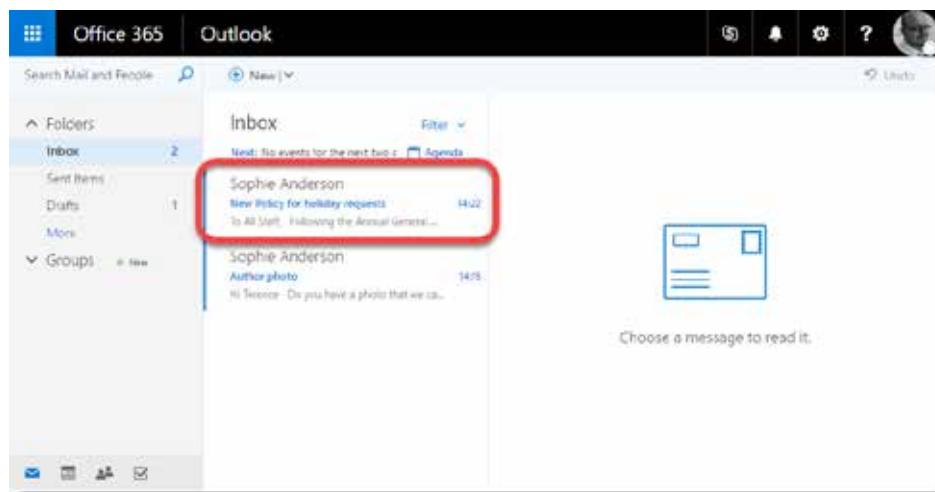


Figure 2-87 A message preview.

2. The message will be displayed in the reading pane.

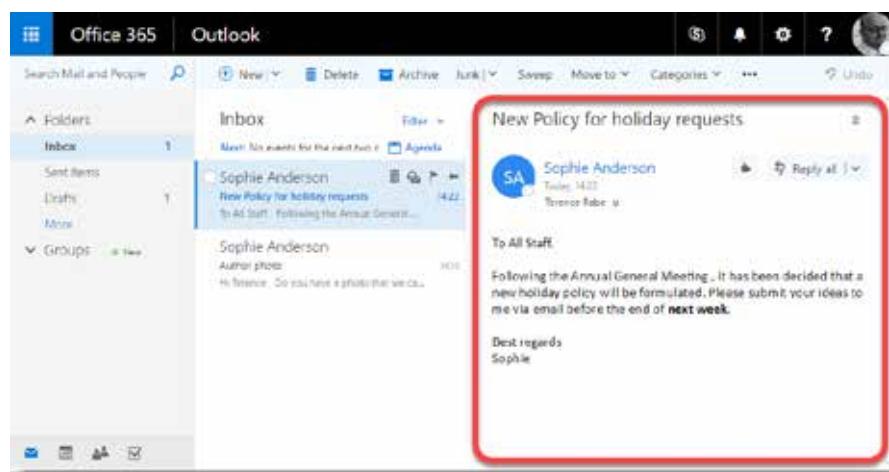


Figure 2-88 A message displayed in the reading pane

3. Double-click the message preview to open the message in a new browser window if needed.

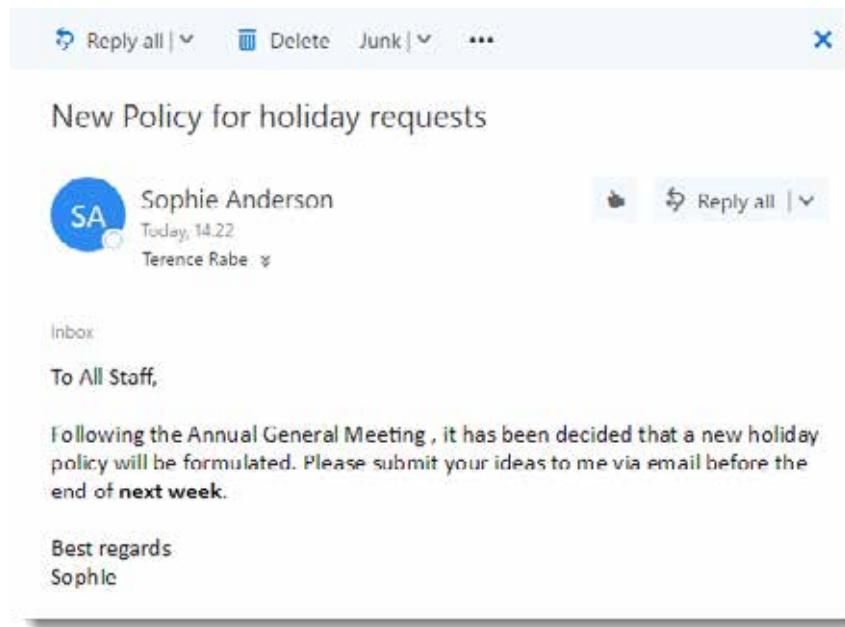


Figure 2-89 An email message in a new window.

2.9.2 MARK MESSAGE AS UNREAD

If you accidentally select a message and the Outlook web app marks it as read, you can mark it as unread.

1. Hold the mouse pointer over the message preview in the message list.
2. As the pointer hovers over the message preview, several action icons will become available.



Figure 2-90 Message action icons.

3. Click on the **envelope icon** to mark the message as unread.



Figure 2-91 The envelope icon.

4. You can also right-click the message in the message list and select **Mark as unread** from the context menu.

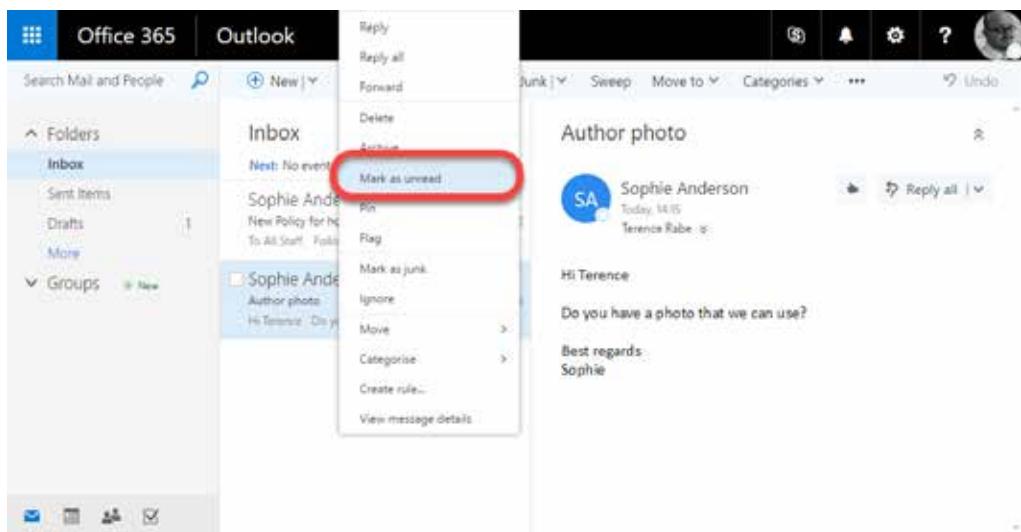


Figure 2-92 The "Mark as unread" option.

2.9.3 REPLY TO A MESSAGE

1. If necessary, select the message preview in the message list.
2. Click the **More Actions** button next to *Reply all*.

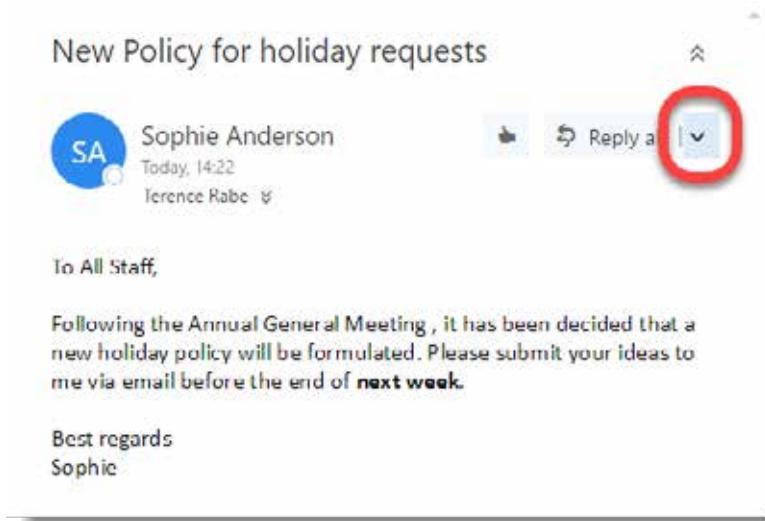


Figure 2-93 The “More actions” button.

3. Chose **Reply** from the context menu.

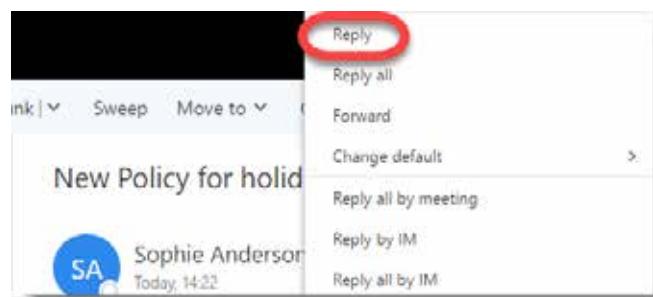


Figure 2-94 The Reply option.

NOTE: You can also right-click the message preview and chose **Reply** from the context menu.

4. A new message will be created in the reading pane with the original message displayed below the new message.
5. Type your reply and click **Send**.

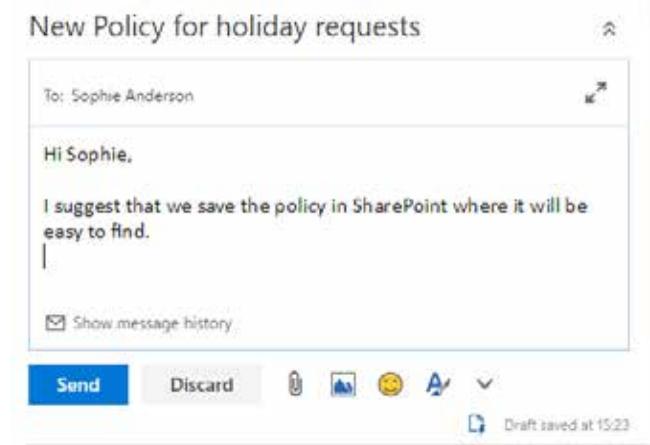


Figure 2-95 A message reply.

6. The message preview will now display a small curved arrow icon, indicating that you have replied.



Figure 2-96 The Reply indicator icon.

NOTE: If you wish to insert your saved email signature manually, you will need to open the message in new window first.

2.9.4. FORWARD A MESSAGE

1. If necessary, select the message preview in the message list.
2. Click the **More Actions** button next to *Reply all*.

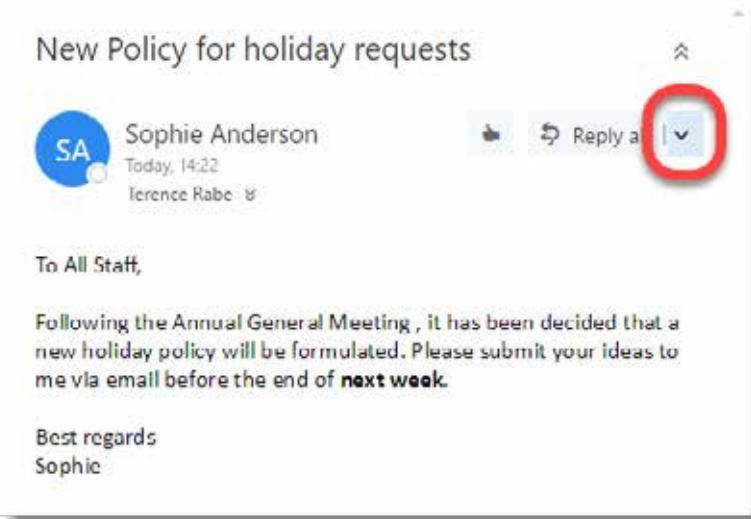


Figure 2-97 The “More actions” button.

3. Click **Forward** on the context menu.

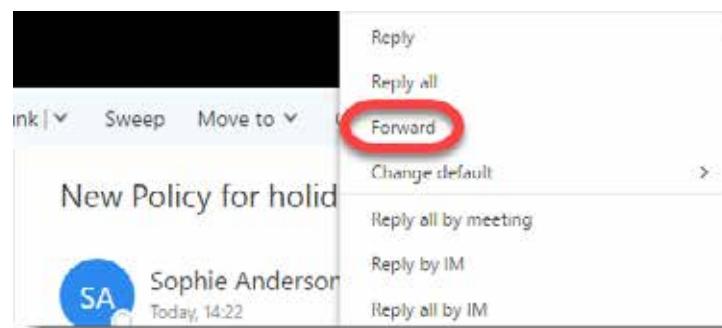


Figure 2-98 The Forward option.

NOTE: You can also right-click the message preview and chose **Forward** from the context menu.

4. Add the message recipients and any additional text needed.

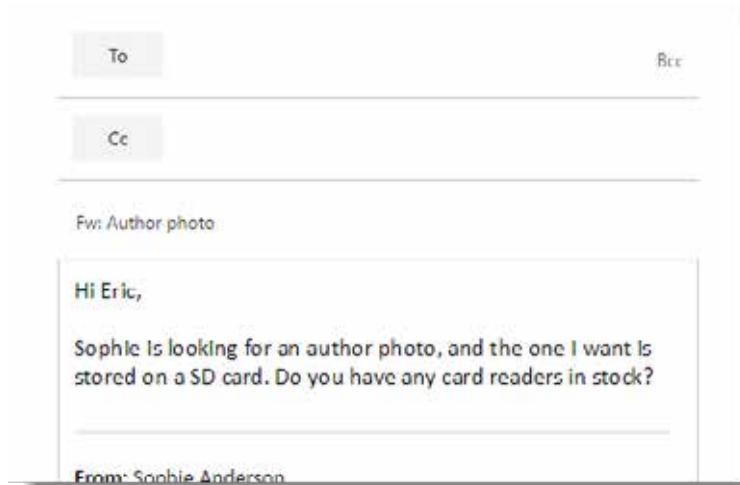


Figure 2-99 A draft forwarded message.

5. Click **Send**.

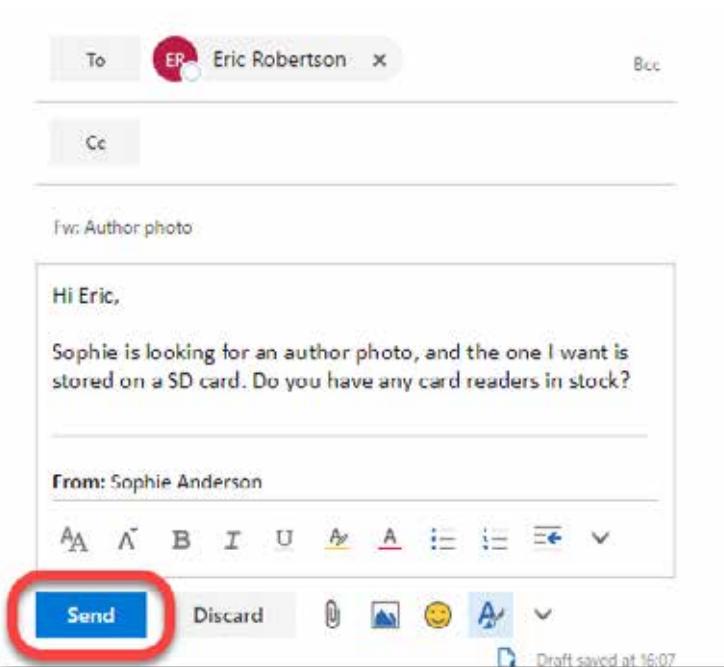


Figure 2-100 The Send button.

6. The message preview will now display an arrow icon, indicating that you have forwarded the message.



Figure 2-101 The forwarded message icon.

2.9.5 REPLY TO ALL

WARNING: The *Reply to all* feature can inadvertently disclose confidential or private information if you mistakenly believe you are replying only the sender but are in fact sending the message to all other recipients.

1. If necessary, select the message preview in the message list.
2. Click **Reply all**.

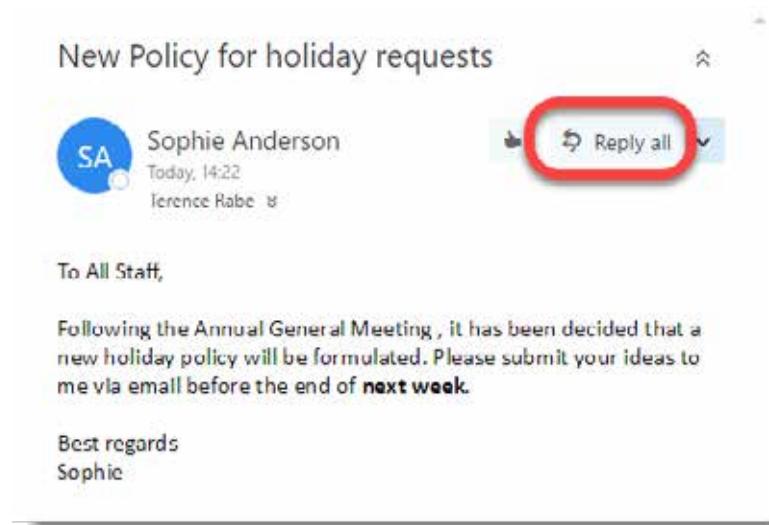


Figure 2-102 The Reply all button.

3. Type your reply and click **Send**.

NOTE: The Outlook Mail web app will display a *MailTip* to warn you if you use *Reply all* on a message with more than 25 recipients.

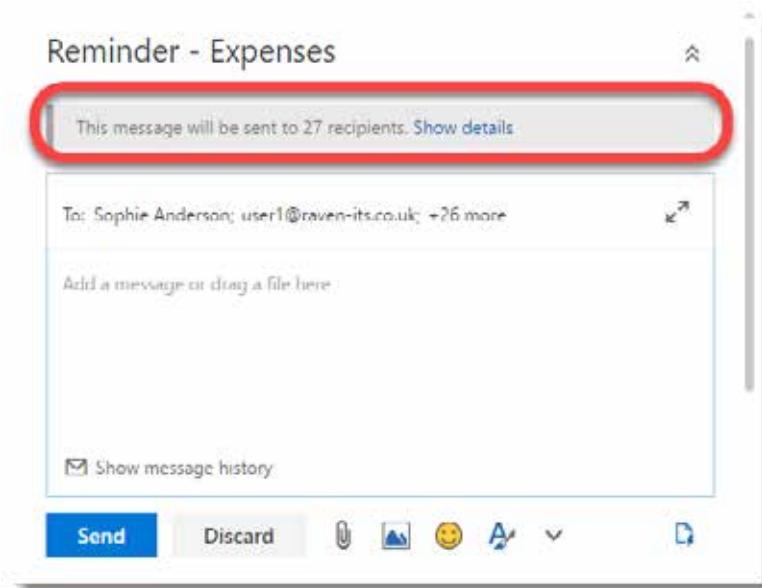


Figure 2-103 MailTip warning of a large number of recipients.

2.9.6 CHANGE DEFAULT REPLY ACTION

Outlook displays the *Reply all* button by default. You can change the default button to reduce the risk of accidentally sending replies to all recipients.

1. Select any message preview in the message list.
2. Click the **More Actions button** next to *Reply all*.

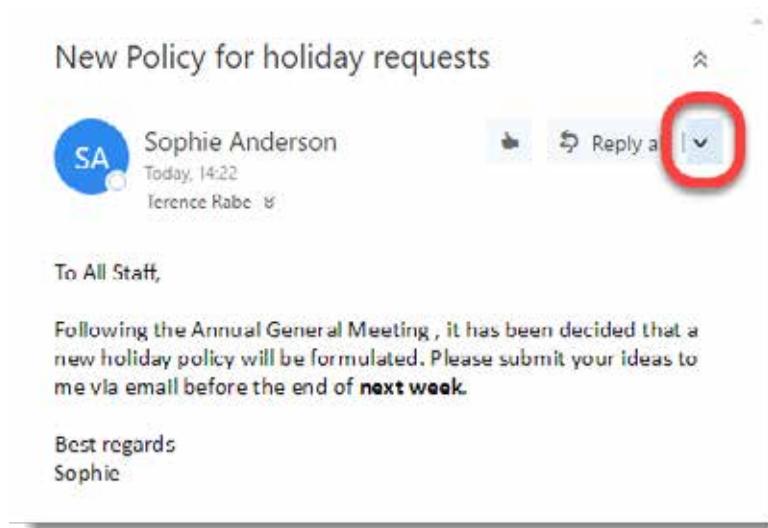


Figure 2-104 The "More actions" button.

3. Click **Change default**.

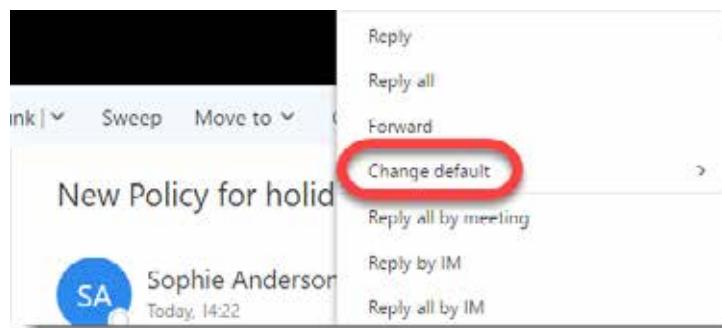


Figure 2-105 The Forward option.

4. Click **Reply**.

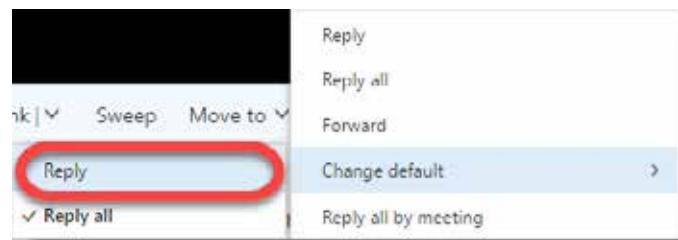


Figure 2-106 The Reply option.

2.10 CONVERSATIONS

2.10.1 WHAT ARE CONVERSATIONS?

When a reply is sent to an email message, the original message and the response are displayed as a *conversation*. Subsequent replies will be displayed as part of the conversation if the subject line is not changed.

Conversations are displayed as a single item in the preview (centre) pane, and messages that make up the conversation are displayed in the reading (right) pane, with the latest message shown at the top of the conversation. You can identify a conversation in the preview pane by the *triangle icon* next to the subject line.

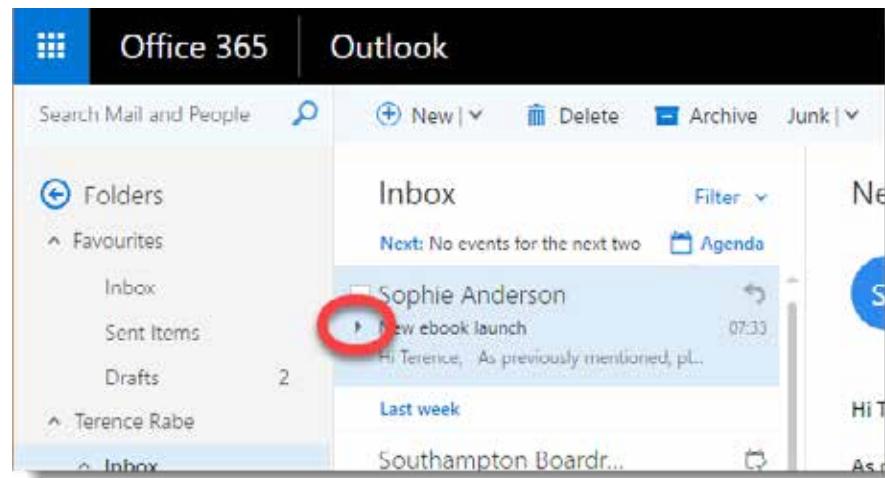


Figure 2-107 The triangle icon.

NOTE: The *Conversation view* feature cannot be disabled in the Outlook web app.

2.10.2 EXPAND OR COLLAPSE A CONVERSATION

1. Click on the **triangle icon** to expand the conversation.
2. The conversation will expand to show the time and date of received messages; sent messages are indicated by the text *Sent items* instead of a time/date stamp and deleted items are shown with *strikethrough* formatting.

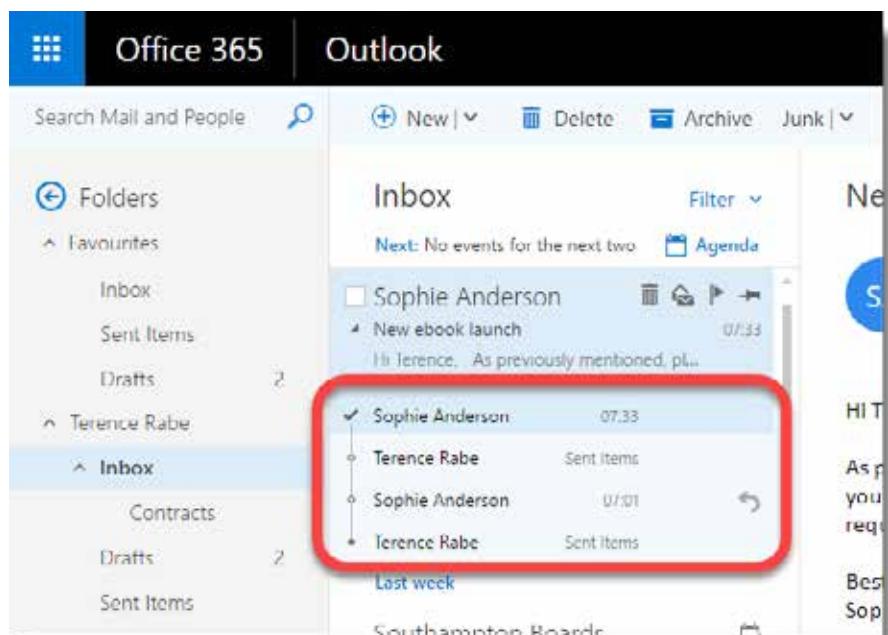


Figure 2-108 An expanded conversation.

3. Select a message from the expanded conversation to display that message in the reading pane.

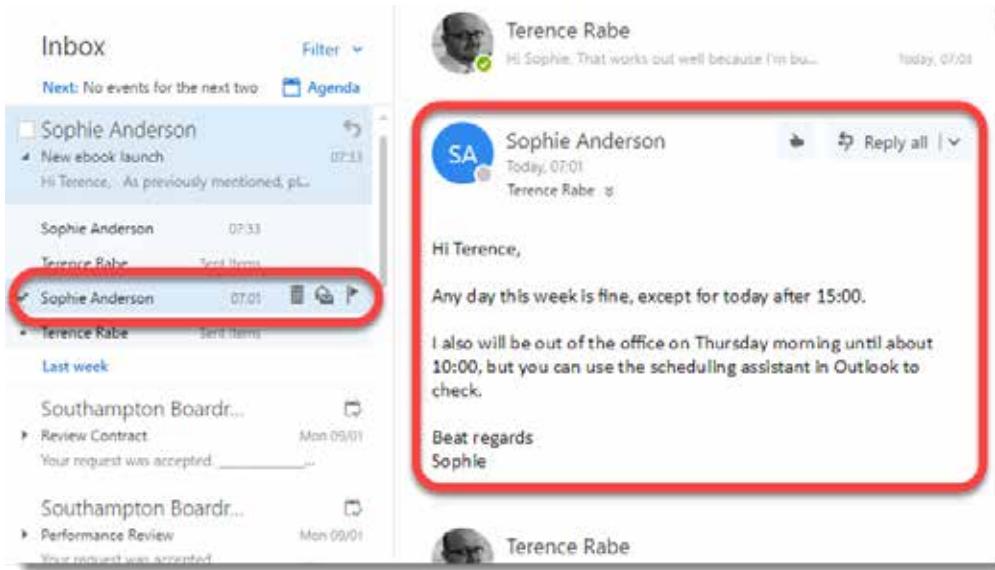


Figure 2-109 A message in a conversation.

4. Click the **triangle icon** again to collapse the conversation.

2.10.3 IGNORE A CONVERSATION

If you have been copied on a message, it is possible that other recipients will use *Reply to all* when responding. This may be useful if you wish to see their replies but can be a distraction if you do not.

If you do not wish to see subsequent replies in an email conversation you can use the *Ignore* feature.

WARNING: Ignoring a message will delete the original message and block subsequent messages in that conversation.

1. Right-click the message and choose **Ignore** from the context menu.

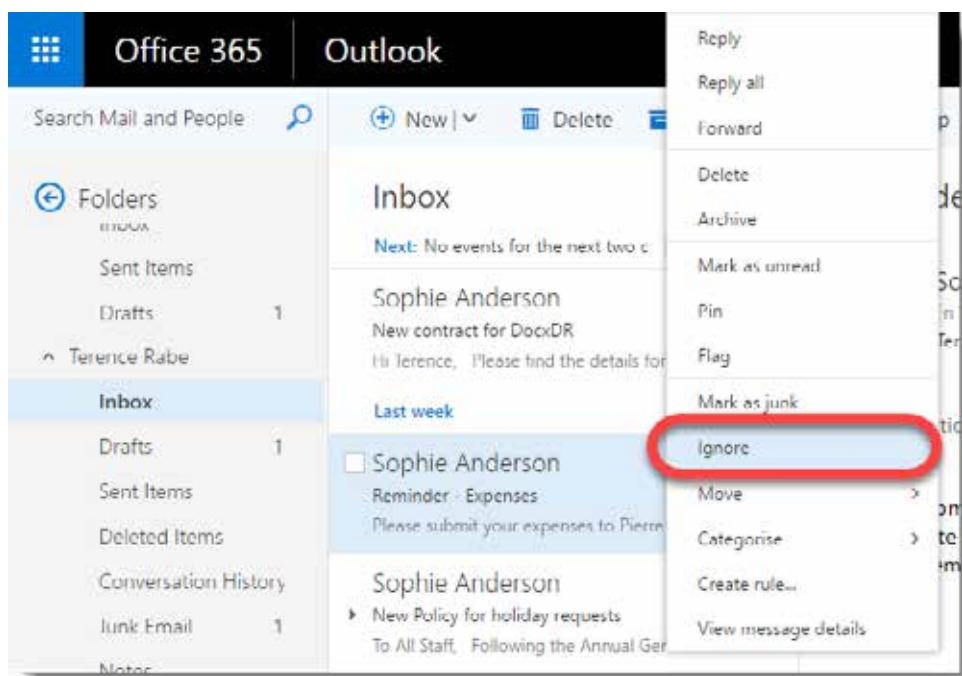


Figure 2-110 The “Ignore” option.

2. On the confirmation dialogue, click **OK**.

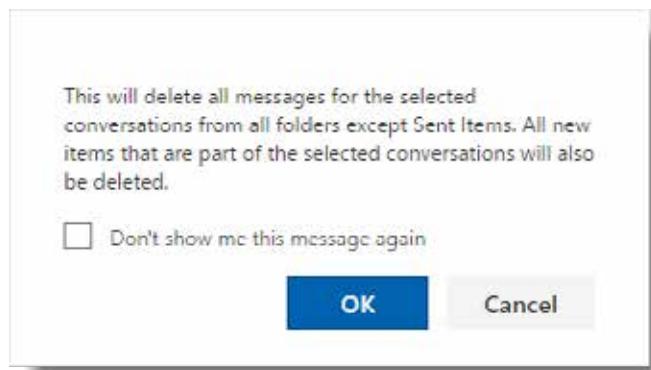


Figure 2-111 The “Ignore” dialogue box.

3. The ignored conversation’s messages will be moved to the *Deleted Items* folder.

2.11 MANAGING YOUR MESSAGES

This guide does not dictate any specific method of email management; it aims to describe the available features and lets the reader choose how to use them.

2.11.1 INBOX FILTERS

Inbox filters display a filtered list of messages in the *message preview* pane.

The following filters can be applied:

- *Unread* – show only unread messages.
- *To me* – show only messages sent to me.
- *Flagged* – show only messages that have been flagged for follow up.
- *Mentions* – show only messages where I have been mentioned using @*username*.

Filters are applied as follows:

1. Click on the **Filter** link at the top of the message list.

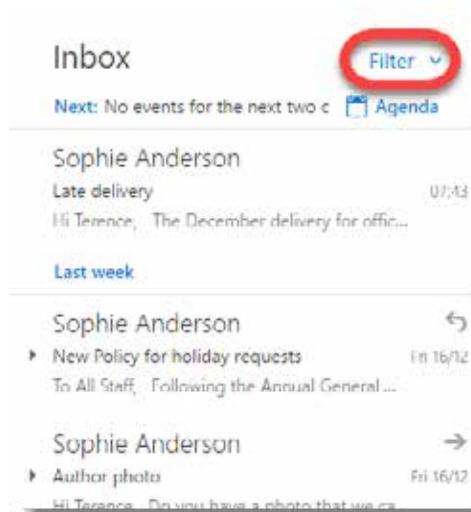


Figure 2-112 The Filter link.

2. Choose a filter from the context menu.

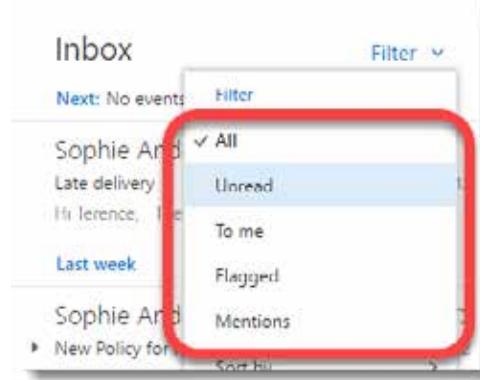


Figure 2-113 Inbox filters.

3. The filter will be applied.
4. Click the **filter name** to remove the active filter and return to the unfiltered view of the inbox.

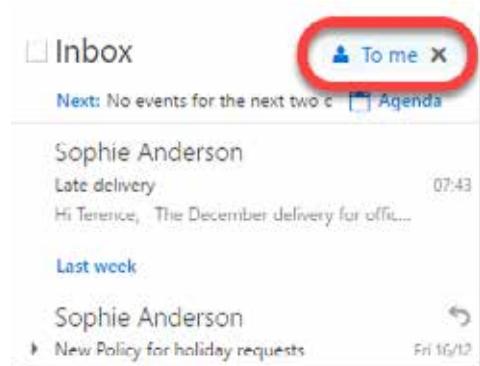


Figure 2-114 The active filter link.

2.11.2 DELETE A MESSAGE

A message can be deleted if it does not need to be retained. Refer to your organisation's policies and procedures to determine whether you have specific message retention guidelines.

1. Hold the mouse pointer over the message preview in the message list.
2. As the pointer hovers over the message preview, several action icons will become available.



Figure 2-115 Message action icons.

3. Click on the **recycle bin icon** to delete the message.



Figure 2-116 The recycle bin icon.

4. The message will be moved to the Deleted Items folder without prompting for confirmation.

NOTE: Deleted items are retained in the *Deleted Items* folder indefinitely and continue to count towards your mailbox size; however, Office 365 mailboxes are very large so it is unlikely that your mailbox will run out of storage space.

2.11.3 RECOVER DELETED ITEMS

If you need to recover a message that has been deleted:

1. Click **More** in the folder pane to display your name.

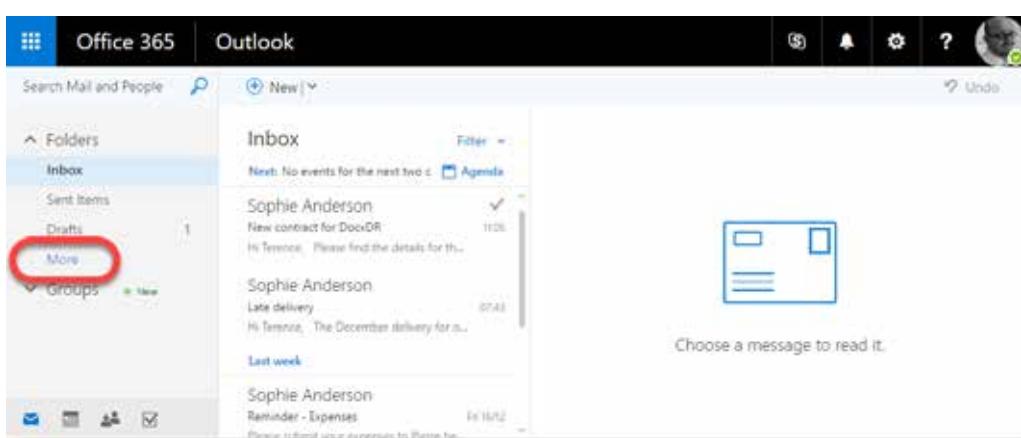


Figure 2-117 The "More" link in the Folders pane.

2. If necessary, click on the **drop-down arrow** next to your name to expand the list of mailbox folders.

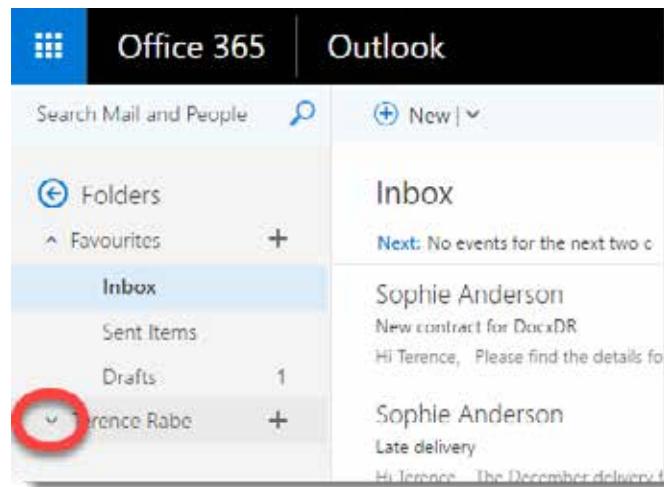


Figure 2-118 The mailbox folder drop-down arrow.

3. Scroll down in the Folders pane to locate and select **Deleted Items**.

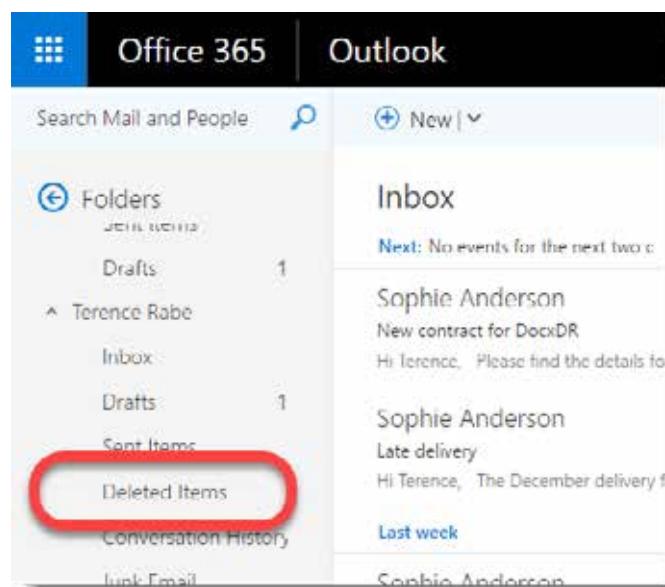


Figure 2-119 The Deleted Items folder.

4. Right-click the message you wish to recover and choose **Move** and then **Inbox** from the context menus.

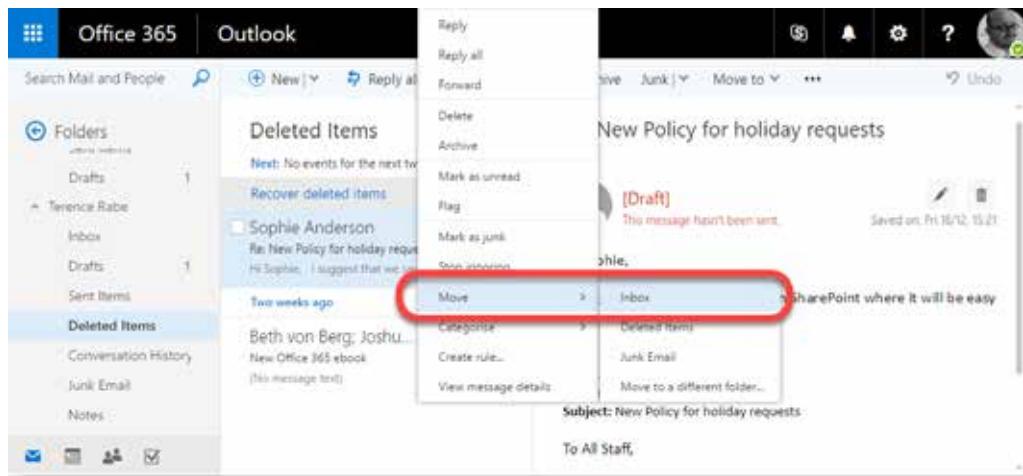


Figure 2-120 Move a message to the inbox.

NOTE: You can also drag-and-drop messages from the Deleted Items folder back to the Inbox.

2.11.4 FLAG A MESSAGE

A message can be *flagged* if it requires a follow-up action. Flagging a message causes a flag icon to be displayed on the message preview in the message list, and it also automatically creates a task in Outlook Tasks. The Tasks web app will be discussed in a later chapter.

1. Hold the mouse pointer over the message preview in the message list.
2. As the pointer hovers over the message preview, several action icons will become available.



Figure 2-121 Message action icons.

3. Right-click on the **flag icon** to see a list of due date options.

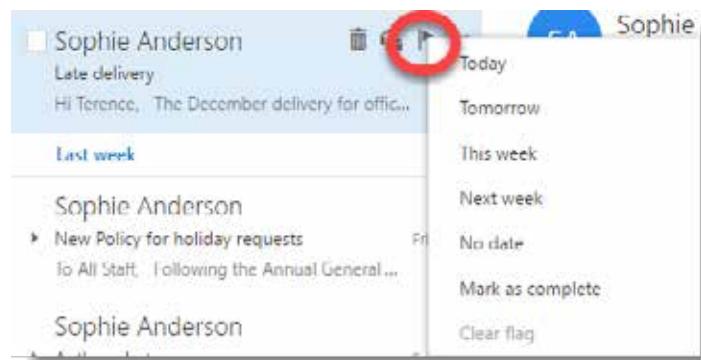


Figure 2-122 The flag icon.

4. Select the desired due date option.

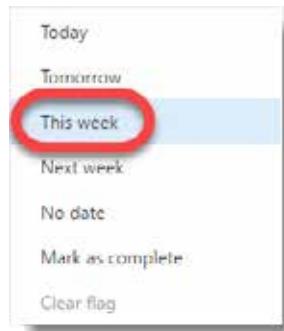


Figure 2-123 Due date options.

NOTE: Messages flagged with a due date of **This week** will be due on the Friday of the current week, messages flagged for **Next week** will be due on the Friday of the following week.

5. You could also left-click on the flag icon to flag the message for follow-up on the same day.



Figure 2-124 The flag icon.

6. Once the message has been flagged, the flag icon will be shown on the message preview, and the message preview will be displayed with a highlight colour.

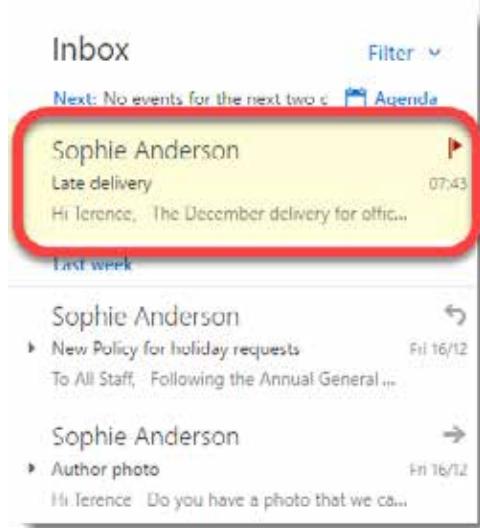


Figure 2-125 A flagged message.

2.11.5 MARK A FLAGGED MESSAGE AS COMPLETE

When the task has been completed, you can mark it as complete.

1. Right-click the flag icon and select **Mark as complete** from the context menu.

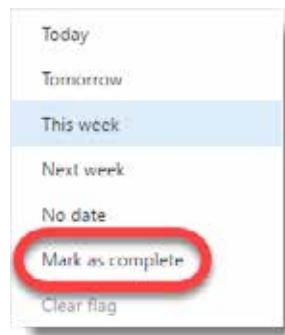


Figure 2-126 The "Mark as complete" option.

2. The message will now display with a check icon instead of a flag, indicating that the task is complete.

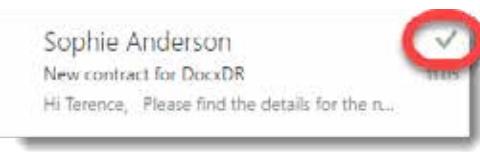


Figure 2-127 The completed task check icon.

2.11.6 CLEAR A MESSAGE FLAG

If you flagged a message accidentally, you can clear the flag.

1. Right-click on the flag icon.

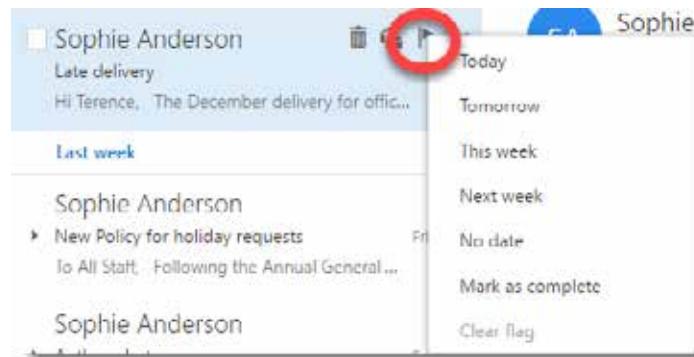


Figure 2-128 The flag icon.

2. Select **Clear flag**.

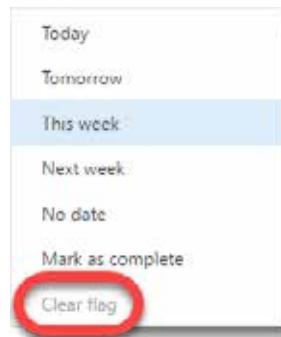


Figure 2-129 The "Clear flag" option.

2.11.7 PIN A MESSAGE

If a message is very important and you want it to be displayed at the top of the message list, you can *pin* it.

1. Hold the mouse pointer over the message preview in the message list.
2. As the pointer hovers over the message preview, several action icons will become available.



Figure 2-130 Message action icons

3. Click on the **pin icon** to pin the message.



Figure 2-131 The pin icon

4. The message will be pinned to the top of the message list.

An advertisement featuring a hand holding a waffle cone with vanilla ice cream and a drizzle of red sauce. The background is blurred lights.

Ses vi til DSE-Aalborg?
Kom forbi vores stand den
9. og 10. oktober 2019.
Vi giver en is og fortæller
om jobmulighederne hos
os.

banedanmark

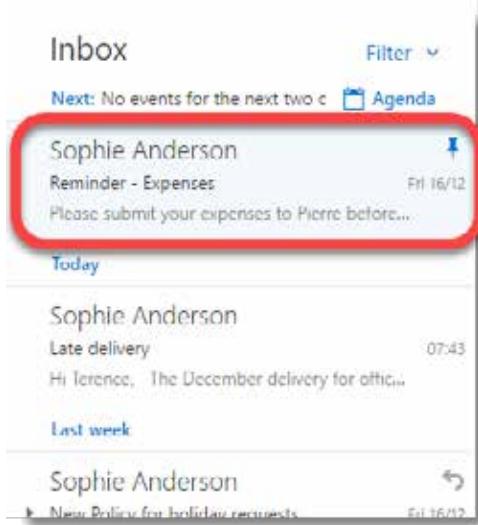



Figure 2-132 A pinned message.

5. When the message no longer needs to be pinned to the top of the message list, it can be unpinned by clicking the **pin icon**.

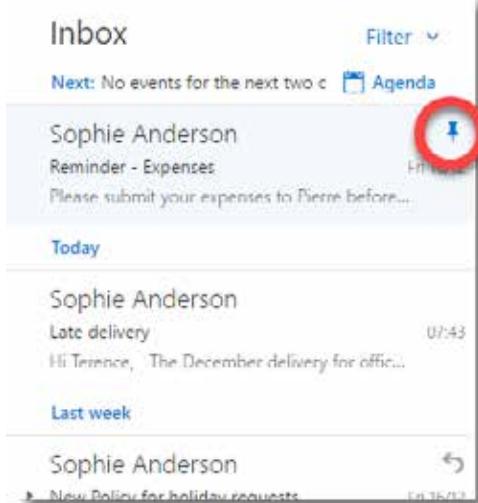


Figure 2-133 The pin icon.

2.11.8 ARCHIVE A MESSAGE

If you don't want a message to remain in your Inbox but want to retain it for future reference, you can *archive* it.

1. Right-click the message preview and choose **Archive**.

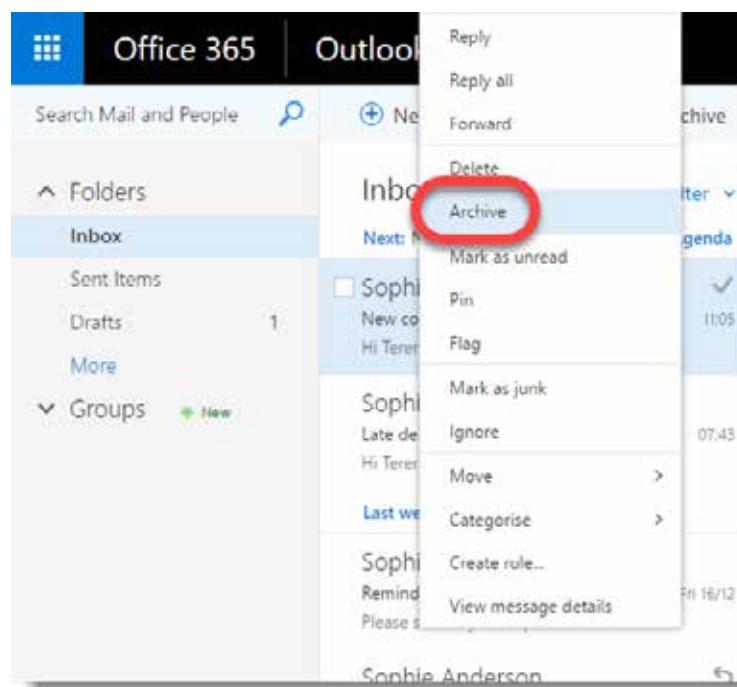


Figure 2-134 The "Archive" option.

2. If it is the first time you have chosen the archive option, you will be prompted to choose a folder; you can either accept the suggestion to create a folder with the default name or you can select an existing folder in your mailbox.

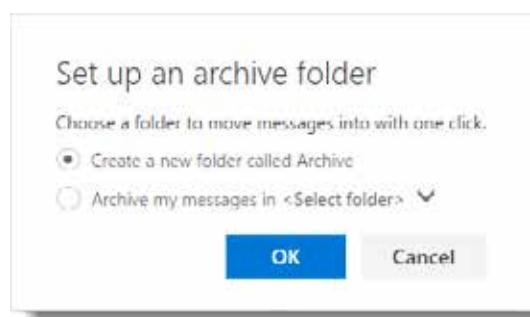


Figure 2-135 The "Set up an archive folder" dialogue.

3. The message will be moved to the designated folder.

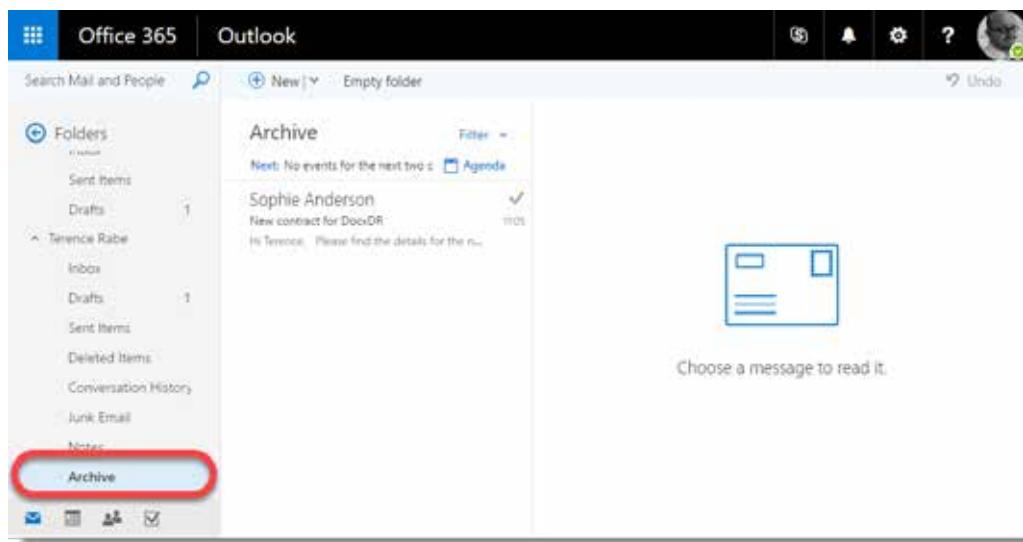


Figure 2-136 The archive folder.

4. The next time you select to archive a message it will be moved into the nominated folder.

NOTE: If you want to archive a message to a different folder after selecting an archive folder, you will need to move it manually.

2.12 JUNK MAIL

If you receive spam messages (also called Unsolicited Commercial Email) in your Inbox, you should mark it as *junk*. This will move it to your *Junk Email* folder and prevent similar messages from being delivered to your inbox again. You also have the option to report the message to Microsoft to improve Office 365 junk mail filtering.

2.12.1 MARK AS JUNK

1. Right-click the message preview in the message list and select **Mark as junk**.

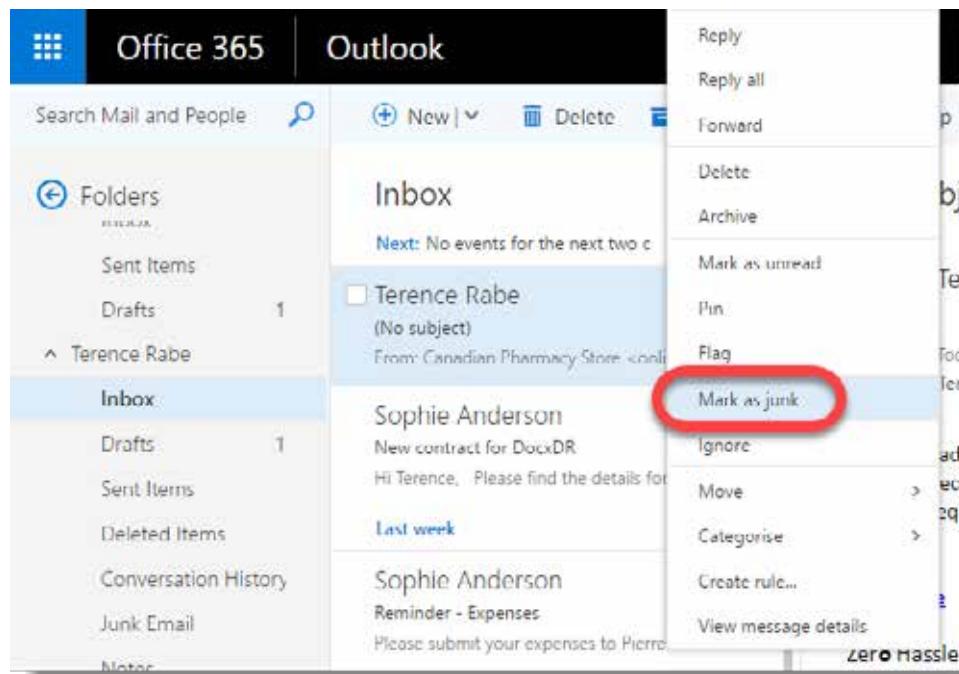


Figure 2-137 The “Mark as junk” option.

2. On the Report as junk dialogue box, click **Report** to report the message to Microsoft or **Don’t report** to close the dialogue box without reporting the message.

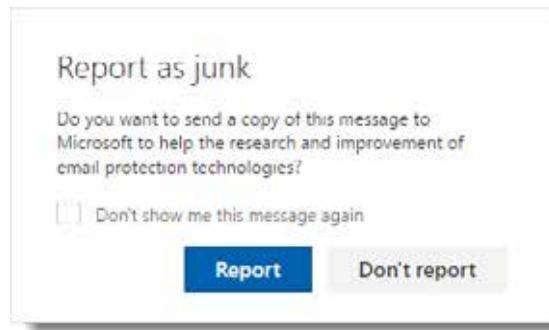


Figure 2-138 The “Report as junk” dialogue box.

3. The message will be moved to the *Junk Email* folder.

2.12.2 FALSE POSITIVES

A *false positive* is a legitimate message has been incorrectly marked as junk. You may wish to periodically check your junk mail folder for false positives and move them out of the Junk Email folder.

1. Select the **Junk Email** folder in the Folders pane.
2. Right-click the legitimate message and choose **Mark as not junk**.

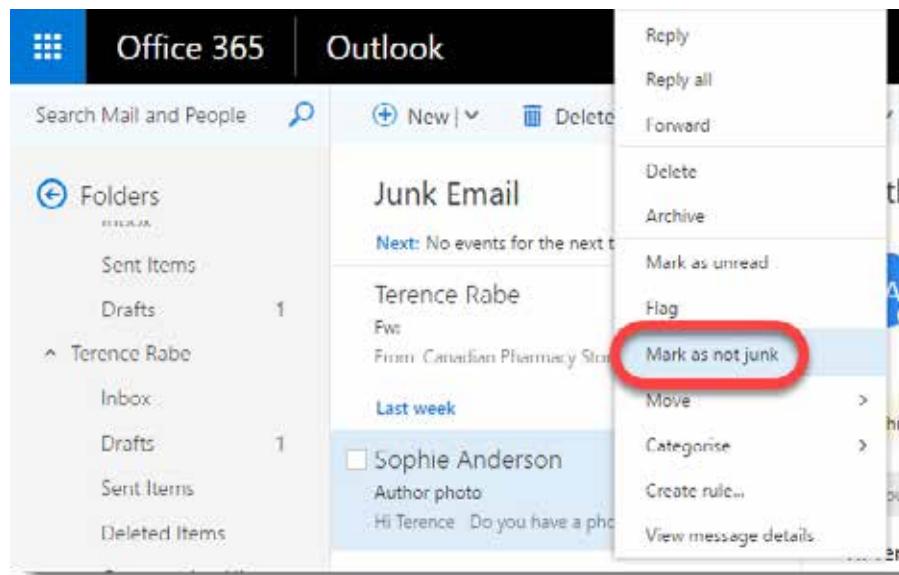


Figure 2-139 The “Mark as not junk” option.

3. On the *Report as not junk* dialogue box, click **Report** to report the false positive to Microsoft or **Don’t report** to close the dialogue box without reporting the message.

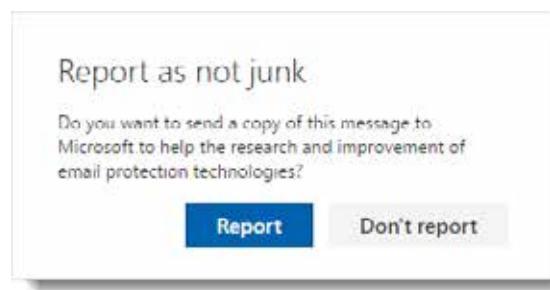


Figure 2-140 The “Report as not junk” dialogue box.

2.13 CATEGORIES

You can apply one or more categories to a message to make it easier to find while scrolling through the message list.

2.13.1 APPLY A CATEGORY

1. Right-click the message and choose **Categorise** from the context menu.

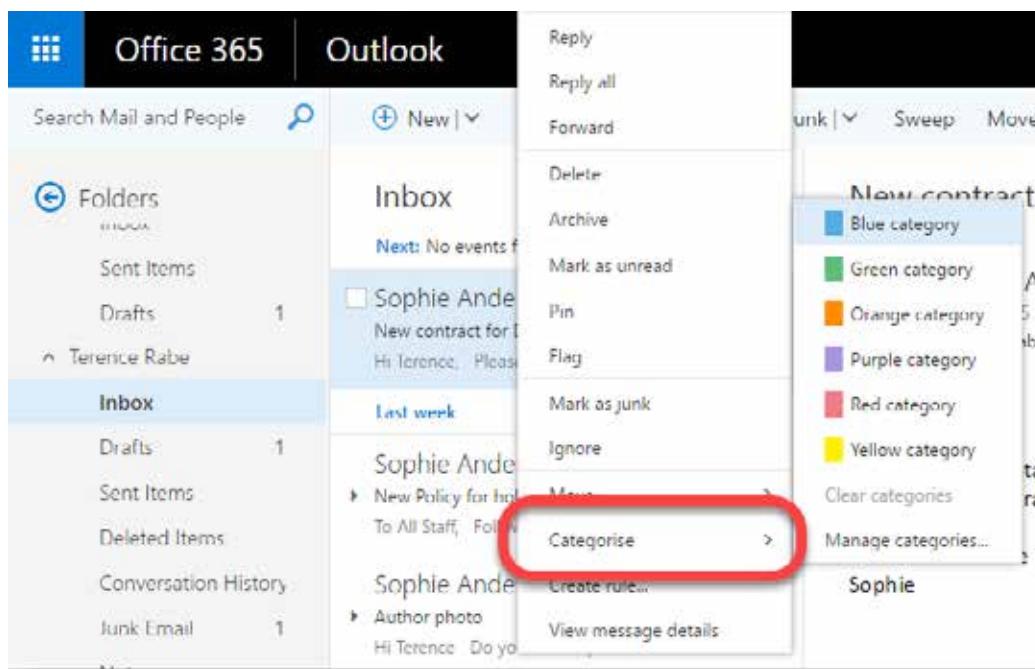


Figure 2-141 The “Categorise” option.

2. The Categorise options menu will be displayed; please select a category.

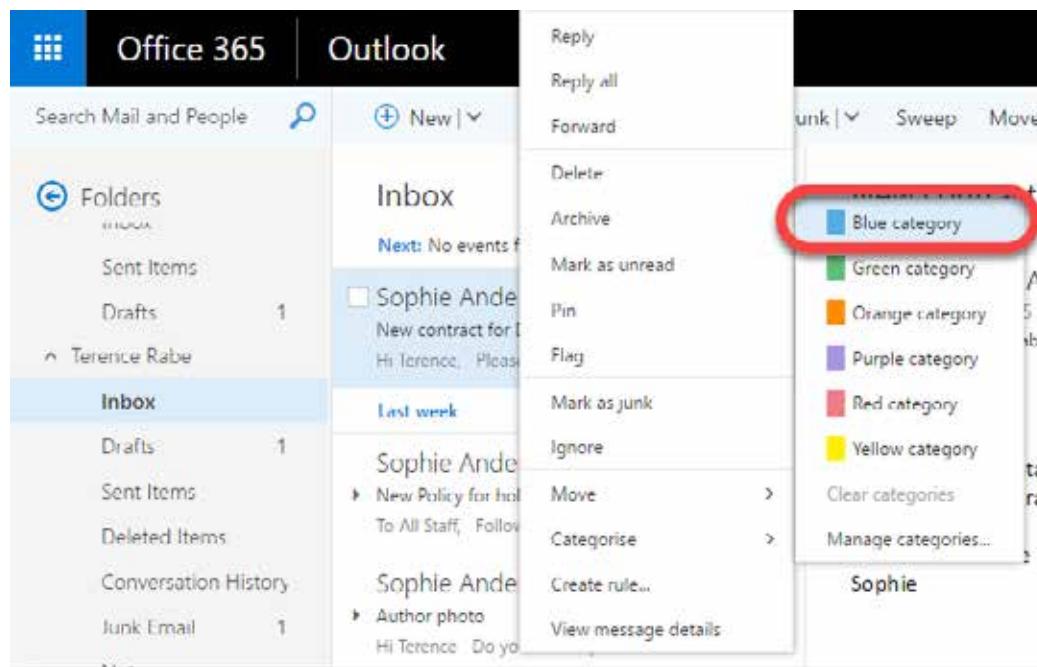


Figure 2-142 A message category.

2.13.2 CREATE YOUR OWN CATEGORY

1. Right-click the message and choose **Categorise** from the context menu.

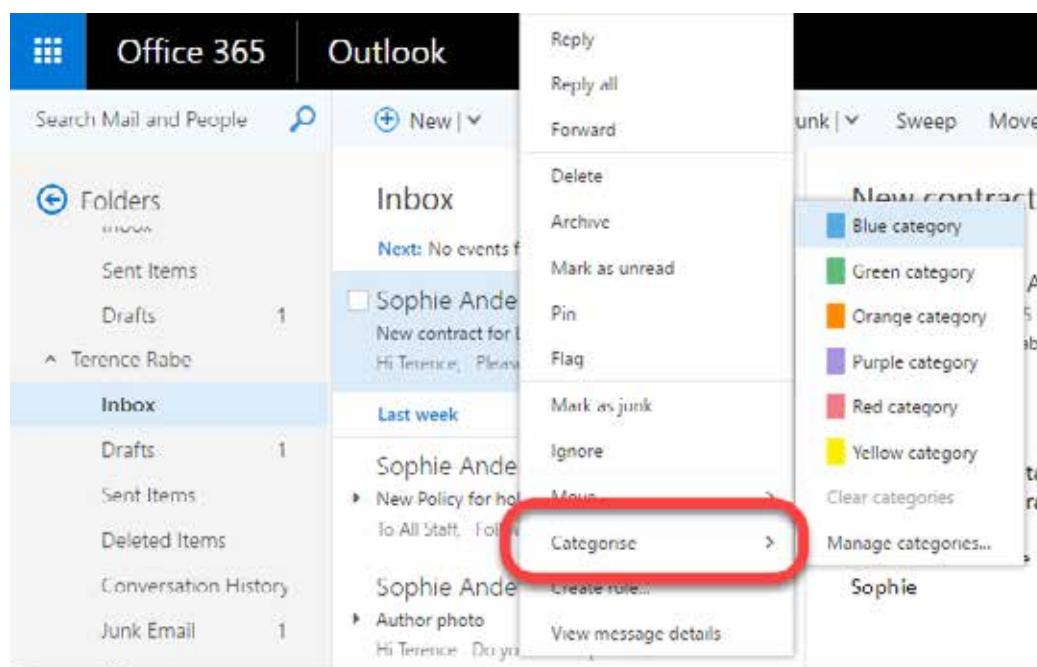


Figure 2-143 The “Categorise” option.

2. Select **Manage categories** from the *Categorise* context menu.
3. Click **Add a new category** on the *Manage categories* dialogue box.

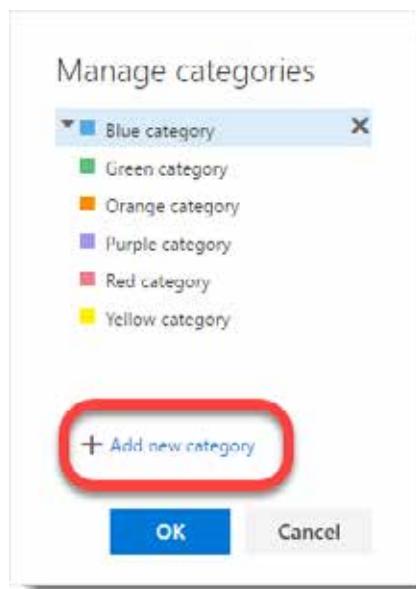


Figure 2-144 Add a new category.

4. Select a colour for the new category on the *Add new category* dialogue box.



Figure 2-145 Category colour options.

5. Type a name for the new category.

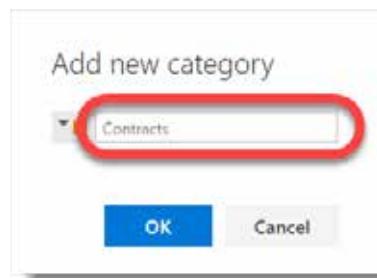


Figure 2-146 Category name field.

6. Click **OK** to create the category.
7. Confirm that the new category is listed on the *Manage categories* dialogue box and click **OK**.

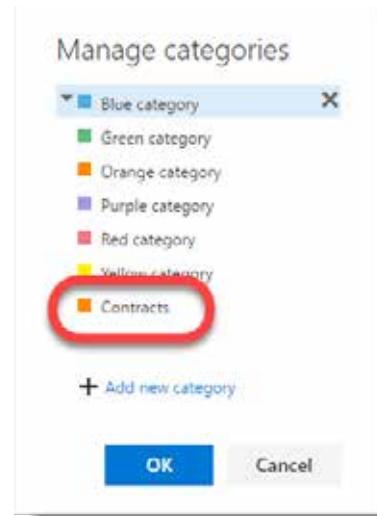


Figure 2-147 Category list.

8. Use the new category to categorise the message.

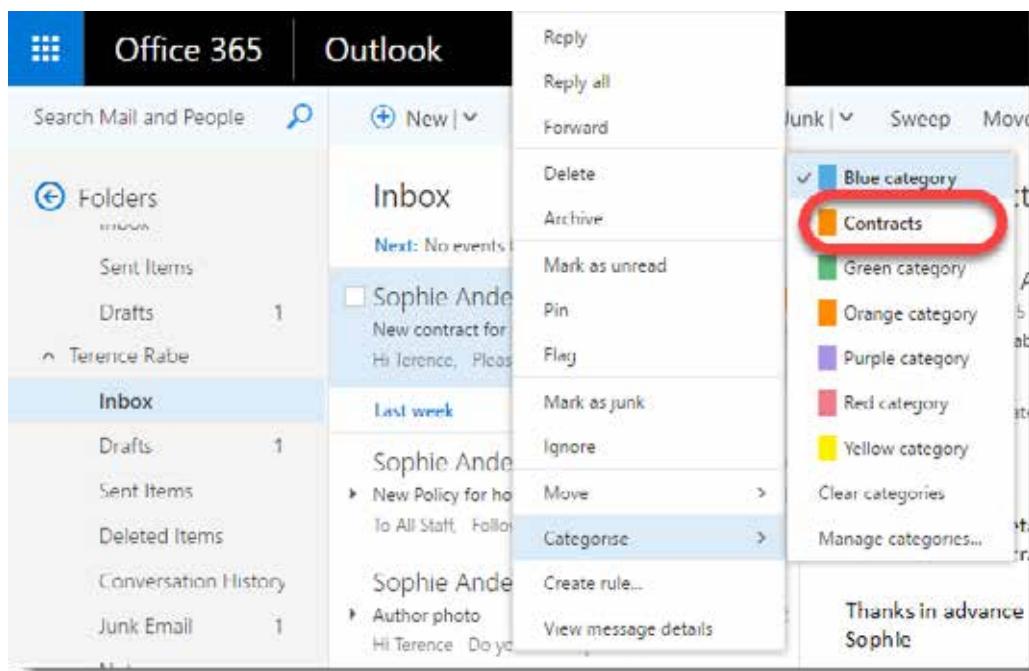


Figure 2-148 Category list.

NOTE: You can assign multiple categories to a message. The categories will be displayed on the message preview and in the Reading pane.

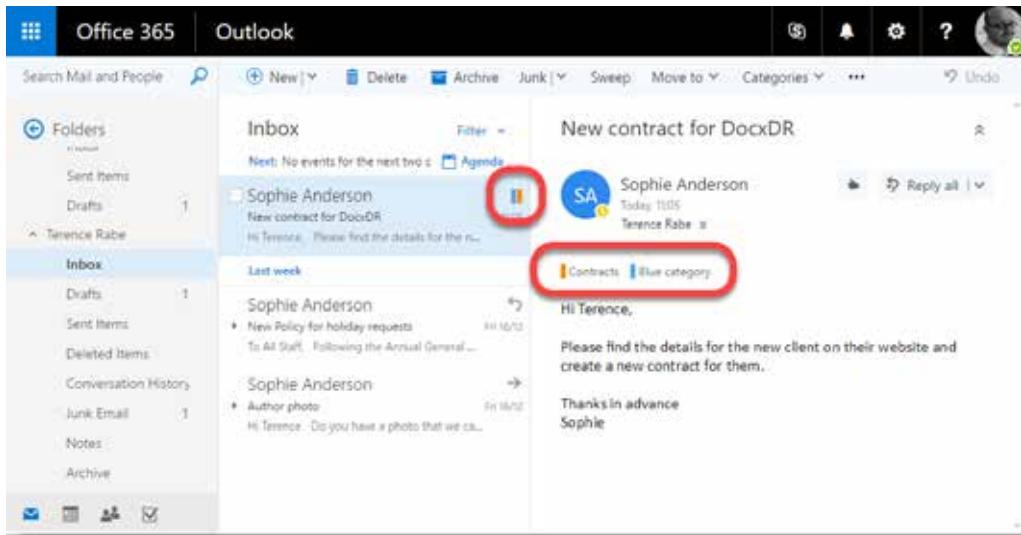


Figure 2-149 Message with multiple categories assigned.

2.13.3 REMOVE A CATEGORY

1. Right-click the message and hold the mouse pointer over the *Categorise* option.
2. When the flyout menu appears, click **Clear categories**.

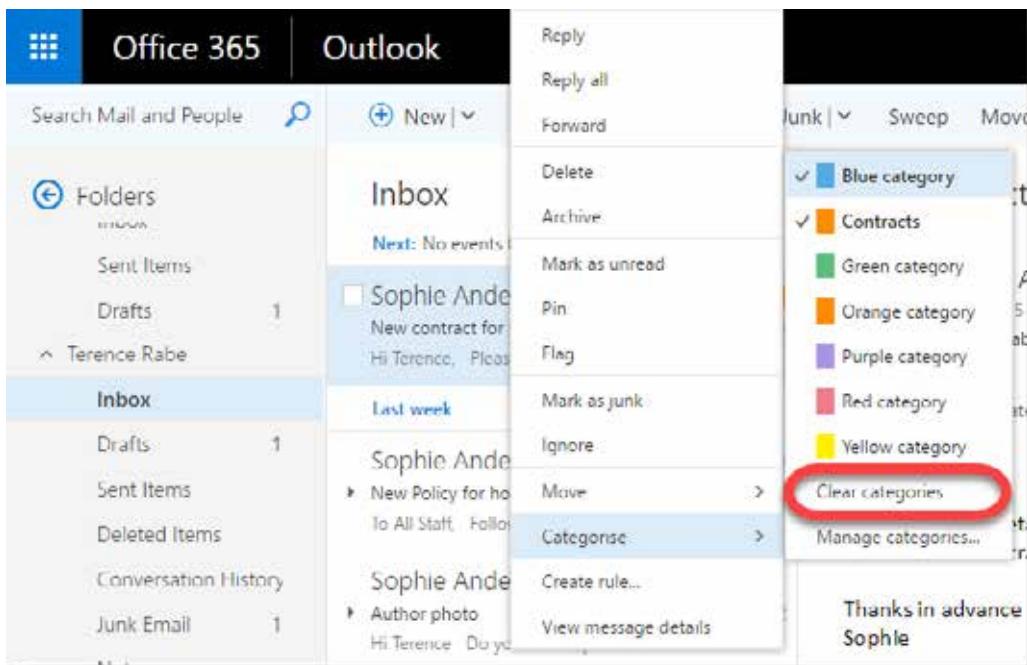


Figure 2-150 The “Clear categories” option.

2.14 FOLDERS

Folders can be used to group together messages that meet a common criterion, such as messages from a certain sender or messages regarding a specific subject.

2.14.1 CREATE A MAILBOX FOLDER

A *mailbox folder* is a folder that is displayed at the same level as the Inbox, Drafts, Sent Items, and other mailbox folders.

1. Hold the mouse pointer over your *username* in the folder pane.

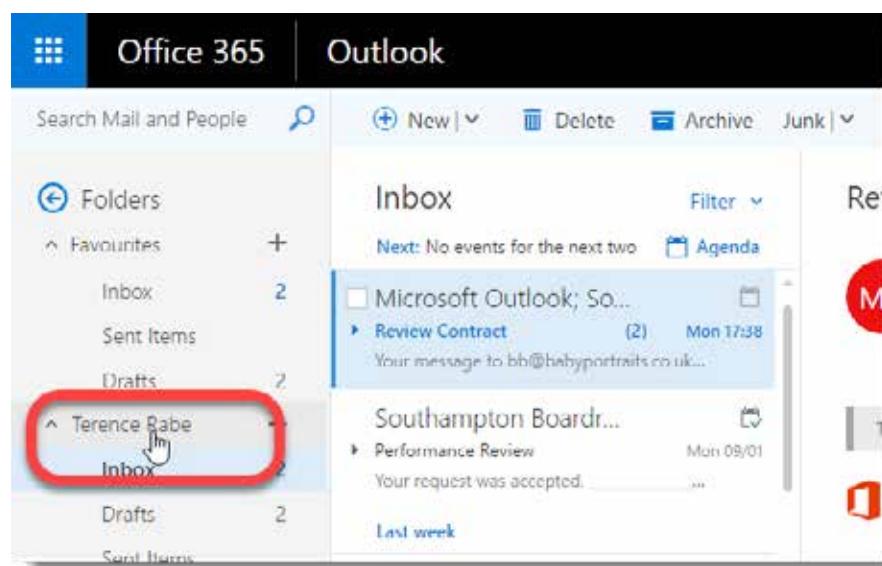


Figure 2-151 The username in the folder list.

2. Click on the **plus (+)** symbol that appears to the right of your name.

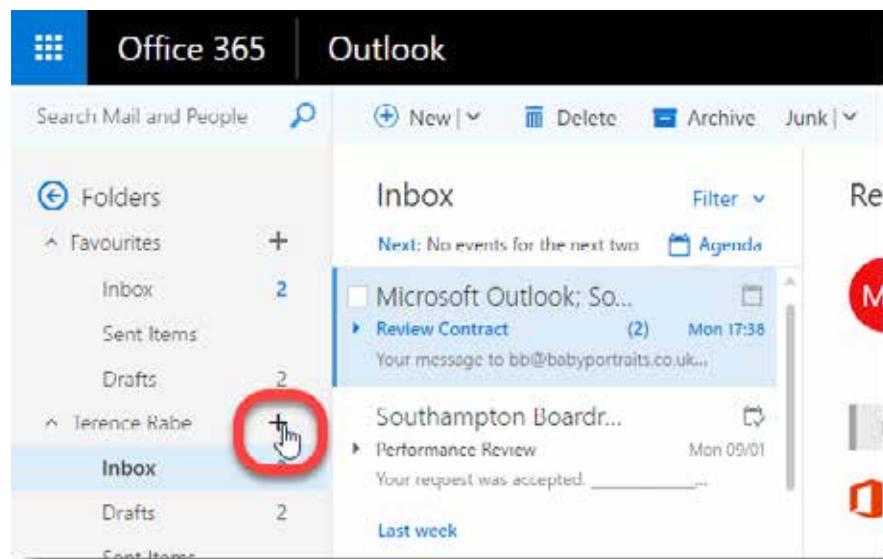


Figure 2-152 The “new folder” button.

3. A field will appear at the bottom of the folder list.

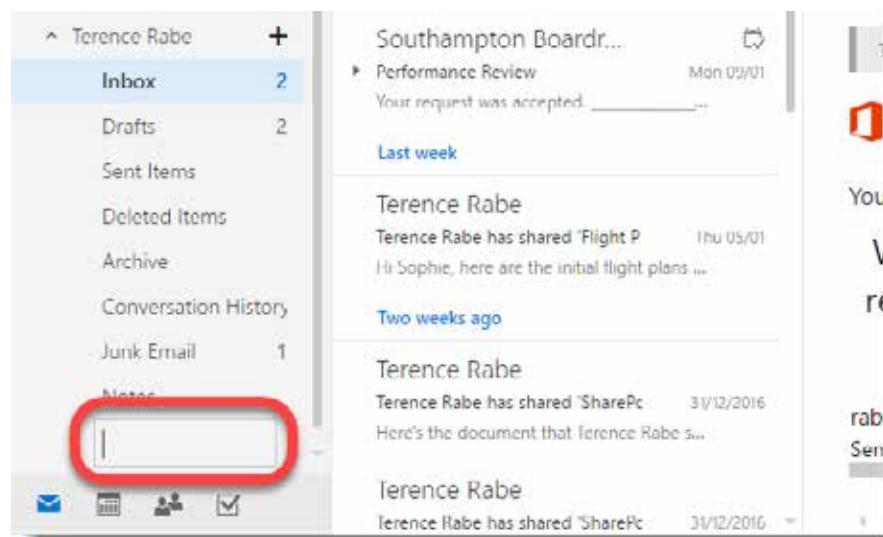


Figure 2-153 The new folder name field.

4. Type the new folder name in the field and press **Enter**.

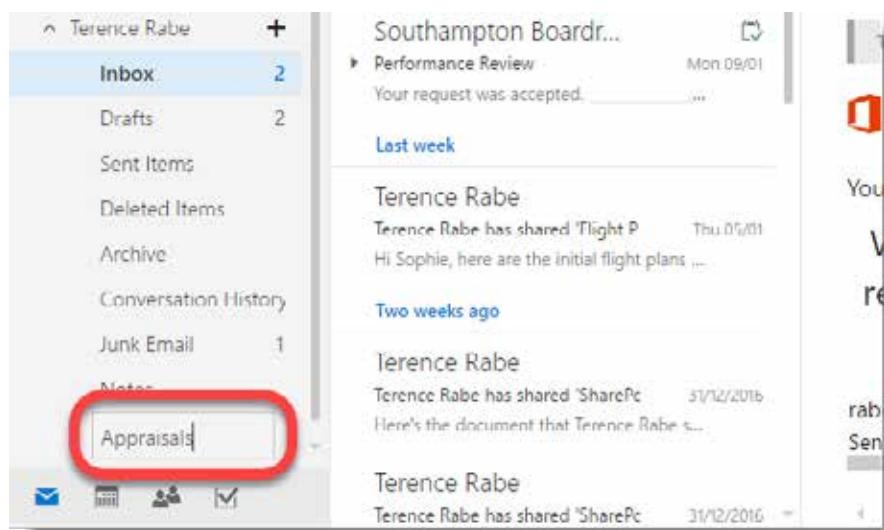


Figure 2-154 The folder name.

5. The folder will be created and displayed in the folder list; when the page is refreshed, the folder will appear in alphabetical order below the *Deleted Items* folder.

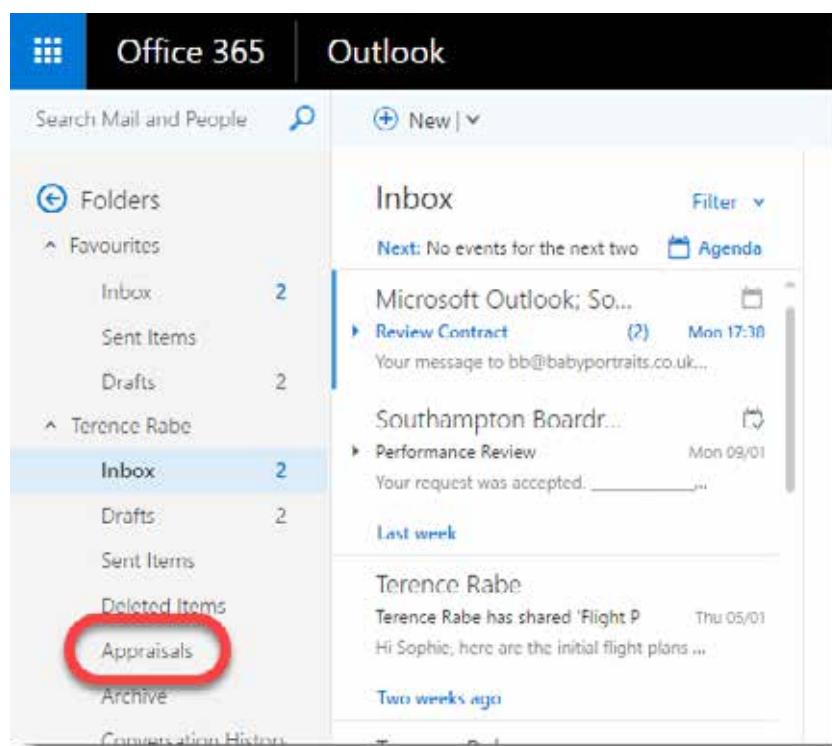


Figure 2-155 Folder sorted in alphabetical order.

2.14.2 CREATE AN INBOX SUBFOLDER

If you prefer to create a subfolder within your inbox, you should attend the following instructions:

1. Right-click the **Inbox** folder in the folder pane.
2. Select **Create new subfolder**.

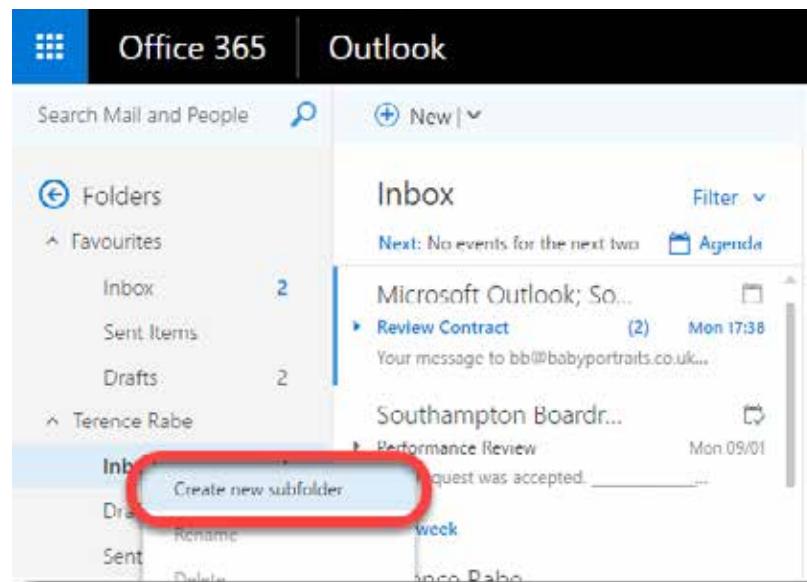


Figure 2-156 The "Create new subfolder" option.

3. A blank field will be displayed.

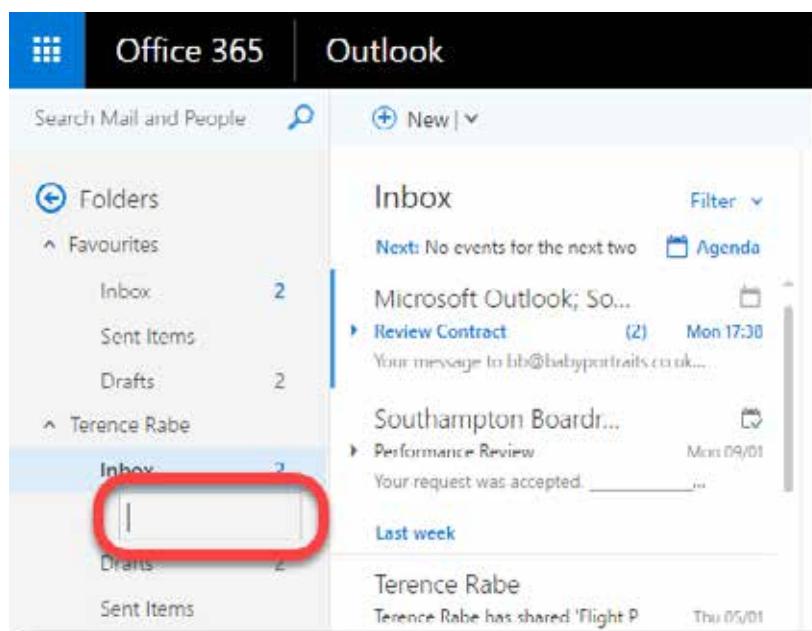


Figure 2-157 The blank folder name field.

4. Type the name of the new folder in the field and press **Enter**.
5. The new folder will be displayed as a subfolder of the *Inbox*.

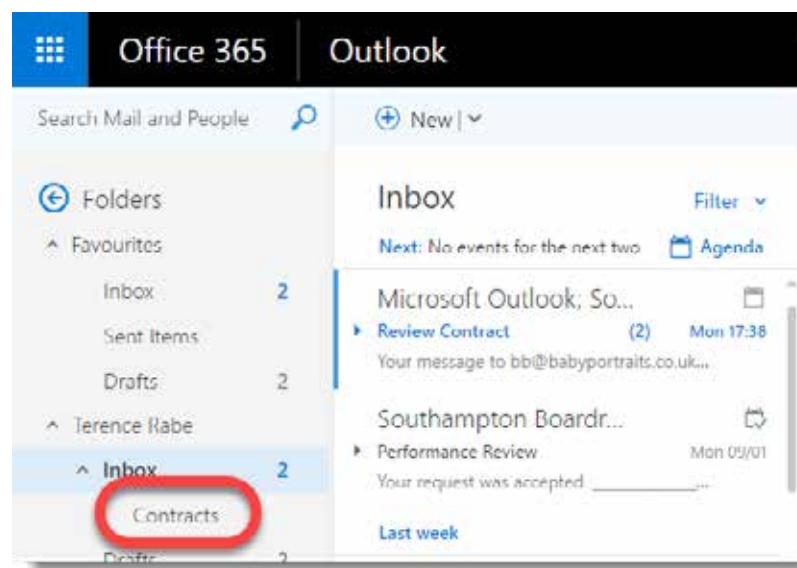


Figure 2-158 A subfolder.

2.14.3 RENAME A FOLDER

1. Right-click the folder.
2. Select **Rename**.

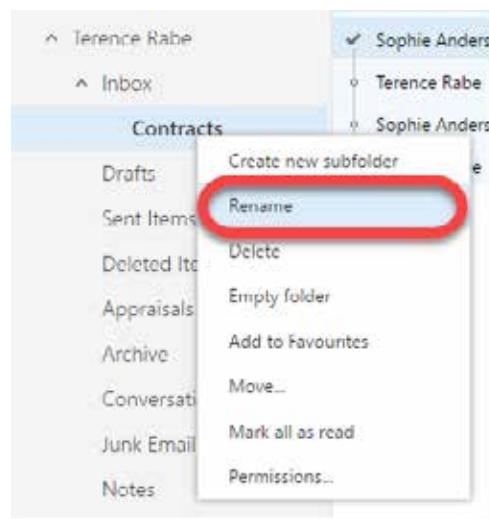


Figure 2-159 The "Rename" folder option.

3. Delete the current name and type the new name.

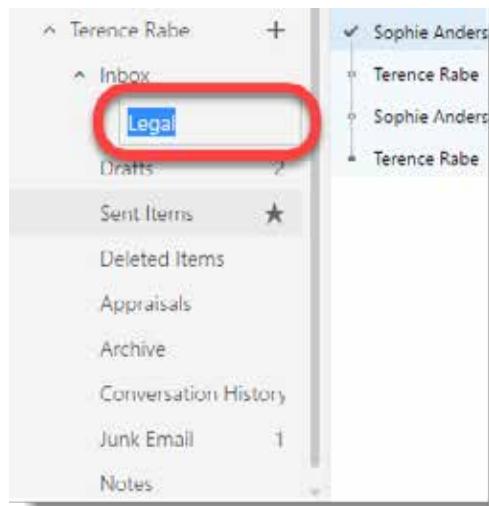


Figure 2160 Folder name in rename mode.

4. Press **Enter** to save the new folder name.

2.14.4 DELETE A FOLDER

1. Right-click the folder and select **Delete**.

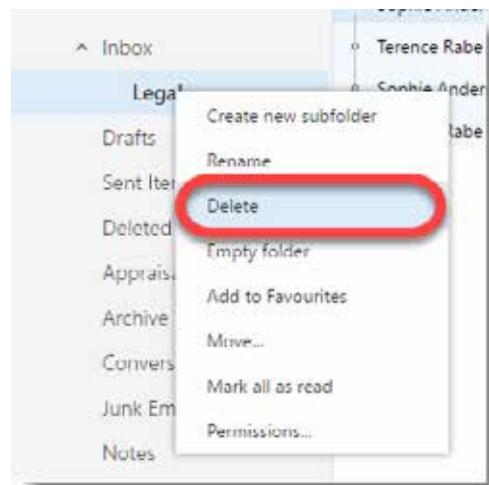


Figure 2-161 The "Delete" menu option.

2. Click **OK**.

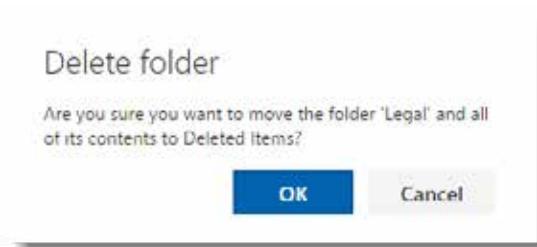


Figure 2-162 The "Delete folder" confirmation prompt.

3. The folder and all its contents will be moved to the *Deleted Items* folder.

2.15 MOVING MESSAGES

Messages and conversations can be moved to folders using *drag-and-drop* or *right-click* methods.

2.15.1 MOVE A MESSAGE USING DRAG-AND-DROP

1. Click on the message and hold the mouse button down.
2. Move the mouse towards the target folder to **drag** the message.
3. Drag the message over the folder and release the mouse button to **drop** the message.

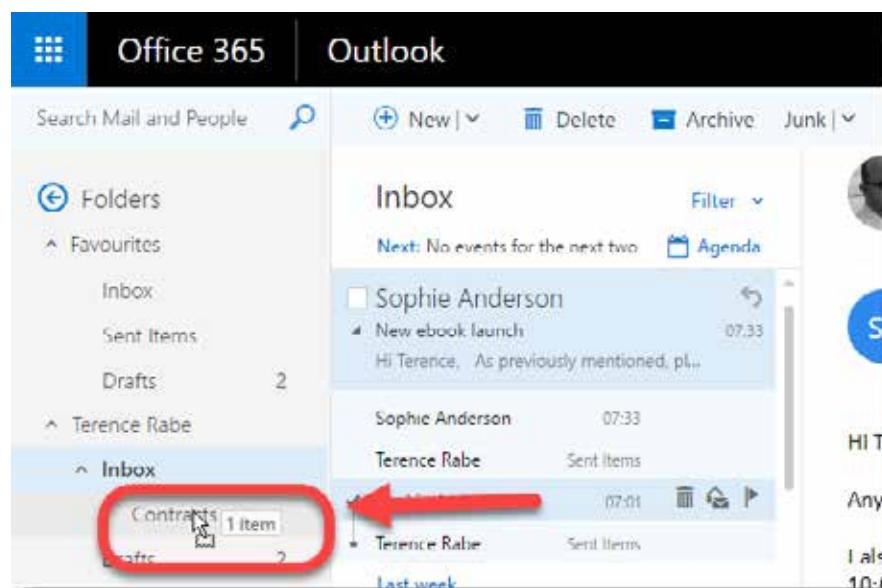


Figure 2-163 Drag-and-drop a message.

2.15.2 MOVE A CONVERSATION USING RIGHT CLICK

1. Right click the conversation and select **Move >** from the context menu.
2. Select the destination folder from the flyout menu.

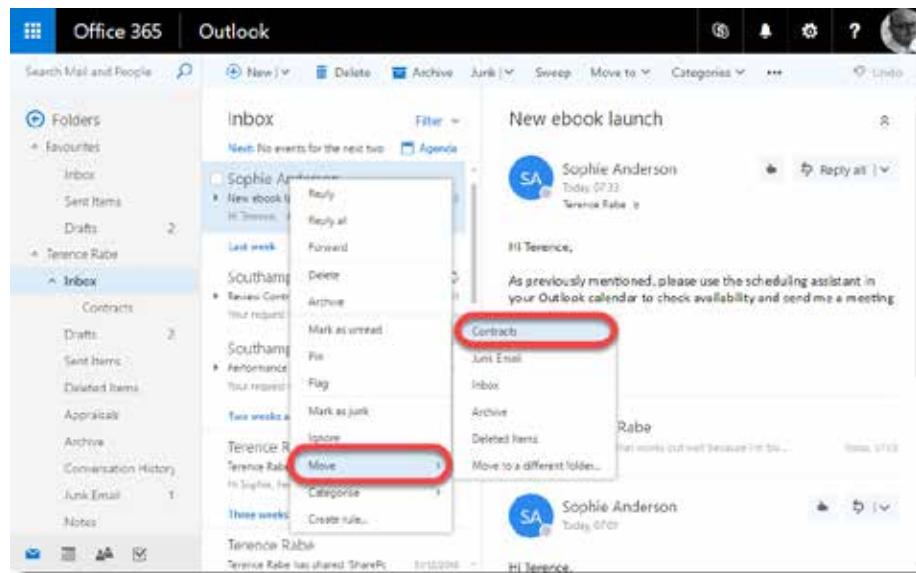


Figure 2-164 The “Move” flyout menu.

3. All the received messages in the conversation will be moved to the target folder; the sent items remain in the *Sent Items* folder while still appearing in the conversation.

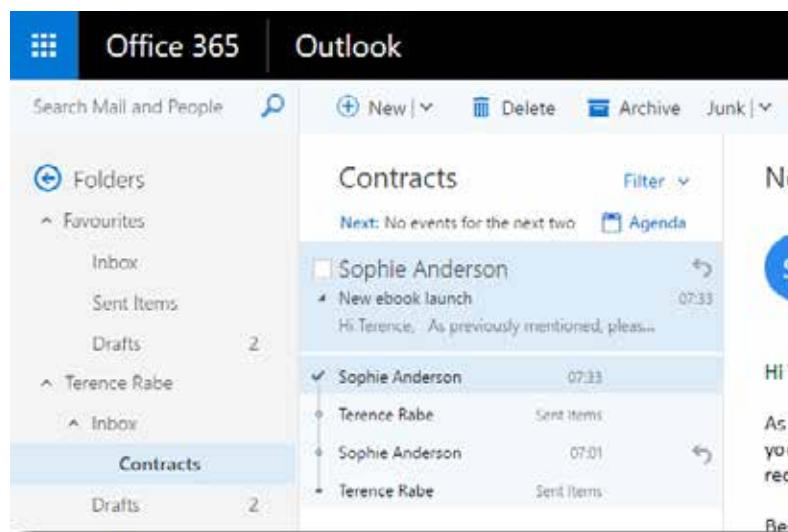


Figure 2-165 Moved messages.

NOTE: Messages that have been moved will still appear as part of conversations, regardless of where they are stored.

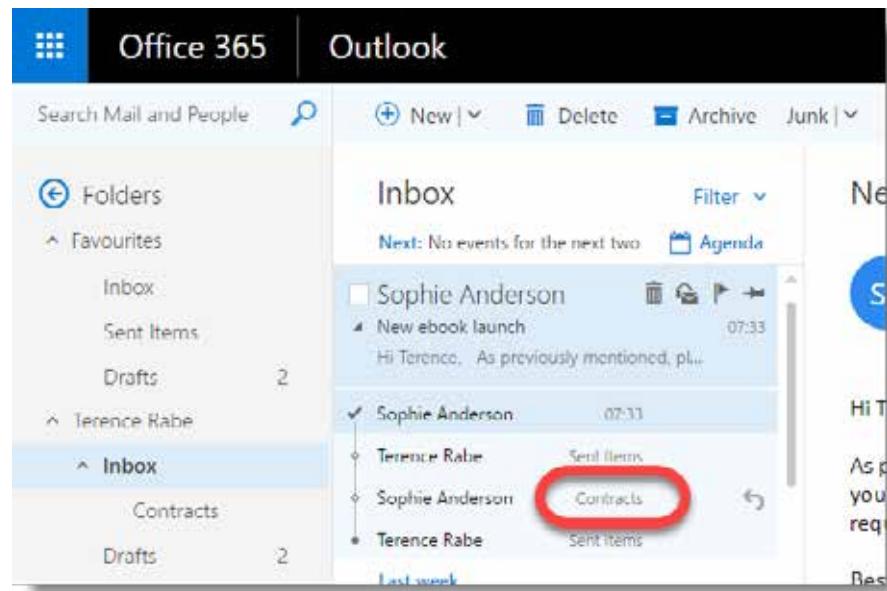


Figure 2-166 Moved message still shown in conversation.

2.16 SEARCH

2.16.1 HOW DOES SEARCH WORK?

Outlook *Search* enables you to find messages and contacts by entering search *terms* (keywords) into the search field. The search results will include messages from your inbox and other folders if those messages have matching words in the subject line, message body, and/or attachment name.

NOTE: Search indexes the *Deleted Items* folder, so your search results may include deleted items.

2.16.2 ENTER SEARCH TERMS

1. Place the cursor in the *Search Mail and People* field.

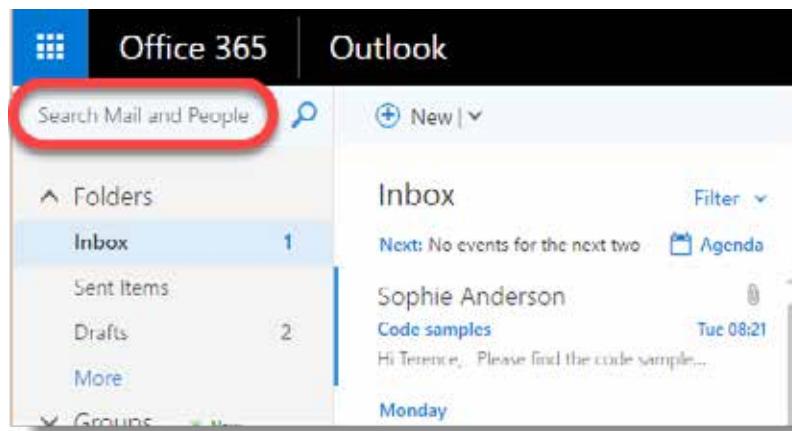


Figure 2-167 The Search Mail and People field.

2. The search suggestions drop-down menu will show the last five searches and last five users emailed; you may select one of these or enter a new search.

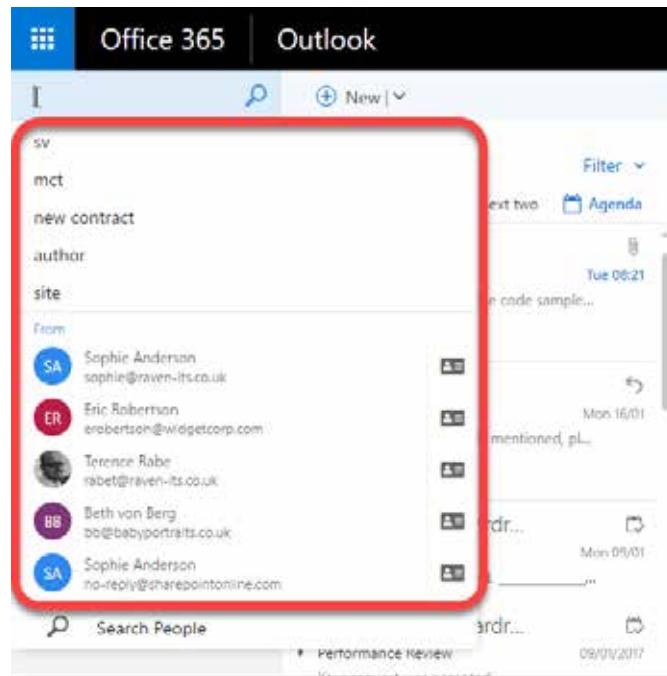


Figure 2-168 The search suggestions drop-down menu.

3. Type your search terms and hit **Enter**.
4. The search results will be displayed in the message preview pane.

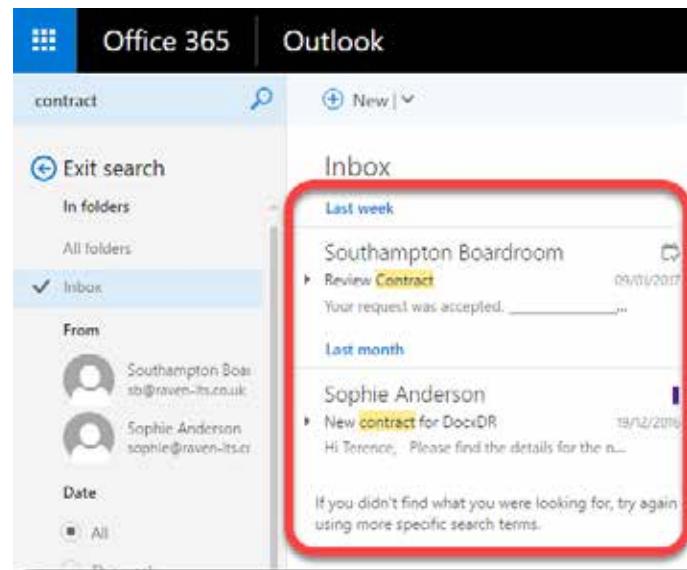


Figure 2-169 Search results with terms highlighted.

NOTE: The search terms will be highlighted wherever they appear in the search results, as shown in the figure above.

2.16.3 FOLDER SEARCH REFINERS

Refiners for folders will be displayed if search finds messages in more than one folder.

1. Click on the folder name in the refiner list.

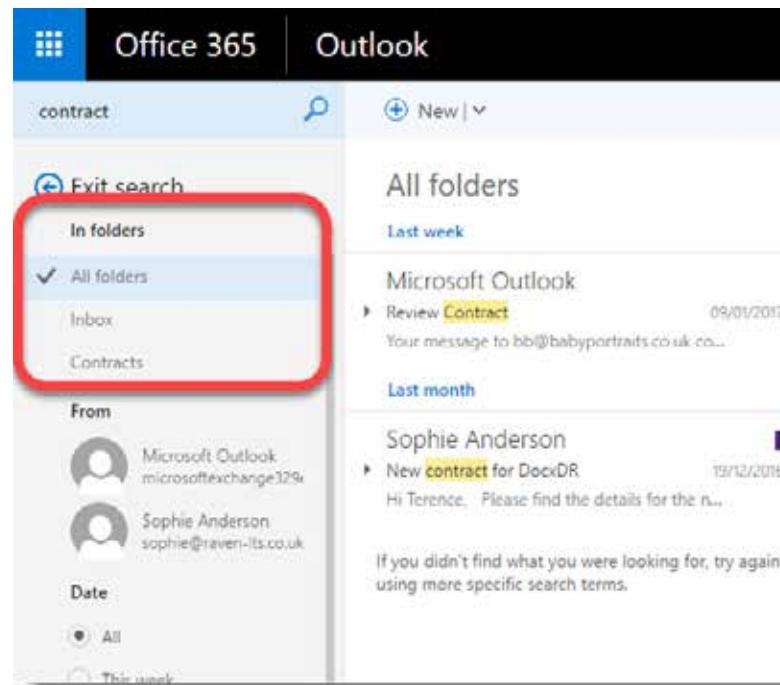


Figure 2-170 Folder search refiners.

2. Only search results from that folder will be displayed.

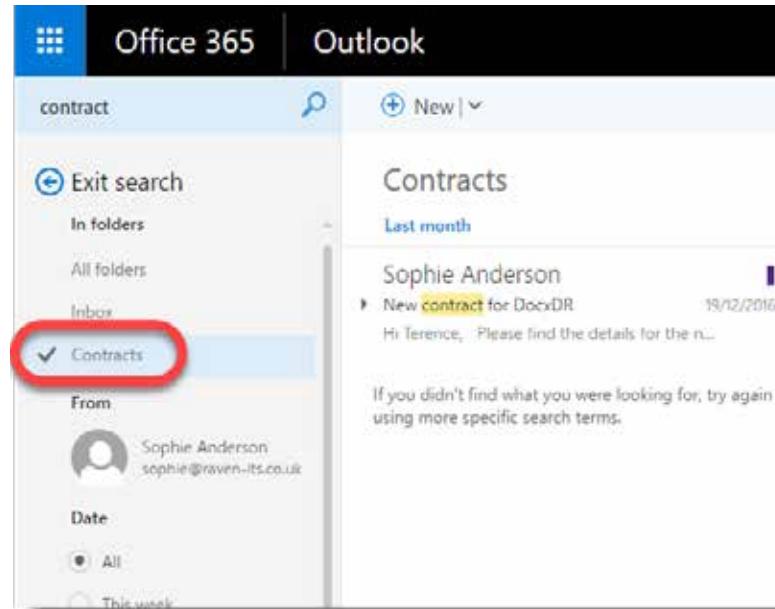


Figure 2-171 Filtered search results.

2.16.4 SENDER SEARCH REFINERS

Sender refiners will be displayed for all those senders whose messages match the search terms.

1. Click on the sender name to show search results only from that sender.

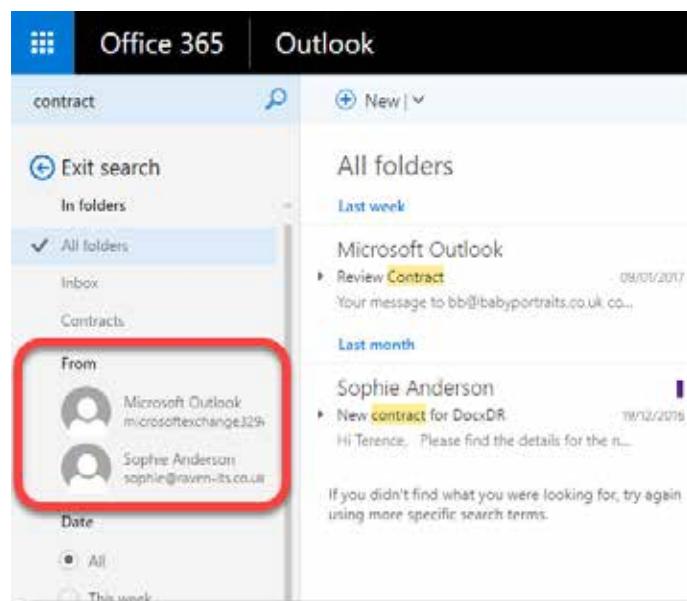


Figure 2-172 Sender search refiners.

2. Only search results that match the sender name will be displayed.

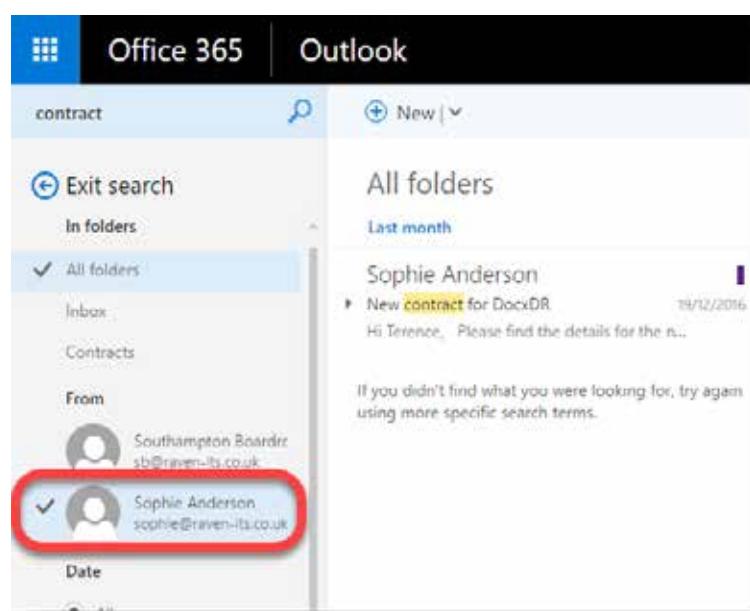


Figure 2-173 Filtered search results.

2.16.5 DATE SEARCH REFINERS

Date refiners are available for a variety of pre-set options or a range of dates.

1. Scroll down (if needed) and select a date refiner option.

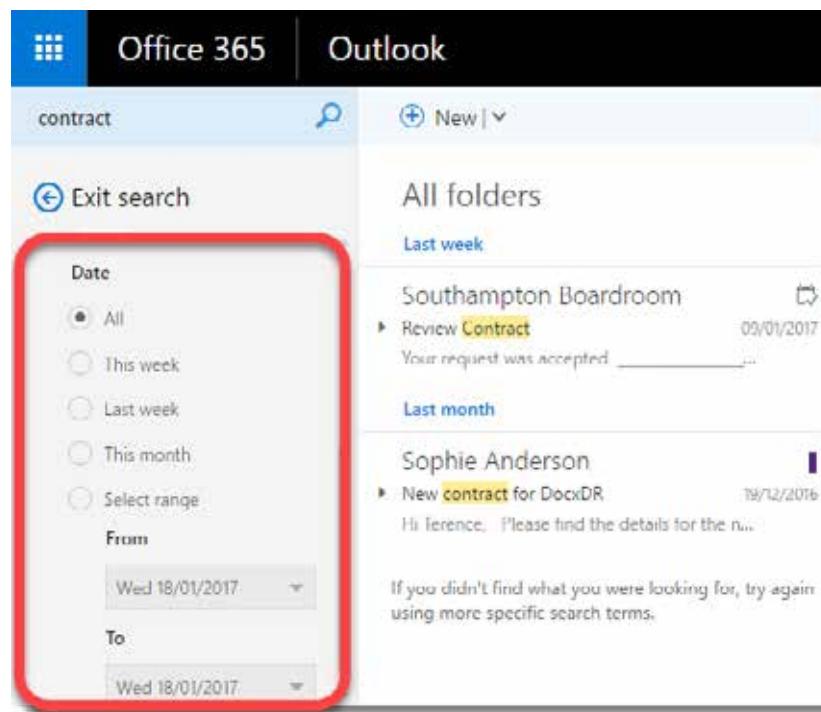


Figure 2-174 Date search refiners.

2. Only messages in that date range are displayed.

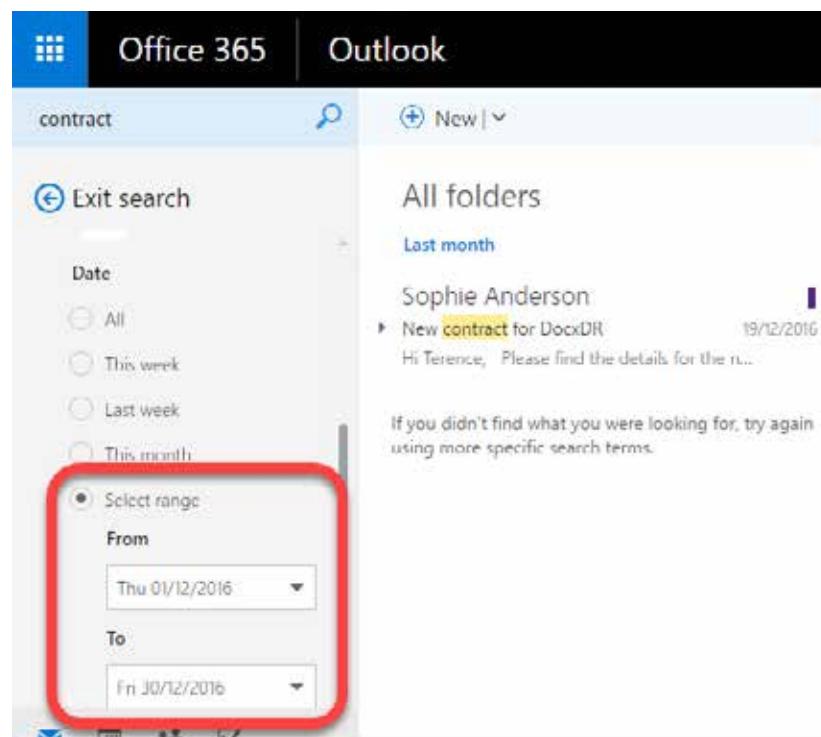


Figure 2-175 Filtered search results

2.16.6 SEARCH TIPS

In addition to refiners, here are some tips to get the best search results:

- Be accurate – misspelled or incorrect terms may produce inaccurate or misleading results.
- Be specific – the more search terms you enter, the more focussed the search results will be.
- Use quotes – e.g. “*pay rise*” will return only results that contain the exact phrase
- Exclude irrelevant terms – use the minus symbol before a term to exclude it; e.g. *pay -rise* will return all messages that include the word ‘pay’ but exclude the messages that have the word ‘rise’.

NOTE: Outlook search does not support *wildcard* searching, which uses the asterisk (*) character.

2.17 AUTOMATIC REPLIES

Automatic replies, also known as “out of office” replies, are set up to respond to incoming emails on your behalf.

In the modern workplace where employees often work away from the office, the literal interpretation of “out of office” may not be applicable; automatic replies should be set only when you are offline and unable to respond to incoming messages.

2.17.1 ENABLE AUTOMATIC REPLIES

1. Click on the **Settings** icon.

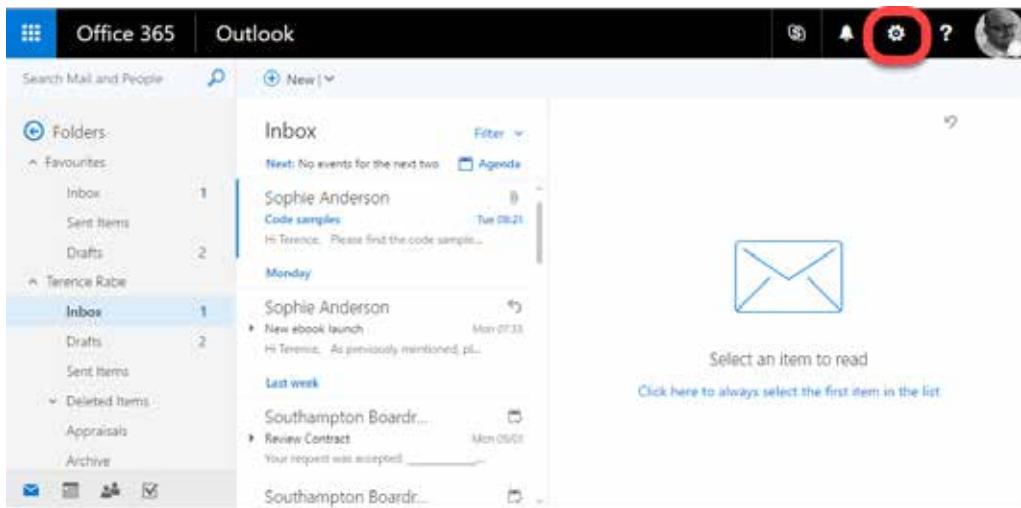


Figure 2-176 The Settings icon.

2. Click **Automatic replies**.

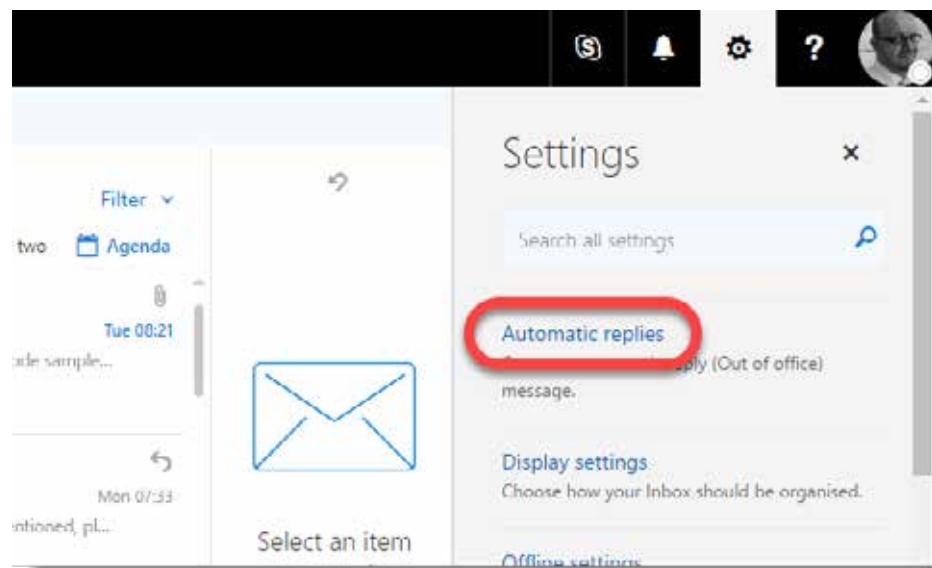


Figure 2-177 the "Automatic replies" link.

3. The *Automatic replies* form will be displayed.

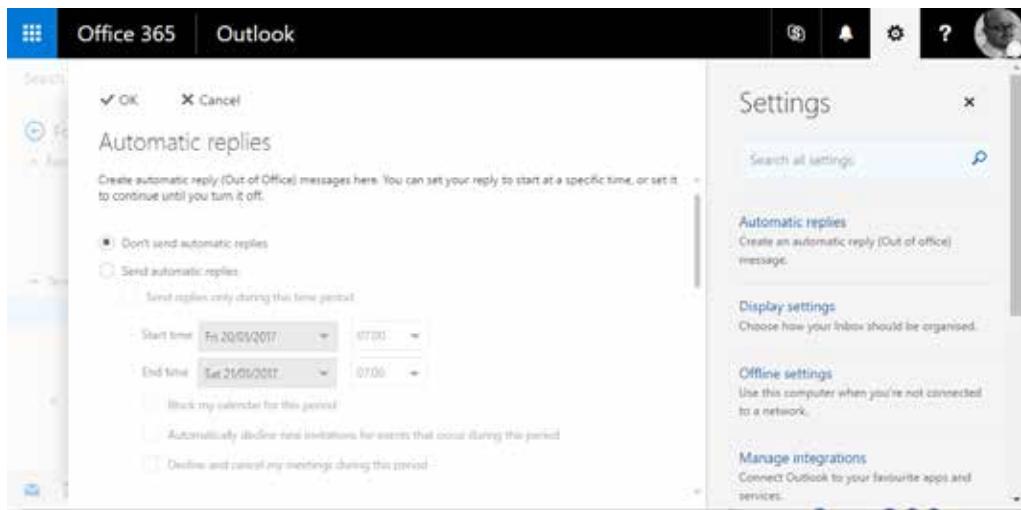


Figure 2-178 Automatic replies form.

4. Click **Send automatic replies**.

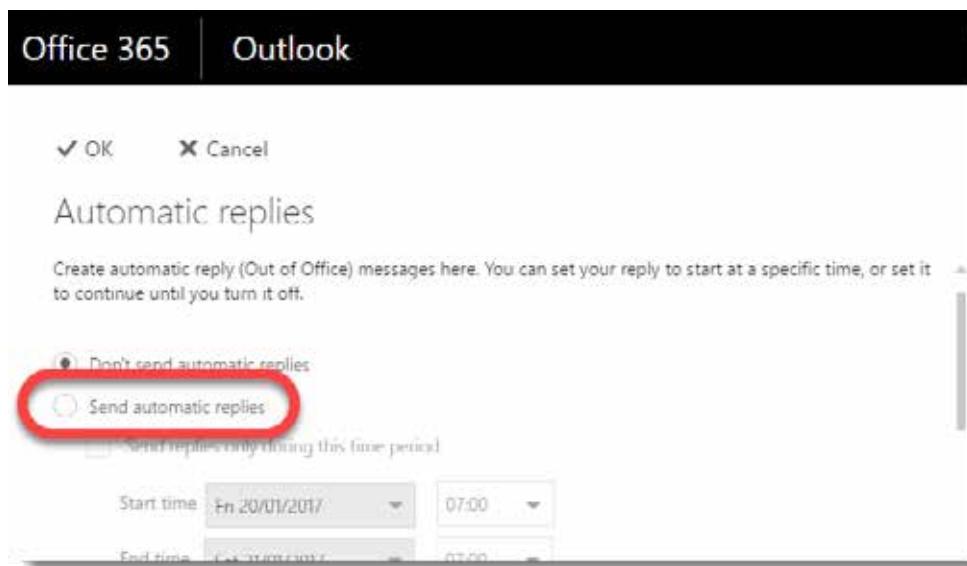


Figure 2-179 The “Send automatic replies” radio button.

5. Scroll down the *Automatic replies* form to locate the *Send a reply once to each sender inside...* text box.

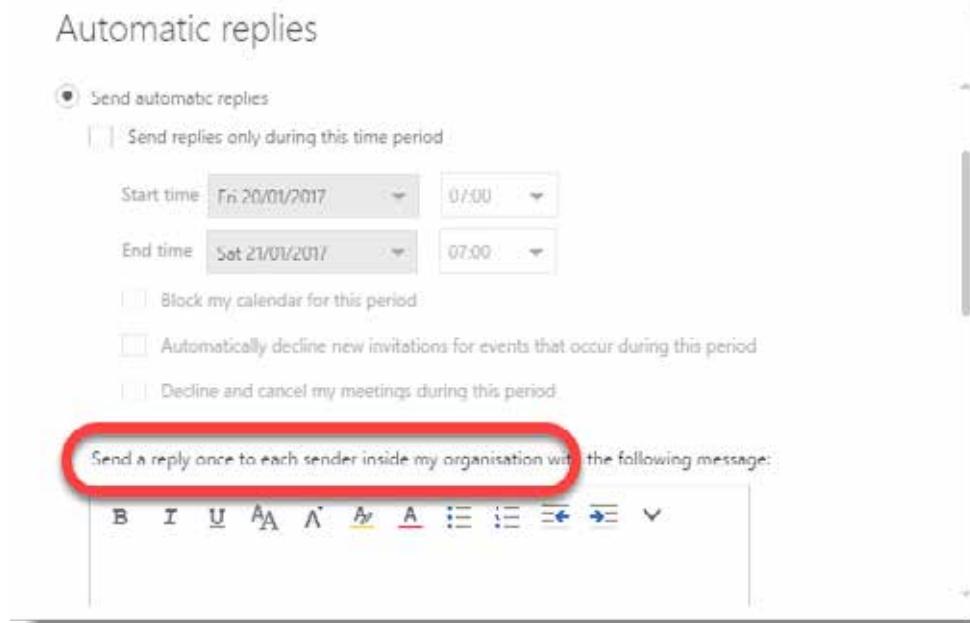


Figure 2-180 Text box for internal sender replies.

6. Type the reply that you wish to send to senders inside your organisation.

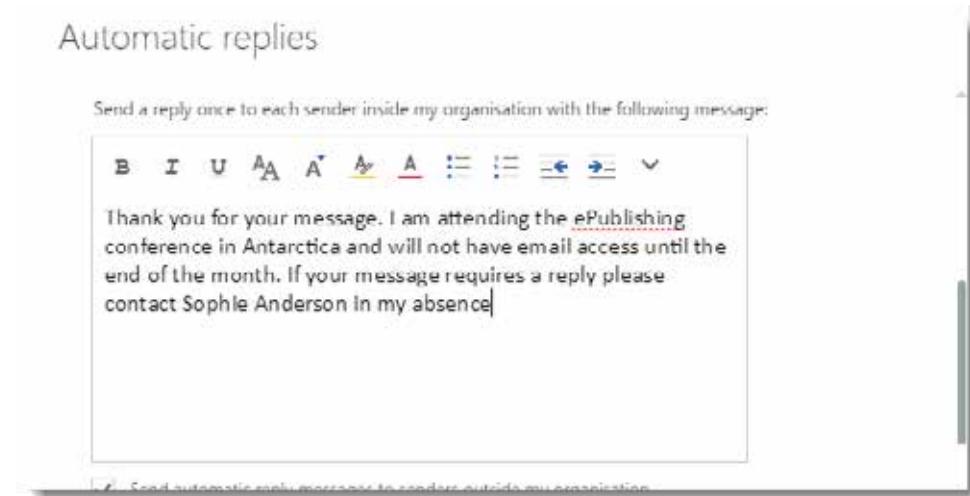


Figure 2-181 Automatic reply text.

After typing your reply for internal senders, you have the option to set replies for external users. If a colleague is monitoring your email and will reply to external senders on your behalf while you are away or if you do not want external senders to know you are away for security reasons, you can **uncheck** the *Send automatic reply messages to senders outside my organisation* box.

Automatic replies

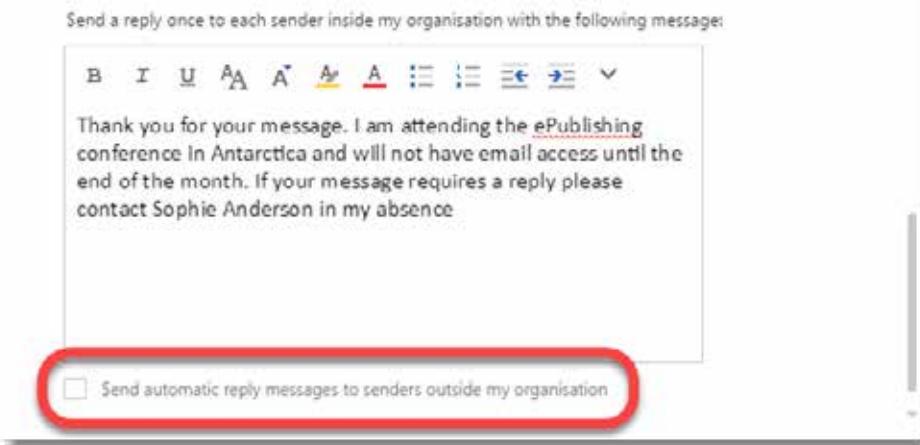


Figure 2-182 The external replies checkbox.

2.17.2 ENABLE AUTOMATIC REPLIES TO EXTERNAL SENDERS

1. Scroll down the Automatic replies form if necessary and ensure that the *Send automatic reply messages to senders outside my organisation* box is checked.

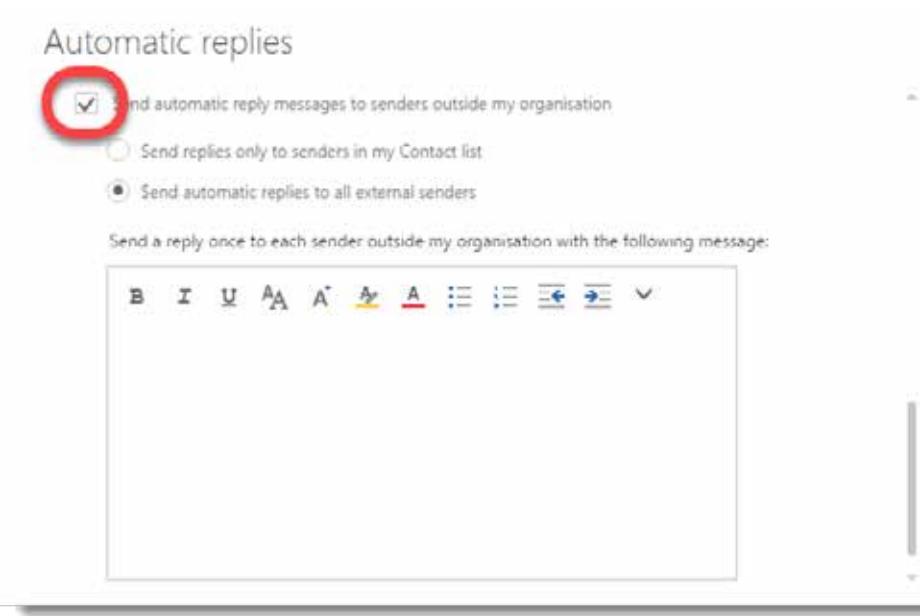


Figure 2-183 The external replies checkbox.

2. Select the radio button to control whether automatic replies go to *all* external senders or just *senders that are saved as contacts* in the People app.

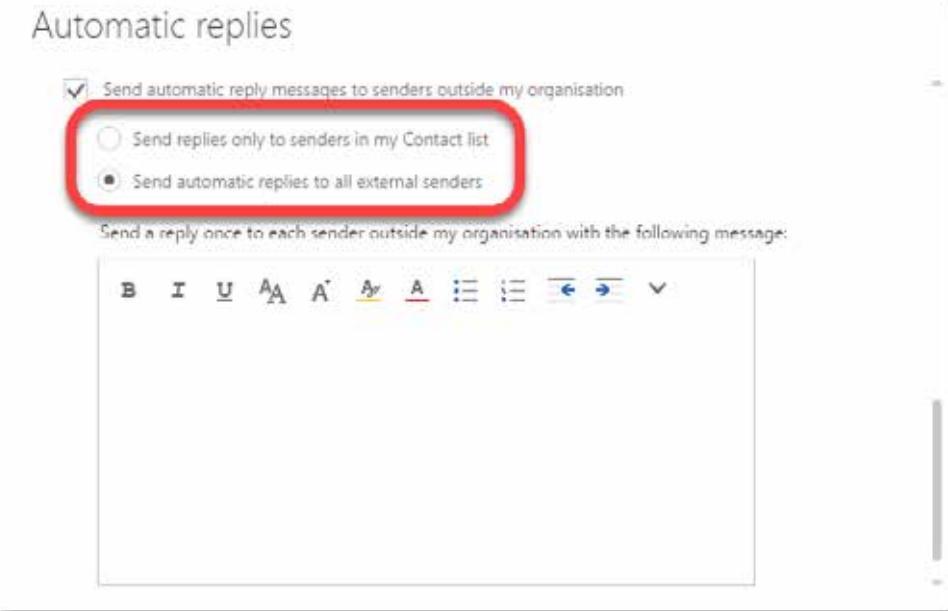


Figure 2-184 Sender options.

3. Type the reply that you wish to send to senders outside your organisation.

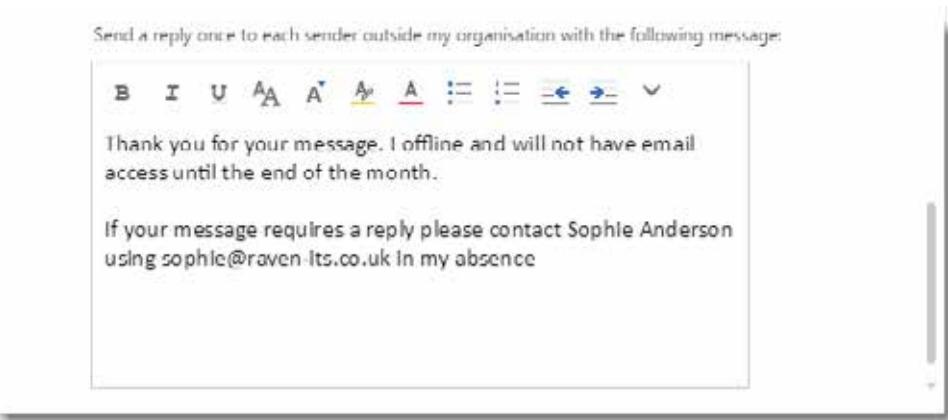


Figure 2-185 Automatic reply text.

4. Click **OK** at the top of the *Automatic replies* form.

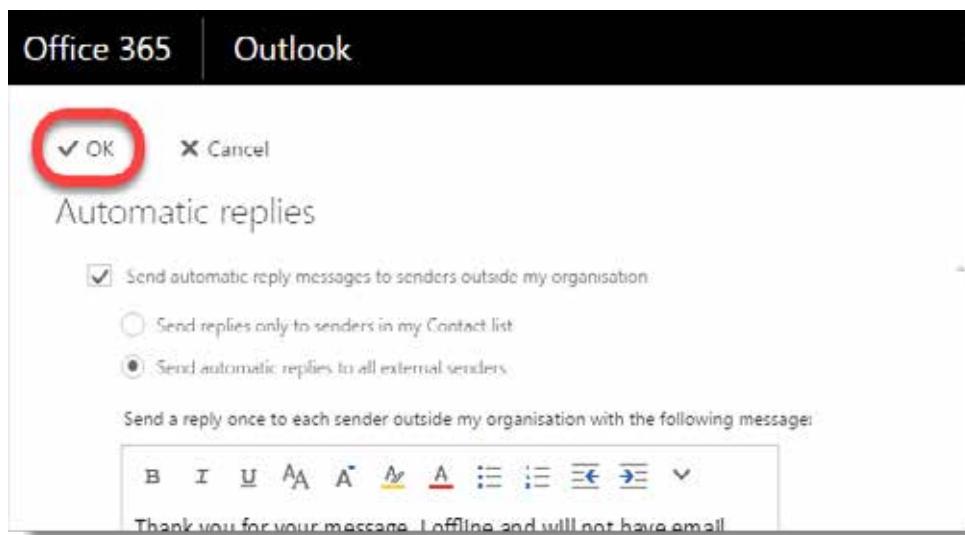


Figure 2-186 OK button.

2.17.3 SCHEDULING AUTOMATIC REPLIES

You can schedule automatic replies in advance if you know when you will be offline, such as a time when you are traveling in an area with no internet access.

1. Follow the steps previously demonstrated to access the *Automatic replies* form and enable automatic replies.
2. Check the box for the *Send replies only during this time period* option.

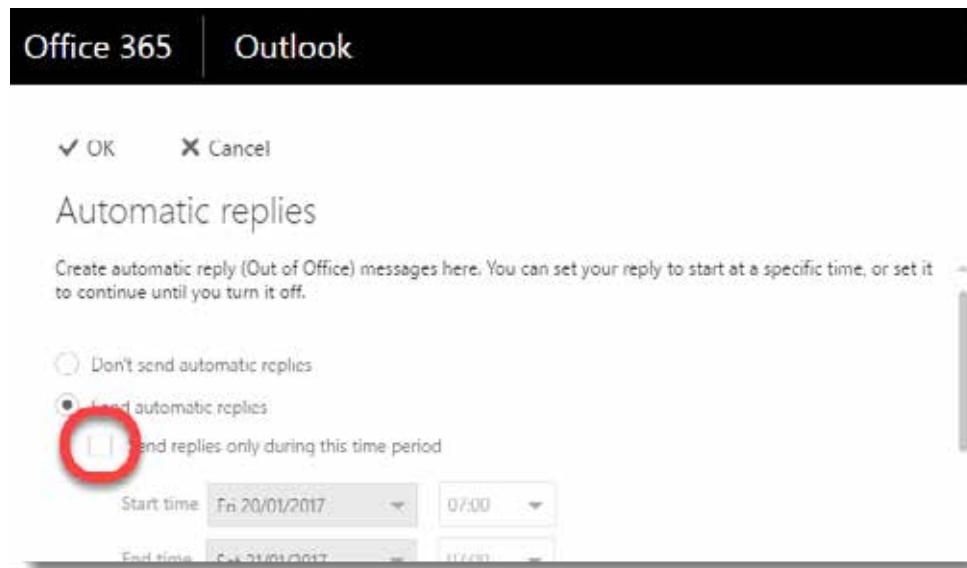


Figure 2-187 The “Send replies only during this time period” box.

3. Set the start and end of the period that you will be offline.

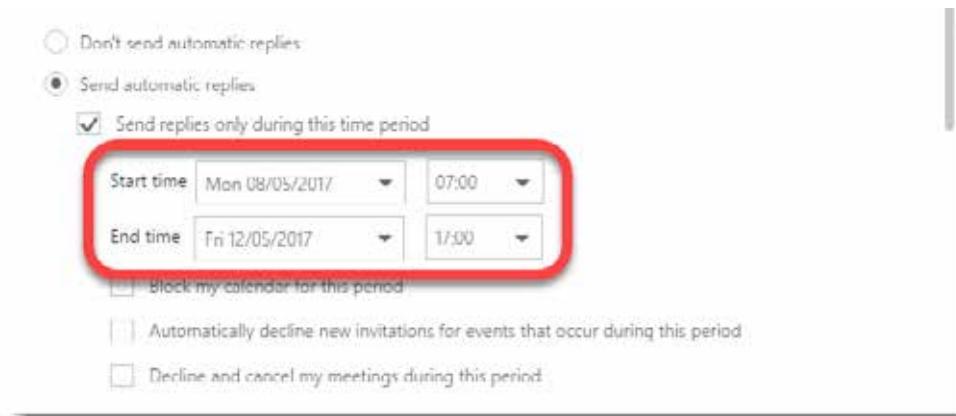


Figure 2-188 Start and end options.

4. Check the boxes for the calendar and meeting options you require.

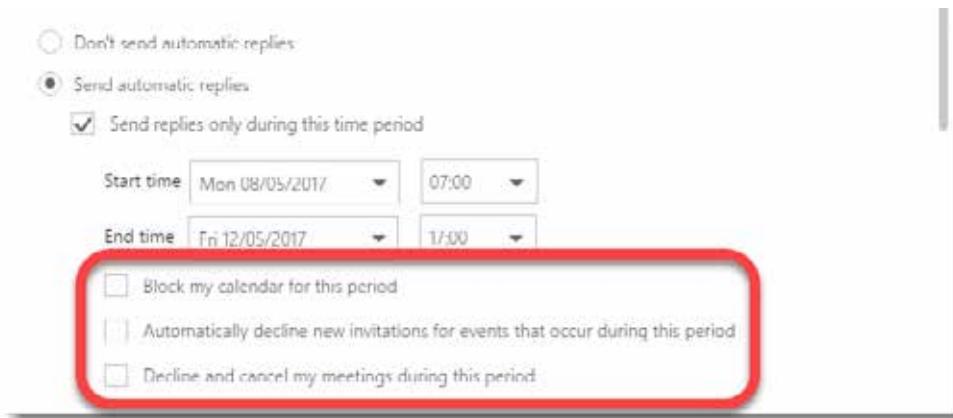


Figure 2-189 Calendar and meeting options.

5. Click **OK** at the top of the *Automatic replies* form.

2.17.4 TURN OFF AUTOMATIC REPLIES

1. Click on the **Settings** icon.
2. Click **Automatic replies**.
3. The *Automatic replies* form will be displayed.
4. Click **Don't send automatic replies**.

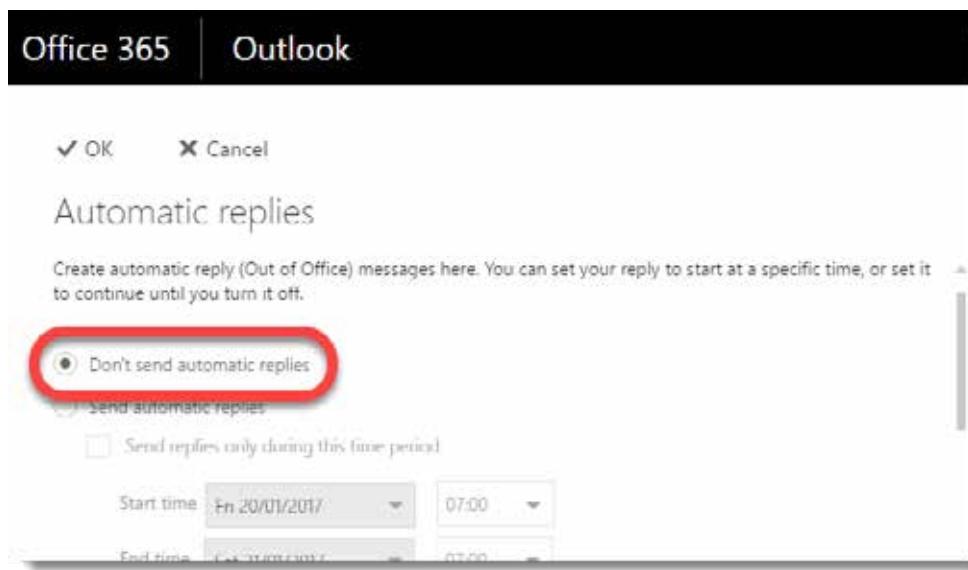


Figure 2-190 The “Don’t send automatic replies” radio button.

3 SKYPE IN OUTLOOK

Skype is a communications tool that offers instant messaging (text chat), voice calls, and video conferencing features. To access all these features, you need to use the desktop version of Skype called Skype for Business.

This guide covers the Skype web app, which is embedded in the Outlook Mail web app and supports only instant messaging.

3.1 GETTING STARTED

3.1.1 SIGN IN TO SKYPE

You are automatically signed in to Skype whenever you access any Outlook web app (Mail, Calendar, People, or Tasks).

3.1.2 OPEN SKYPE

1. Navigate to one of the Outlook web apps.
2. Click the **Skype icon**.

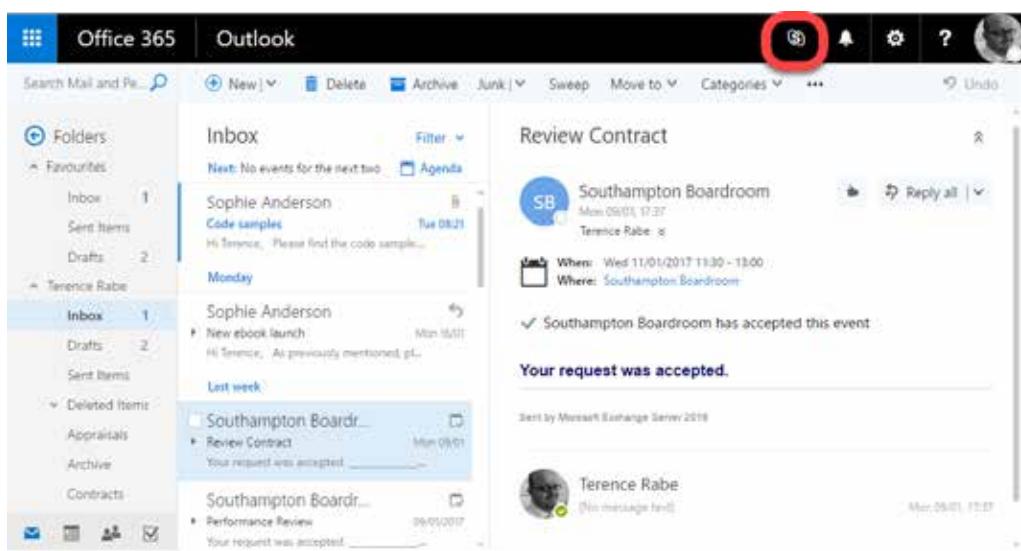


Figure 3-1 The Skype icon.

3. The *Skype* pane will open and display your contacts.

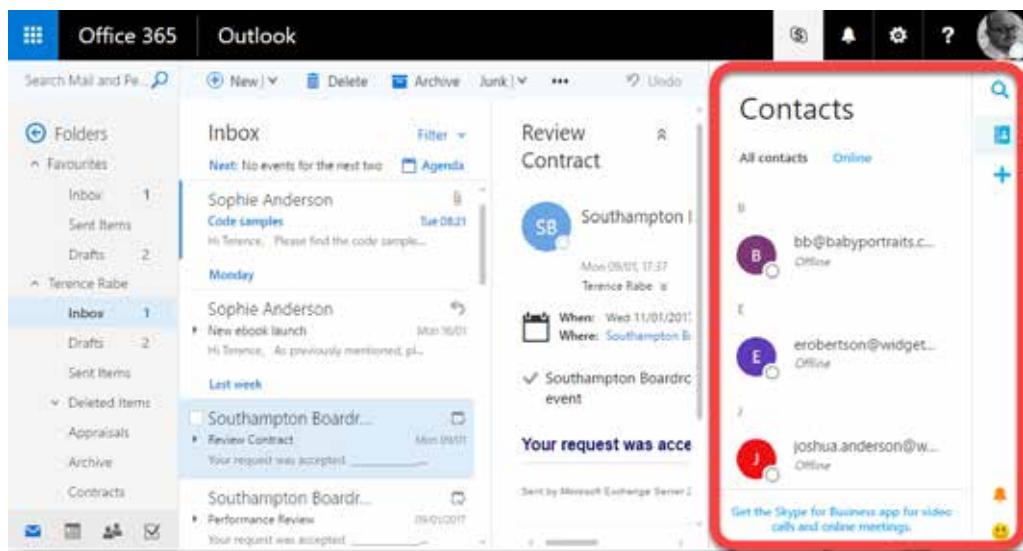


Figure 3-2 The Skype pane in Outlook.

4. Click the **Online** link to show only contacts that are signed into one of the Outlook web apps.

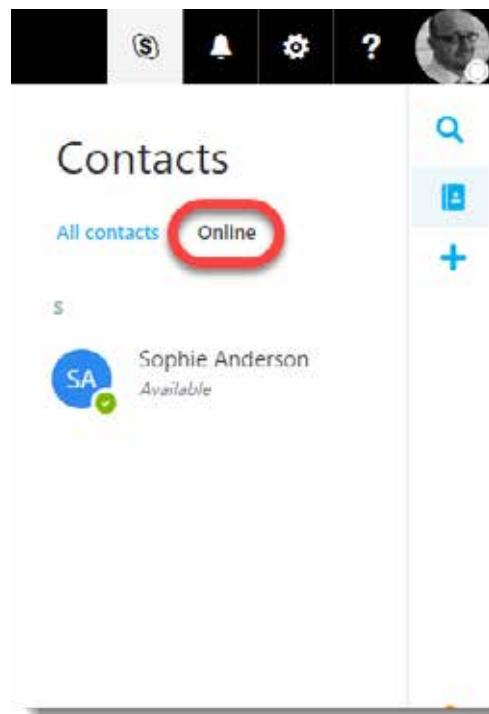


Figure 3-3 Online contacts.

3.2 STATUS

3.2.1 STATUS ICONS

Status icons use colours to indicate availability information in real time. This information may help you decide which method to use when communicating with a contact.

Available – the icon is green, which means that the contact is actively using Outlook and is likely to respond to a Skype chat request.



Figure 3-4 Available status.

Away – the icon is yellow and has a clock face graphic, which means the user is online but not using Outlook. They may be away from their desk or are just using a different application. Either way, they may be less likely to respond to an instant message. Email may be a better option in this case.

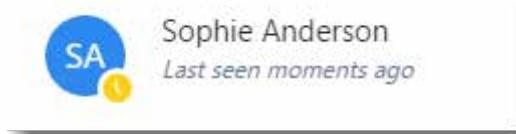


Figure 3-5 Away status.

Busy – the icon is red. The contact is in a meeting, or has set their status to busy, and is unlikely to respond to an instant message. Use email to contact them.



Figure 3-6 Busy status.

Do not disturb – the icon is a no-entry sign. The contact does not wish to be disturbed and is unlikely to respond to an instant message. Use email to contact them.



Figure 3-7 Do not disturb status.

3.2.2 SET YOUR SKYPE STATUS

1. Click your profile picture in the top right corner.

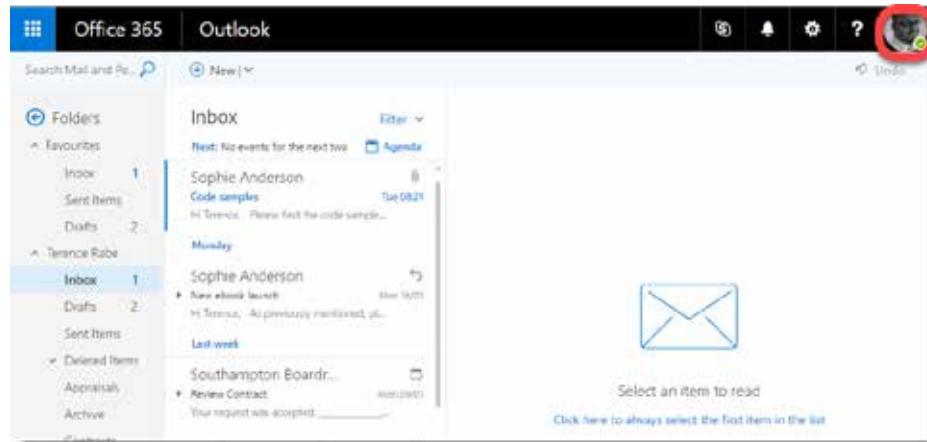


Figure 3-8 Profile picture.

- Choose your status from the available options.

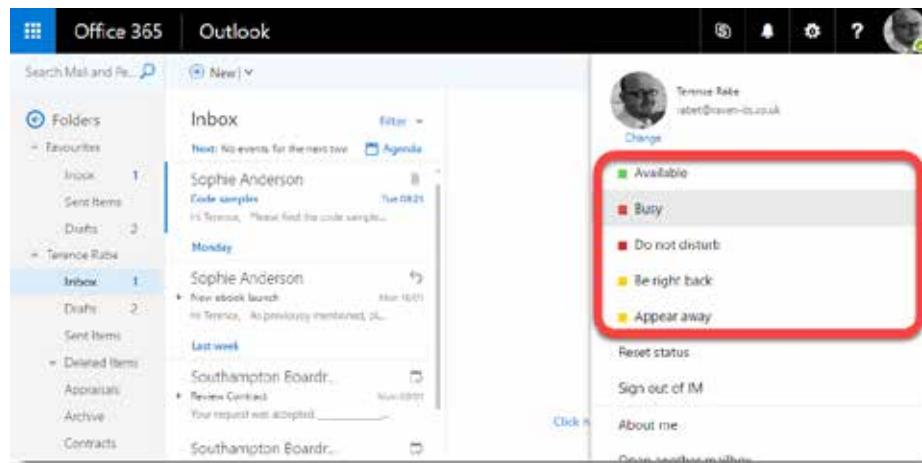


Figure 3-9 Status options.

3.3 CONVERSATIONS

3.3.1 STARTING A CONVERSATION

- Open the Skype pane in Outlook.
- Click on the name of the contact with whom you want to start a conversation.

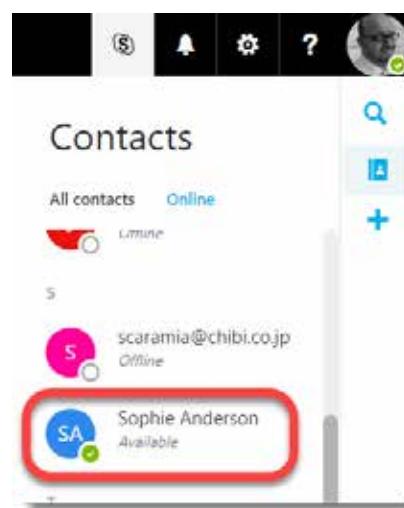


Figure 3-10 A contact.

- Type your message and hit **Enter**.

4. Your message will be displayed in your conversation window.

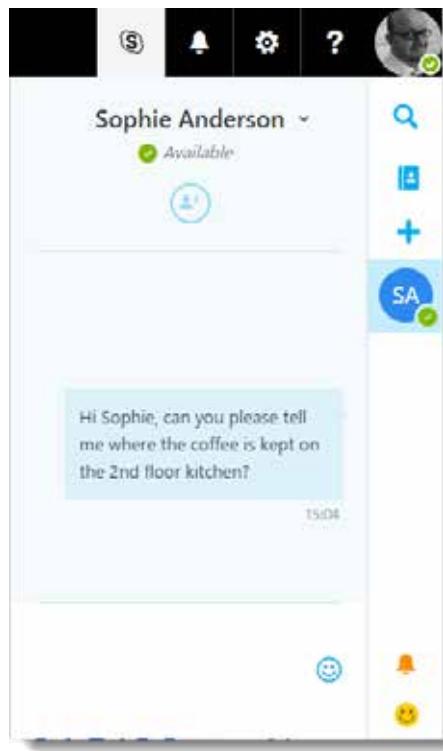


Figure 3-11 Message to contact.

5. If the other user replies you will see their message displayed below yours.

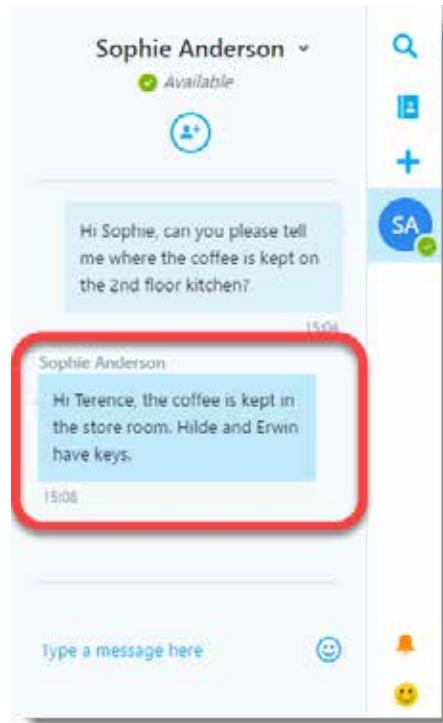


Figure 3-12 Reply from contact.

3.3.2 RESPOND TO AN INSTANT MESSAGE

When someone sends you an instant message in Skype, you may hear an audio alert and see a notification pop up in the top right corner of your browser window, depending on your notification settings.

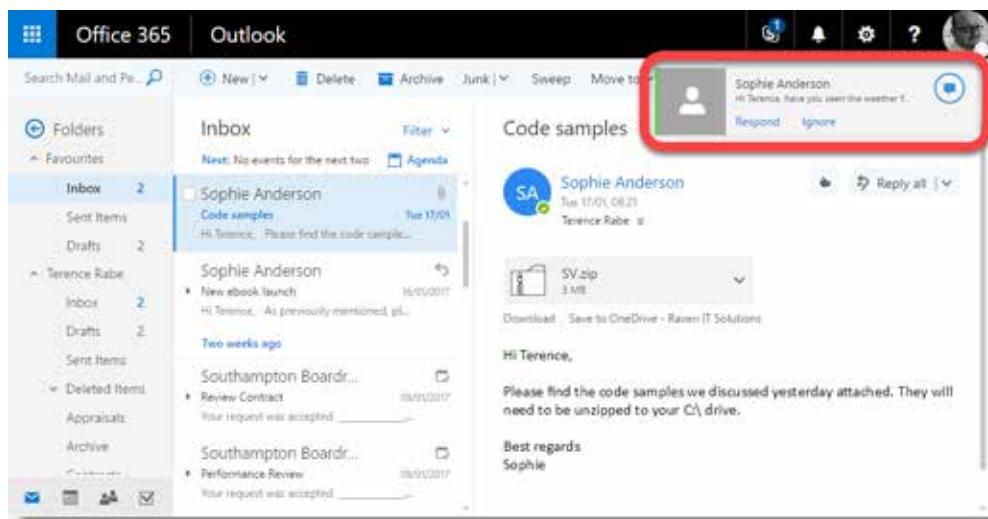


Figure 3-13 Skype notification.

1. Click **Respond** on the notification pop up.

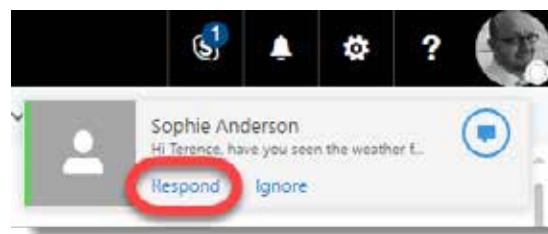


Figure 3-14 The "Respond" link.

2. The Skype pane will be displayed with the received message.

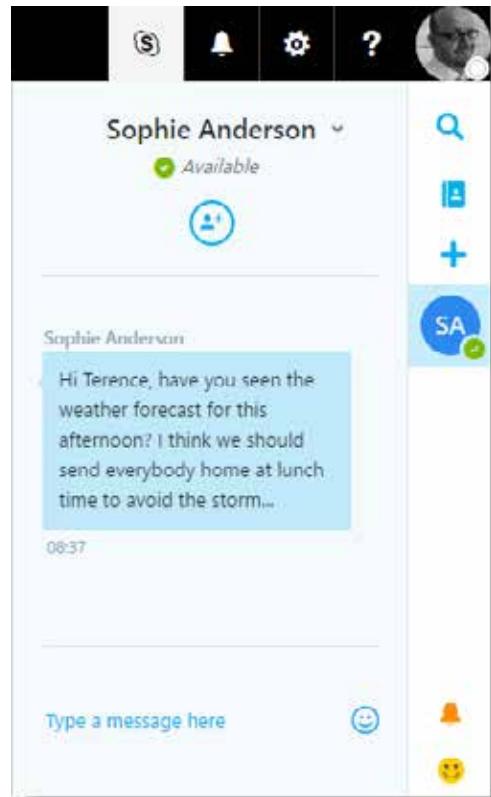


Figure 3-15 Received message.

3. Type your reply in the text field at the bottom of the Skype pane and press **Enter** to reply to the message.

3.3.3 IGNORE AN INSTANT MESSAGE

If you do not wish to respond to the instant message, you can click **Ignore**.

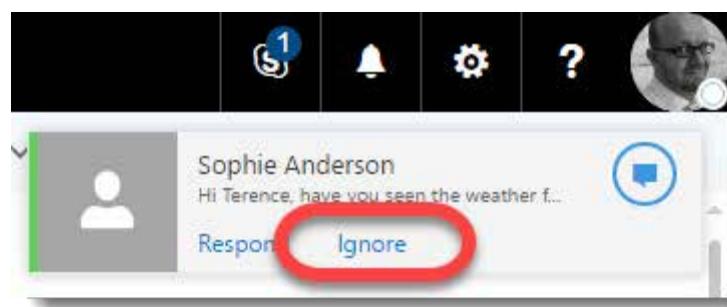


Figure 3-16 The "Ignore" link.

NOTE: Skype will send the instant message to you as a *missed conversation* email message if you ignore a Skype notification.

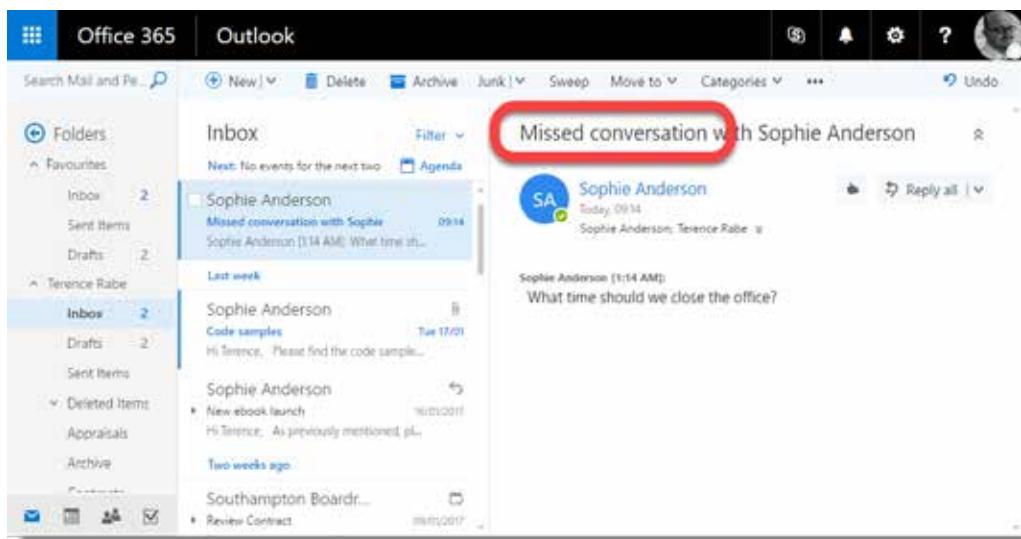


Figure 3-17 Missed conversation email message.

3.3.4 END A CONVERSATION

1. Hold the mouse pointer over the icon displaying the contact's initials.

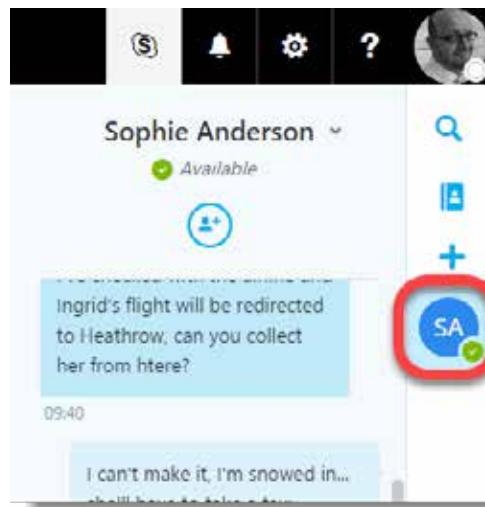


Figure 3-18 Contact initials.

2. When the slider menu opens, right click on the contact's name.

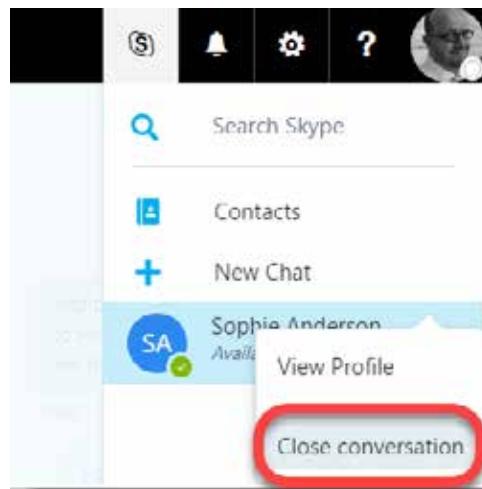


Figure 3-19 The “Close conversation” option.

3. Select **Close conversation**.

NOTE: The conversation will also be closed if you close your web browser or sign out of Office 365.

3.3.5 CONVERSATION HISTORY

When conversations are closed, they are saved in the Conversations folder in the *Mail* app.

1. Open the *Mail* web app.
2. If necessary, expand the folder view by clicking **More**.

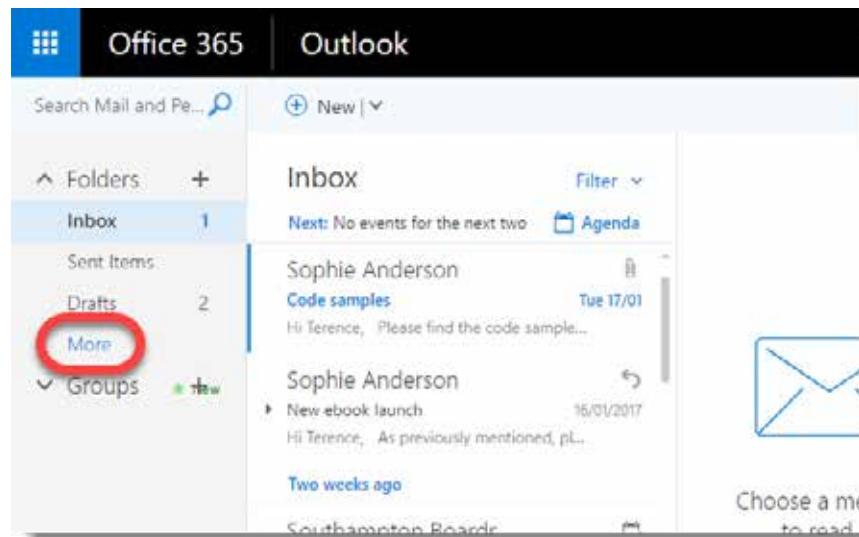


Figure 3-20 The “More” link in the folder pane.

3. Select **Conversation History** in the folder pane.

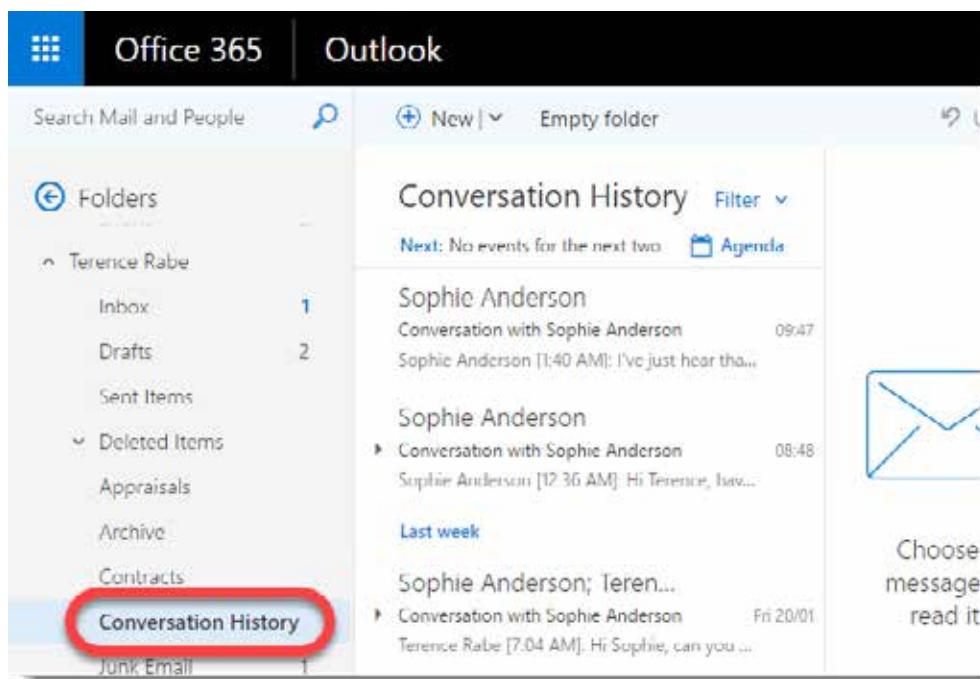


Figure 3-21 The “Conversation History” link in the folder pane.

4. Previous Skype conversations will be listed in the preview pane.

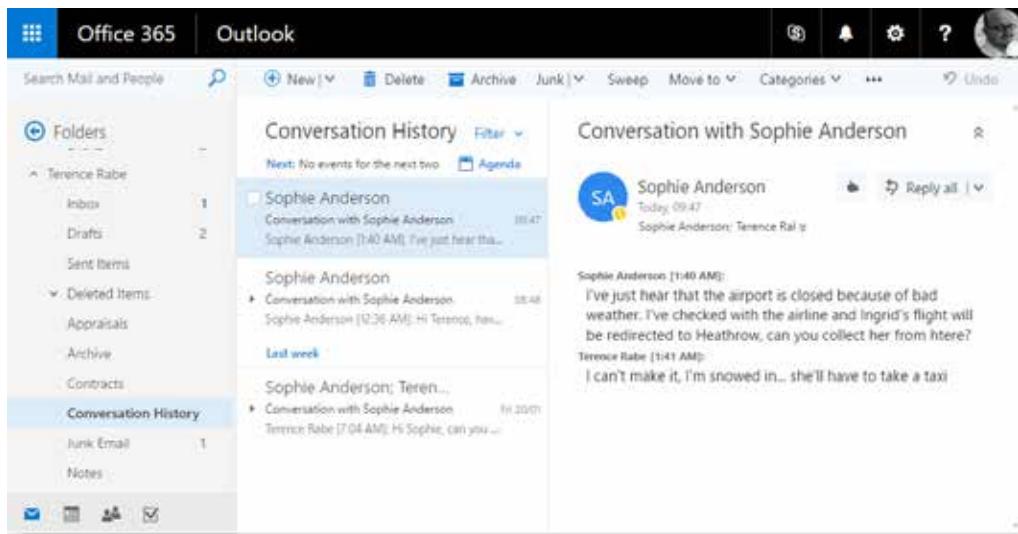


Figure 3-22 Conversation History.

NOTE: Conversation history is searchable using Outlook Search.

4 CALENDAR

4.1 OVERVIEW

The Outlook *Calendar* app is used to manage your schedule and availability. You can create appointments and arrange meetings to help organise your schedule, and colleagues can view your calendar to see if you're available to join their meetings.

4.1.1 ACCESSING CALENDAR

The Outlook *Calendar* web app has its own app tile which can be found on the Office 365 Home page.

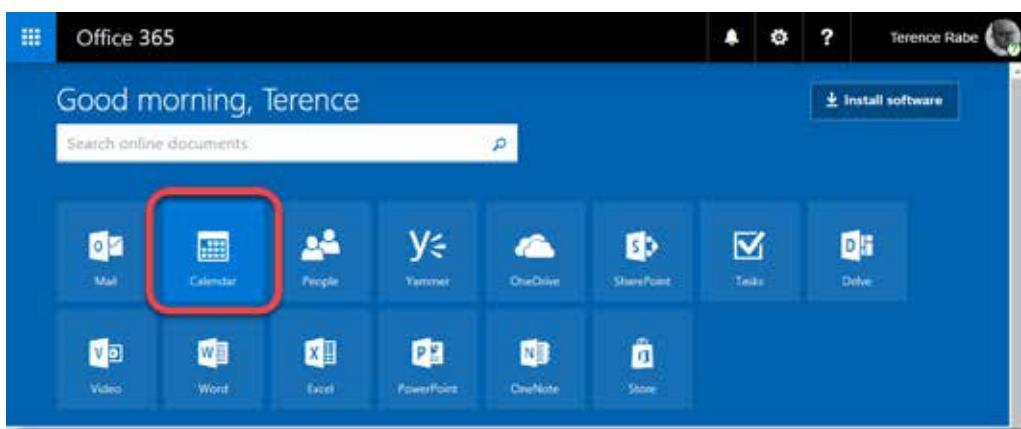


Figure 4-1 The Calendar app tile on the Home page.

The App launcher also has a Calendar app tile.

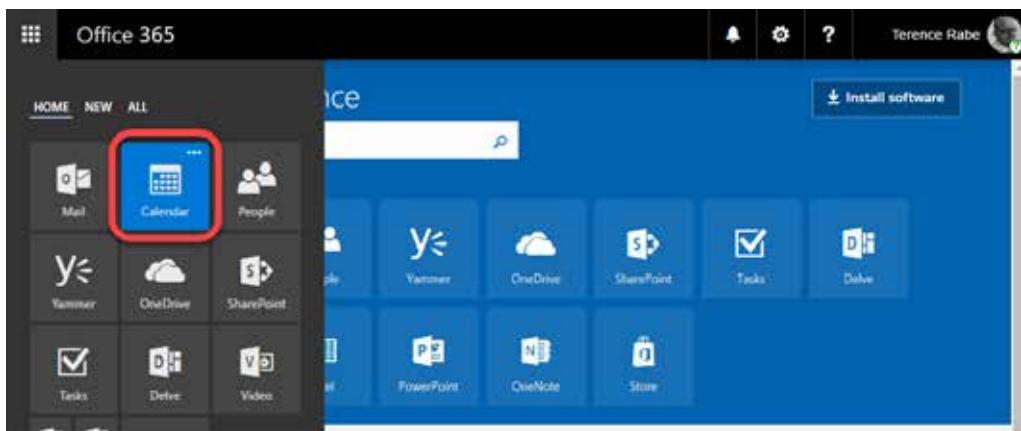


Figure 4-2 The Calendar app tile on the App launcher.

4.2 CALENDAR VIEWS

You can change how events are displayed using views.

4.2.1 MONTH VIEW

Month view is the default view. All the days of the current month are displayed in a compact grid format with coloured blocks indicating the presence of an event. Minimal event detail is visible.

1. *Month* view can be selected by clicking the **Month** link.

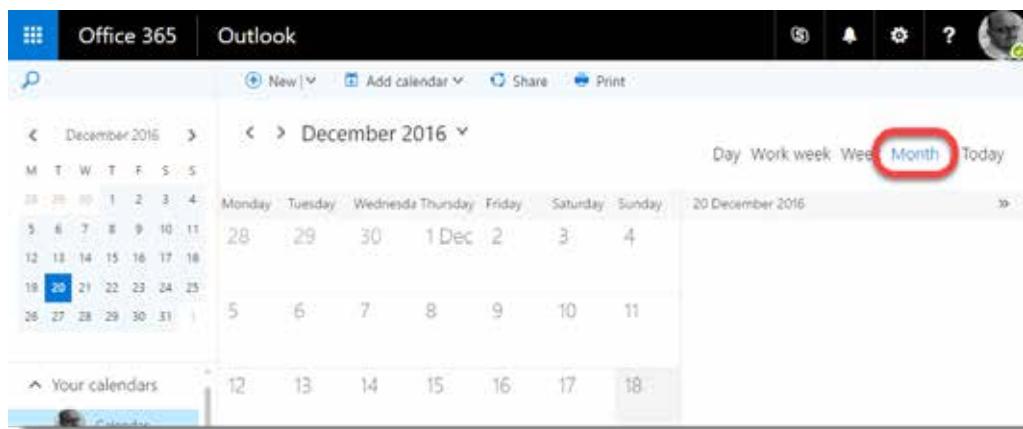


Figure 4-3 The Month link.

2. You can view the previous or next month by clicking on the **arrows** next to the month name.

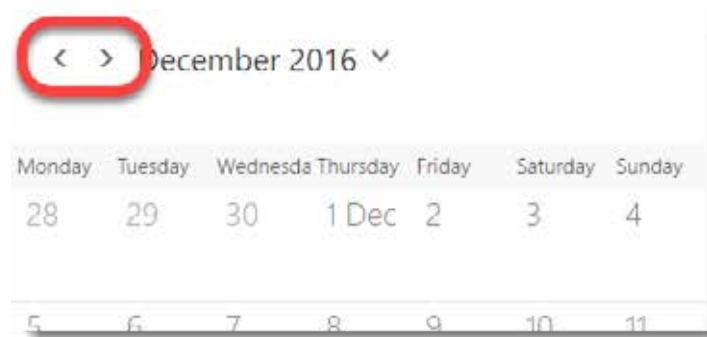


Figure 4-4 Previous/Next month selector.

3. To view a specific month, click on the drop-down arrow next to the month name and then select a month; you can also use this drop-down menu to select a year.

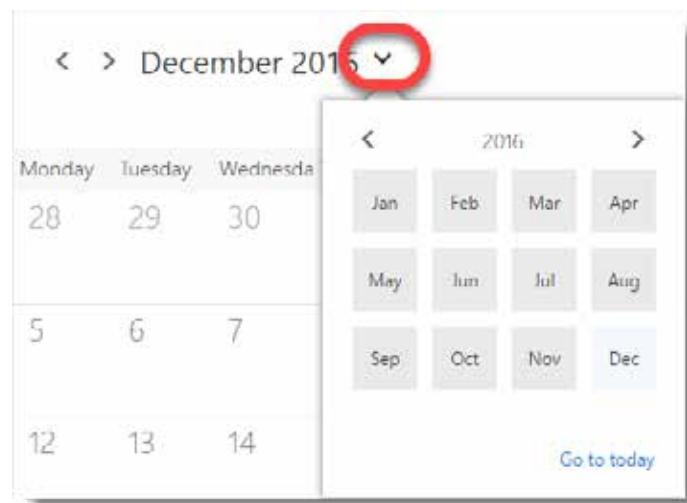


Figure 4-5 Month/year selector drop-down arrow.

4.2.2 DAY VIEW

1. Click on the **Day** link to switch to *Day* view.

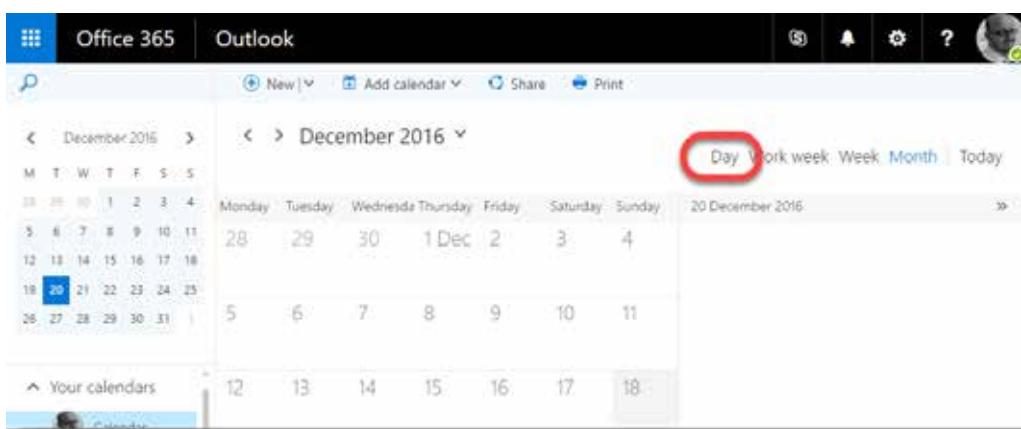


Figure 4-6 Day view link.

2. Day view allows you to see the maximum details of your daily schedule; due to the length of a day, you may need to scroll up or down to see all the events on a day.

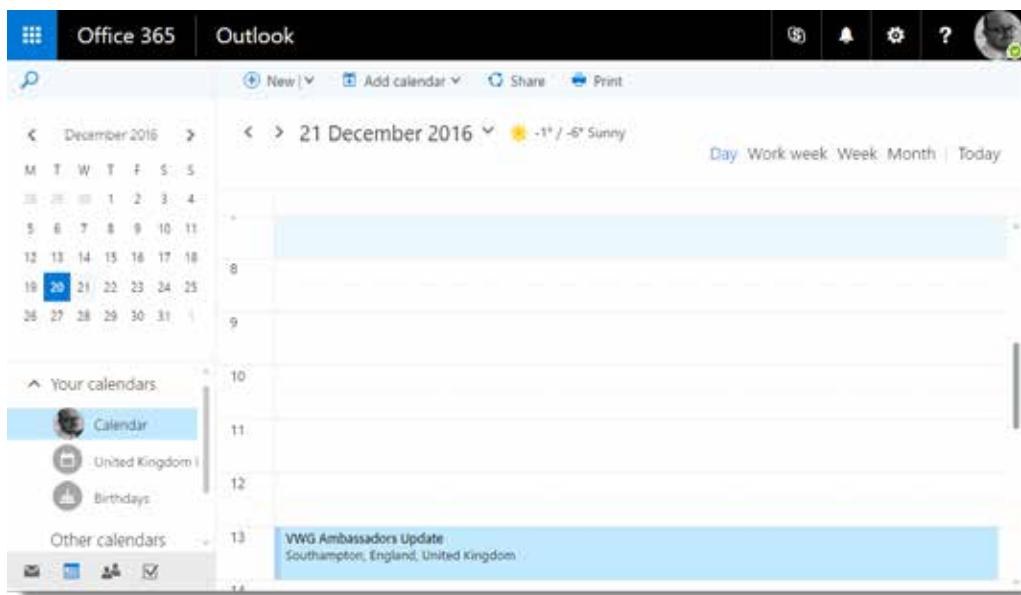


Figure 4-7 Day view.

3. Day view provides the most detail in the event preview with the name and location fully visible.

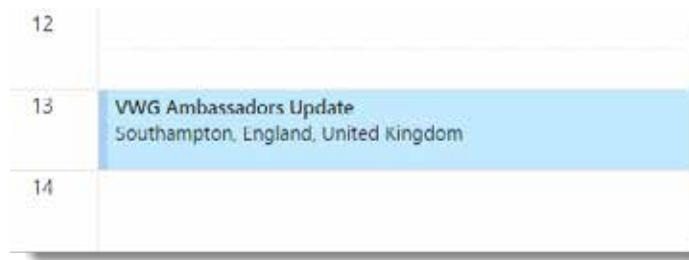


Figure 4-8 Event detail in day view.

4.2.3 WORK WEEK VIEW

The *Work week* view displays only the working days of the selected week. The work week runs from Monday to Friday by default, but these options can be customised by your IT

department if you are based in a country that has its weekend on a Thursday and Friday, or Friday and Saturday.

1. Click on the **Work week** link to switch to *Work week* view.

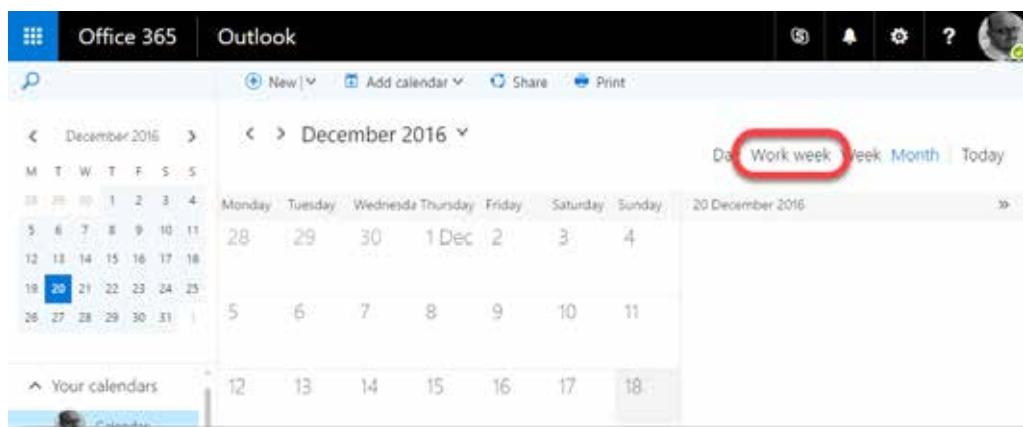


Figure 4-9 The Work week link.

2. *Work week* view shows more event detail than *Month* view but not as much as *Day* view.

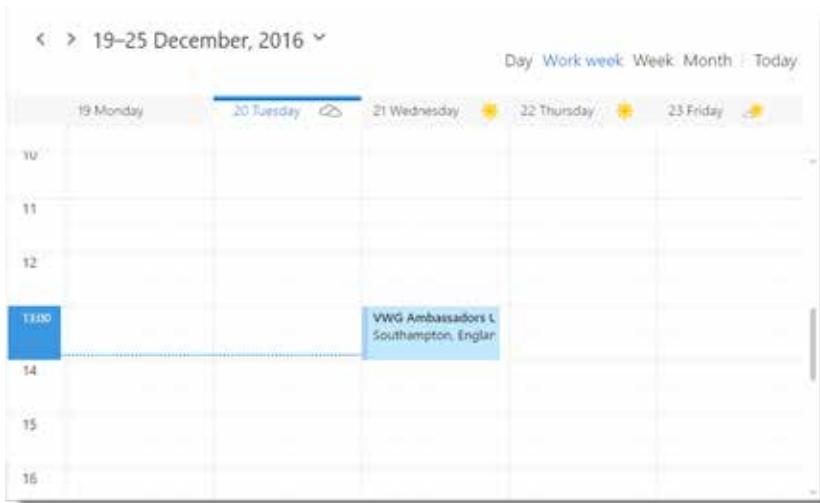


Figure 4-10 Work week view.

4.2.4 WEEK VIEW

Like *Work week* view, the *Week* view provides an intermediate amount of detail but shows seven days in the week.

1. Click the **Week** link.

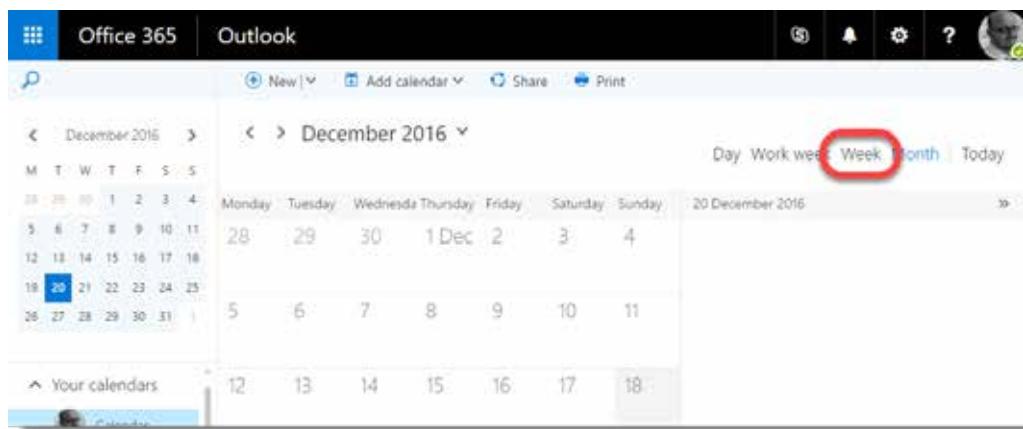


Figure 4-11 The Week link.

2. The *Week* view will load.

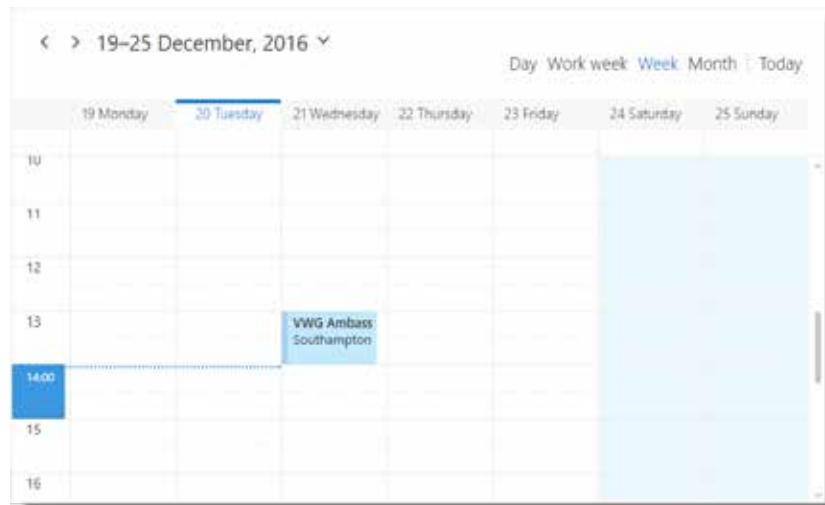


Figure 4-12 Week view.

4.3 APPOINTMENTS

An *appointment* is an event where the organiser (the user who creates the event) does not invite any other users. You can create appointments for personal and private events like holidays and medical appointments or just to reserve time in your calendar for when you do not wish to be disturbed.

4.3.1 QUICK APPOINTMENT

1. Set the Calendar to the required view (day, month, etc.).
2. Click on the area of free time where you want to create the appointment.

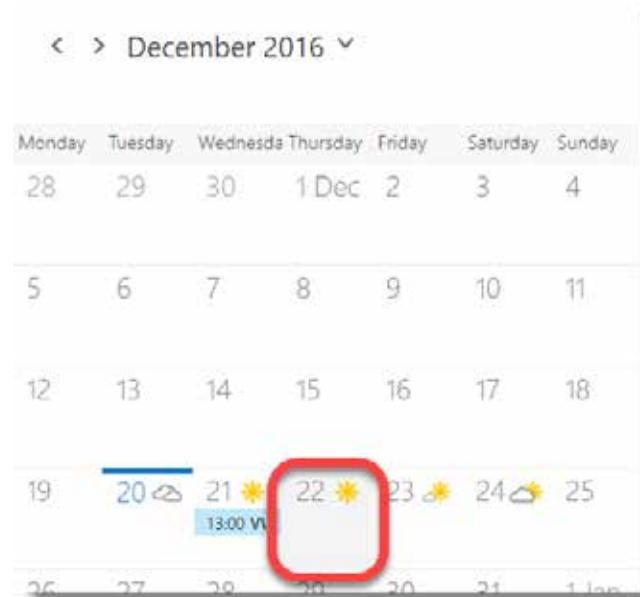


Figure 4-13 A day with available time.

3. A dialogue box will pop up, ready to accept the basic event information.

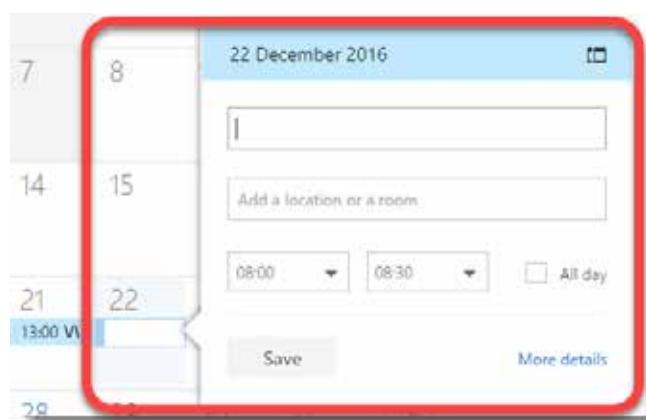


Figure 4-14 Quick event dialogue box.

4. Fill in the *title* of the event.

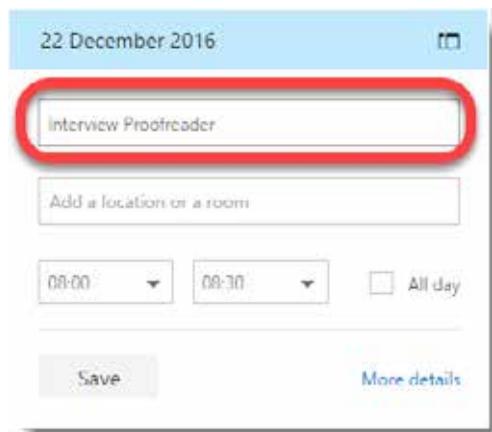


Figure 4-15 Event title.

5. When you begin to fill in the location field, Office 365 may attempt to use location tracking to improve the accuracy of suggested meeting locations; click **Allow** or **Block**.



Figure 4-16 Location tracking prompt.

6. Type in the *location*; Office 365 will use Bing maps to try determine an exact location.
7. Select a location from the list of suggestions or type the location name in full.

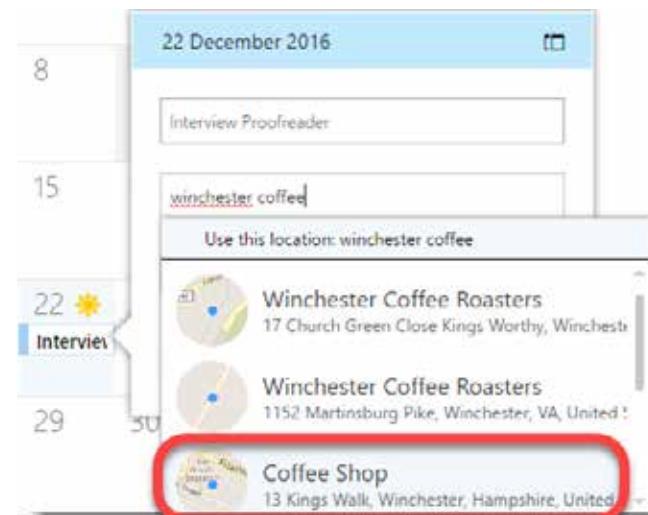


Figure 4-17 A suggested location.

8. Specify the start and end times or check the **All day** box.

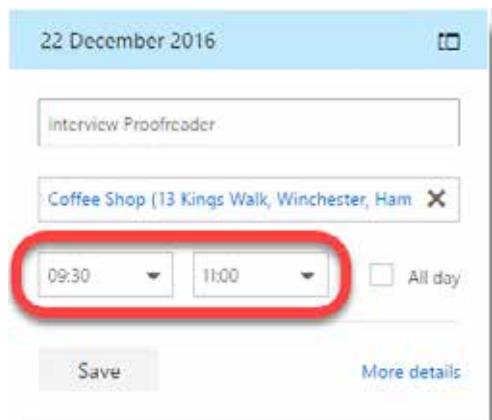


Figure 4-18 Event times.

9. Click **Save**.

4.3.2 DETAILED APPOINTMENT

To create an appointment with more detailed event information, follow the directions below:

1. Click **New**.

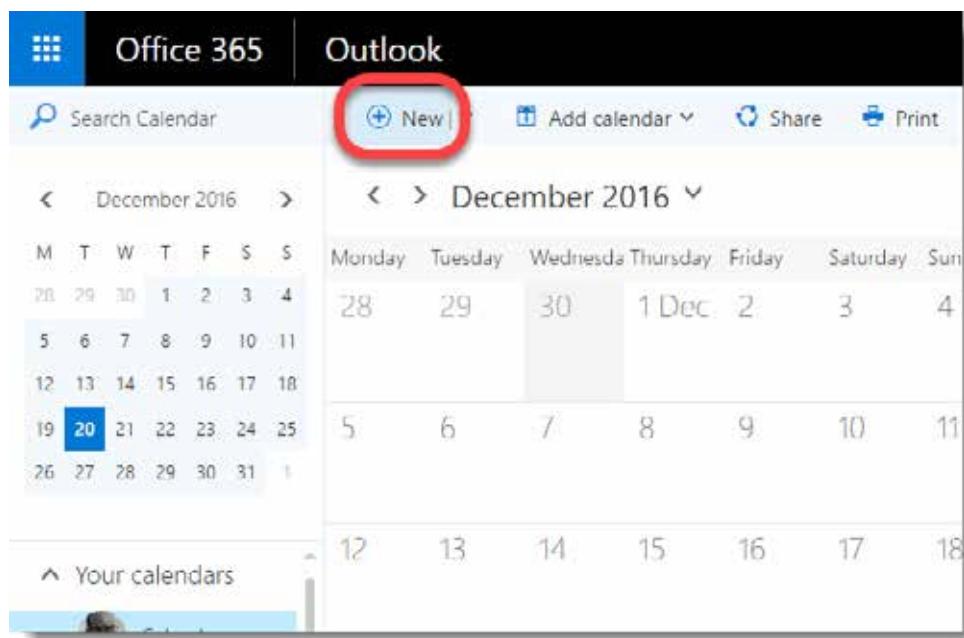


Figure 4-19 The new event button.

2. The detailed event form will be displayed.

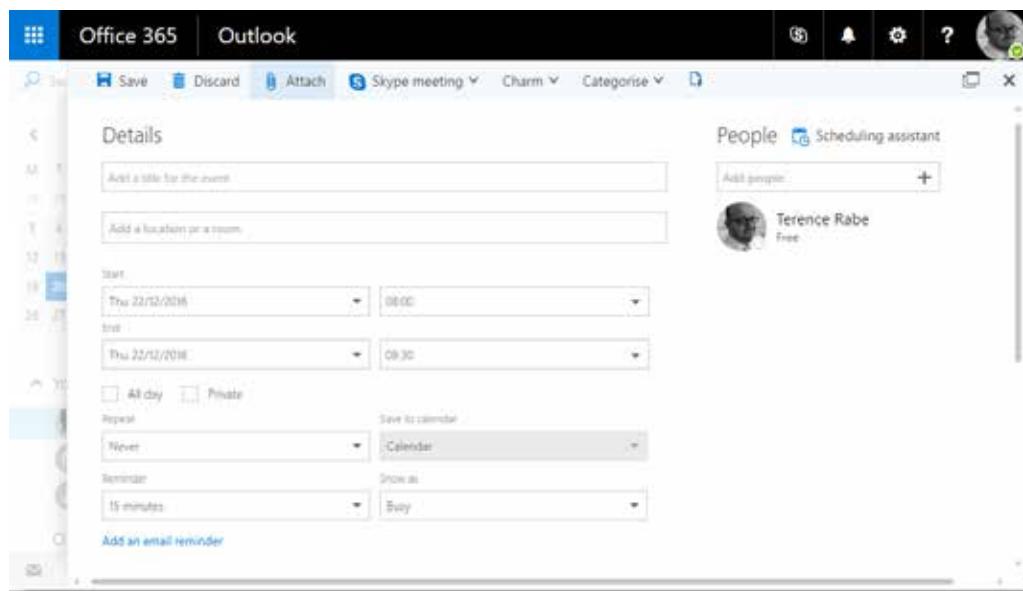


Figure 4-20 The detailed event form.

3. Add the event *title*.
4. Place the cursor in the *location* field.

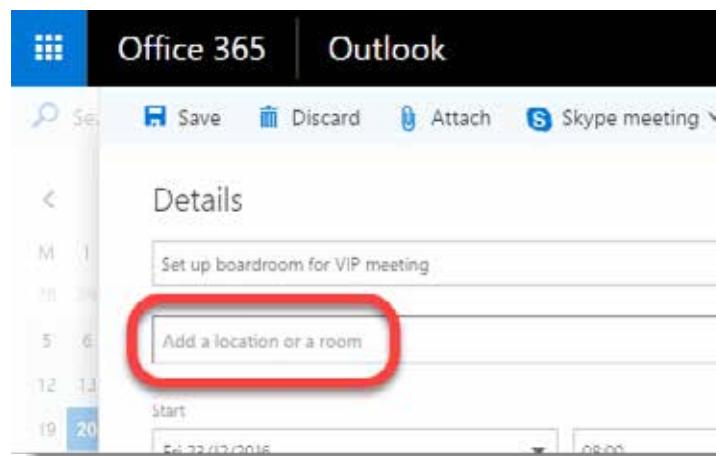


Figure 4-21 The location field.

NOTE: The *Add room* option is available when using the detailed event form.

5. Click **Add room**.

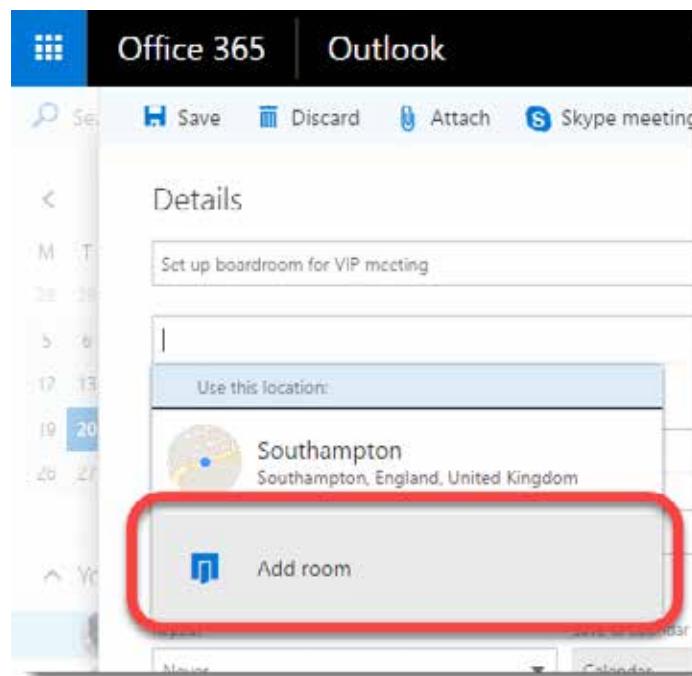


Figure 4-22 The Add room option.

6. The form will display a list of available rooms; the list of rooms is set up by your IT department and stored in Office 365.

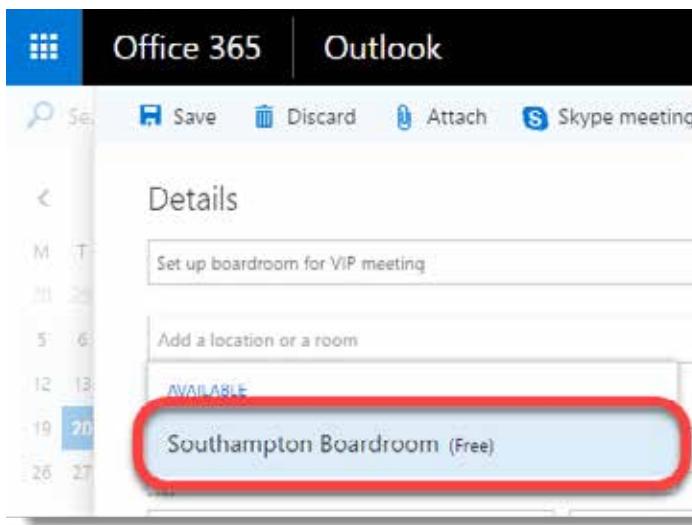


Figure 4-23 A room.

7. Choose a room from the list or specify your own location.
8. Select the *start date and time* and the *end date and time*; or check the **All day** box for an all-day event.

9. Check the **Private** box to hide the event details from other users who have shared access to your calendar.

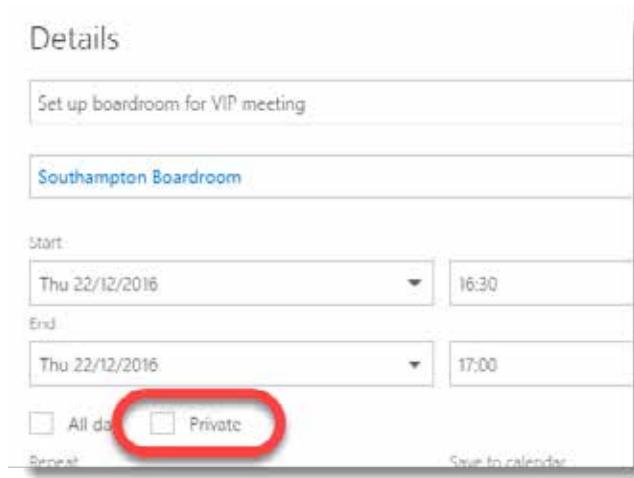


Figure 4-24 The Private check box.

10. If the event takes place on a regular schedule, click on the **Repeat** drop-down menu to set a recurrence value.

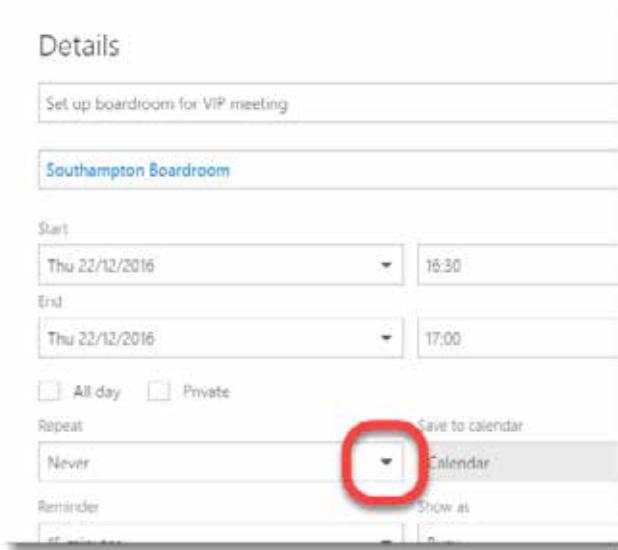


Figure 4-25 The Repeat drop-down arrow.

11. Select a suggested recurrence pattern or select **Other...** to define a custom recurrence pattern.

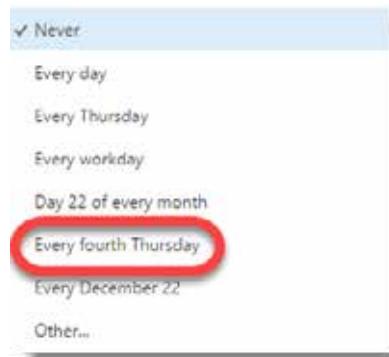


Figure 4-26 Event recurrence patterns.

12. The *From:* and *To:* fields become available when you select one of the suggested recurrence patterns; use these to set the recurrence range.

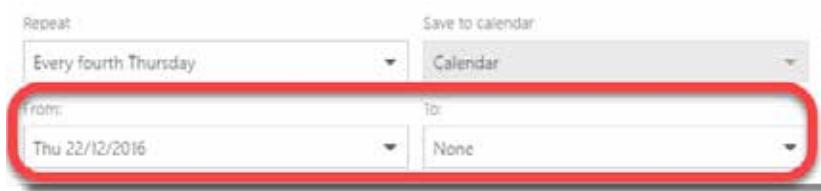


Figure 4-27 Recurrence range settings.

13. Use the *Reminder* field to control how long before the event you will be reminded.

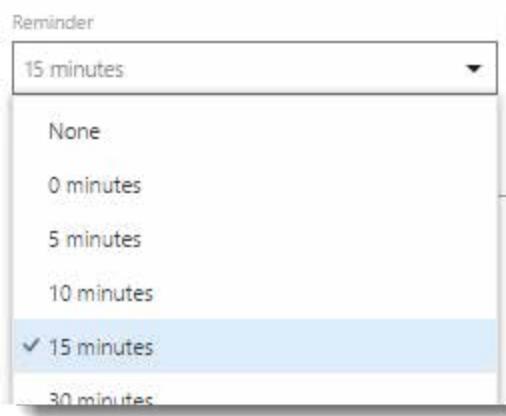


Figure 4-28 Reminder options.

14. The *Show as* menu can be used to change the status (also known as Free/Busy information) of the event.

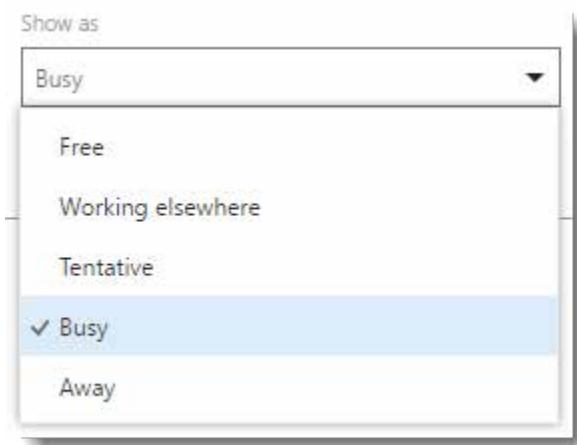


Figure 4-29 "Show as" options.

The *Show as* options should be set for the benefit of your colleagues. Consider the following suggestions, but bear in mind that your organisation may have policies that explain how these options should be used:

- *Free* – not used for appointments; please refer to the section on *meetings* later in this chapter.
- *Working elsewhere* – this status warns colleagues that you are not present at your usual office so you are more virtual, rather than physical, meetings.
- *Tentative* – you have tentatively scheduled an event or have received a meeting request which you have not yet accepted. You may be available to attend a higher priority meeting.
- *Busy* – you are not available to attend meetings.
- *Away* – you are not available and possibly not contactable; in other words, you may be away on annual leave.

4.3.3 CANCEL AN APPOINTMENT

1. Right-click the event and select **Delete**.

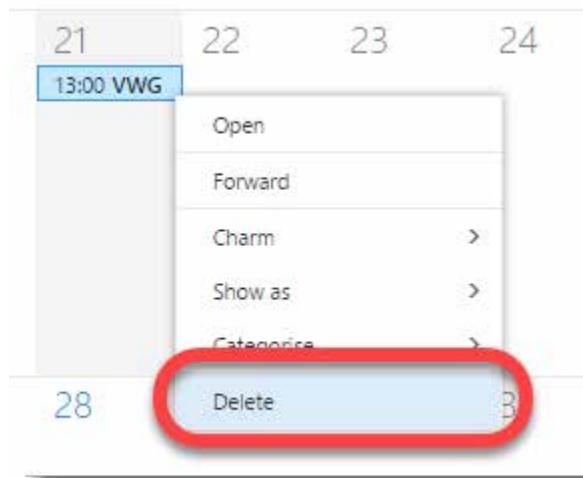


Figure 4-30 The Delete option.

4.4 MEETINGS

When you invite other users to an event, Outlook *Calendar* saves the event as a *meeting*. Attendees are invited by adding their email addresses to the event; when the event is saved to the calendar, they will receive an email message containing the invitation.

4.4.1 CREATE A MEETING

Setting up a meeting is almost identical to creating an appointment in your calendar; the only difference is that you will invite people to a meeting.

1. Click **New**.

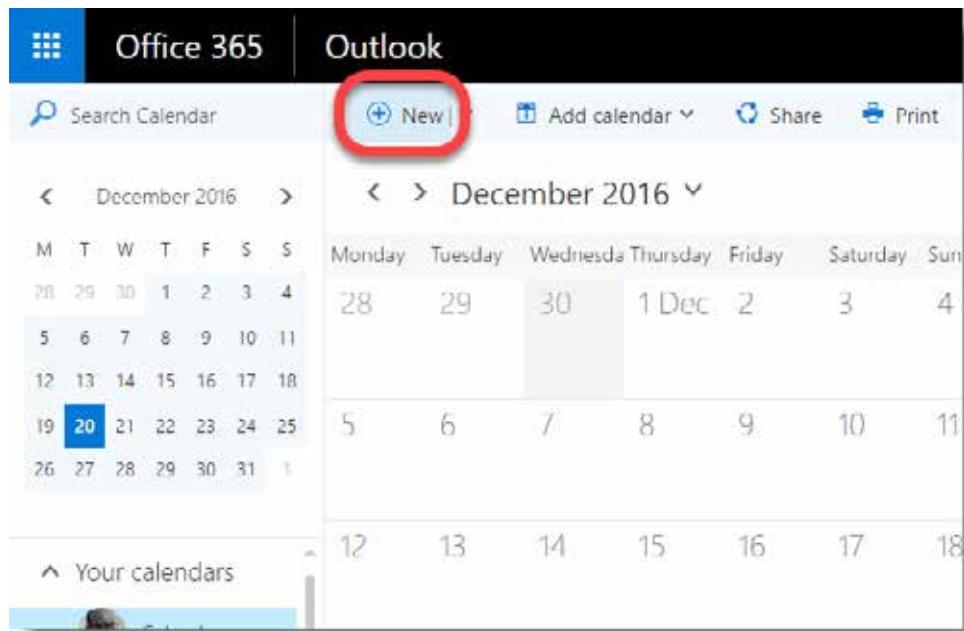


Figure 4-31 The new event button.

2. The detailed event form will be displayed.

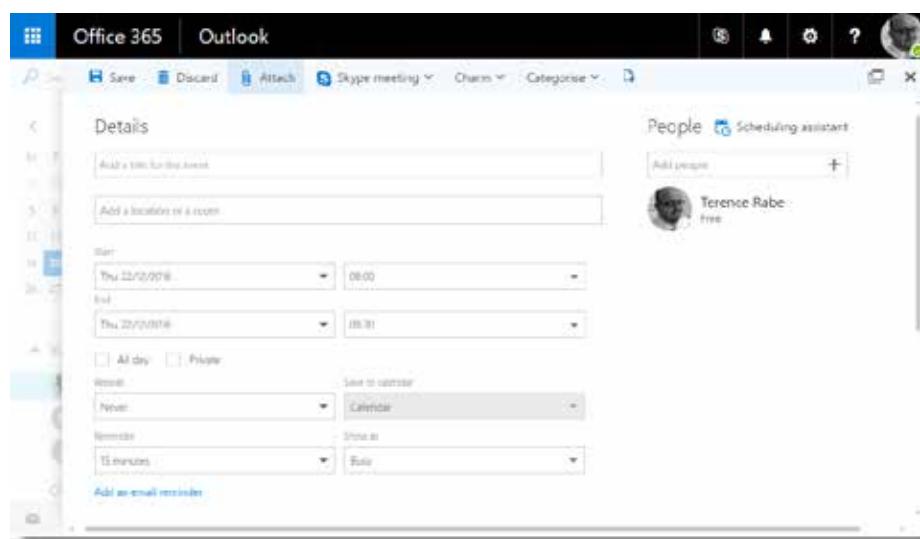


Figure 4-32 The detailed event form.

4.4.2 INVITE ATTENDEES

The event form contains an attendees section. If only your username appears on the list, the event is regarded as an appointment. Adding names or email addresses to this list is what makes the event a *meeting*.



Figure 4-33 Event attendees.

1. Place the cursor in the *Add people* field.

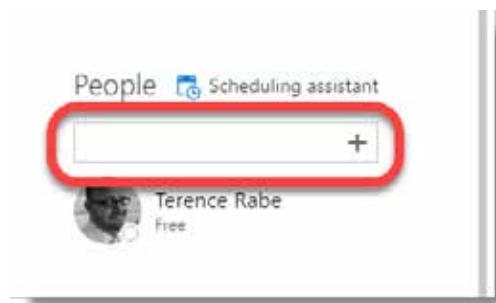


Figure 4-34 The "Add people" field.

2. The field will generate a list of suggested contacts to invite to the meeting based on the five people that you have most recently emailed or with whom you have most recently attended meetings.

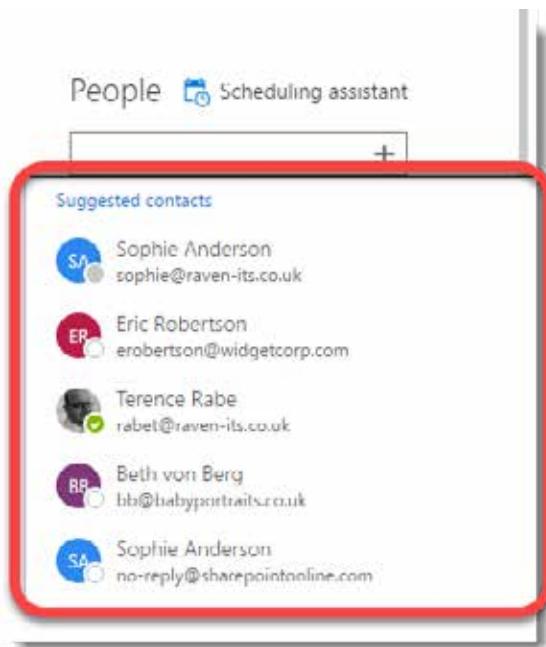


Figure 4-35 Recent contacts.

3. Click on one of the suggested contacts or begin typing the name of a contact; the field will generate a list of matching contacts.

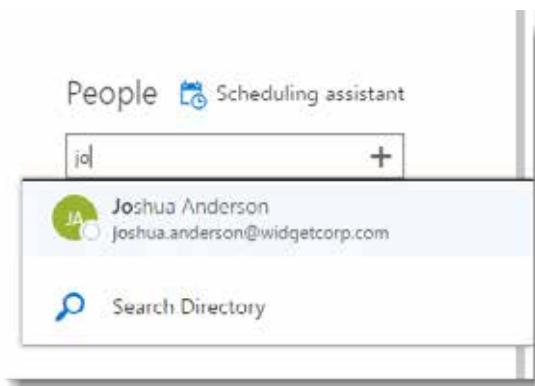


Figure 4-36 Suggested contacts.

4. Select a suggested contact or, if the contact is still not displayed, click **Search Directory**.

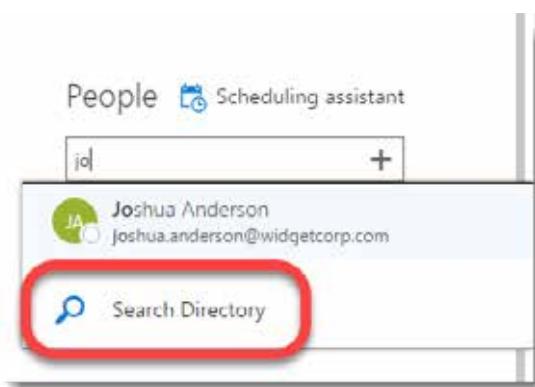


Figure 4-37 The "Search Directory" link.

5. If neither the suggested contacts nor Directory search can find the contact, you can still invite them by typing their email address and then clicking on **Use this address:**.

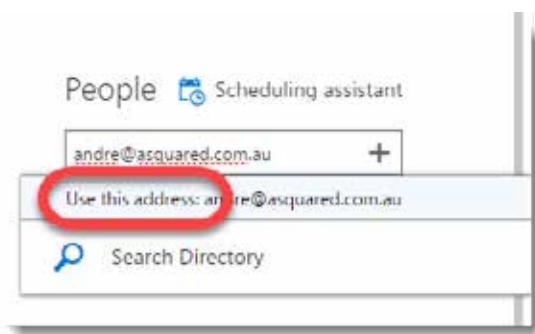


Figure 4-38 An email address.

6. As the recipients are selected using the methods described above, they will be added to the attendee list.

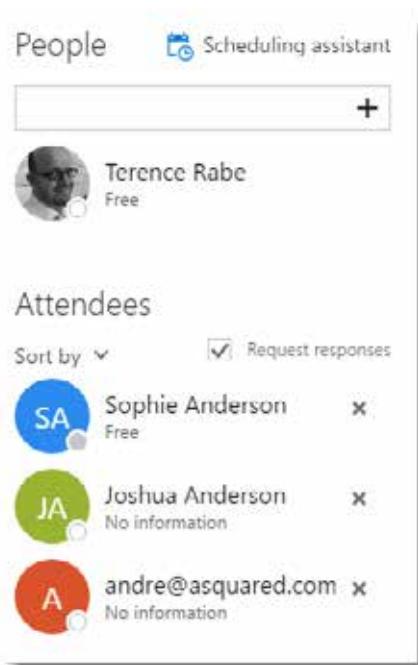


Figure 4-39 List of meeting attendees.

4.4.3 ATTENDEE AVAILABILITY

Availability information for attendees (also known as “free-busy” information) is available for people who have Office 365 accounts in your organisation. Office 365 can check their calendar and determine whether they are free, busy, away, or working elsewhere during the time the meeting is scheduled.

Basic availability information is shown below the contact’s name on the attendee list so you can see if they are free before sending the invitation.

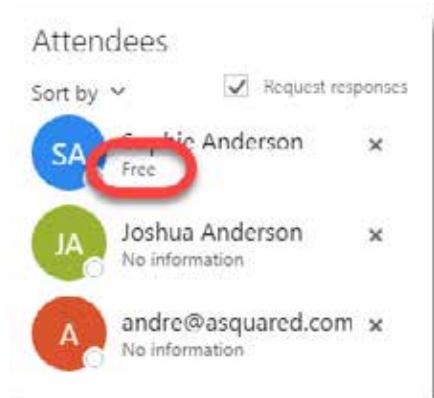


Figure 4-40 Availability information.

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NOTE: Availability information for users outside your Office 365 organisation will be shown as *No information*.

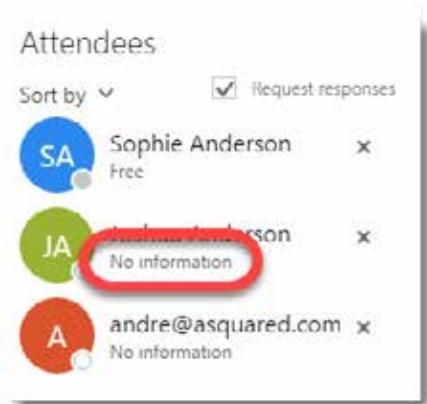


Figure 4-41 Availability information.

4.4.4 CANCEL A MEETING

1. Click on the meeting to select it.

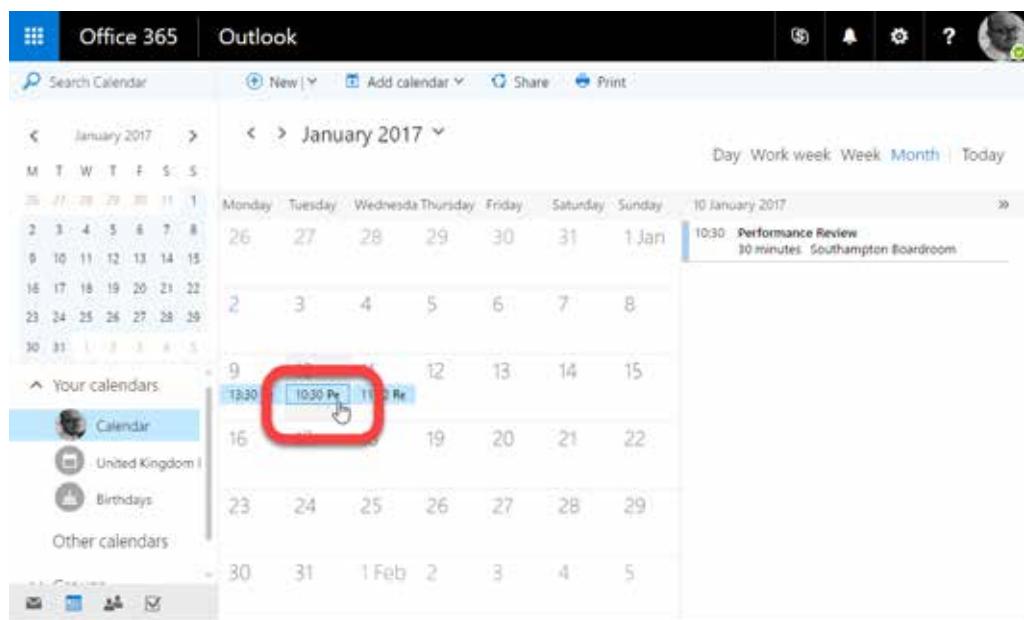


Figure 4-42 A meeting.

2. Click **Cancel**.

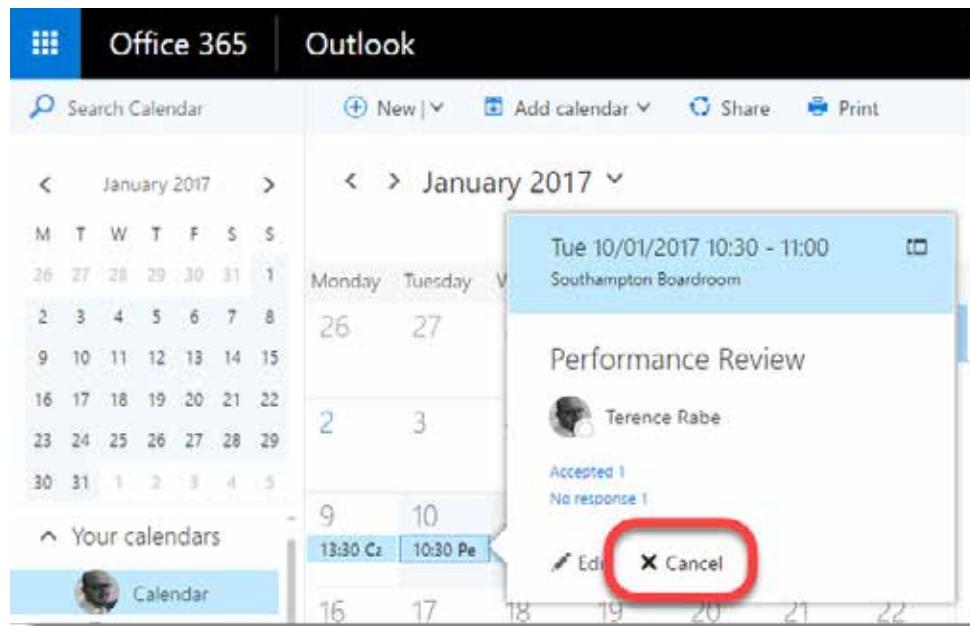


Figure 4-43 The Cancel link on the meeting details pop-up.

3. Click **Edit the cancellation before sending** to edit the cancellation message (if you wish to provide more information to attendees about the cancellation) or **Send the cancellation now** to send the cancellation message immediately.

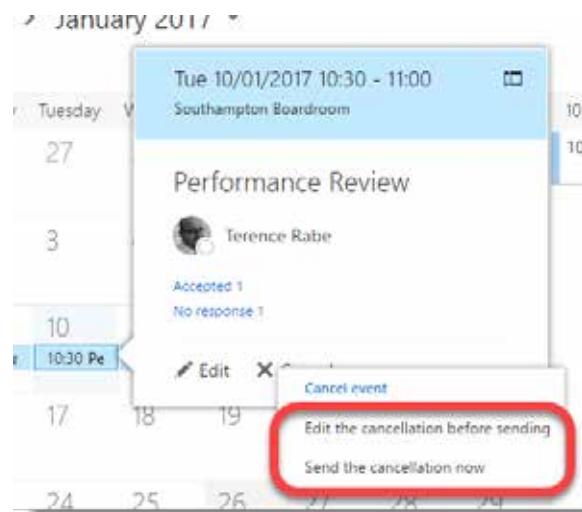


Figure 4-44 Cancellation options.

4. The meeting is removed from your calendar, and cancellation notice is sent to attendees.

4.5 SCHEDULING ASSISTANT

The Scheduling Assistant displays simple availability information without the attendees having to share their calendars with you. This function takes the guesswork out of organising meetings and reduces time wasted rescheduling meetings over and over until a suitable time can be agreed by all attendees.

4.5.1 OPEN THE SCHEDULING ASSISTANT

1. Create a new meeting or open an existing meeting.
2. Click **Scheduling assistant**.

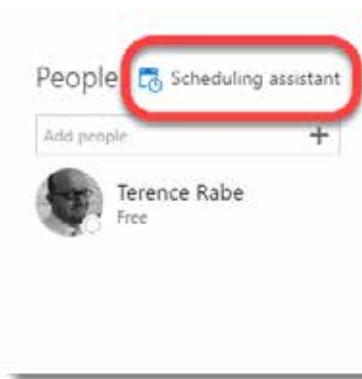


Figure 4-45 The "Scheduling assistant" link.

3. The *Scheduling Assistant* pane will open.

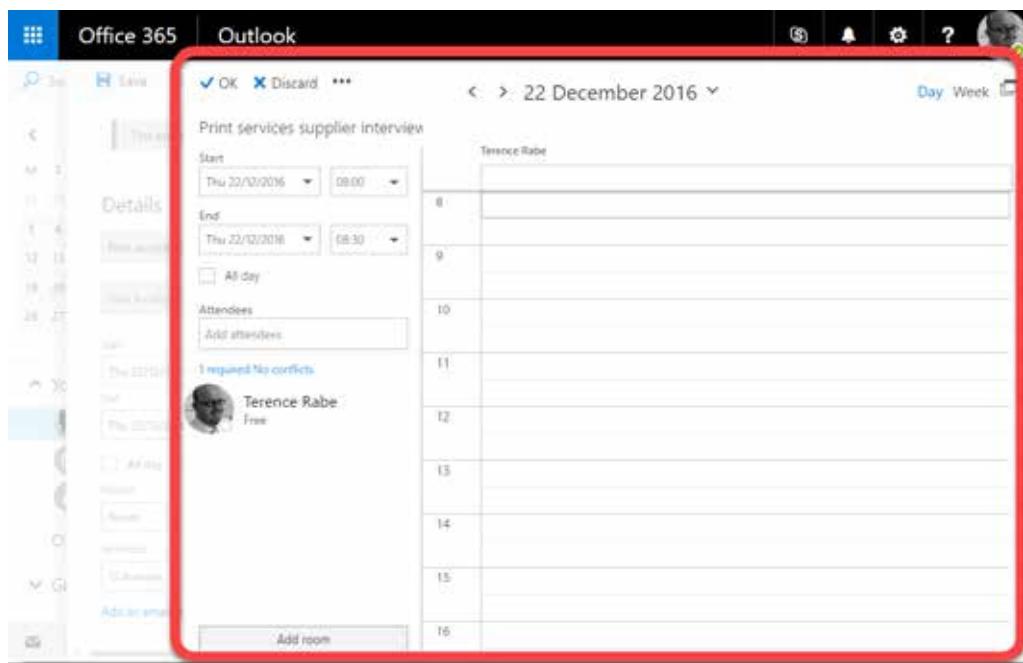


Figure 4-46 Scheduling Assistant.

4.5.2 ADD ATTENDEES

1. Place the cursor in the **Add attendees** field and begin typing an attendee name.

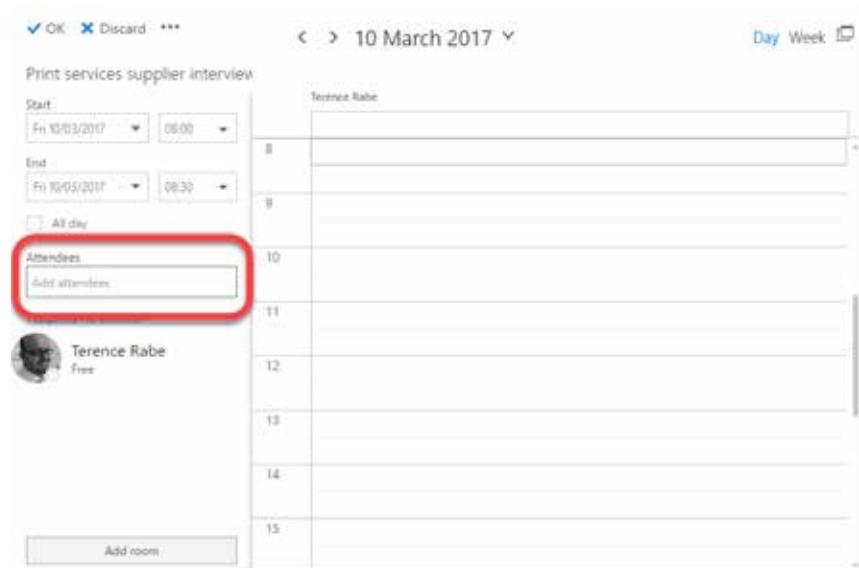


Figure 4-47 The "Add attendees" field.

2. Pick a name from the list of suggestions.



Figure 4-48 Suggested attendees.

3. If the required attendee is not listed, type their full email address and press **Enter** to add them to the attendee list.

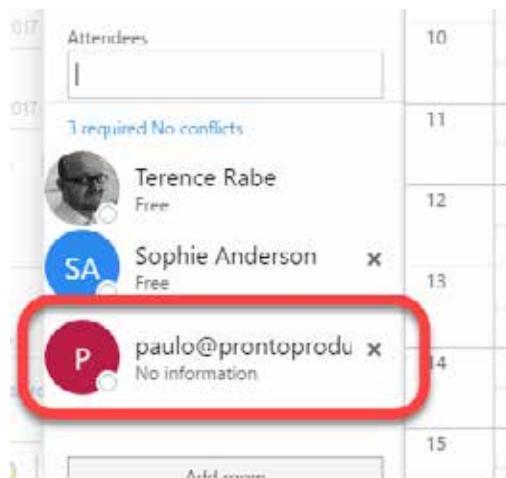


Figure 4-49 An attendee.

4. Continue to add all required attendees.

4.5.3 MEETING ROOMS/VENUE

The meeting venue can be added to the meeting request as plain text, or as an *attendee*; for example, the room is invited to the meeting as if it were a person.

1. Click **Add room**.

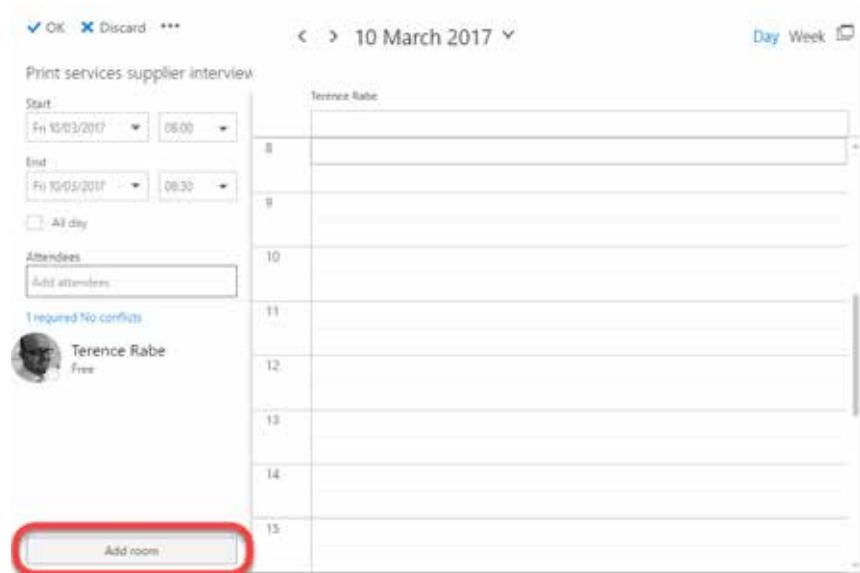


Figure 4-50 The “Add room” button.

2. A list of available rooms will be displayed; select the room.

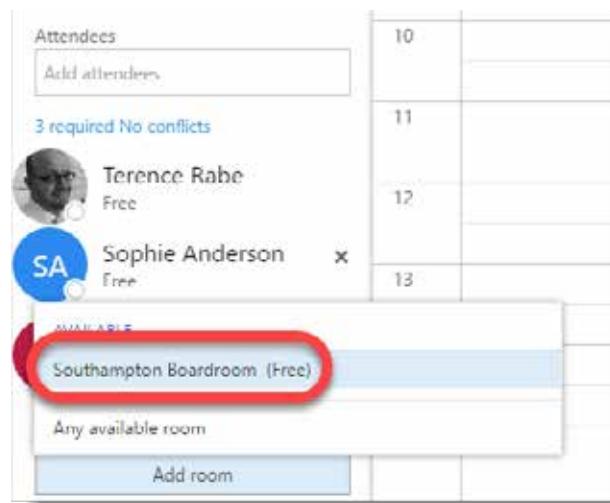


Figure 4-51 A meeting room.

3. Type the full venue address if no room is available or if you wish to use a venue that does not appear as a room.

4.5.4 VIEW AVAILABILITY

1. Once the attendees and the room have been added, you can see the free/busy information shown as shaded areas on the Scheduling Assistant pane.

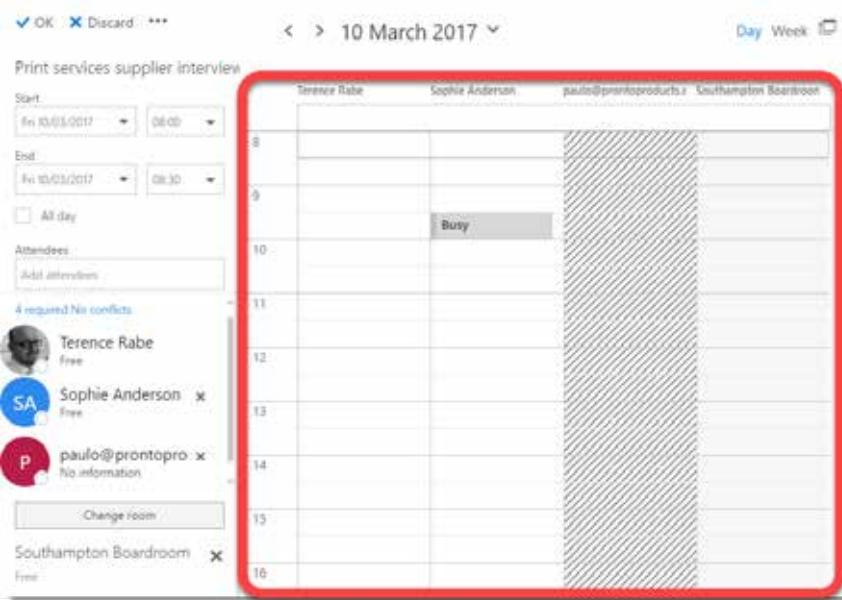


Figure 4-52 Availability information.

2. Availability information for external attendees cannot be determined and is shown as a hatched pattern with no text.

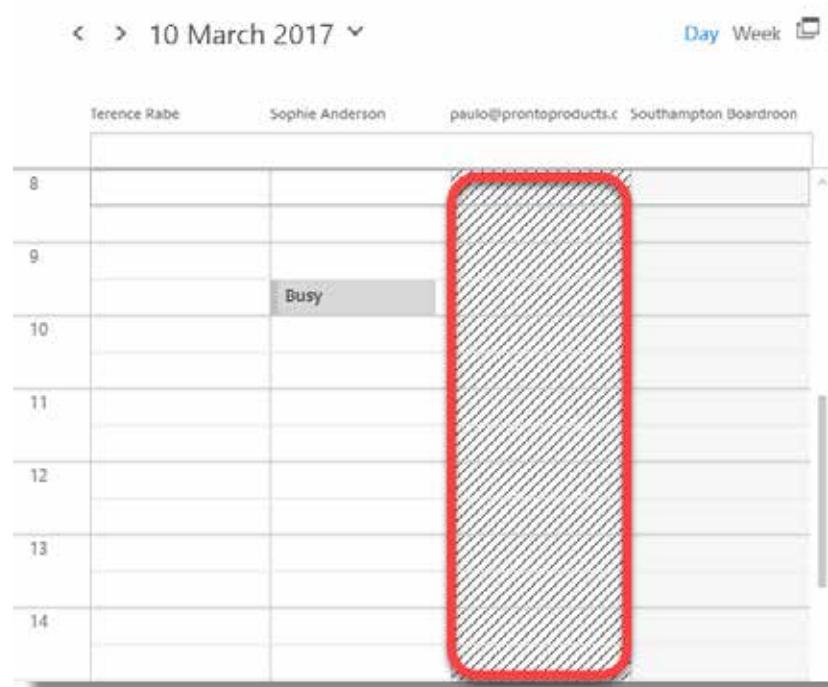


Figure 4-53 External attendee availability information.

4.5.5 SWITCH BETWEEN DAY/WEEK VIEW

When looking for a specific time within a day to hold a meeting, you may find it more useful to use the *Day* view. *Week* view offers a good overview of the week. You can switch between the views.

1. Click the **Day** or **Week** link.

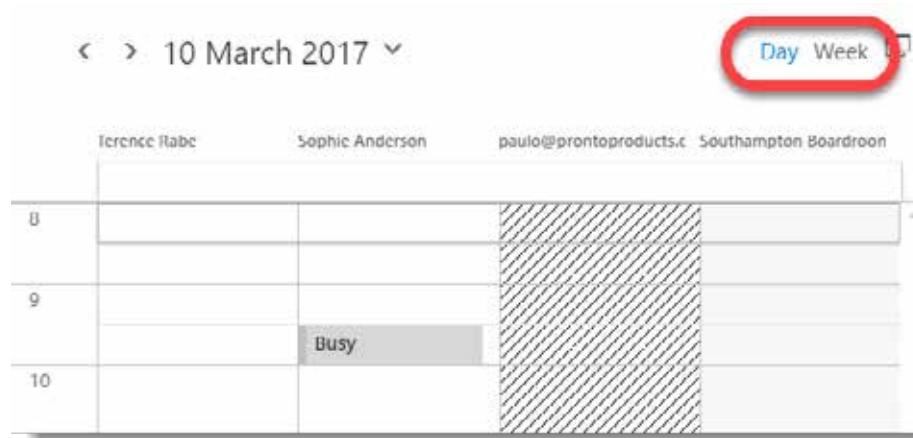


Figure 4-54 The "Day/Week" view selector.

2. The view will update depending on your selection.

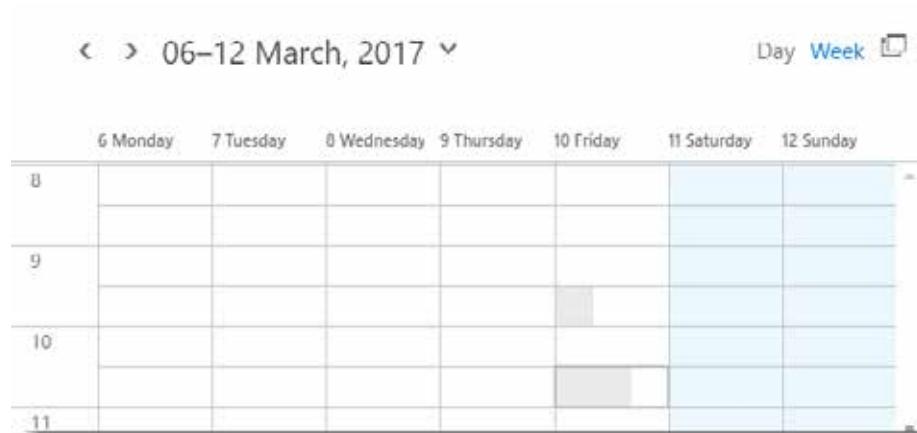


Figure 4-55 Week view.

NOTE: In *Week* view, the block is proportionally shaded to represent availability. For example, if the meeting has four attendees and the block is 25% shaded, then one out of four attendees is not available, whereas if 75% is shaded, the three are unavailable and only one is available. Use the shading to pick a time when all attendees are available.

4.5.6 SEND THE INVITATION

Once you have selected a time when all attendees are available, you can send the invitation.

1. Click **OK** to close the *Scheduling Assistant* pane.

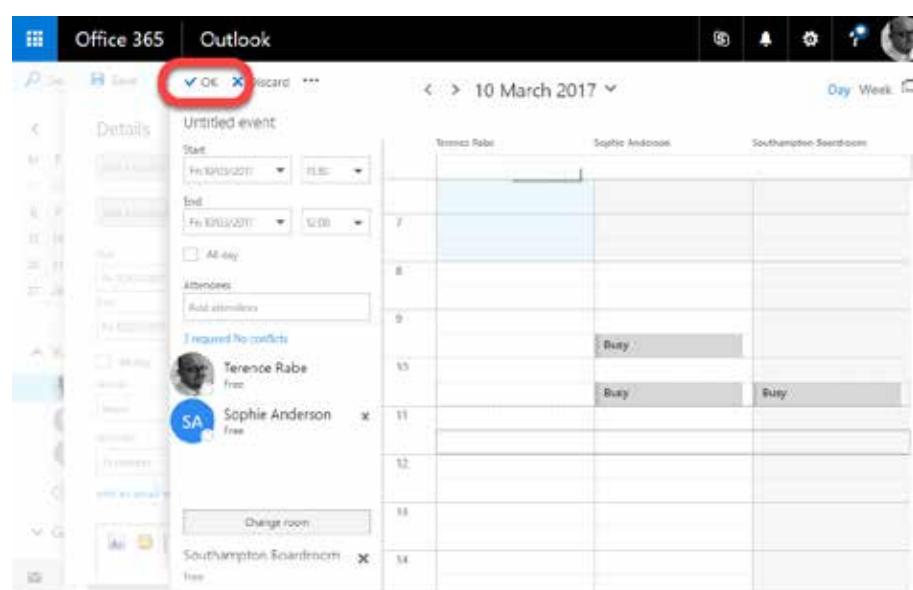


Figure 4-56 The OK button.

2. Complete the remaining fields needed for your meeting and click **Send**.

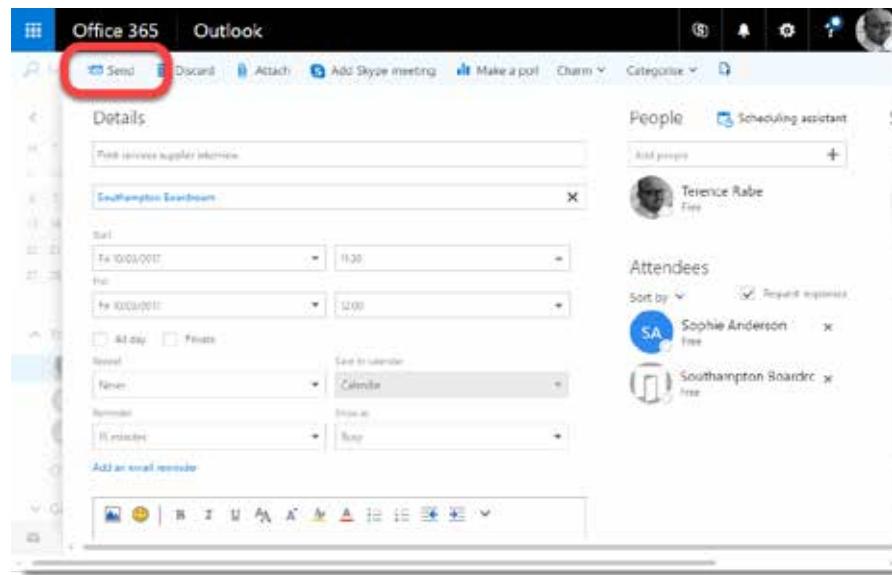


Figure 4-57 The Send button.

4.6 CALENDAR SHARING

4.6.1 SHARE YOUR CALENDAR

Although the *Scheduling Assistant* makes it easy to check attendee availability, it is not possible to view details of events in other users' calendars by default. You may also want to enable other users to view your calendar without having to open the Scheduling Assistant.

1. Click **Share**.

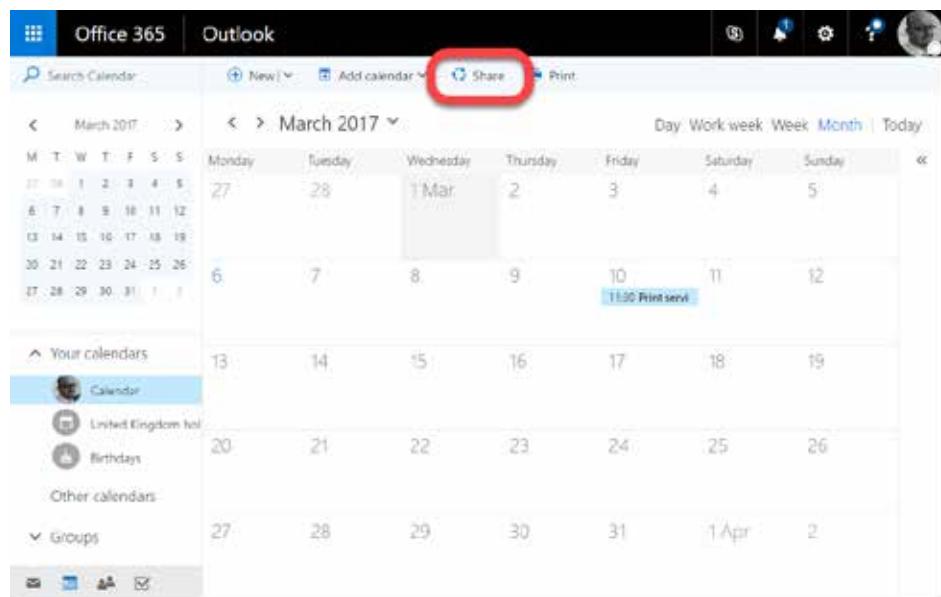


Figure 4-58 The Share button.

2. The *Share this calendar:* pane will open.

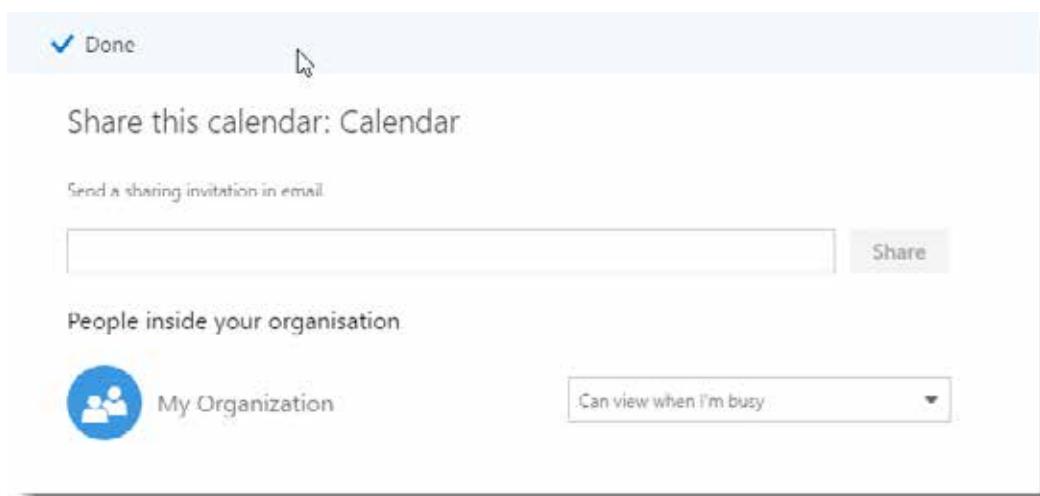


Figure 4-59 The "Share this calendar:" pane.

3. Type the name of the person with whom you wish to share the calendar.
4. Select the name from the list of suggestions or type the full email address.

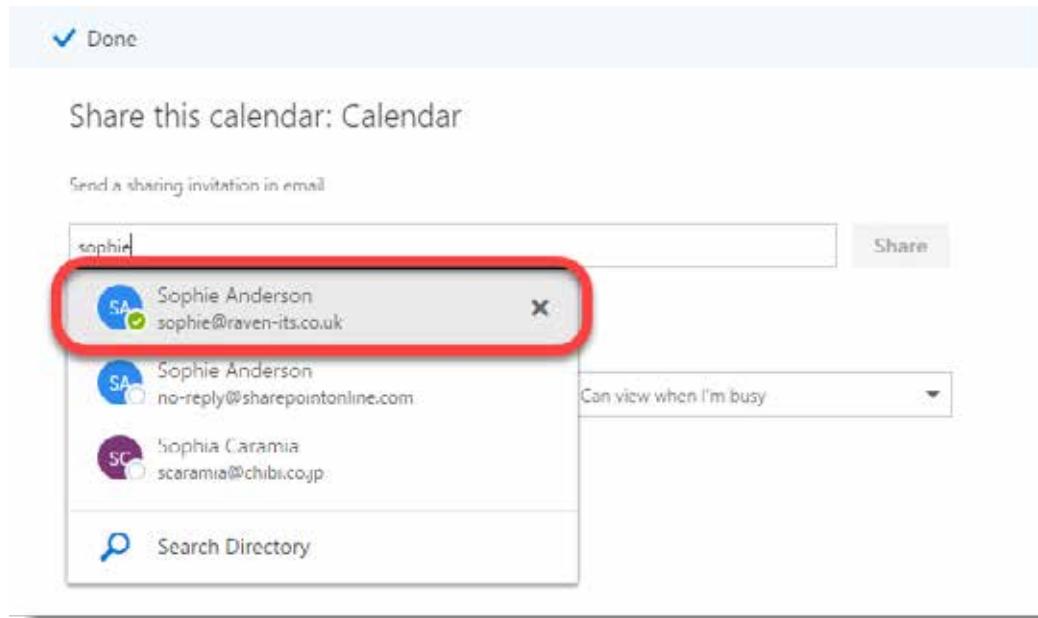


Figure 4-60 A calendar sharing invitation recipient.

5. Select the level of access that they will have.

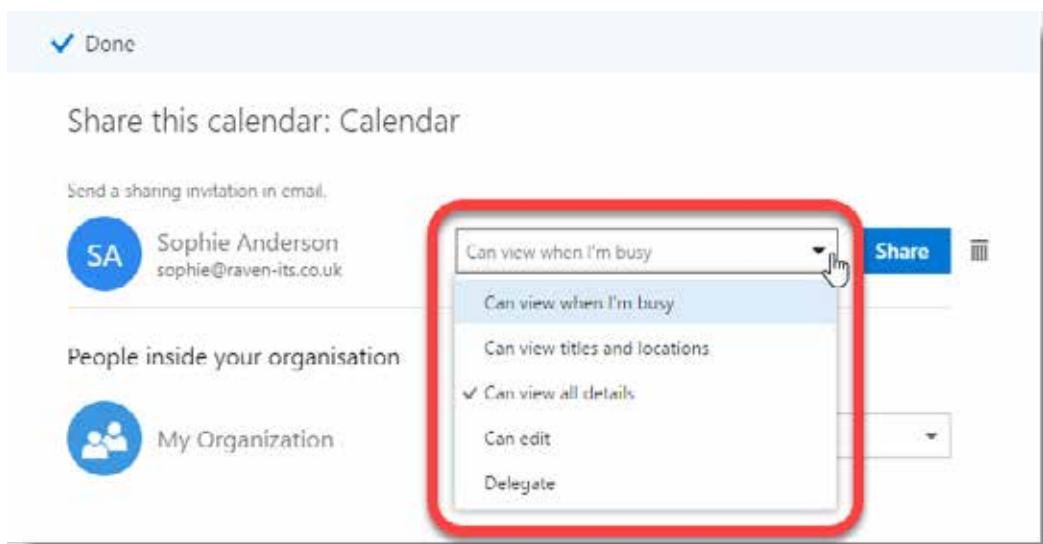


Figure 4-61 Calendar sharing access level.

6. Click **Share**.
7. Your calendar will be shared, and a sharing entry will be added to the *Share this calendar:* pane.

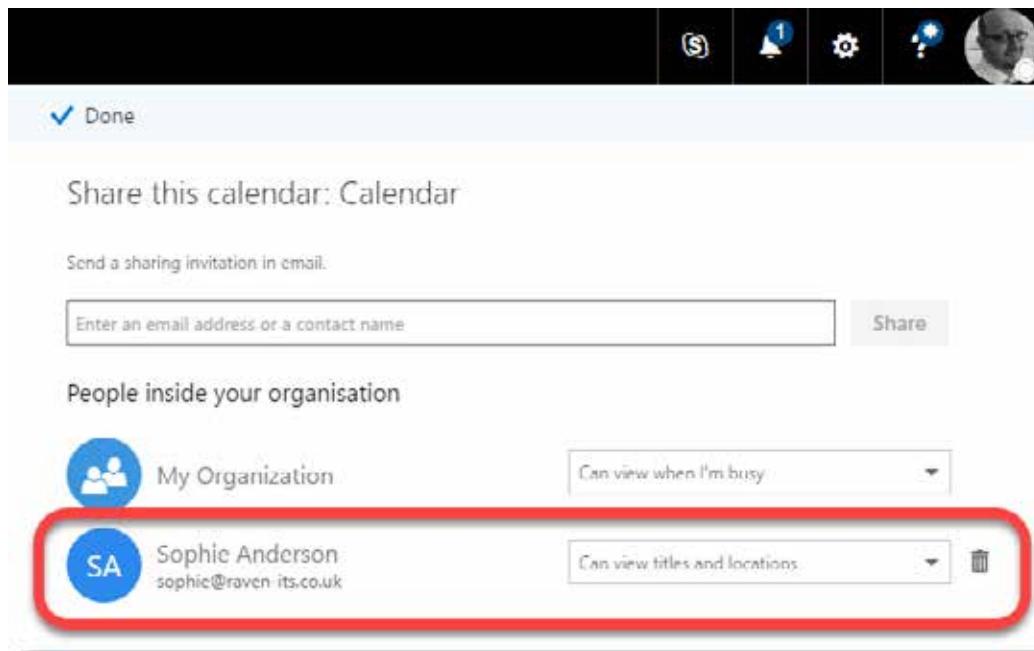


Figure 4-62 Calendar sharing entry.

8. Click **Done**.

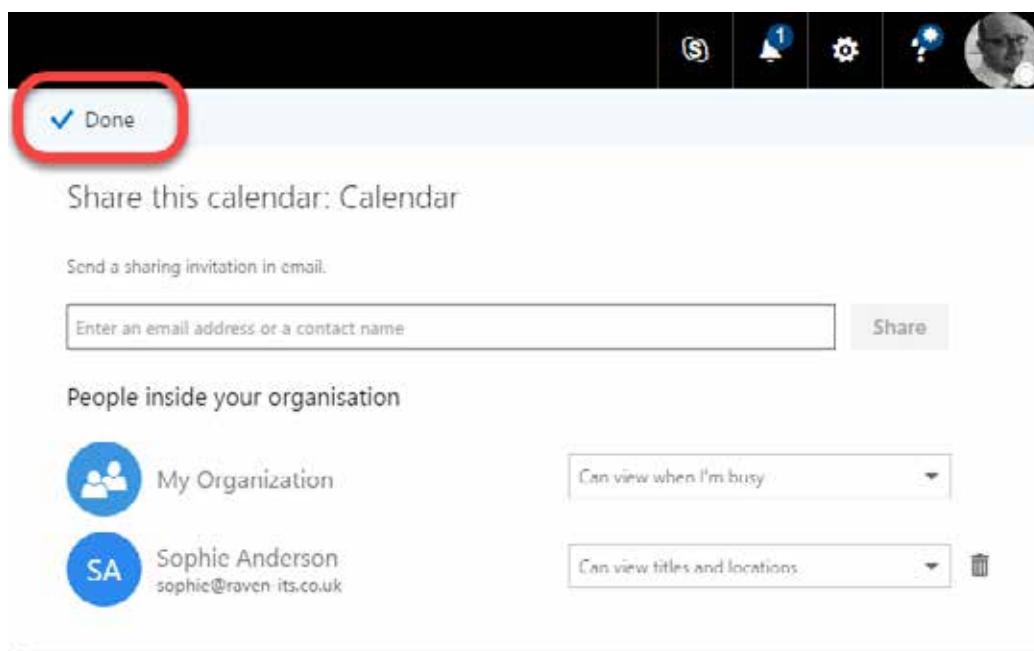


Figure 4-63 The Done button.

4.7 WORKING WITH MULTIPLE CALENDARS

4.7.1 ACCEPT A CALENDAR SHARING INVITATION

If another user invites you to access their calendar, you will receive an invitation email.

1. Open the Outlook Mail app and select the message.

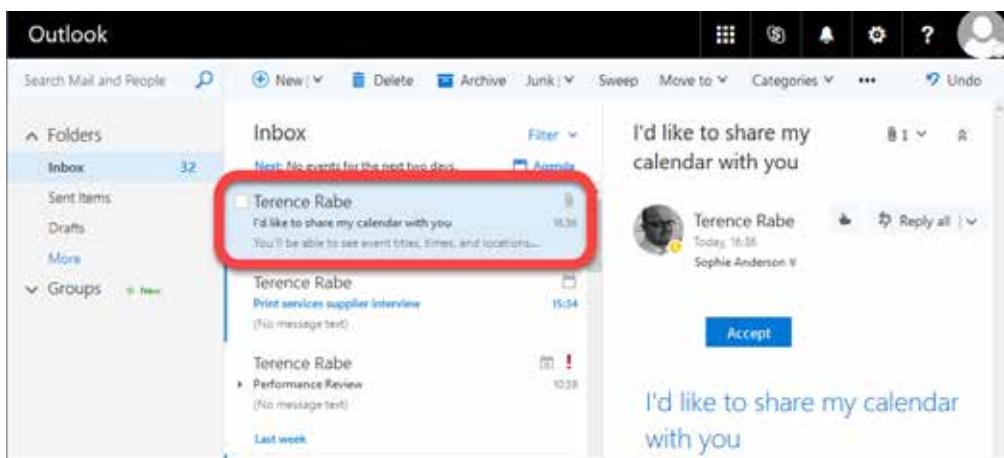


Figure 4-64 Calendar sharing invitation.

2. Click **Accept**.

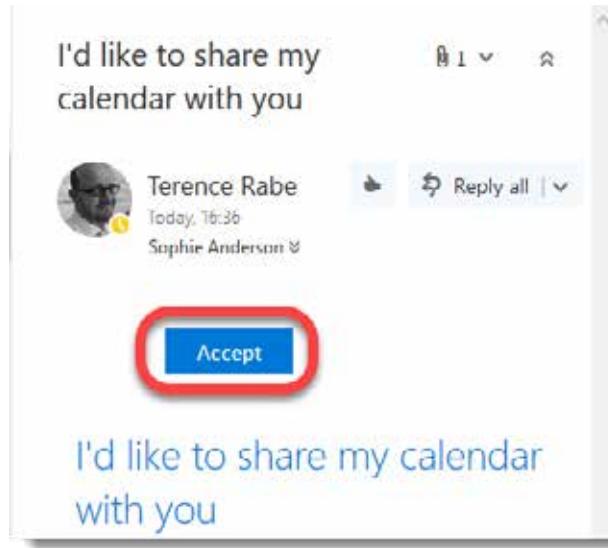


Figure 4-65 The Accept button.

3. The calendar sharing invitation will be processed and the Outlook Calendar web app will open; events from the shared calendar will automatically be displayed in a different colour.

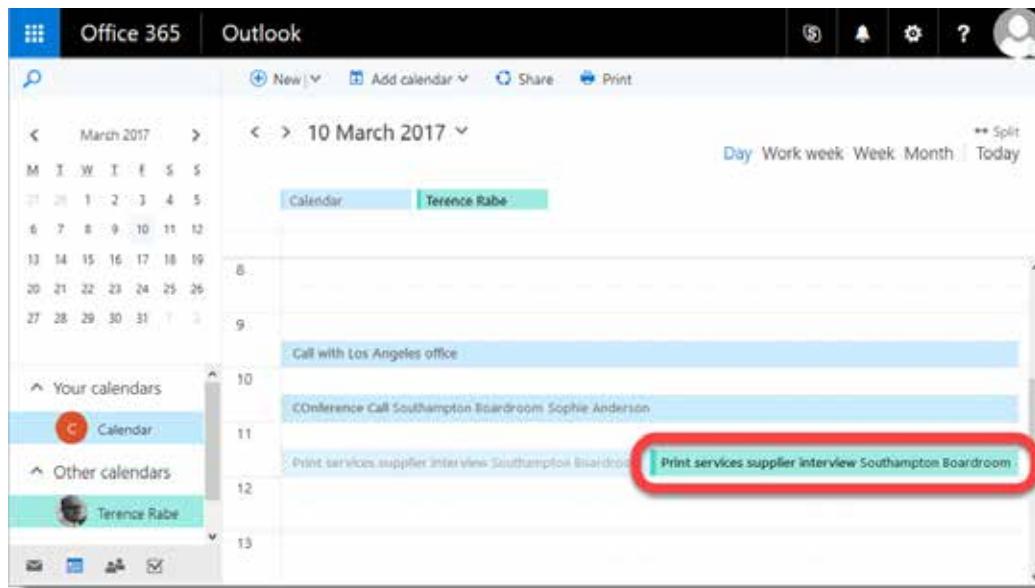


Figure 4-66 Multiple calendars display.

4.7.2 SELECT/DESELECT SHARED CALENDAR

If you have access to additional calendars, you can choose whether events from the other calendar are displayed or not by selecting the calendar.

1. Expand **Other calendars** in the left pane if necessary.

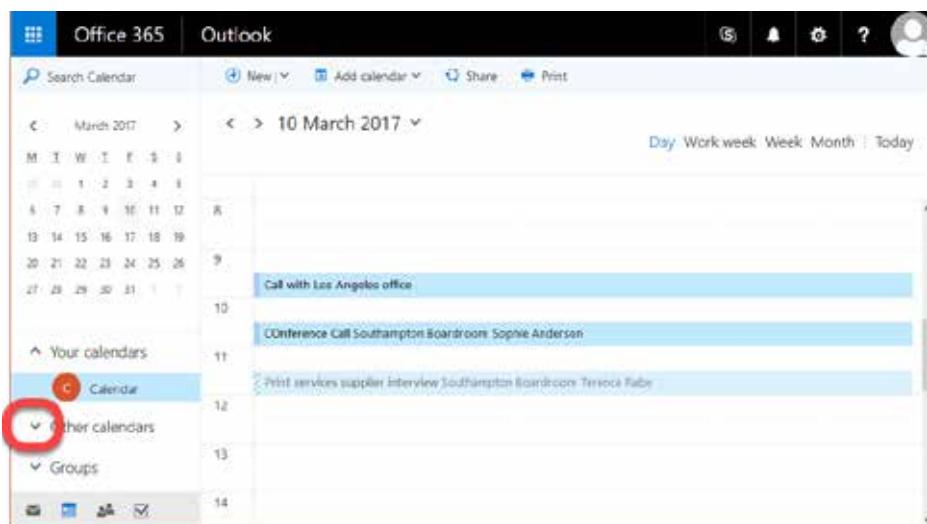


Figure 4-67 Other calendars expansion button.

2. Click the calendar name to select it.

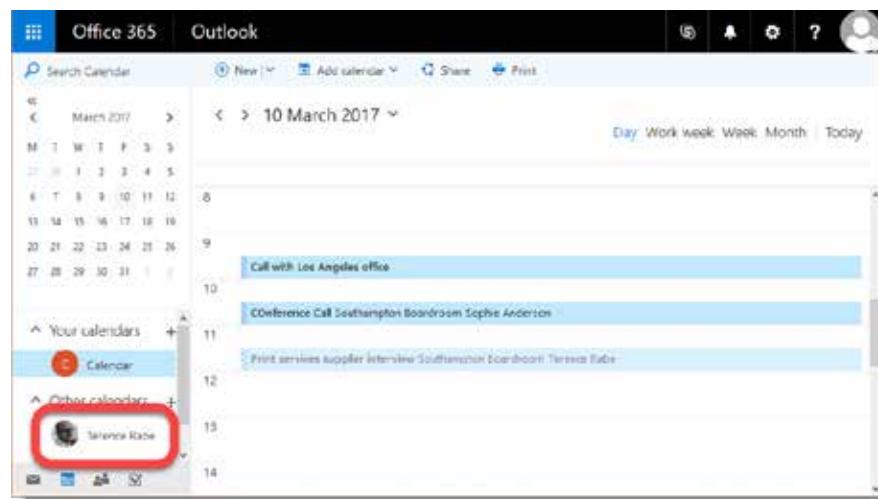


Figure 4-68 Shared calendar.

3. Events from the other calendar will be displayed in *merge* or *split* view, depending on which view was most recently used.
4. Click the calendar name again to deselect it.

4.7.3 MERGE VIEW

Merge view displays all selected calendars in a merged, or overlapping, view. In this view, there is only one set of hours or days displayed. Events are shown side-by-side and differentiated by colour.

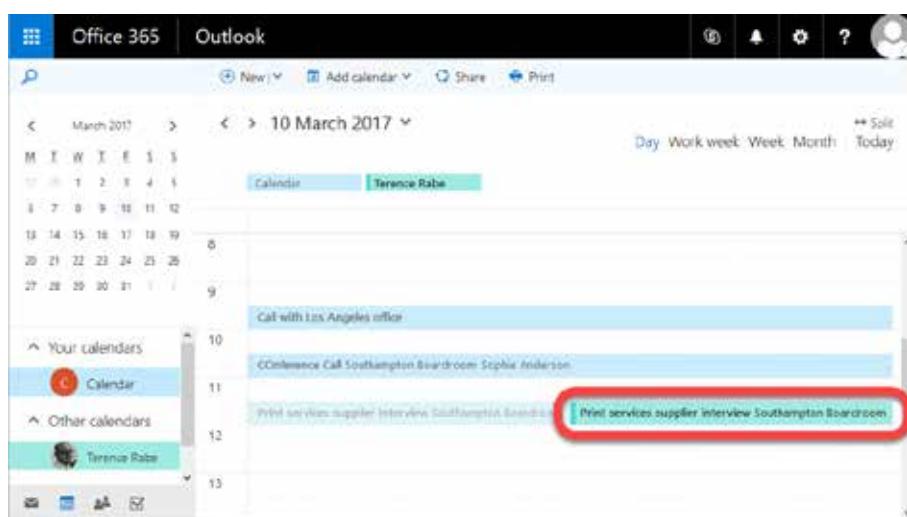


Figure 4-69 Merge view.

4.7.4 SPLIT VIEW

Split view displays selected calendars side-by-side.

1. Click **Split** to change to *Split* view.

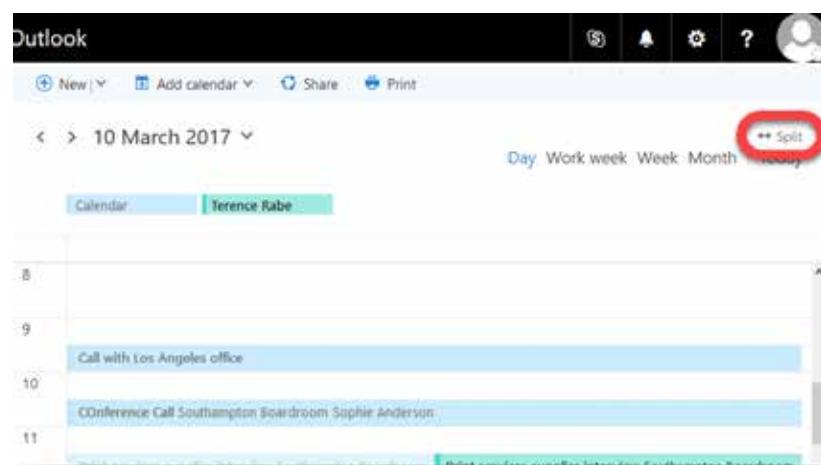


Figure 4-70 The Split view button.

2. Selected calendars will be displayed side-by-side.

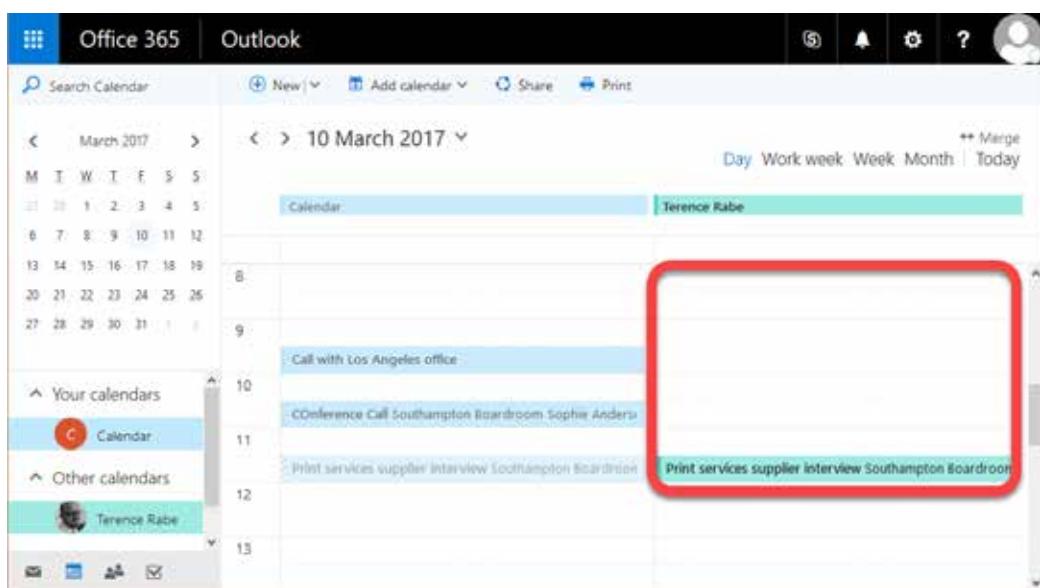


Figure 4-71 Split view.

5 PEOPLE

5.1 OVERVIEW

5.1.1 WHAT IS THE PEOPLE APP?

Outlook *People* is an Office 365 web app used to store contacts. It also allows you to view your organisation's address books.

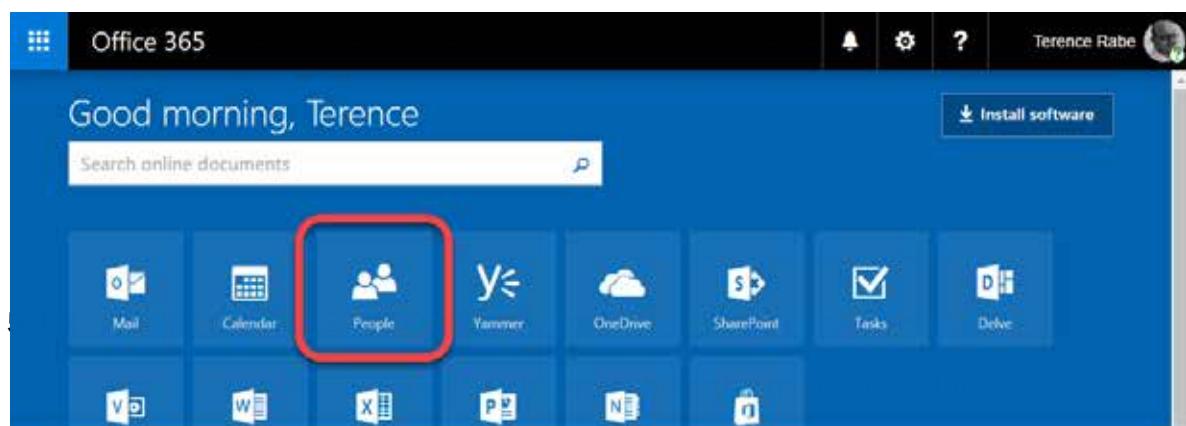


Figure 5-1 The People app tile on the Home page.

2. You can also access **People** by clicking the app tile on the app launcher menu.



Figure 5-2 The People app tile on the app launcher.

3. Clicking the app tile will navigate to the Outlook *People* web app.



Figure 5-3 The People app.

5.2 WORKING WITH CONTACTS

5.2.1 WHEN TO USE CONTACTS

The contacts created in the People app are intended to represent people who do not appear in your organisation's *Directory*.

The Directory contains other Office 365 users in your organisation, and can contain email addresses for groups, meeting rooms, and users from other company email systems.

Contacts are used to save details of customers, contractors, and suppliers with whom you have a direct working relationships.

5.2.2 CREATE A CONTACT

1. Click the **New** button.

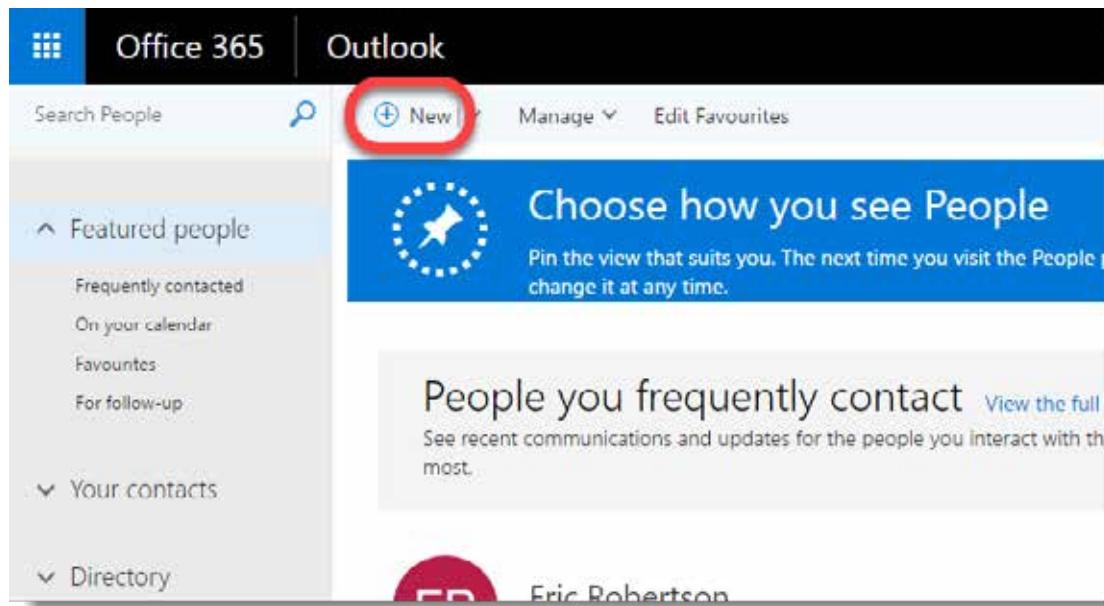


Figure 5-4 The New button.

2. The *Add contact* pane will be displayed.

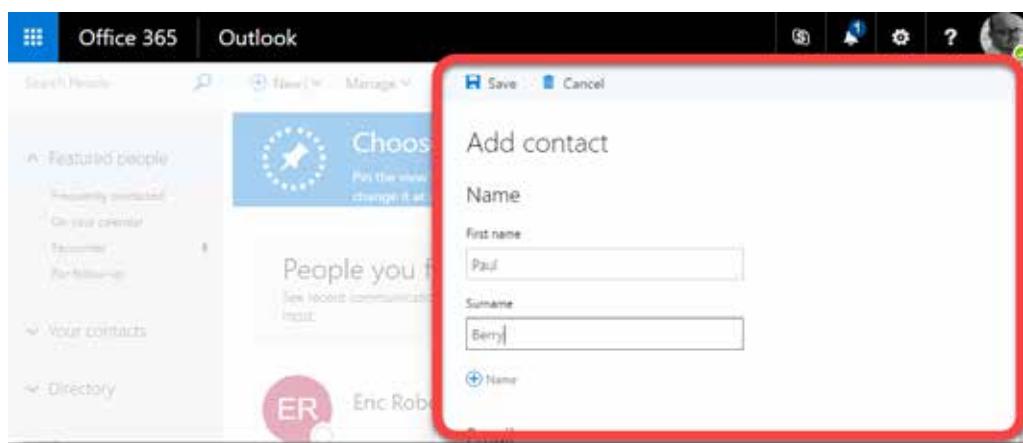


Figure 5-5 The "Add contact" pane.

3. Complete the form with as much information as possible; at least a first and last name are needed for the contact to display correctly.
4. Click **Save**.

Save Cancel

Add contact

Name

First name:

Paul

Surname:

Berry

[Name](#)

Email

Email:

paul.berry@greenpavonpublishing.com

Figure 5-6 The Save button.

5. The *contact card* will be displayed on the right side of the screen.

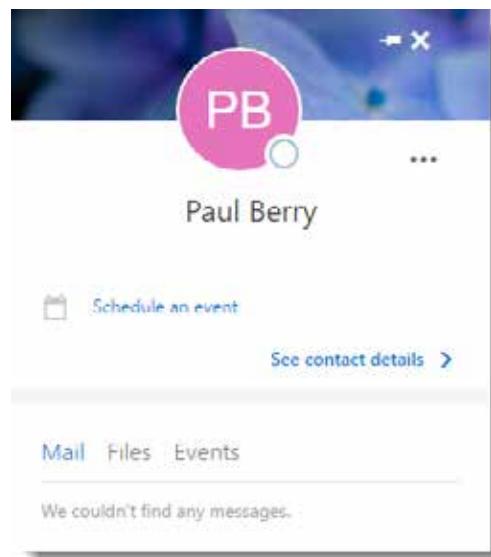


Figure 5-7 A contact card.

5.2.3 EDIT A CONTACT

1. Click on the **Your contacts** link to view all contacts.

The screenshot shows the 'Your contacts' view in the Office 365 Outlook interface. The sidebar on the left has a section titled 'Featured people' with options like 'Frequently contacted', 'On your calendar', 'Favorites', 'For follow-up', and 'Your contacts'. The 'Your contacts' option is highlighted with a red oval. The main area is titled 'Your contacts' and shows '4 total'. It lists four contacts with their initials in colored circles (BB, ER, JA, PB) and their names and email addresses. The contacts are sorted by first name.

| Full name | Email address | Title |
|-----------------|--------------------------------|---------|
| Beth von Berg | bb@babyporraits.co.uk | (empty) |
| Eric Robertson | erobertson@widgetcorp.com | (empty) |
| Joshua Anderson | joshua.amderson@widgetcorp.com | (empty) |

Figure 5-8 The "All contacts" view.

2. Check the box to the left of the initials icon to select the contact.

This screenshot shows the 'Your contacts' view with 5 total entries. The contact 'Joshua Anderson' is selected, as indicated by the checked checkbox to its left. The other contacts listed are Beth von Berg, Eric Robertson, and Paul Berry.

| Full name | Email address |
|-----------------|-------------------------------------|
| Beth von Berg | bb@babyporraits.co.uk |
| Eric Robertson | erobertson@widgetcorp.com |
| Joshua Anderson | joshua.amderson@widgetcorp.com |
| Paul Berry | paul.berry@greencavenpublishing.com |

Figure 5-9 Contact selector.

3. Click **Edit**.

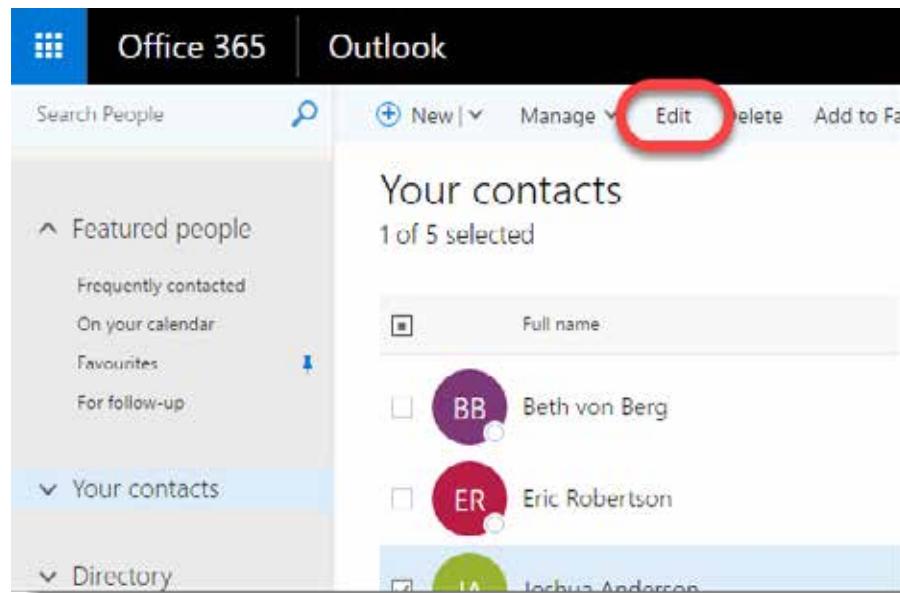


Figure 5-10 The Edit button.

4. The *Edit contact* pane will be displayed.

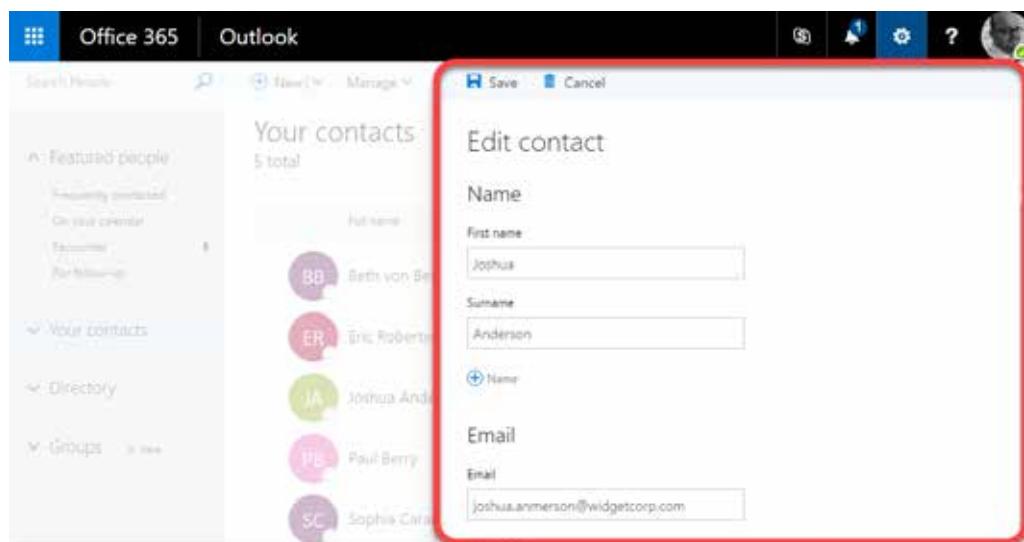


Figure 5-11 The Edit contact pane.

5. Add or correct information as required.



Figure 5-12 Incorrect email address.

6. Click **Save**.

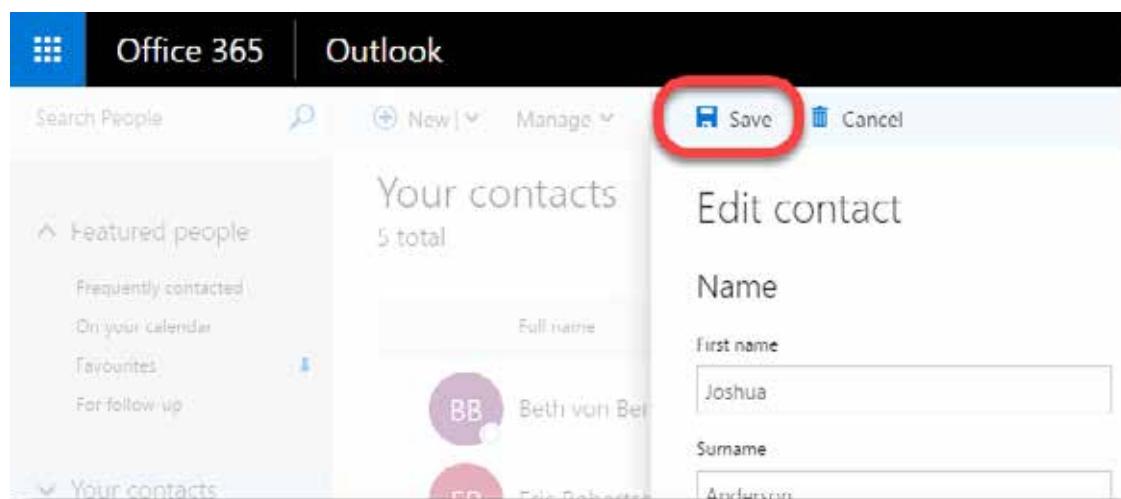


Figure 5-13 The Save button.

5.2.4 CONTACT ACTIONS

You can interact with contact cards in the People app in several ways. You can:

- Schedule an event.
- See a list of upcoming events.
- See a list of recent emails.
- See a list of shared files.

1. Click on the contact name.

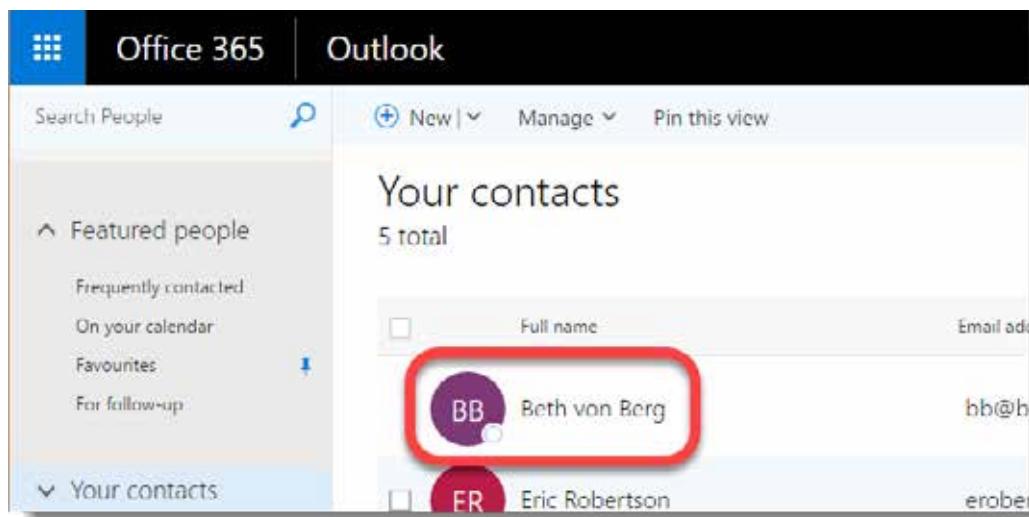


Figure 5-14 A contact.

2. The contact card will be displayed.

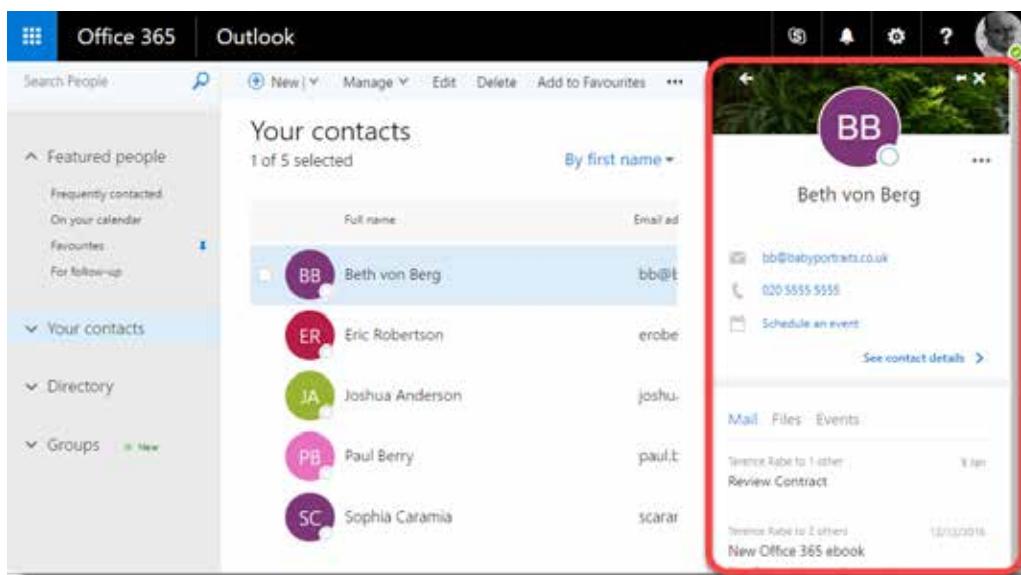


Figure 5-15 A contact card.

3. The upper section of the contact card displays contact details that are also links for actions like sending emails, starting calls, and scheduling meetings.

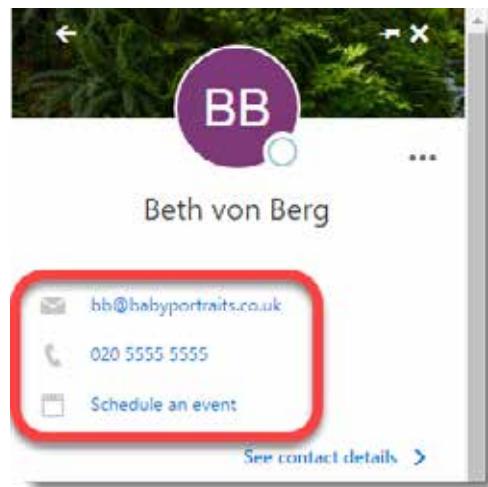


Figure 5-16 Contact actions.

4. The lower section of the contact card displays contact interaction information like recent email history, shared files, and upcoming events.

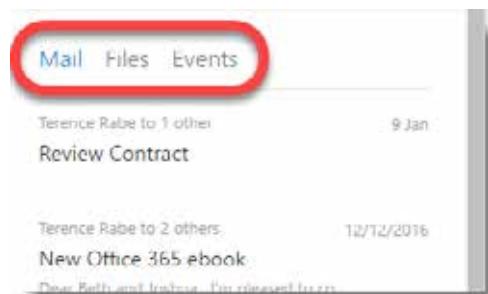


Figure 5-17 Contact interaction information.

5.2.5 DELETE A CONTACT

1. Click the **Your contacts** link to view all contacts.

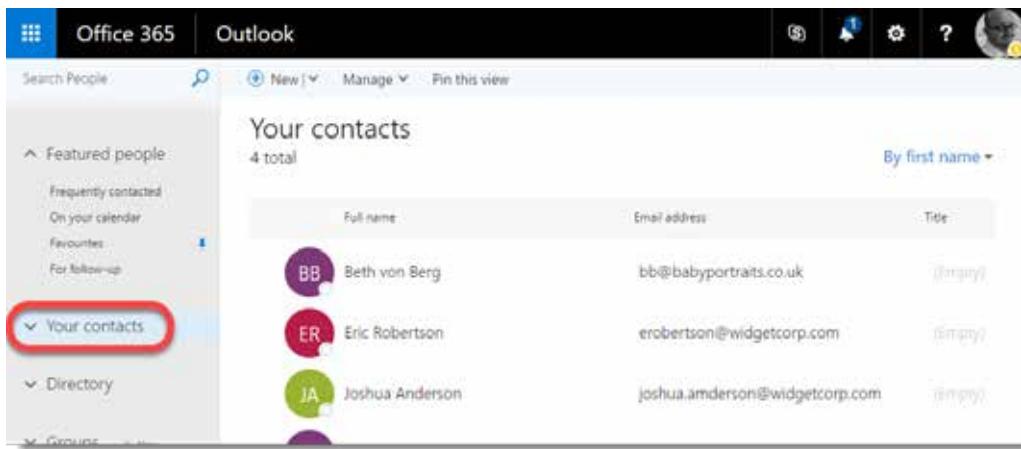


Figure 5-18 The “All contacts” view.

2. Select the contact and click **Delete**.

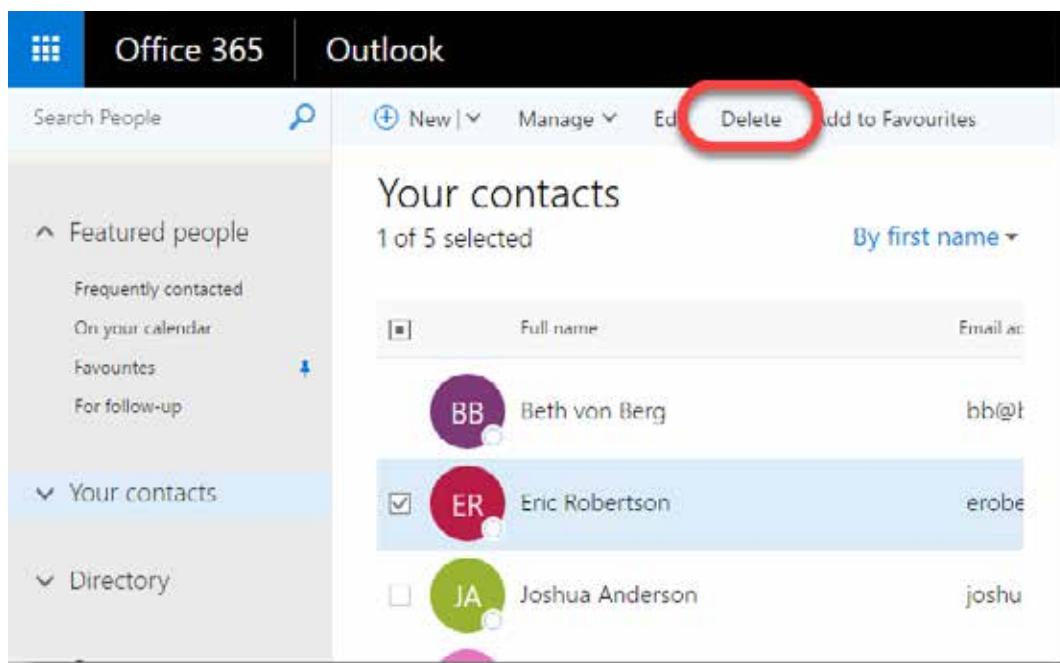


Figure 5-19 The Delete button.

3. Click **Delete** on the *Delete contacts* dialogue box.

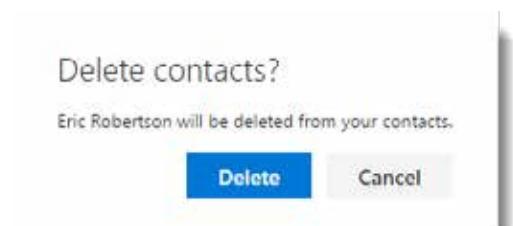


Figure 5-20 Delete confirmation dialogue box.

NOTE: Deleted contacts are stored in the *Deleted Items* folder in the Mail web app.

5.2.6 WHEN SHOULD I CREATE A CONTACT?

Many organisations use dedicated tools like Microsoft Dynamics or Salesforce to track correspondence with 3rd parties. Do not create contacts in the People app for individuals who may have contacts set up in more suitable systems already.

It is also not recommended to create contacts for users in your own organisation. They should appear in the directory automatically. Please inform your IT department if you believe a co-worker is missing from the directory or if their contact information is out of date.

5.3 USING SEARCH

The *Search People* field is located at the top-left corner of the People app. You may find it is quicker to locate a contact using the search function than what it is to browse, especially if you have many contacts and large address lists. The search will return results from contacts you created and from your organisation's Directory.

5.3.1 PERFORM A SEARCH

1. Position the cursor in the search field.

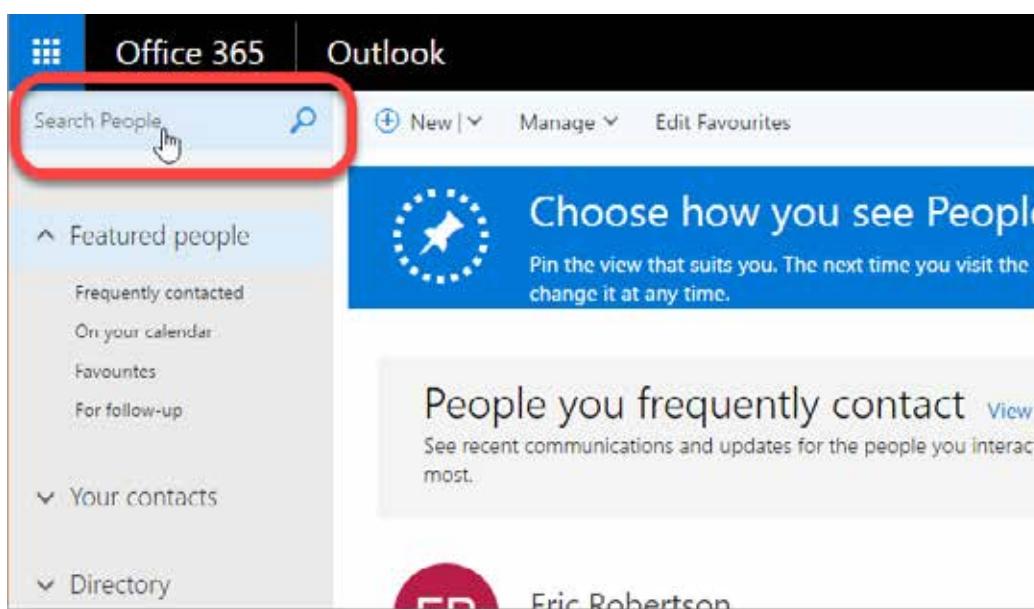


Figure 5-21 The "Search people" field.

2. Type the first name, last name, or full name of the contact for whom you are looking and press **Enter**.

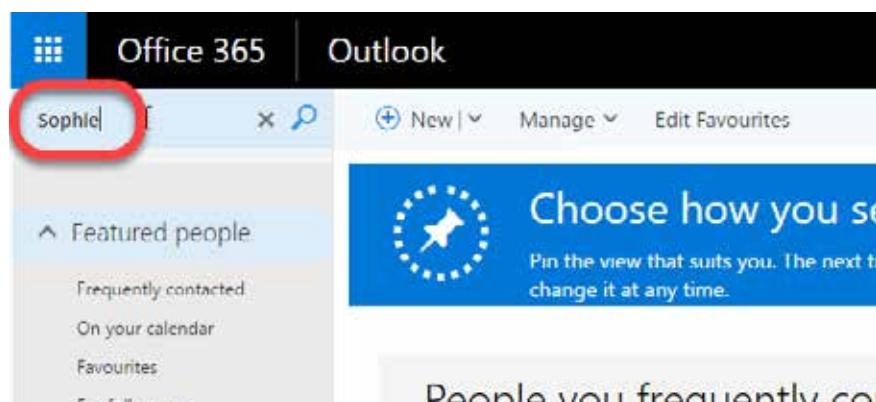


Figure 5-22 A contact's name.

3. If Search returns too many results, use the radio buttons and check boxes to refine your search criteria.

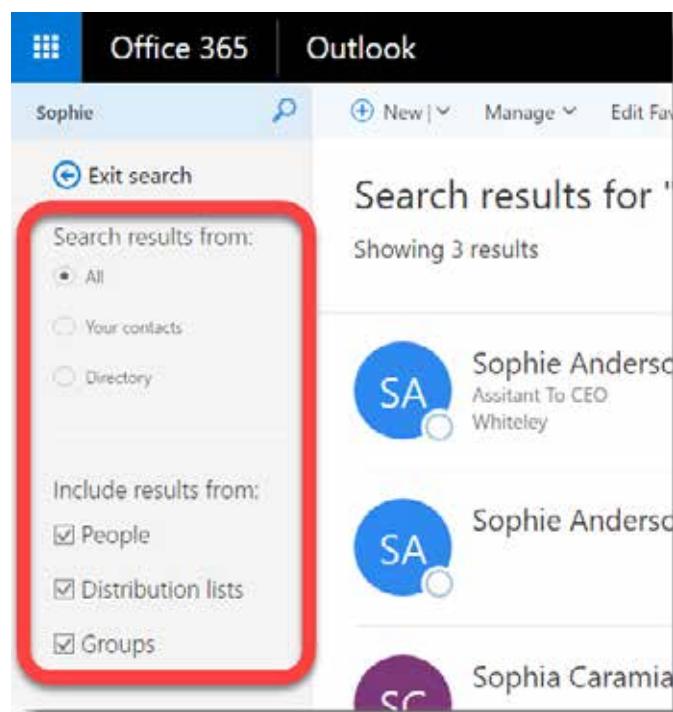


Figure 5-23 People search filters.

4. Click on the desired search result to see the person's contact card.

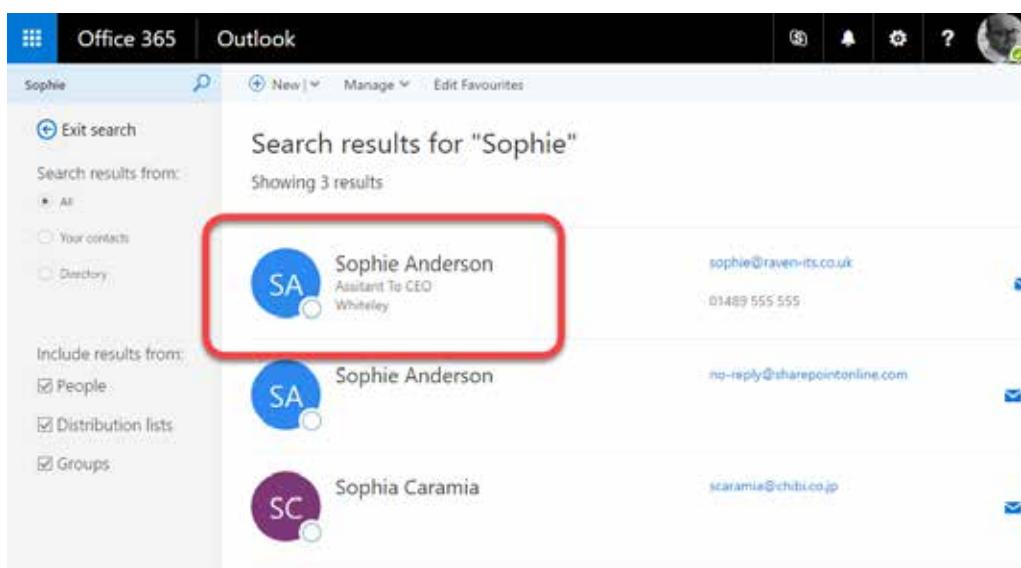


Figure 5-24 People search results.

5. The contact card will be displayed on the right-hand side of the screen.

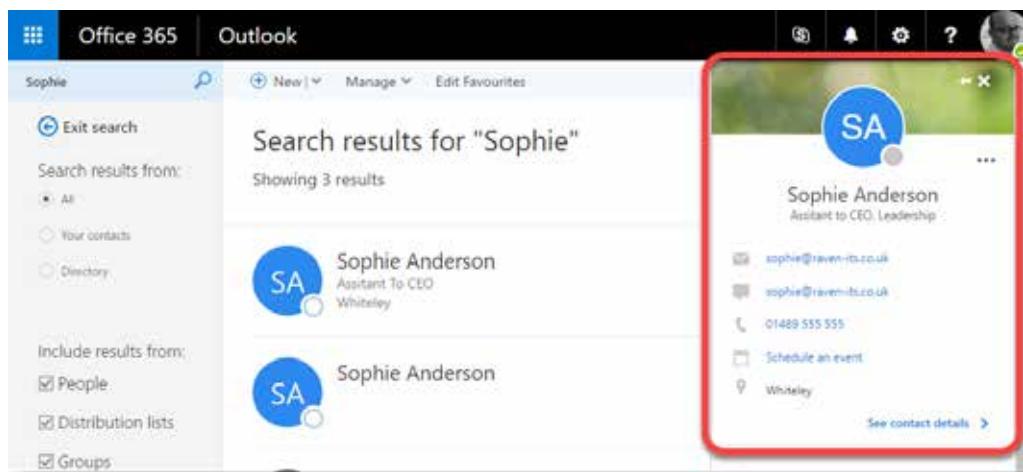


Figure 5-25 A contact card.

5.4 FEATURED PEOPLE

When you first navigate to the People app web page for the first time, the page displays the *Choose how you see people* reminder.

This function enables you to set the default view that is displayed when you navigate to the People app. Take a moment to review the following views:

5.4.1 FREQUENTLY CONTACTED

The *Frequently contacted* view shows details of the contacts that you interact with most often.

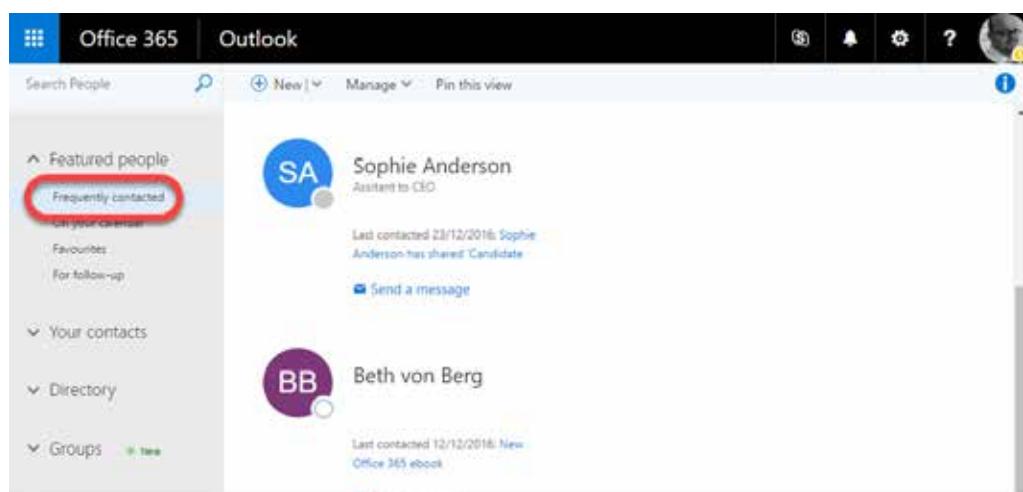


Figure 5-26 The "Frequently contacted" view.

5.4.2 ON YOUR CALENDAR

The *On your calendar* view displays contacts with whom you have meetings on that day.

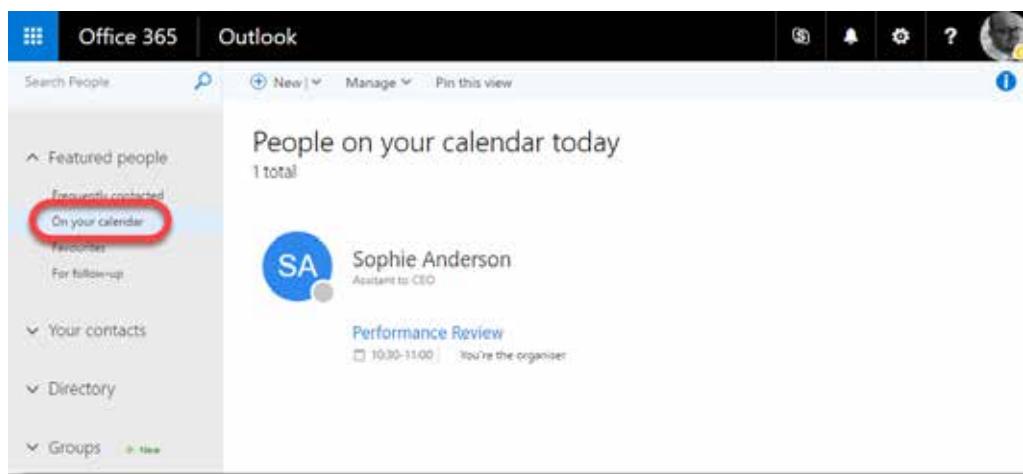


Figure 5-27 The “On your calendar” view.

NOTE: The view will display the text *It looks like your calendar is open for the rest of the day* if you do not have a meeting scheduled on the day. This information can be misleading; although you don't have any meetings with contacts, you may still have appointments on the day.

5.4.3 FAVOURITES

The *Favourites* view shows those contacts that you have marked as favourites.

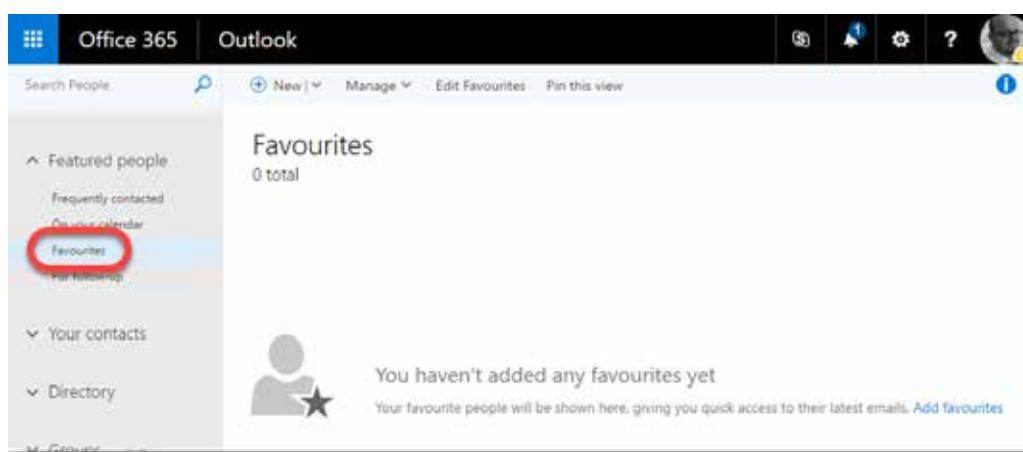


Figure 5-28 The “Favourites” view.

5.4.4 ADDING FAVOURITE CONTACTS

1. Click on **Add favourites**.

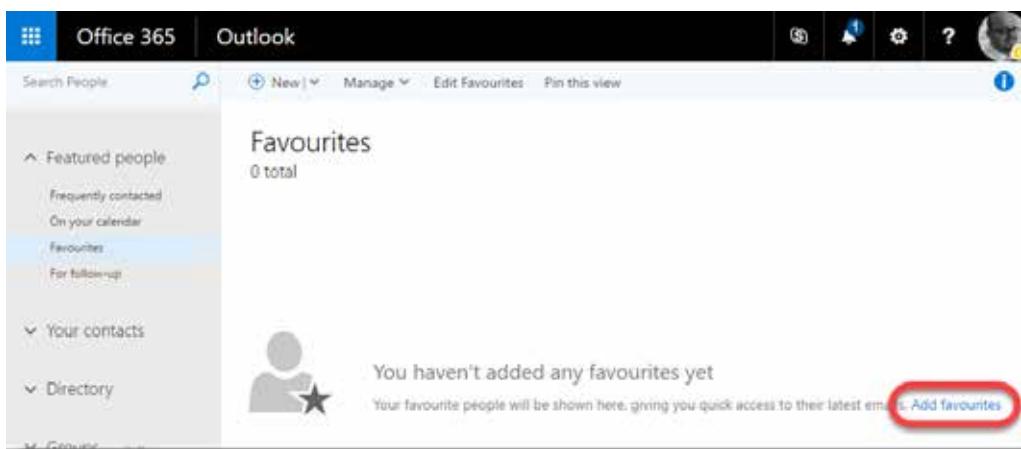


Figure 5-29 The "Add favourites" link.

2. Position the cursor in the *Edit Favourites* field and begin typing the name or email address of a favourite contact.
3. Select the contact from the list of suggestions.

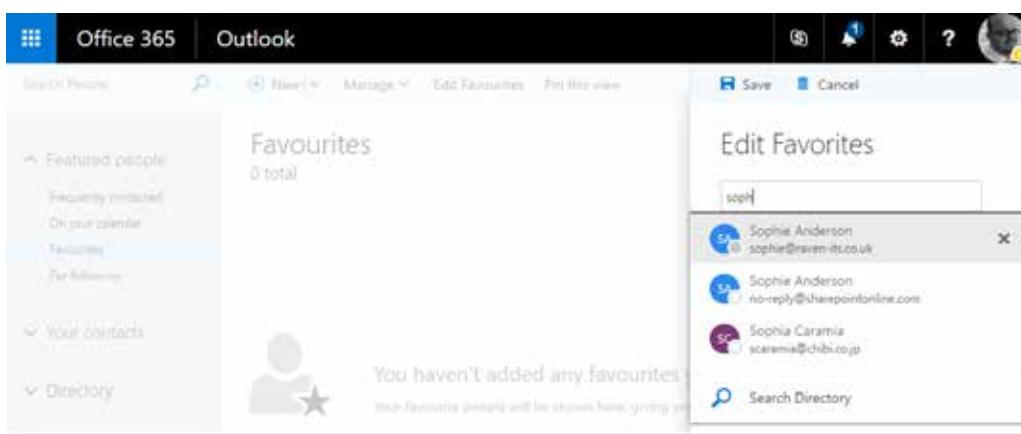


Figure 5-30 Suggested favourite contacts.

4. Click **Save**.

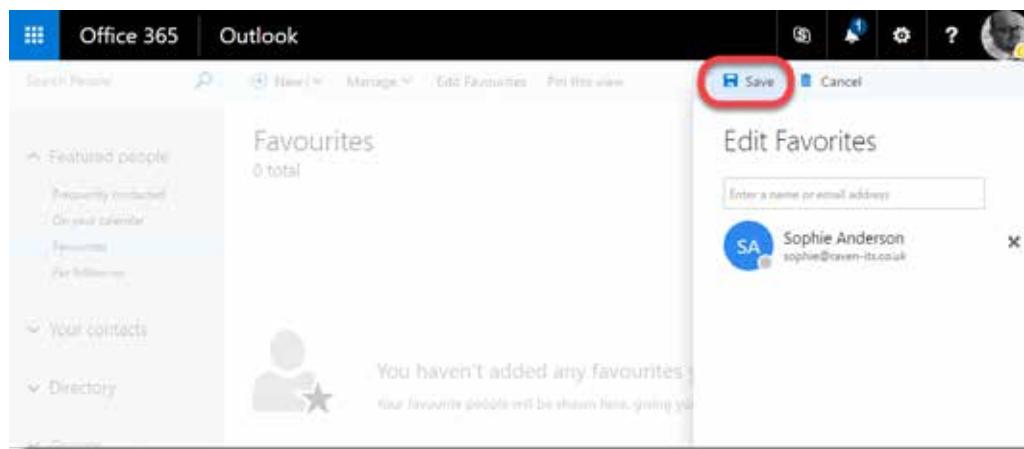


Figure 5-31 The Save button.

5. The contact will now be displayed as a favourite.

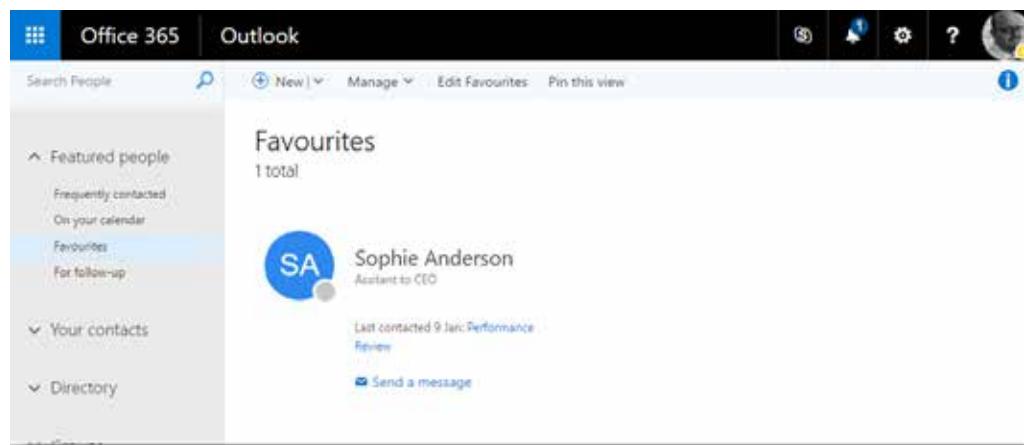


Figure 5-32 A favourite contact.

5.4.5 FOR FOLLOW-UP

This view displays a list of contacts with which Office 365 thinks you may need to follow up. The list is created by Office 365 by monitoring which users with whom you exchange email messages most frequently.

1. Click the **For follow-up** link on the left.

The screenshot shows the 'People you may want to follow up with' view in Outlook. On the left, a sidebar menu is open with the 'For follow-up' link highlighted by a red circle. The main pane displays a contact card for Sophie Anderson, showing her profile picture (SA), her name, and a message from Terence Rabe. Below the message, there are links to '6 more messages in your inbox' and a 'Southampton Boardroom' section.

Figure 5-33 The "For follow-up" view.

5.4.6 YOUR CONTACTS

The *Your contacts* view shows an unfiltered view of all the contacts you have created.

1. Click the **Your contacts** link.

The screenshot shows the 'Your contacts' view in Outlook. On the left, the 'Your contacts' link in the sidebar menu is highlighted by a red circle. The main pane displays a list of four contacts: Beth von Berg, Eric Robertson, and Joshua Anderson, each with their respective profile pictures and contact details.

| Full name | Email address | Title |
|-----------------|--------------------------------|---------|
| Beth von Berg | bb@babyporraits.co.uk | (empty) |
| Eric Robertson | erobertson@widgetcorp.com | (empty) |
| Joshua Anderson | joshua.amderson@widgetcorp.com | (empty) |

Figure 534 The "Your contacts" view.

5.4.7 PINNING A VIEW

Once you have explored the available views, you can decide which one should be displayed as the default view when accessing the People app.

1. If necessary, click on the **Featured People** link to display the *Choose how you see people* reminder.

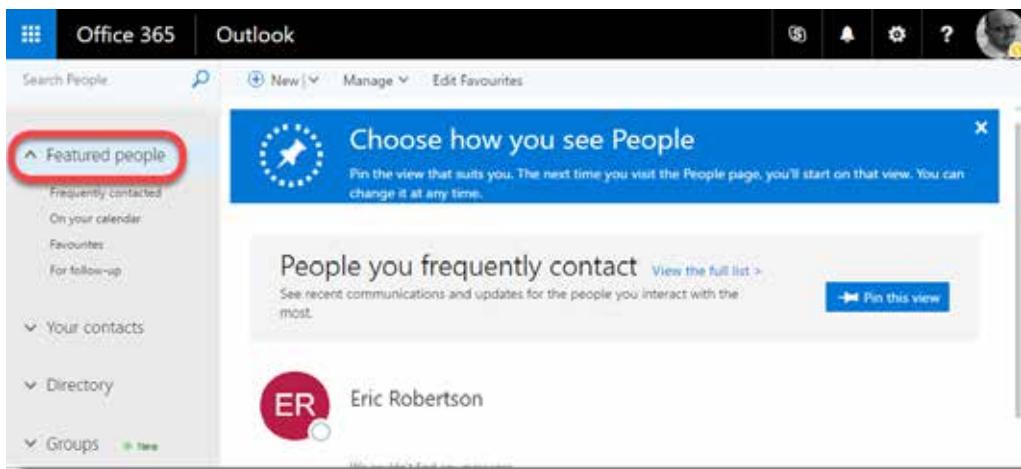


Figure 5-35 The “Featured people” link.

An advertisement for the CISO Conference. The background image shows the exterior of the Apollo Hotel 1 at night. On the left, there's a large red lightbulb icon. To its right, the text reads 'CISO Conference' and 'Produced by Inspired'. On the right side of the image, there's a white callout box with the text 'Apollo Hotel 1, Groenlandsekade Vinkeveen, Amsterdam, NL Dec 5th 2019'. At the bottom, there's a call-to-action: 'Listen, learn & build relationships with our Network of CISOs & Cyber Security Leaders' and the 'Inspired' logo.

2. Locate the view preview for the view that you wish to set as default and click the *Pin this view* button.

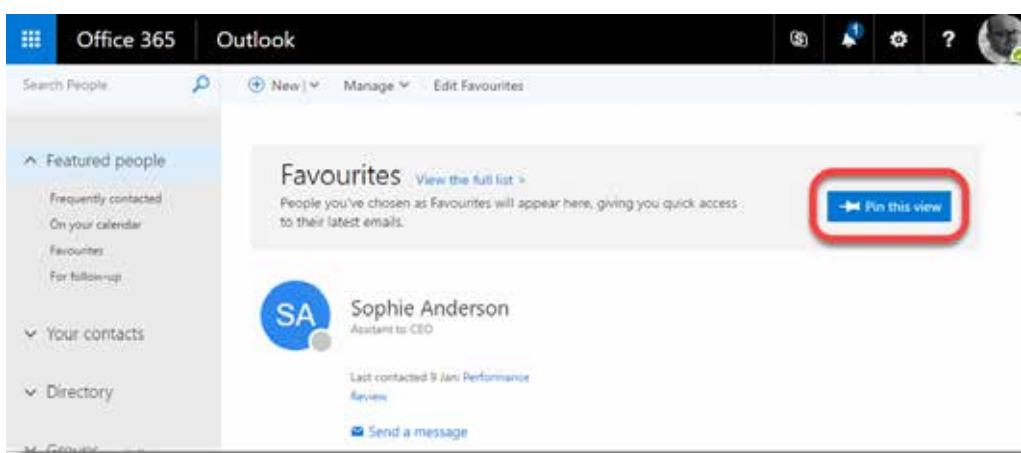
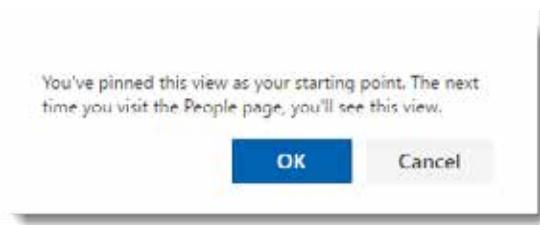


Figure 5-36 The “Pin this view” button.

3. Click **OK**.



4. The preview for the view that you pinned is now shown at the top of the list; notice the pin icon on the menu link.

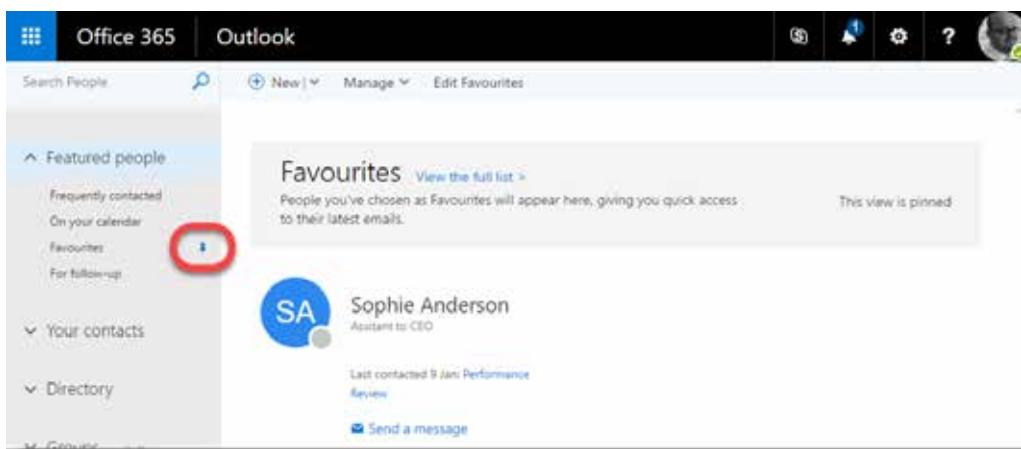


Figure 5-37 The pin icon.

NOTE: The pinned view will be displayed next time you access the People web app, but the other views can still be accessed from the view links. You can pin a different view at any time.

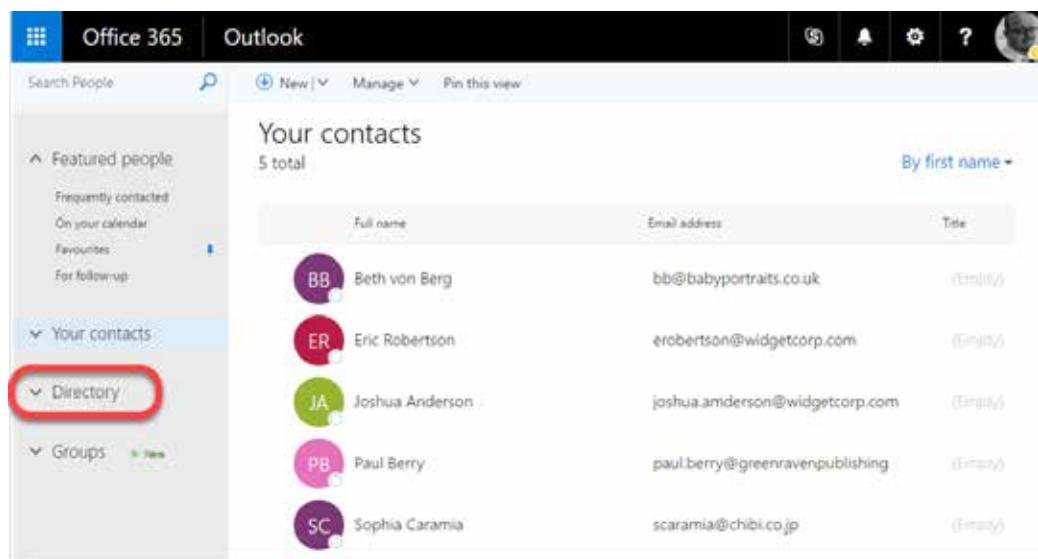
5.5 DIRECTORY

5.5.1 WHAT IS THE DIRECTORY?

The Directory is a list of *recipients* set up and maintained by your organisation's IT department. A recipient is any object that has an email address; users, meeting rooms, and distribution lists are all examples of recipients.

5.5.2 ACCESS THE DIRECTORY

1. Click the Directory link on the left-hand menu.



The screenshot shows the 'Your contacts' view in the Office 365 People web app. On the left, there is a navigation sidebar with the following options:

- Featured people
- Frequently contacted
- On your calendar
- Favourites
- For followup
- Your contacts** (this option is currently selected)
- Directory** (this option is highlighted with a red oval)
- Groups

The main area displays a table titled 'Your contacts' with 5 total entries. The columns are 'Full name', 'Email address', and 'Title'. The data is as follows:

| Full name | Email address | Title |
|-----------------|-------------------------------------|---------|
| Beth von Berg | bb@babyporraits.co.uk | (Empty) |
| Eric Robertson | erobertson@widgetcorp.com | (Empty) |
| Joshua Anderson | joshua.anderson@widgetcorp.com | (Empty) |
| Paul Berry | paul.berry@greenravenpublishing.com | (Empty) |
| Sophia Caramia | scaramia@chibi.co.jp | (Empty) |

Figure 5-38 The Directory link.

2. The Directory will be displayed.

The screenshot shows the Microsoft People app interface. The left sidebar has a tree view with 'Featured people' expanded, showing 'Frequently contacted', 'On your calendar', 'Favorites', and 'For follow-up'. Below it are collapsed sections for 'Your contacts', 'Directory' (which is selected and highlighted in blue), and 'Groups'. The main area is titled 'Directory' with '7 total' contacts. A 'By display name' filter dropdown is at the top right. The contact list includes:

| Full name | Email address | Title |
|-----------------------|--------------------------------|--------------|
| Pass exam 70-346 | passexam70346@raven-its.co.uk | (empty) |
| Project Dolphin | projectdolphin@raven-its.co.uk | (empty) |
| Project Zulu | projectzulu@raven-its.co.uk | (empty) |
| Sophie Andersch | sophie@raven-its.co.uk | Assistant to |
| Southampton Boardroom | sb@raven-its.co.uk | (empty) |
| Terence Rabe | terence@raven-its.co.uk | Trainer Cx |

Figure 5-39 The Directory.

5.6 CONTACT LISTS

5.6.1 WHAT ARE CONTACT LISTS?

Contact lists are used to group together contacts in the People app so that it is easier to address email messages to them as a group.

5.6.2 CREATE A CONTACT LIST

1. Click on the **arrow icon** next to the New button.

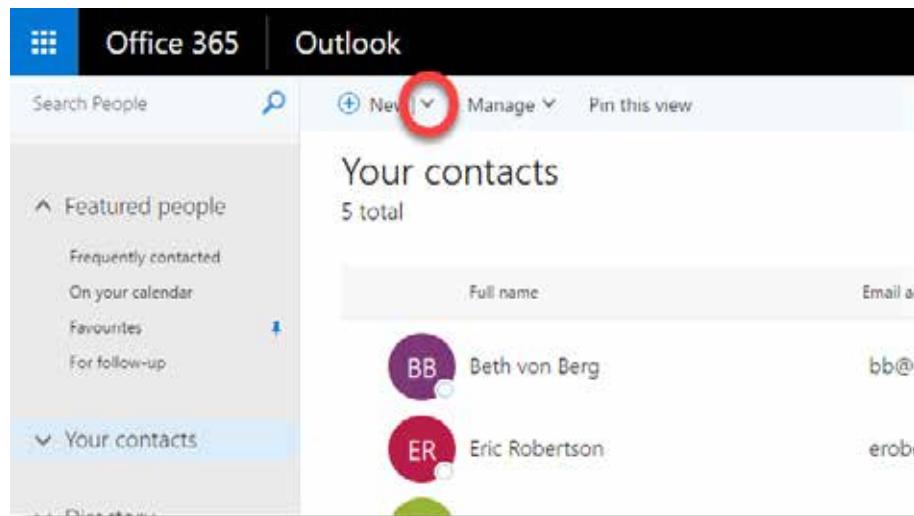


Figure 5-40 The New options button.

2. Select **Contact list**.

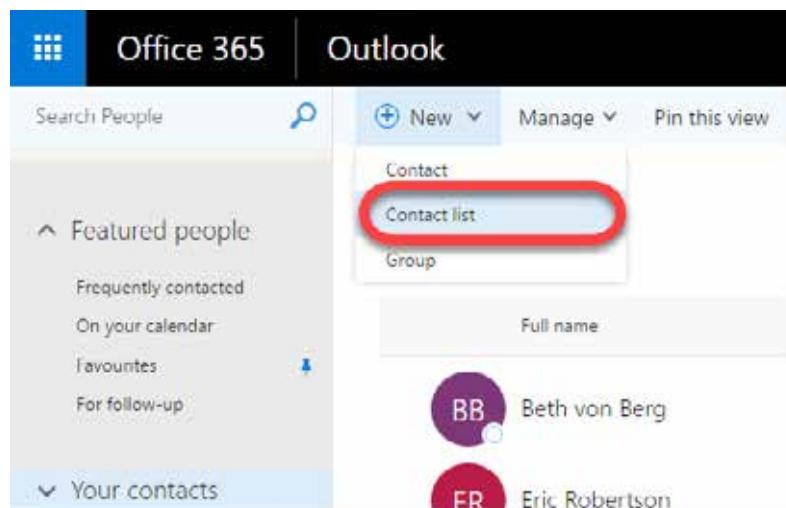


Figure 5-41 The "Contact list" option.

3. The *new contact list* pane will be displayed on the right-hand side of the screen.

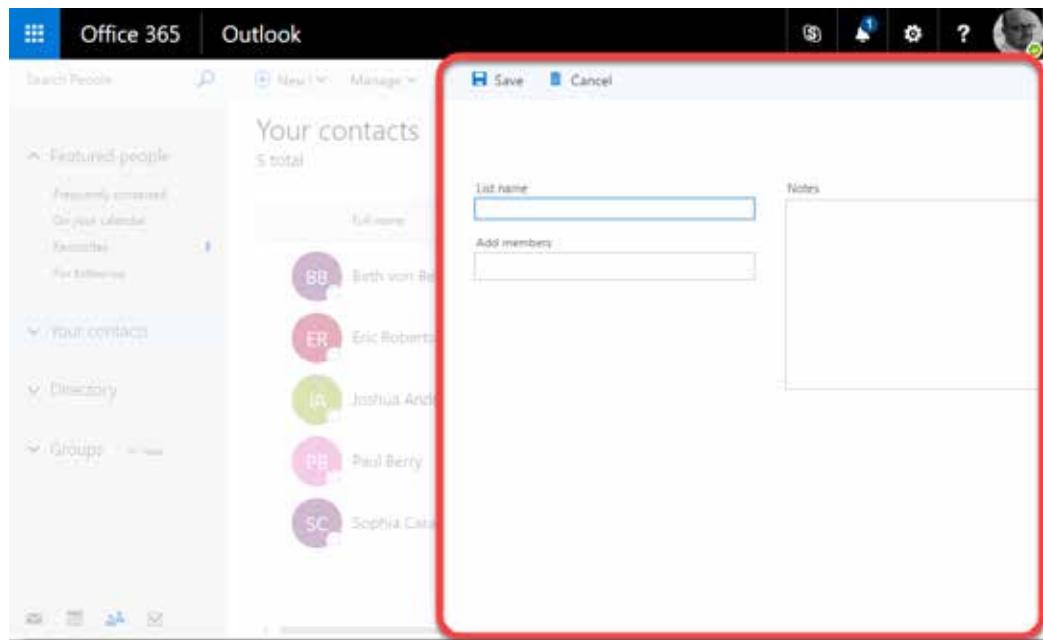


Figure 5-42 New contact list pane.

4. Type a name for the contact list in the *List name* field.

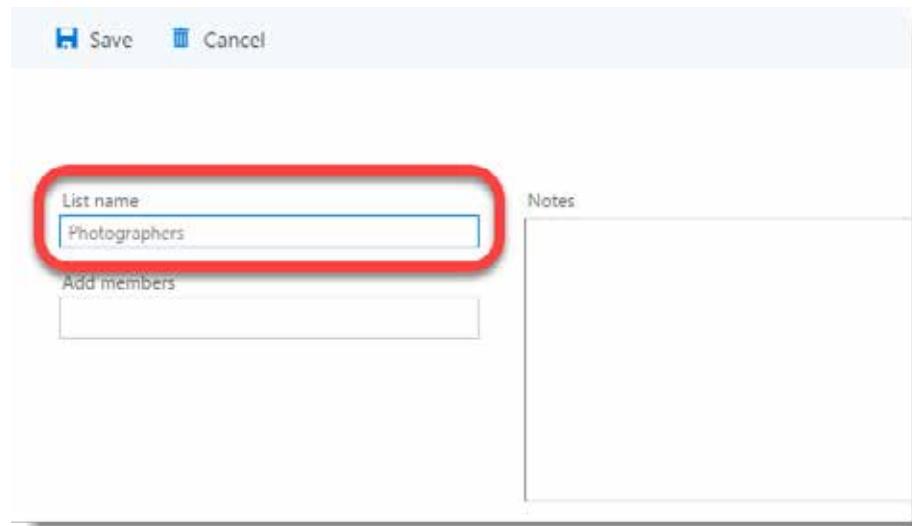


Figure 5-43 List name.

5. Begin typing a name in the *Add members* field; the page will display a list of suggested names.

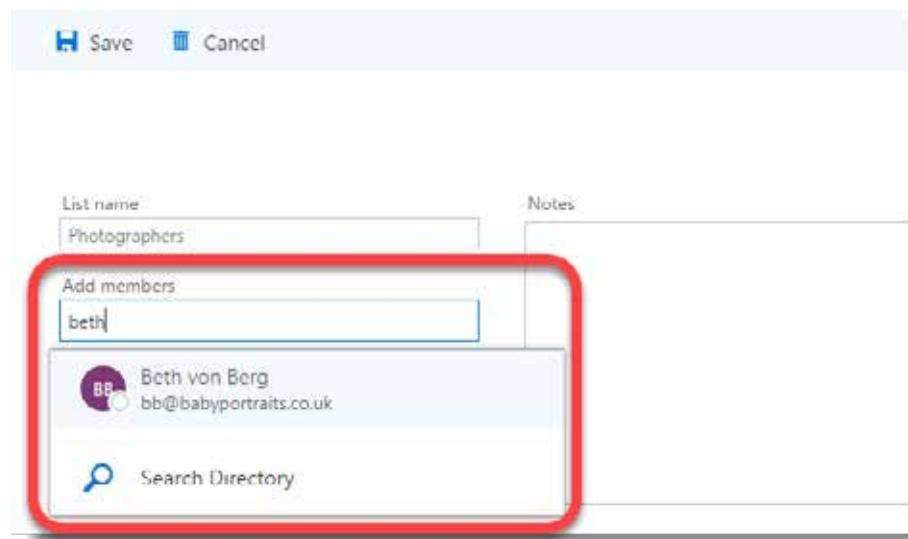


Figure 5-44 Suggested member names.

6. Click on a name to add it to the contact list.

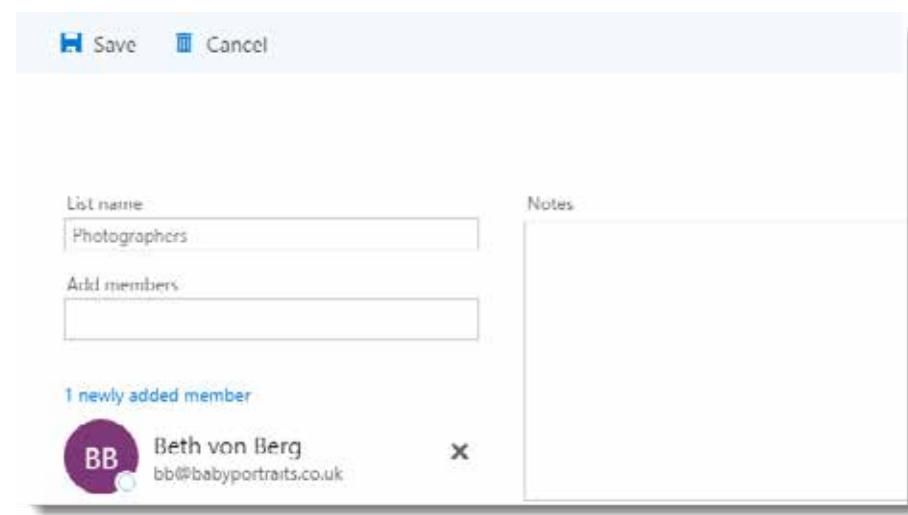


Figure 5-45 Contact list with new member.

7. Once you have added all the members, you need click **Save**.

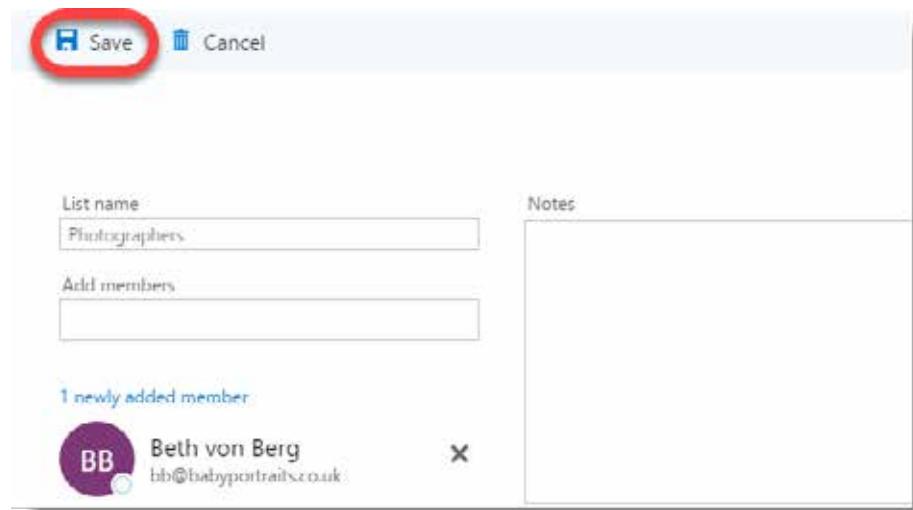


Figure 5-46 The Save button.

8. The new contact list card is shown on the right of the screen.

A screenshot of the Microsoft People interface. On the left, there's a navigation pane with 'Your contacts' selected. The main area shows a list of contacts: Beth von Berg, Eric Robertson, Joshua Anderson, Paul Berry, and Sophia Caramia. A contact list card for 'Photographers' is highlighted with a red box. This card includes a green circular icon with a white 'P', the list name 'Photographers', a 'Contact list' section, a 'Schedule an event' button, a 'Members' section listing Beth von Berg and Sophie Anderson, a 'See all members >' link, and a 'Notes' section stating 'No notes have been added.'.

Figure 5-47 A contact list card.

5.6.3 SEND EMAIL TO A CONTACT LIST

To address an email message to all the members of a contact list, follow the directions below:

1. Create a new email message.

2. In the *To* field, begin typing the name of the contact list.

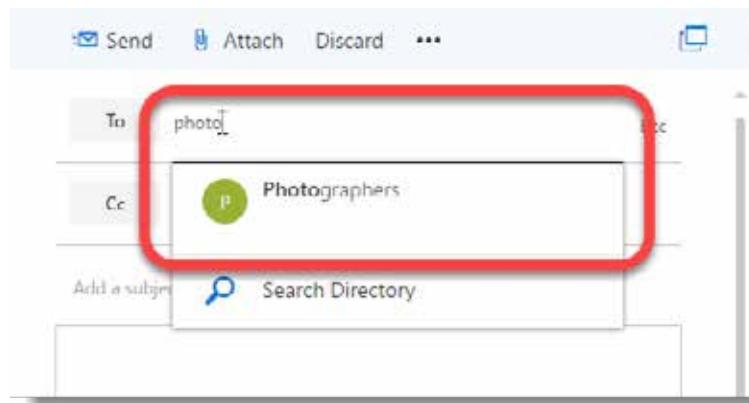


Figure 5-48 A contact list in recipient suggestions.

3. Select the contact list from the suggestions displayed.
4. The contact list will be added to the *To* field.

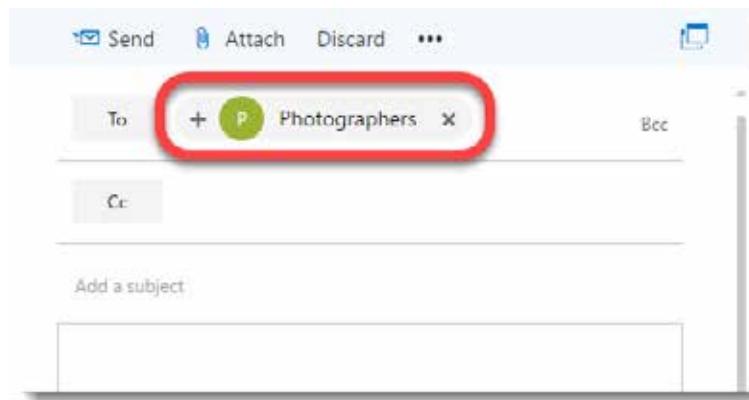


Figure 5-49 A contact list in the To field.

5.6.4 UPDATE A CONTACT LIST

1. Click the selector check box.

The screenshot shows the 'Your contacts' page in the Office 365 Outlook interface. On the left, there's a sidebar with sections like 'Featured people' and 'Your contacts'. The 'Your contacts' section is expanded. In the main area, it says '1 of 7 selected'. Below this, there's a table with two rows. The first row has a checkbox (which is checked and highlighted with a red circle), a blue circular icon with the letter 'A', the name 'Authors', and an empty email address field. The second row has an unchecked checkbox, a purple circular icon with the letters 'BB', the name 'Beth von Berg', and the email address 'bb@babyporraits.com'. The 'Edit' button in the top navigation bar is also circled in red.

Figure 5-50 The selector check-box.

2. Click **Edit**.

This screenshot is similar to Figure 5-50, showing the 'Your contacts' page in Outlook. The 'Edit' button in the top navigation bar is now explicitly circled in red. The rest of the interface, including the sidebar and the contact list, appears identical to the previous figure.

Figure 5-51 The Edit button.

3. The contact list properties will be displayed in a pane on the right of the screen.

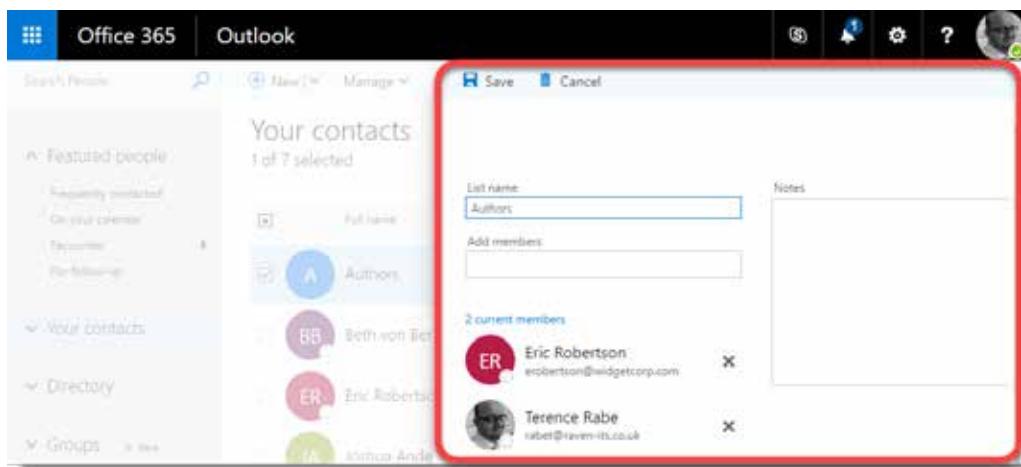


Figure 5-52 Contact list properties.

4. Make the necessary changes and click **Save**.

5.6.5 DELETE A CONTACT LIST

1. Click the selector check box.

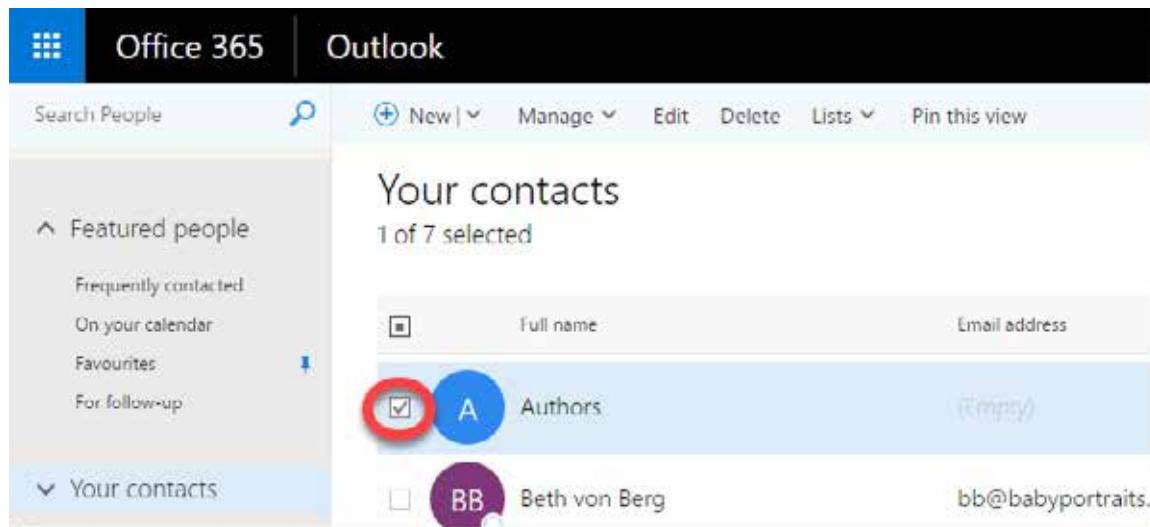


Figure 5-53 The selector check-box.

2. Click **Delete**.

The screenshot shows the 'Your contacts' page in the Office 365 Outlook interface. On the left, there's a sidebar with sections like 'Featured people', 'Frequently contacted', 'On your calendar', 'Favourites', and 'For follow-up'. Below that is a section titled 'Your contacts'. In the main area, it says 'Your contacts' and '1 of 7 selected'. There are two contact entries listed:

| | Full name | Email address |
|-------------------------------------|-----------------|------------------|
| <input checked="" type="checkbox"/> | A Authors | (Empty) |
| <input type="checkbox"/> | B Beth von Berg | bb@babyporraits. |

The 'Delete' button in the top navigation bar is circled in red.

Figure 5-54 The Delete button.

3. Click **Delete** on the *Delete contacts* dialogue box.

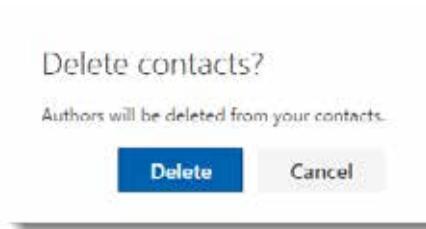


Figure 5-55 Delete confirmation.

5.7 GROUPS

Office 365 *Groups* is a collaboration web app that gives a team of users access to a shared email account, document library, calendar, and notebook. The Groups app may or may not be available to you depending on the type of Office 365 subscription you use.

Groups are not covered in this guide; if you wish to set up a Group, please seek advice from your IT department.

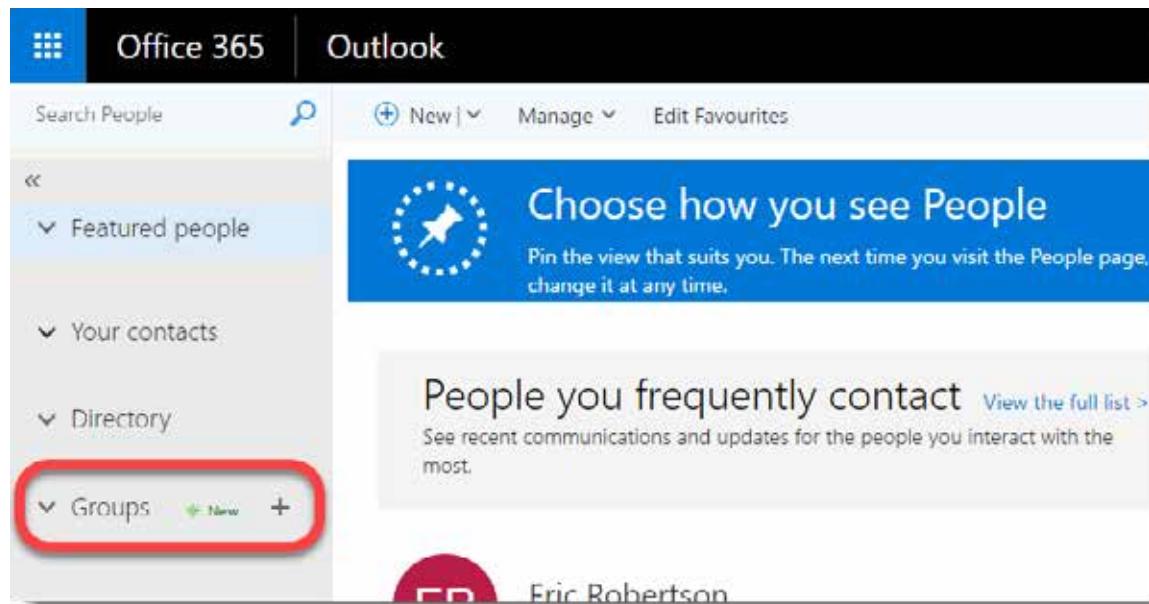


Figure 5-56 Office 365 Groups.

5.8 MANAGE PEOPLE

5.8.1 CONNECT TO SOCIAL NETWORKS

If you have a social network account that stores email addresses and other contact details for your contacts, you can link your account to the People app.

NOTE: At the time of writing, only LinkedIn is available to connect.

1. Click on **Manage**.

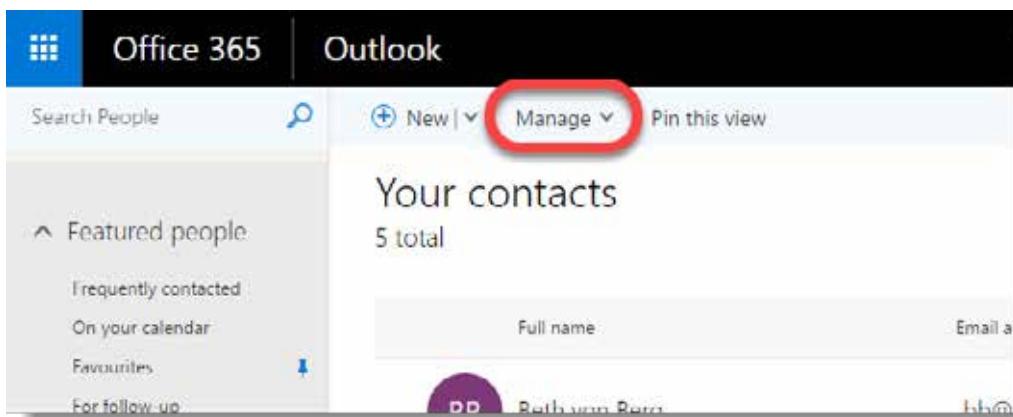


Figure 5-57 The Manage button.

2. Choose **Connect to social networks**.

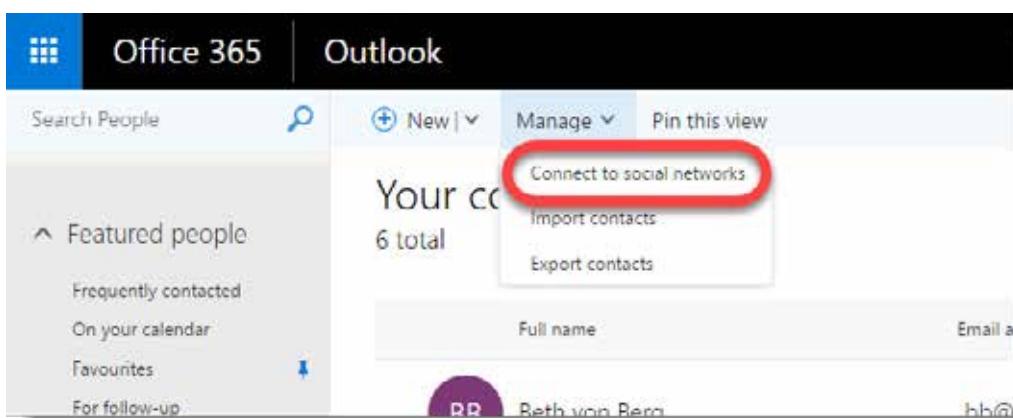


Figure 5-58 The "Connect to social networks" option.

3. Click **Connect**.

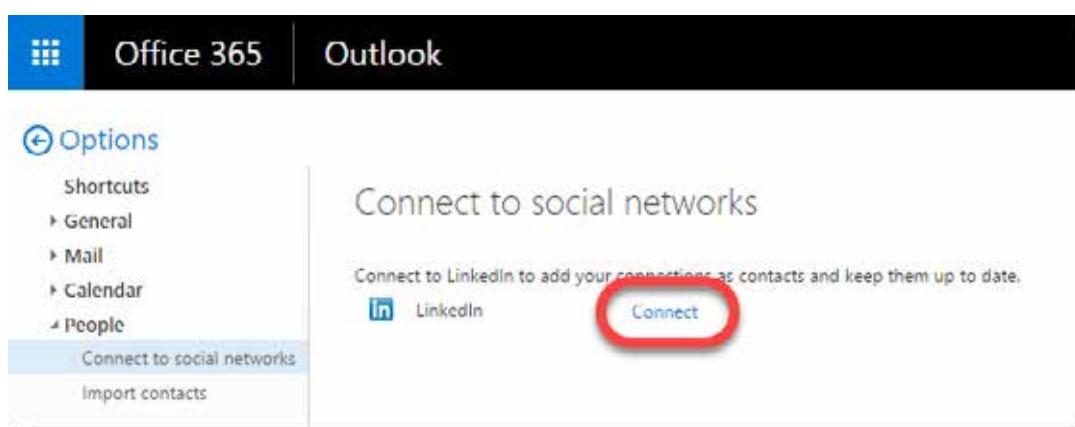


Figure 5-59 The Connect link.

4. Fill in the required information and click **OK, I'll Allow It.**



Figure 5-60 Social network security credentials.

5. You will be returned to the *Connect to social networks* page.
6. Click on the **back arrow** to return to the People app.

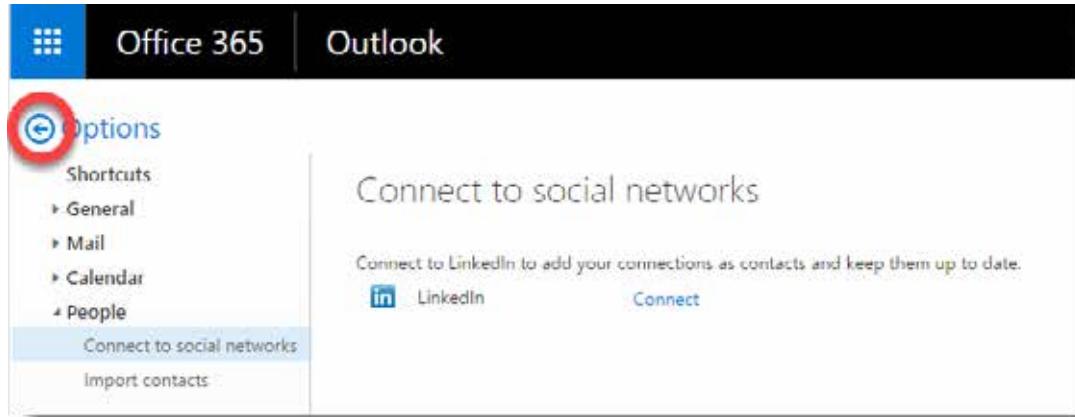


Figure 5-61 The back icon.

7. Click on the **arrow icon** next to *Your contacts* to expand the link.

The screenshot shows the 'Your contacts' section of the Office 365 People app. On the left, there's a sidebar with sections like 'Featured people' and 'Your contacts'. The 'Your contacts' section is expanded, indicated by a red circle around the downward arrow icon. The main area displays two contacts: 'Authors' (with a blue A icon) and 'Beth von Berg' (with a purple BB icon). Both contacts have checkboxes next to their names. The contact list has columns for 'Full name' and 'Email address'.

Figure 5-62 Expand arrow.

8. Click **LinkedIn** to see only your social network contacts or click **Contacts** to see only the contacts you have created in the People app.

This screenshot shows the 'Your contacts' section with a focus on LinkedIn social network contacts. The sidebar shows 'Your contacts' expanded, with 'LinkedIn' highlighted and circled in red. The main area lists six contacts from LinkedIn, each with a small profile picture and some basic information. The contacts are sorted by first name.

Figure 5-63 Social network contacts.

NOTE: You can disconnect the social network from the People app at any time by navigating to the *Connect to social networks* page and clicking **Remove**.

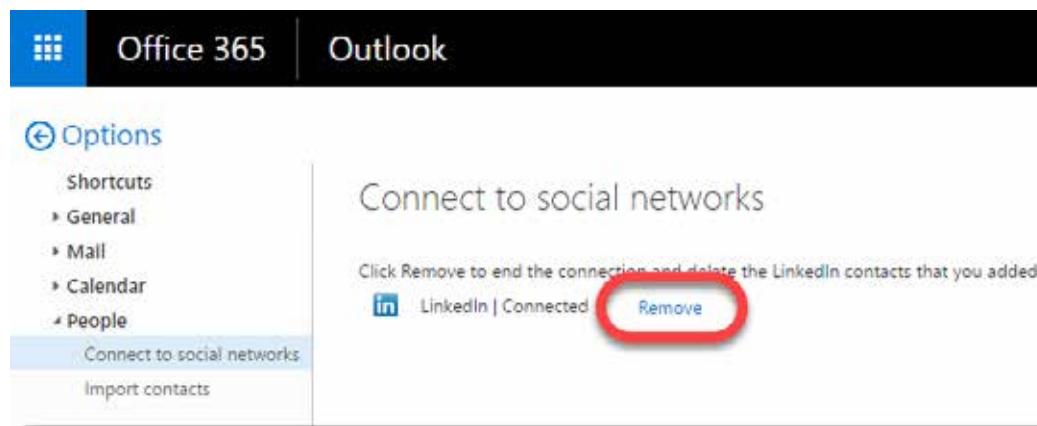


Figure 5-64 Remove link.

5.8.2 IMPORT CONTACTS

If your organisation has recently started using Office 365, you may have contacts stored in the service or application you used previously. If your IT department did not transfer contacts from the previous system, you can transfer the contacts yourself, rather than recreate them.

The Office 365 People app provides instructions for importing contacts from the following systems:

- Gmail.
- Yahoo! mail.
- Window Live mail (includes Hotmail and Outlook.com).
- Outlook 2010, 2013, and 2016 desktop applications.

1. Click on **Manage**.

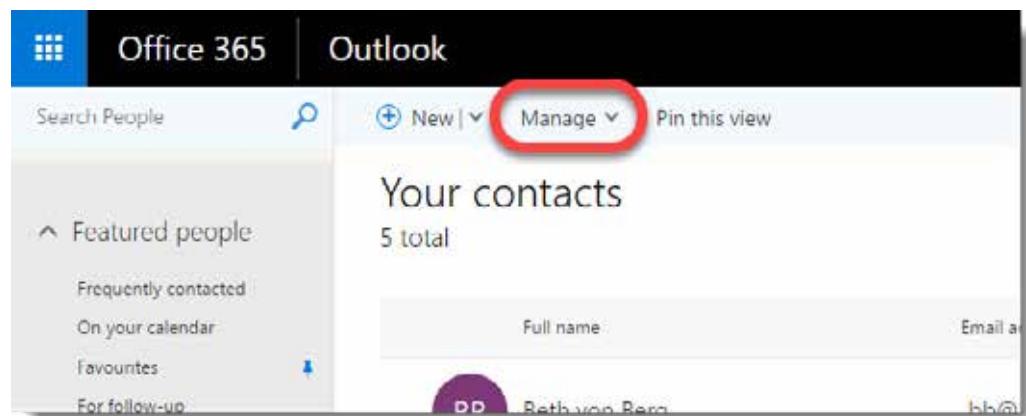


Figure 5-65 The Manage button.

2. Choose **Import contacts**.

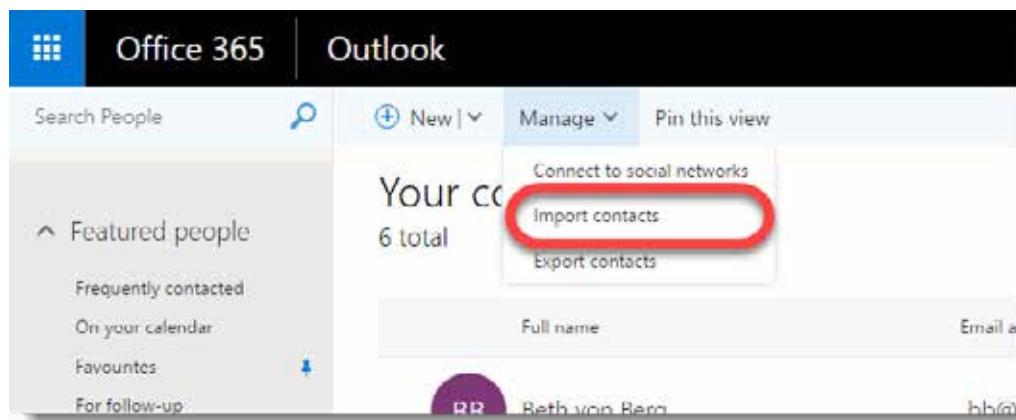


Figure 5-66 The “Import contacts” option.

3. The Import contacts pane will be displayed on the right side of the page.

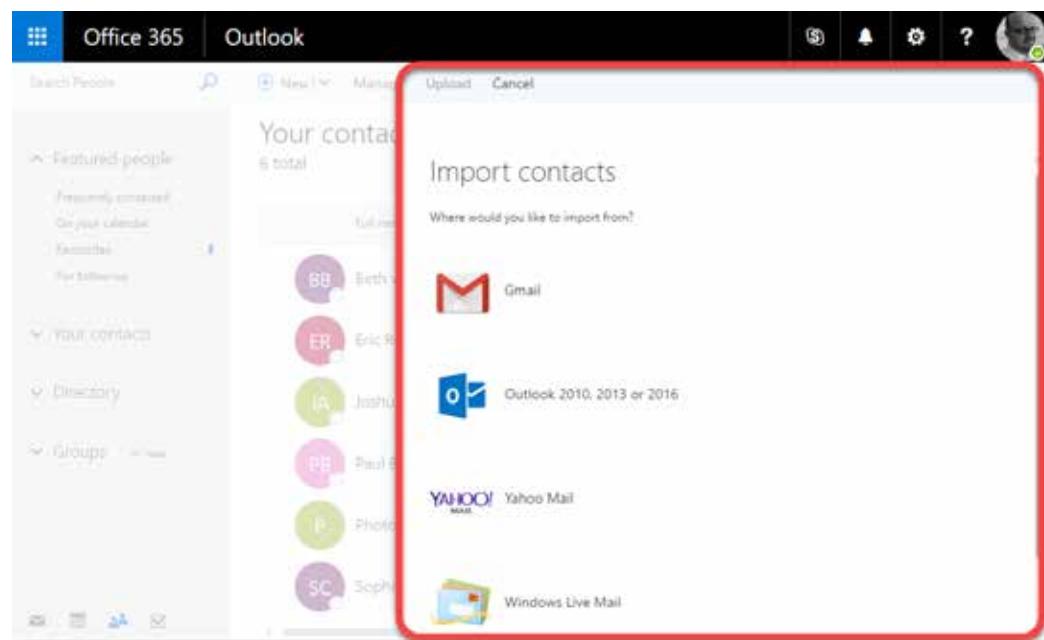


Figure 5-67 The “Import contacts” pane.

4. Click on the service or application that holds your existing contacts.

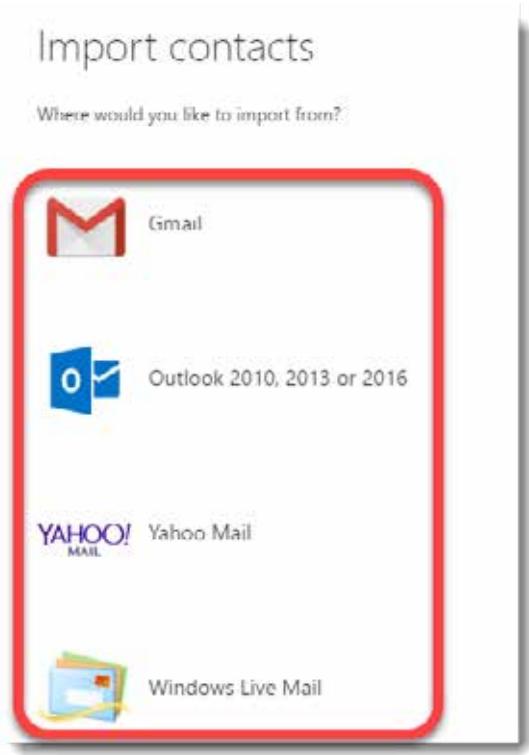


Figure 5-68 Contact import sources.

5. Instructions will be displayed for exporting contacts from the chosen system.

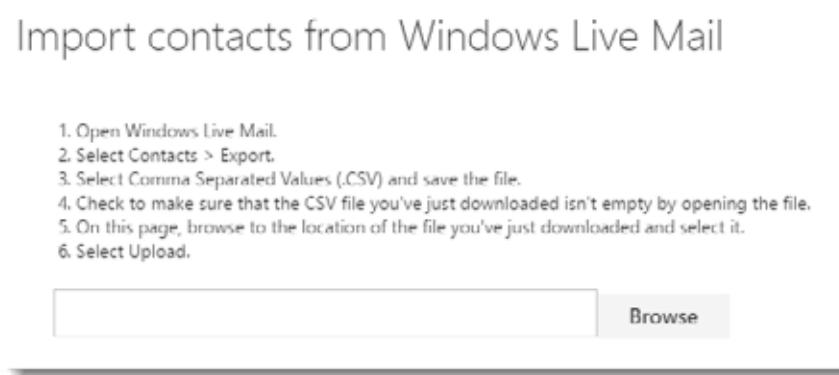


Figure 5-69 Export instructions.

6. After clicking **Upload** (Step 6 in the example above), the contacts from the previous system will upload.

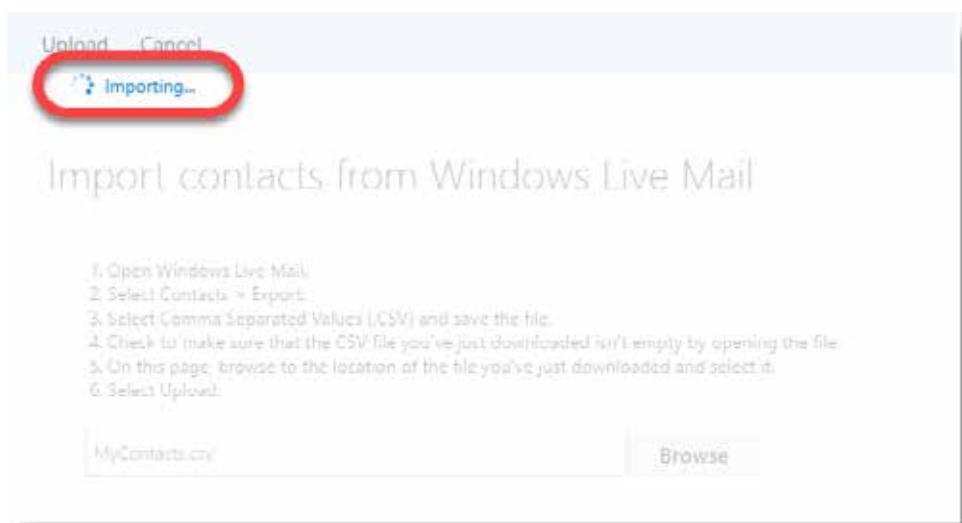


Figure 5-70 Import status.

7. Following a successful import, the *Import successful* screen will be displayed.

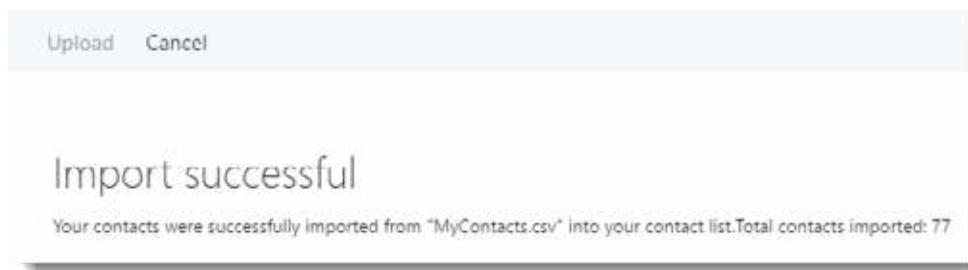


Figure 5-71 The "Import successful" screen.

8. Click **Cancel** to close the Import successful screen and return to your contacts.

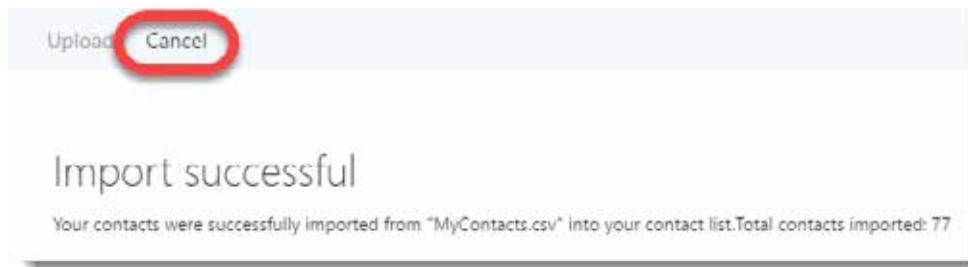


Figure 5-72 The Cancel button.

6 TASKS

6.1 OVERVIEW

The Outlook *Tasks* app is used to keep track of tasks that you need to perform.

6.1.1 ACCESSING THE TASKS WEB APP

The Outlook *Tasks* web app has its own app tile which can be found on the Office 365 Home page.

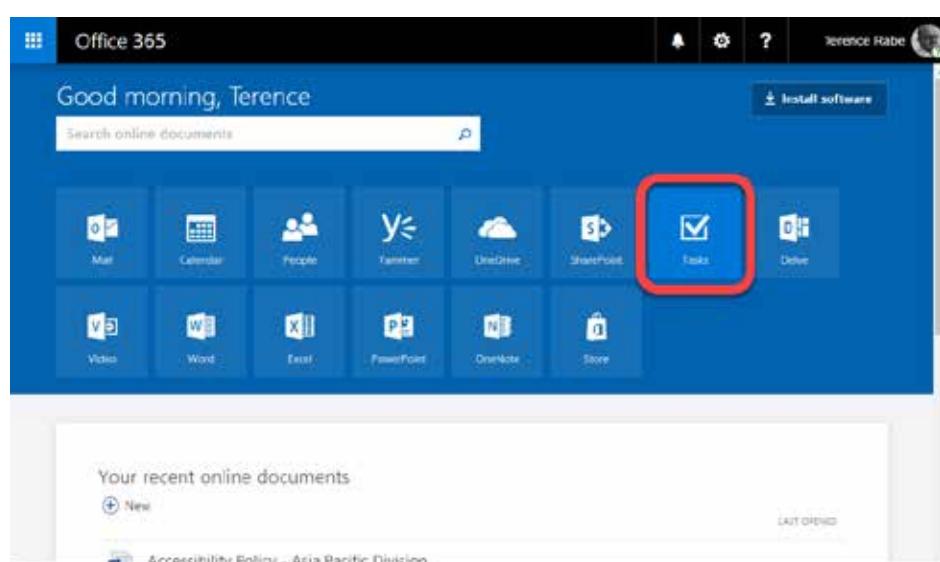


Figure 6-1 The Tasks app tile on the Home page.

The App launcher also has a Tasks app tile.

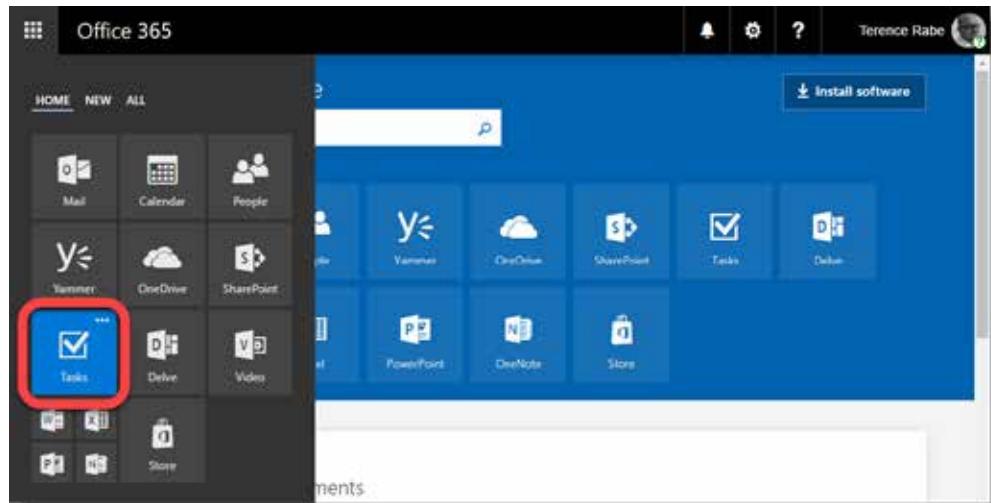


Figure 6-2 The Calendar app tile on the App launcher.

Clicking the app tile will open the web app.

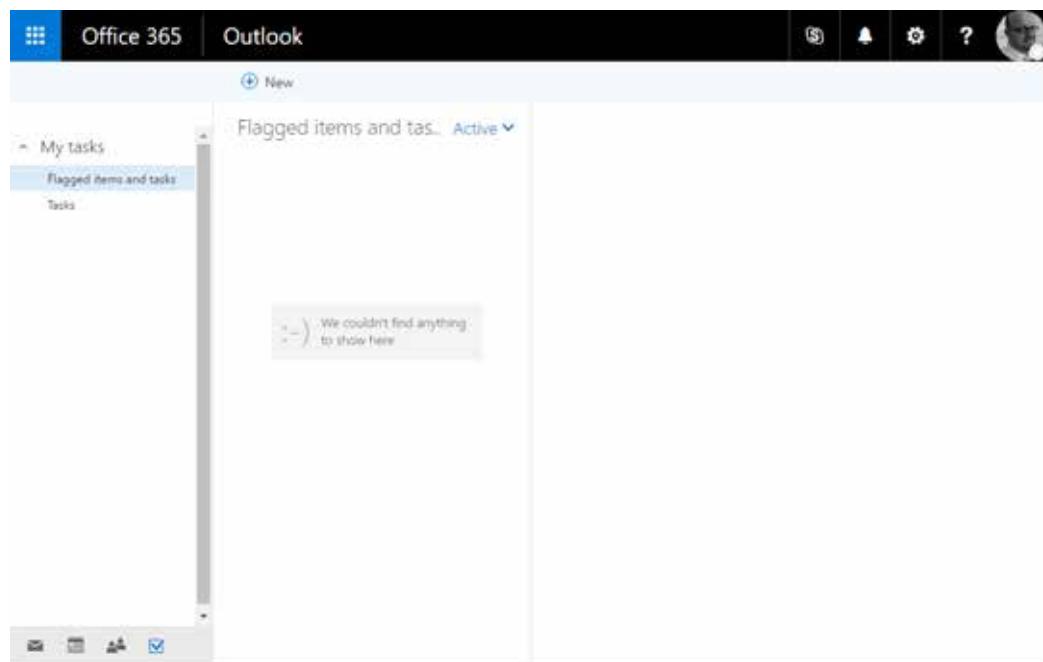


Figure 6-3 Outlook Tasks.

6.2 CREATING TASKS

6.2.1 CREATE A TASK

1. Click **New**.

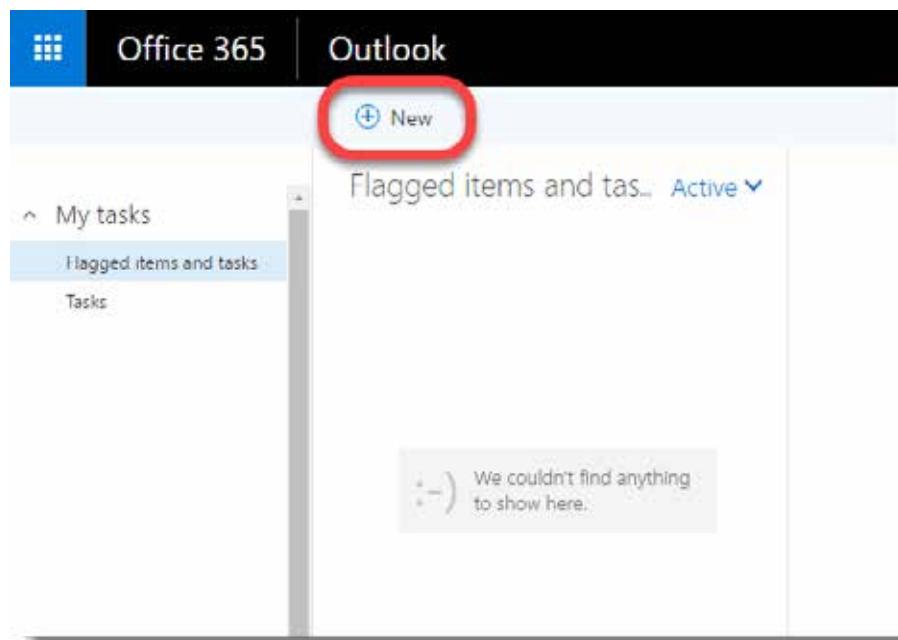


Figure 6-4 The New button.

2. The *task* pane will be displayed.

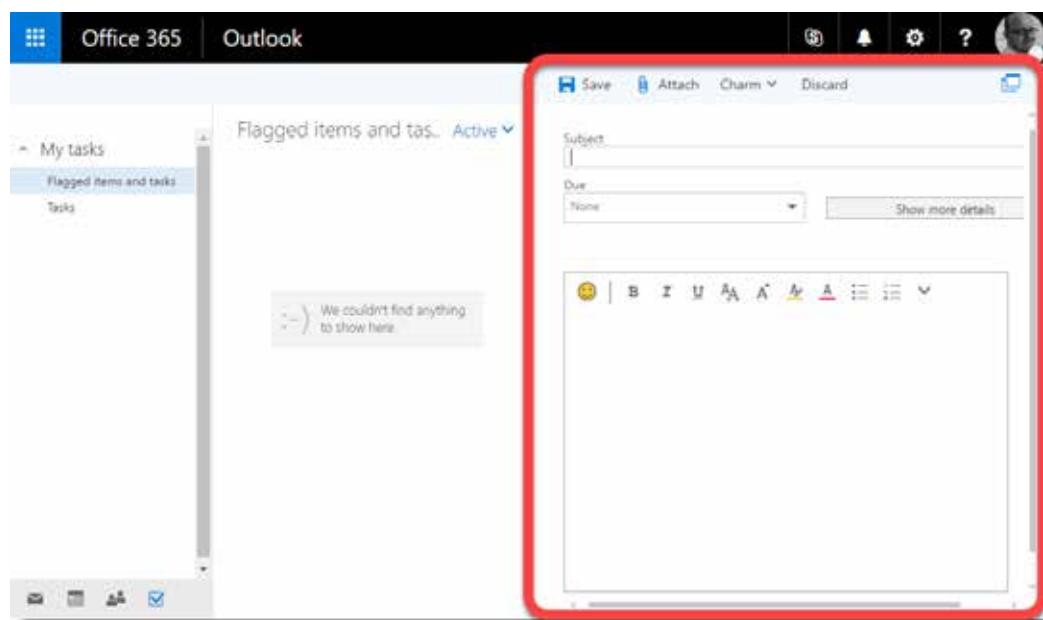


Figure 6-5 The Task pane.

3. Add a **subject**.

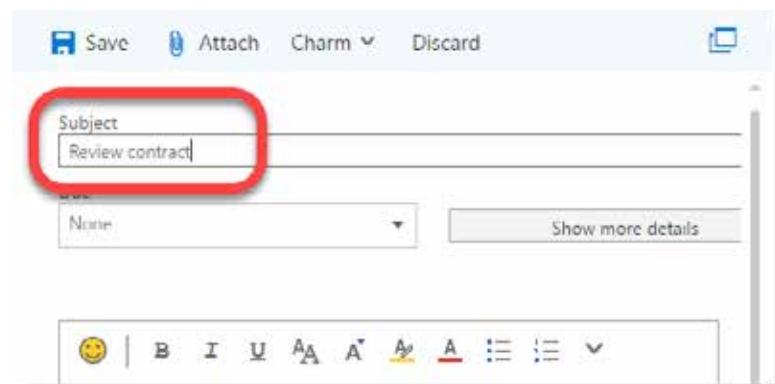


Figure 6-6 Task Subject.

4. Use the drop-down menu to select a due date.

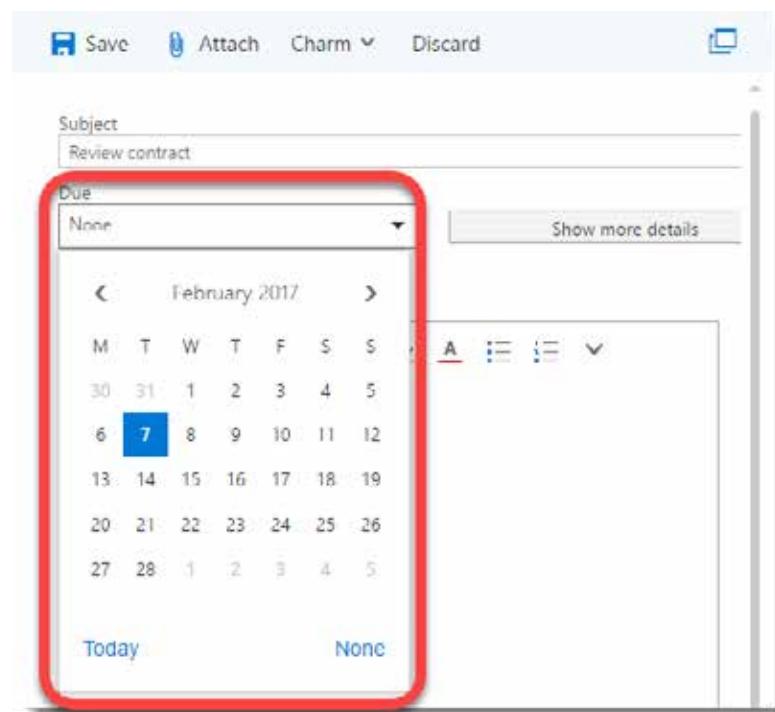


Figure 6-7 Task due date.

5. Add any description required.

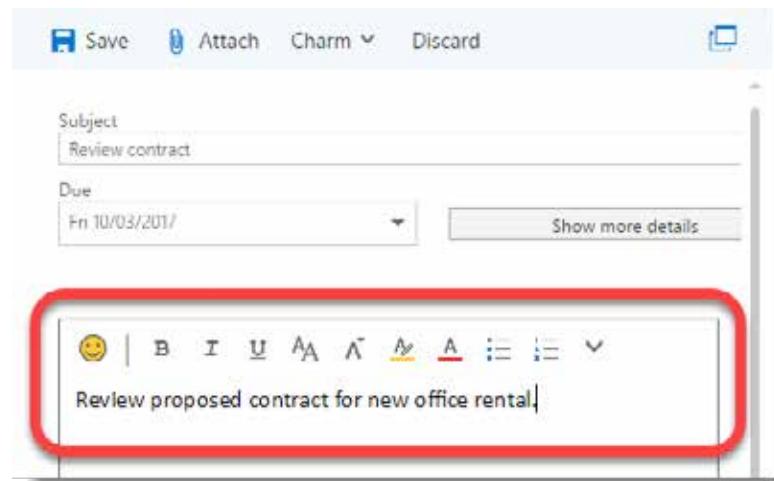


Figure 6-8 Task description.

6. Click **Show more details**.

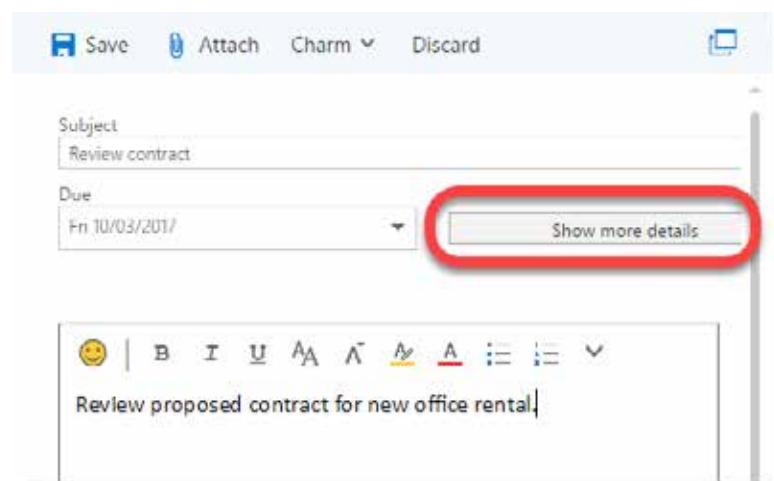


Figure 6-9 "Show more details" button.

7. Add any extra details required.

The screenshot shows a 'Due' field set to 'Fri 10/03/2017' and a 'Show fewer details' button. Below are fields for 'Start date' (None), 'Date complete' (None), 'Status' (Not started), '% complete' (0), 'Priority' (Normal), 'Reminder' (None), 'Mark as private' (unchecked), 'Repetition' (Never), 'Total work' (0 hours), 'Actual work' (0 hours), 'Mileage' (empty), 'Billing' (empty), and 'Companies' (empty). A vertical scroll bar is visible on the right side of the form.

Figure 6-10 Additional task details.

8. Click **Save**.

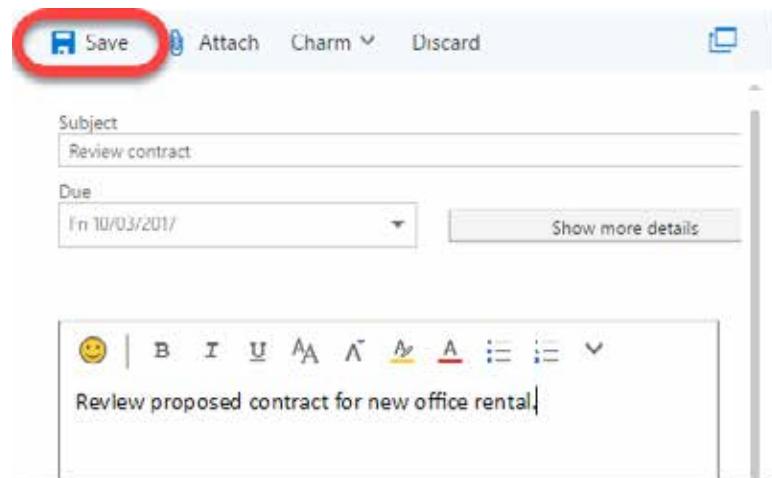


Figure 6-11 The Save button.

9. The task will be saved and displayed in the task list; task details will be visible in the task pane when the task is selected.

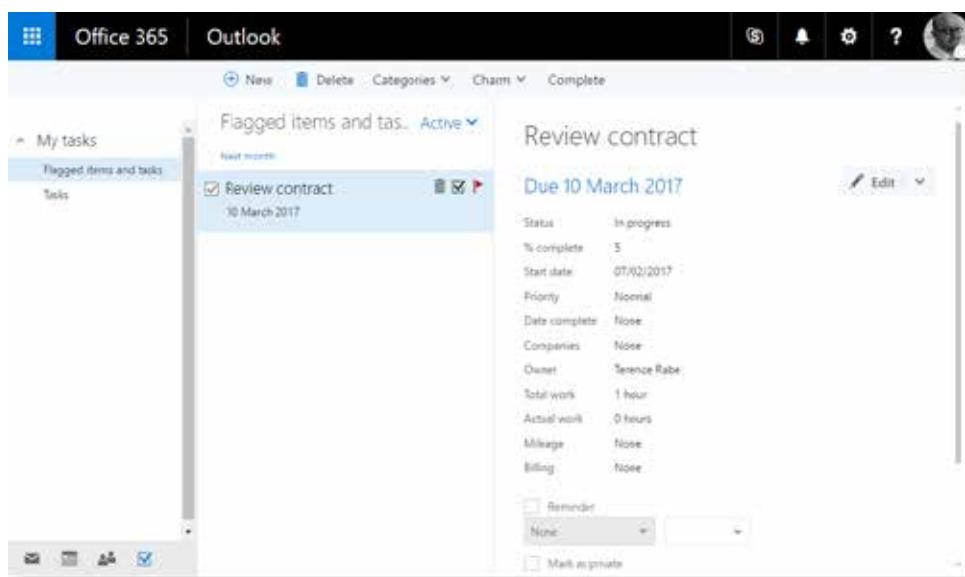


Figure 6-12 A task.

6.2.2 FLAG AN EMAIL MESSAGE

Tasks are created when an email message is flagged. Please refer to Chapter 2, Section 11, Topic 4 for more information about flagging email messages.

6.3 TASK VIEWS AND FILTERS

Outlook Tasks has two view options: *Tasks* and *Flagged items and tasks*.

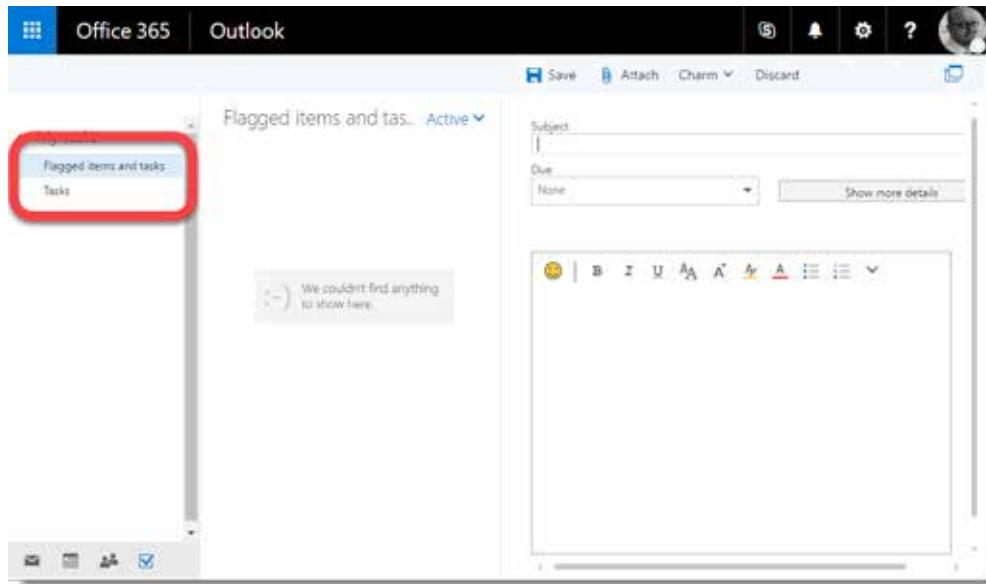


Figure 6-13 Task view selectors.

6.3.1 FLAGGED ITEMS AND TASKS VIEW

The *Flagged items and tasks* view shows tasks created in the Outlook Tasks app, as well as tasks that were created by flagging email messages in the Outlook Mail app.

6.3.2 TASKS VIEW

The tasks view shows only tasks created in the Outlook Tasks app.

6.3.3 TASK LIST FILTERS

The task list can be filtered to display certain tasks depending on their status. The filters are as following:

- *Active* – shows only tasks that have not been marked as completed or overdue.
- *All* – shows all tasks.
- *Overdue* – show tasks that have not been completed within the due date.
- *Completed* – show only completed tasks.

1. Click on the active filter name.

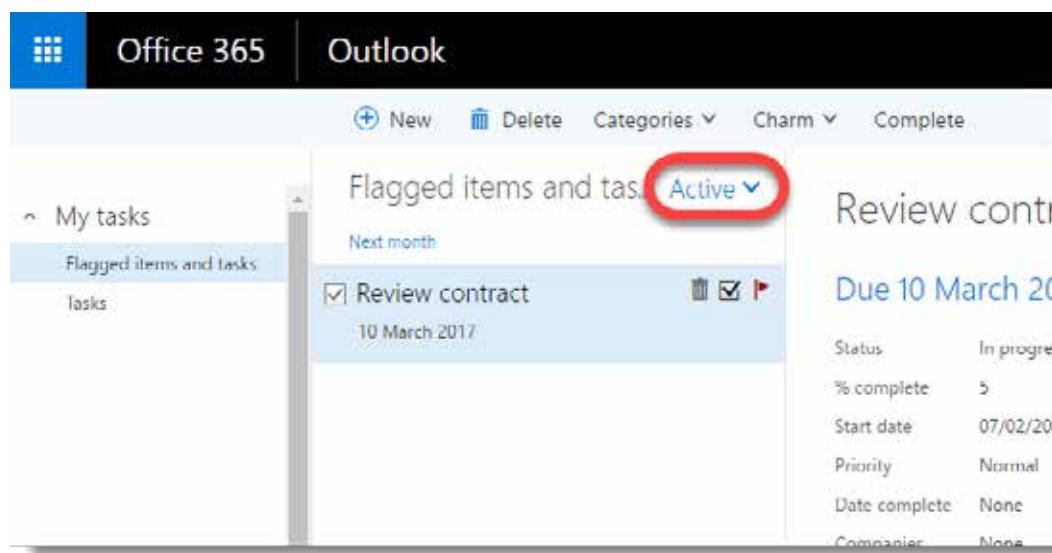


Figure 6-14 Task list filter selector.

2. Select the filter from the menu.

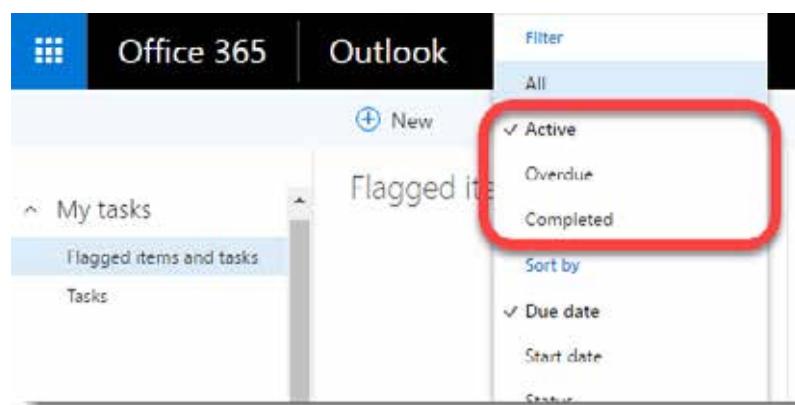


Figure 6-15 Task list filter options.

6.4 MANAGING TASKS

6.4.1 CATEGORIES

Categories can be used to mark tasks with a category label. This function makes them easier to find in the task list.

1. Select a task.
2. Click **Categories** and select a category from the menu.

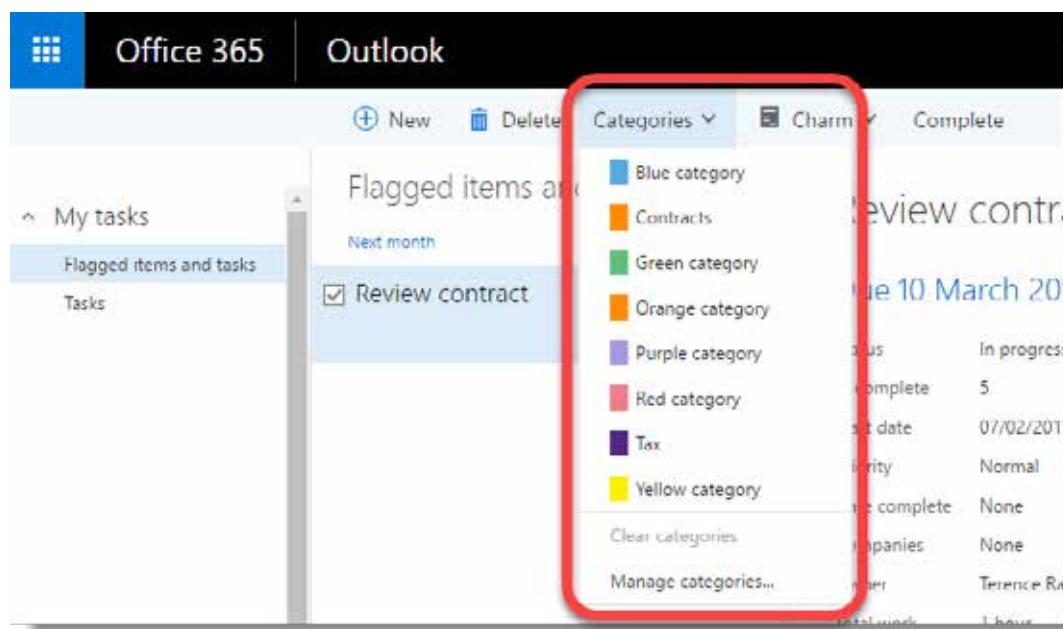


Figure 6-16 Task categories.

3. The category marker will be displayed in the task preview and on the tasks details.

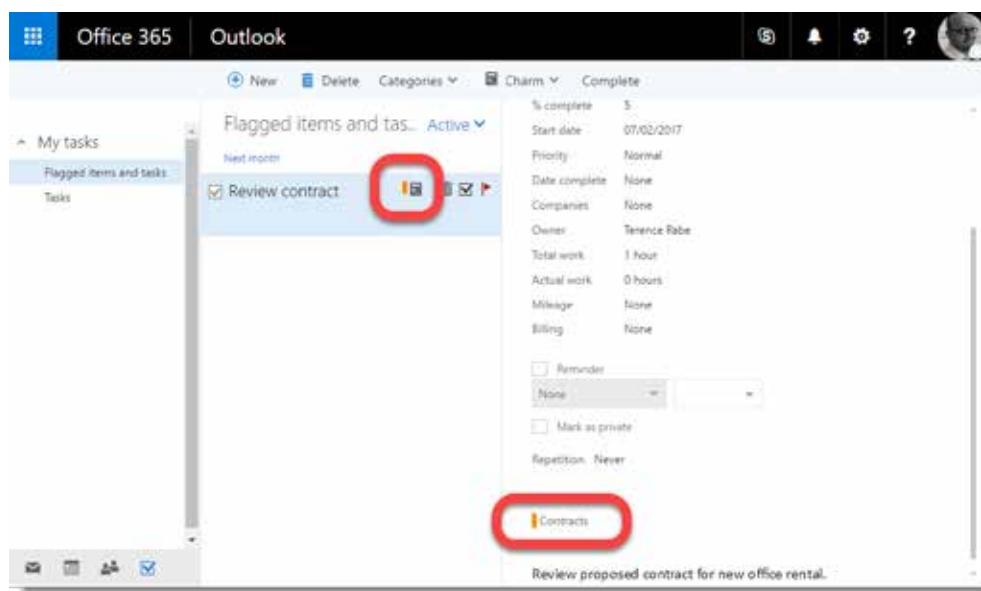


Figure 6-17 Task category markers.

NOTE: The categories created in Outlook tasks can be re-used in the Outlook Tasks app and vice versa.

6.4.2 CHARMS

A *Charm* is an icon that can be displayed on a task preview in the task list. Charms are purely cosmetic and have no effect on views or filtering.

1. Select a task.
2. Click the **Charm** button and choose a charm icon from the menu.

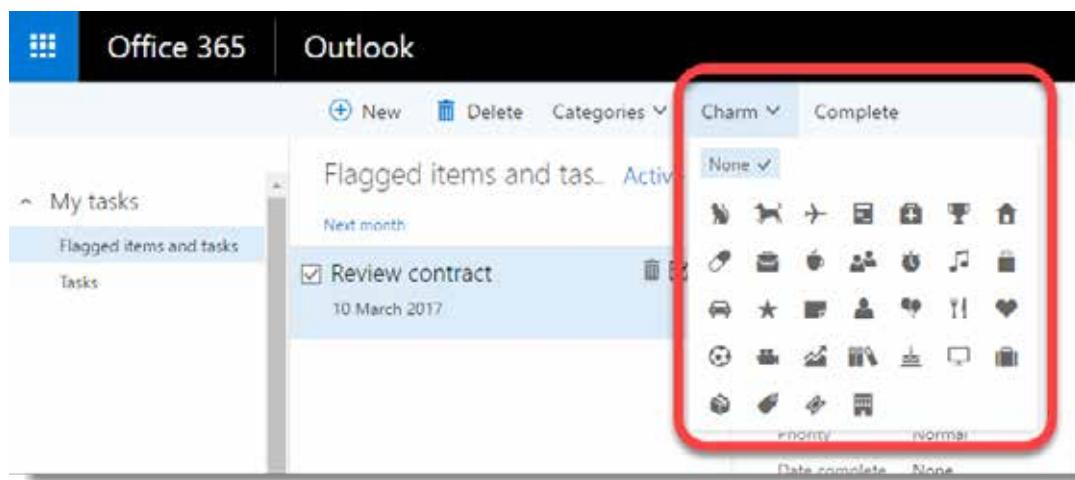


Figure 6-18 Task Charms.

3. The charm icon will be displayed on the task preview in the task list.

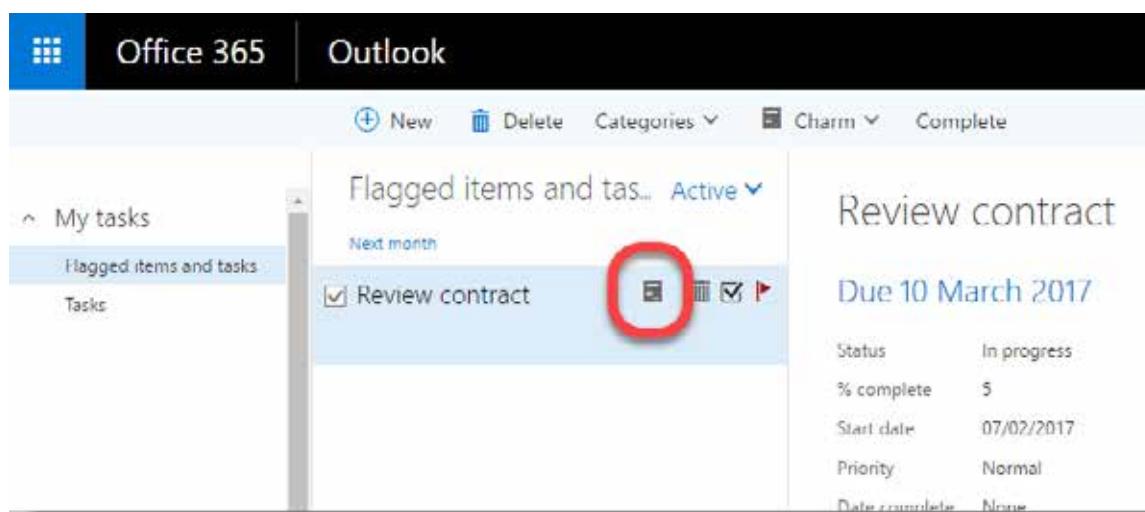


Figure 6-19 Task charm icon.

6.4.3 COMPLETE A TASK

When a task has been completed, it should be marked as completed.

1. Select the task.
2. Click **Complete**.

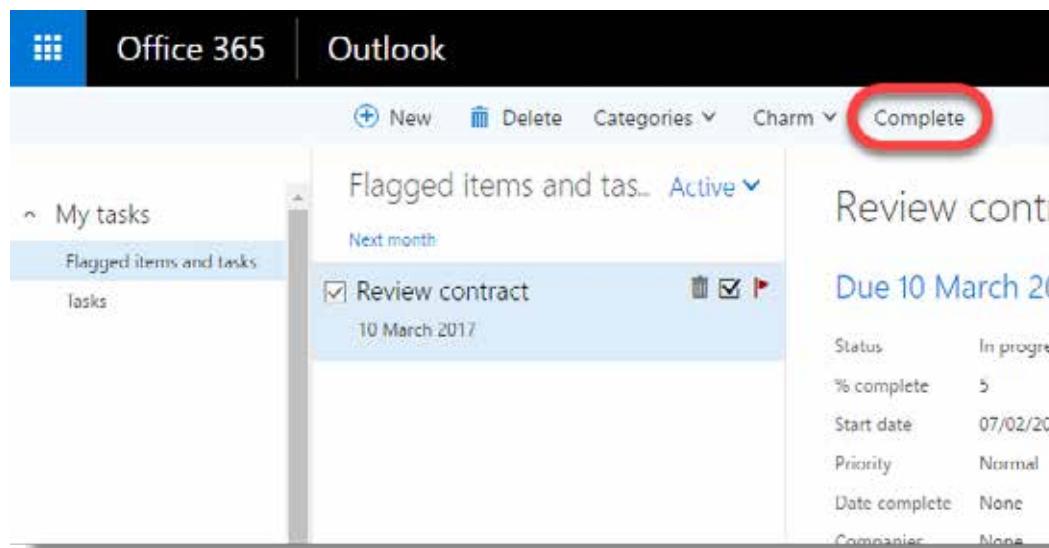


Figure 6-20 The Complete button.

3. The task will be marked as complete and hidden from the *Active* task list; it can be viewed using the *Completed* task list filter.

6.4.4 DELETE A TASK

You can delete a task if it is no longer needed or if you do not need to keep a completed task for your records.

1. Select the task.
2. Click **Delete**.

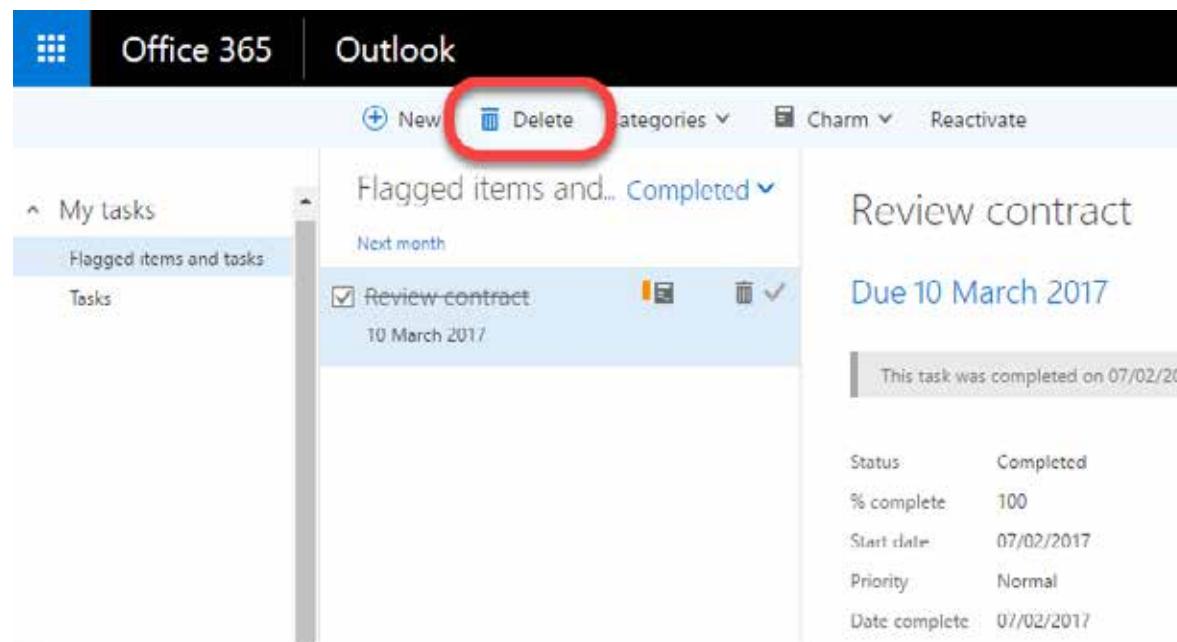


Figure 621 The Delete button.

3. The task will be moved to the Deleted Items folder in the Outlook Mail app.

7 ONEDRIVE FOR BUSINESS

7.1 INTRODUCTION

7.1.1 WHAT IS ONEDRIVE?

OneDrive is a file storage web app that. You can access it using almost any device that has a web browser.

7.1.2 WHAT IS THE DIFFERENCE BETWEEN ONEDRIVE AND ONEDRIVE FOR BUSINESS?

Several Microsoft product names contain the word OneDrive. The web app and app tiles found in Office 365 are labeled as *OneDrive*, which can be confusing for users who already use the version of OneDrive included with Windows Phone and Outlook.com (the free cloud email service, previously called Hotmail).

The full name of the Office 365 version of OneDrive is *OneDrive for Business*. Although it looks the same as the Outlook.com version, the Office 365 version is separate and intended for business use.

NOTE: This guide does not cover the Outlook.com version of OneDrive; the term ‘OneDrive’ is used here as an abbreviation for **OneDrive for Business**.

7.1.3 ONEDRIVE FOR BUSINESS CAPACITY

The space available in your OneDrive depends on your Office 365 subscription; most subscriptions allow one terabyte per user, which is a million megabytes of storage!

7.1.4 ACCESSING ONEDRIVE

1. You can access the **OneDrive** web app by clicking the tile on the Office 365 home page.

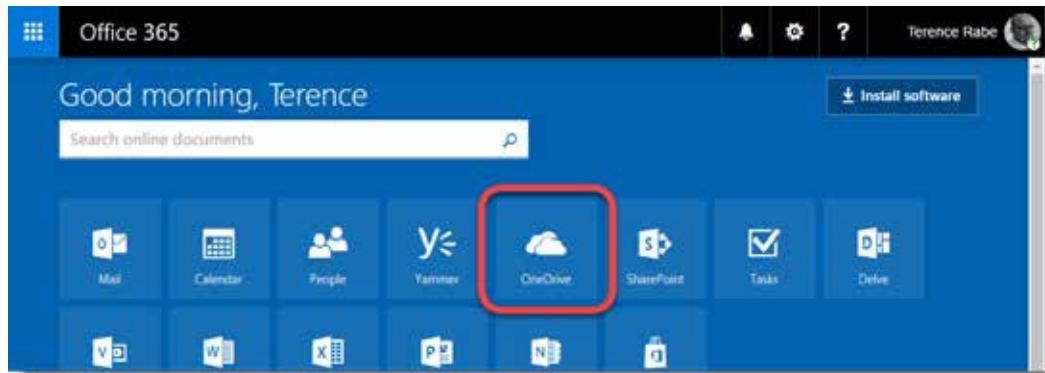


Figure 7-1 The OneDrive app tile on the Home page.

2. You can also access OneDrive by clicking the app tile on the app launcher menu.

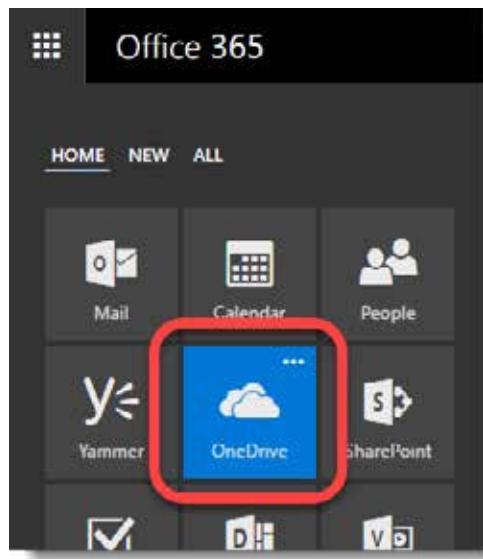


Figure 7-2 The OneDrive app tile on the app launcher.

3. Clicking the app tile will navigate to the OneDrive web app.

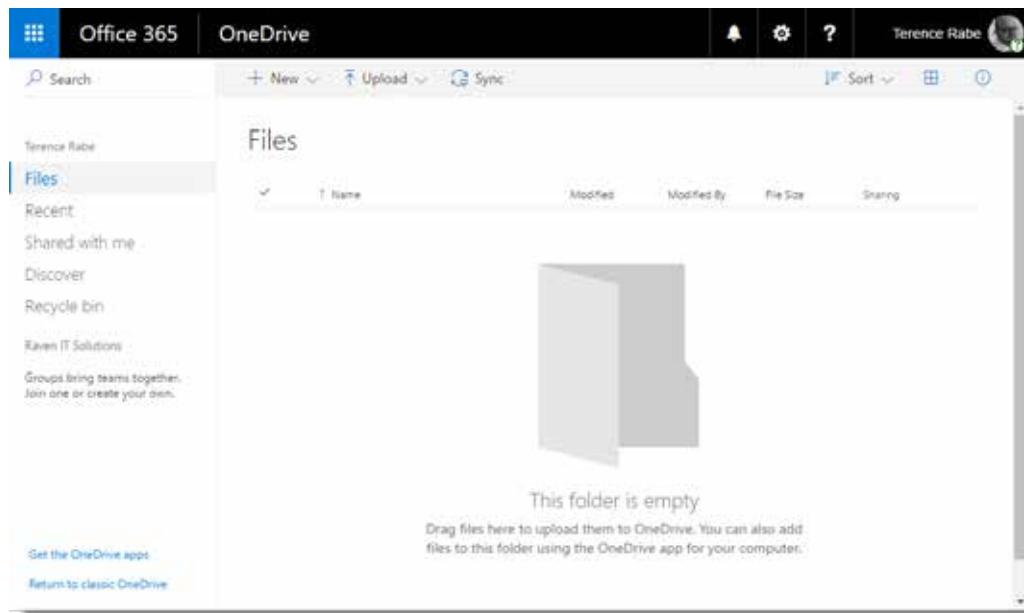


Figure 7-3 OneDrive for Business.

7.2 UPLOADING FILES AND FOLDERS

7.2.1 UPLOAD USING DRAG-AND-DROP

The easiest way to upload a file or folder is with drag-and-drop.

1. Click on the file you want to upload with the left mouse button and hold the button down.
2. Move the mouse pointer to **drag** the file over the OneDrive web app.
3. Release the mouse button to **drop** the file when the *Drag the items to any location* prompt appears.

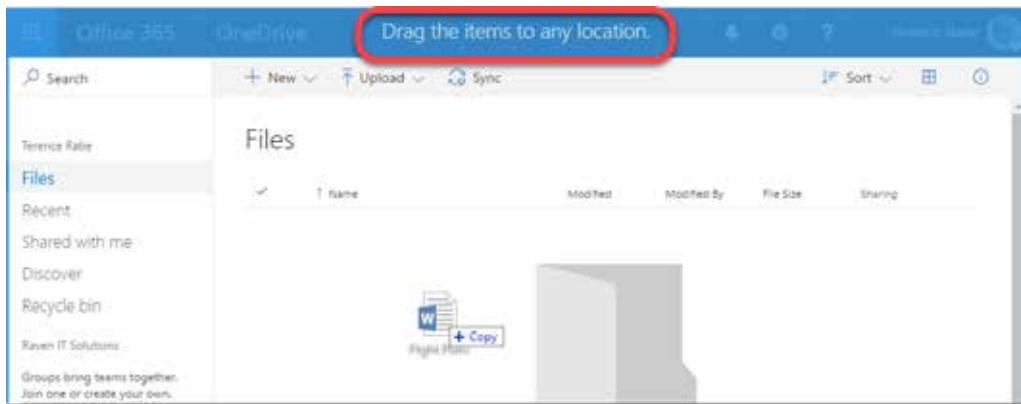


Figure 7-4 The “Drag the items to any location” prompt.

4. Wait for the file to upload; the time taken will depend on the size of the file and the speed of your Internet connection.

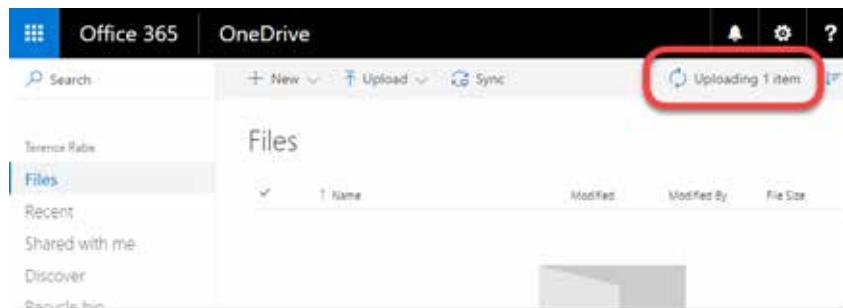


Figure 7-5 The upload status indicator.

5. When the upload is complete, the page will refresh and the uploaded file will display.

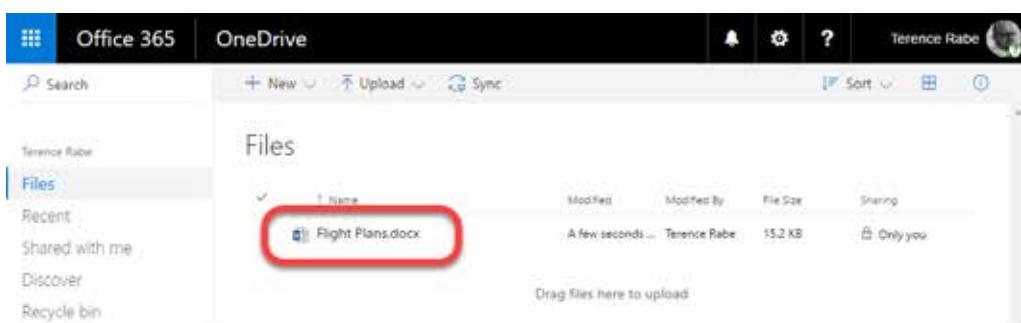


Figure 7-6 Uploaded file.

7.2.2 USING THE UPLOAD BUTTON

The drag-and-drop method may not work with some operating systems or web browsers. If it does not work as described above, you can use the *Upload* button.

1. Click **Upload**.

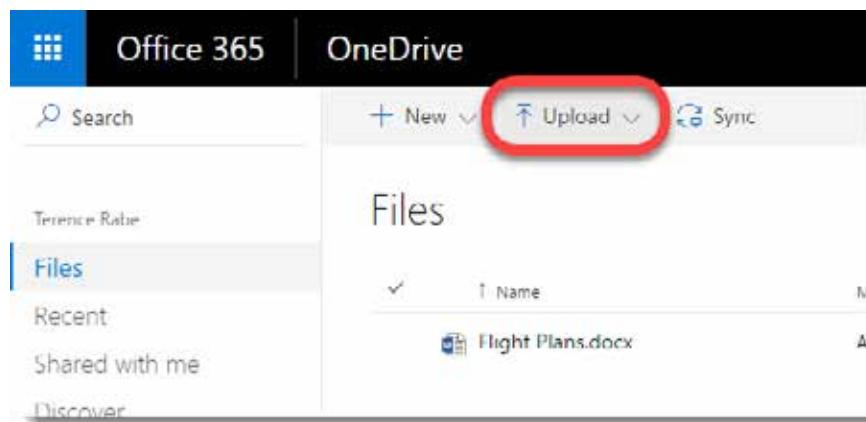


Figure 7-7 The Upload button.

2. Select the **Files** option.

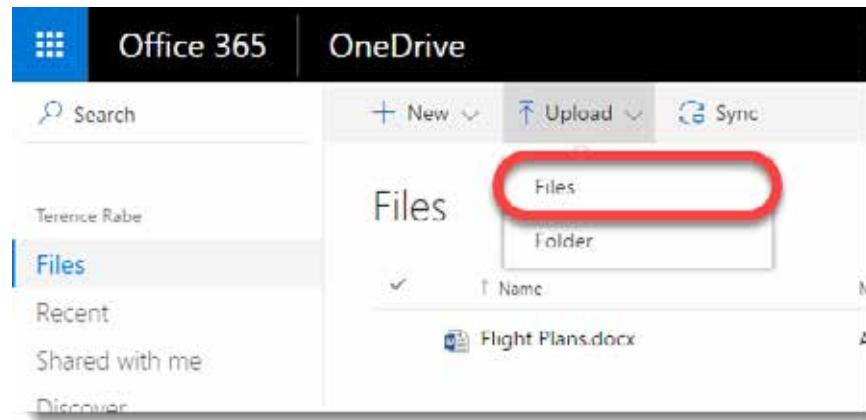


Figure 7-8 The Files option.

3. Use the *Open* dialogue box to find the file.
4. Select a file, or select multiple files if needed.
5. Click **Open** to upload the file.

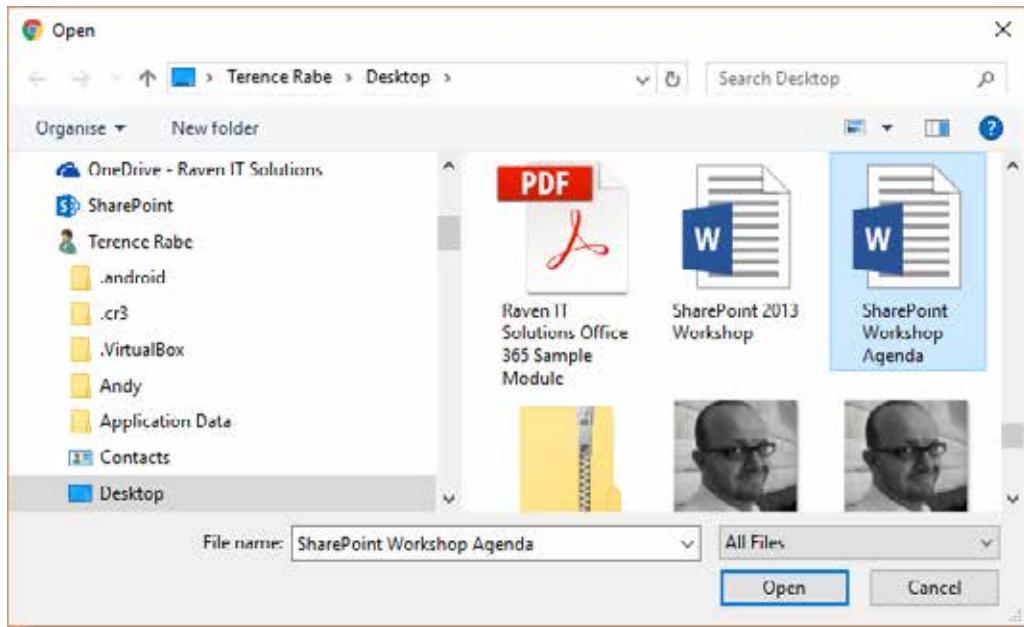


Figure 7-9 The Open dialogue box.

6. Wait for the file to upload; the time taken will depend on the size of the file and the speed of your internet connection.
7. When the upload is complete, the page will refresh and the uploaded file will display.

7.2.3 UPLOAD A FOLDER USING THE UPLOAD BUTTON

The *Upload* button can also be used to upload a folder.

1. Click **Upload**.
2. Select the **Folder** option.

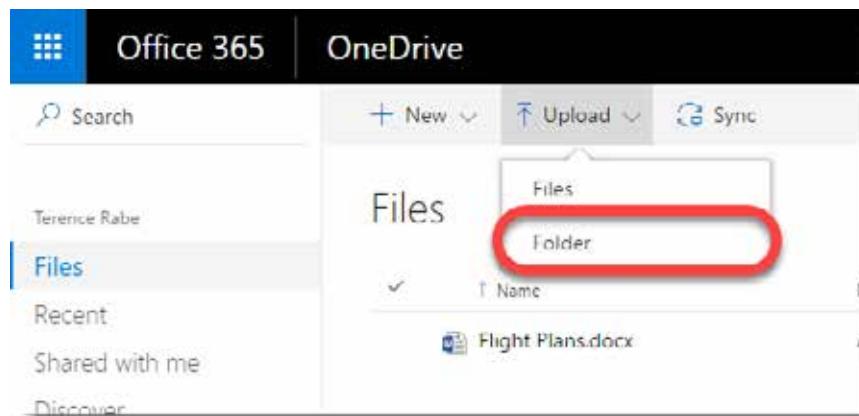


Figure 7-10 The Folder option on the Upload context menu.

3. Use the *Browse for Folder* dialogue box to find and select the folder.
4. Click **OK** to upload the folder.

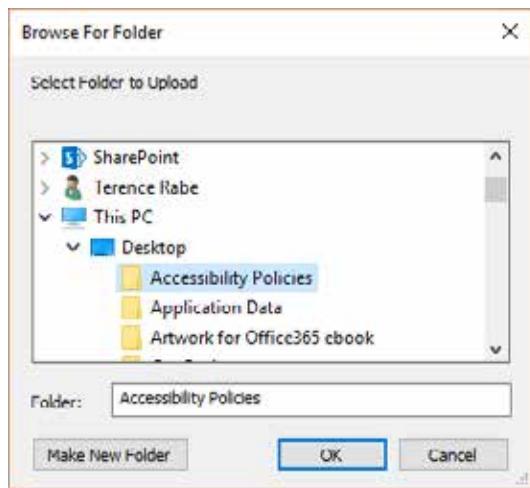


Figure 7-11 The “Browse for folder” dialogue box.

5. Wait for the file to upload; the time taken will depend on the size of the file and the speed of your internet connection.
6. When the upload is complete, the page will refresh and the uploaded folder will display.

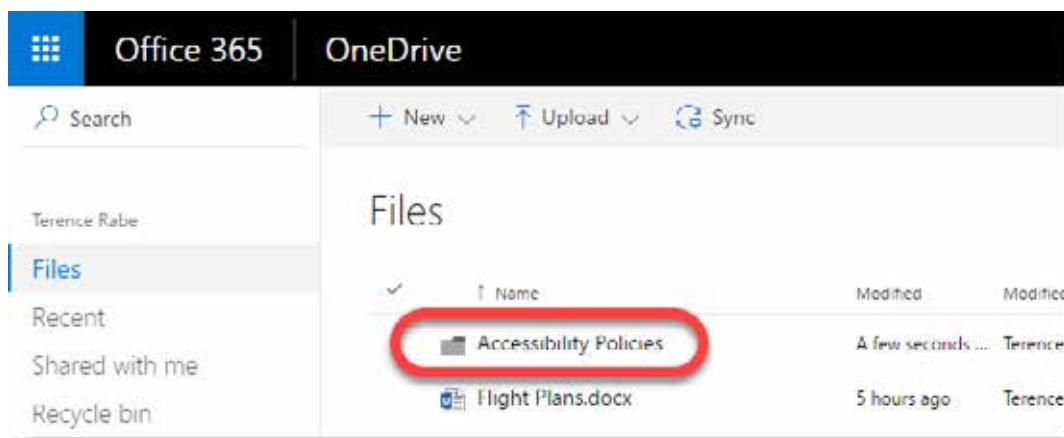


Figure 7-12 A folder in OneDrive.

NOTE: The Upload feature can only upload one folder at a time.

7.3 USING OFFICE ONLINE

Office Online is a collection of web apps that offer word processing, spreadsheets, presentations, and note-taking capabilities. Office Online is included in all Office 365 business subscriptions and works with most modern web browsers.

7.3.1 CREATE A FILE

Rather than creating a file, saving it on your computer, and then uploading it into OneDrive, you can now create the file in OneDrive using an Office Online app.

1. Navigate to the OneDrive web app.
2. Click **New**.

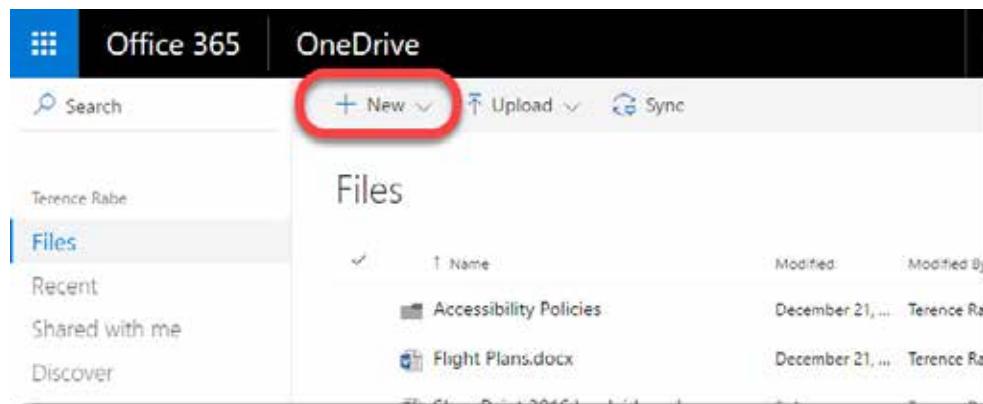


Figure 7-13 The New button.

3. Select the file type.

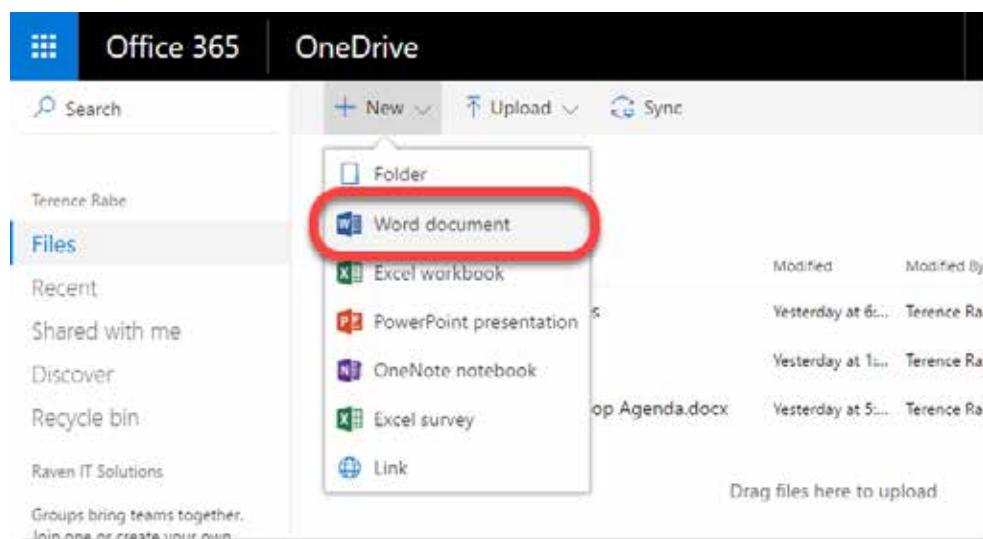


Figure 7-14 New options context menu.

4. The Office app will open and display the file.

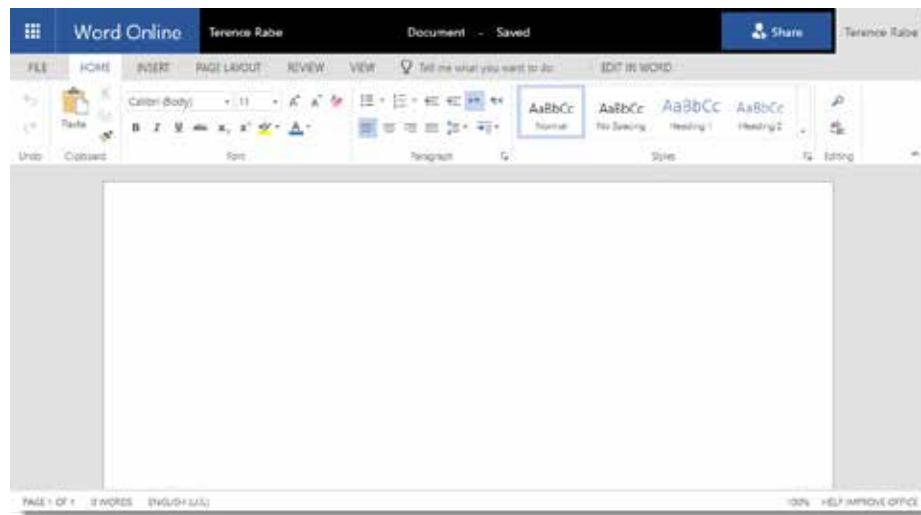


Figure 7-15 A new Word Online document.

7.3.2 NAME A FILE IN OFFICE ONLINE

New files are saved directly to OneDrive using a default file name as soon as they are created. You can rename the file as follows:

1. Click on the default file name.

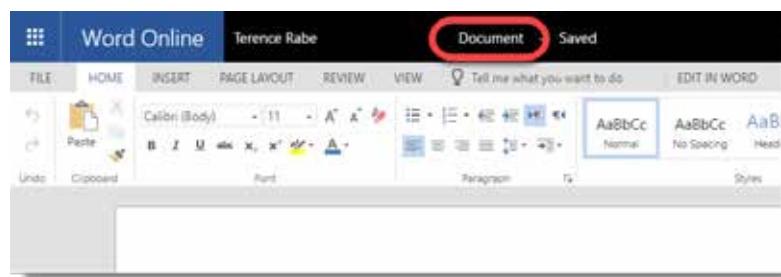


Figure 7-16 The default file name.

2. The file name enters rename mode.

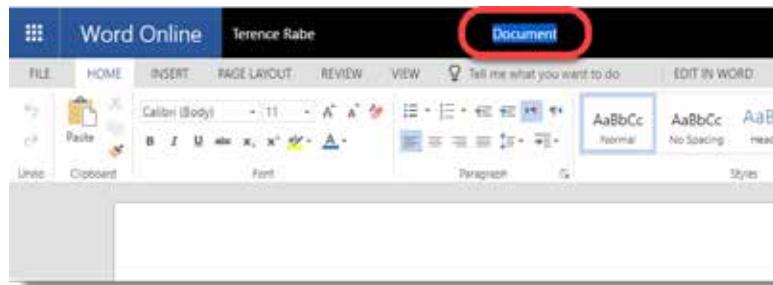


Figure 7-17 File name in rename mode.

3. Delete the default file name and type the new file name.
4. Press **Enter** to save the new file name.

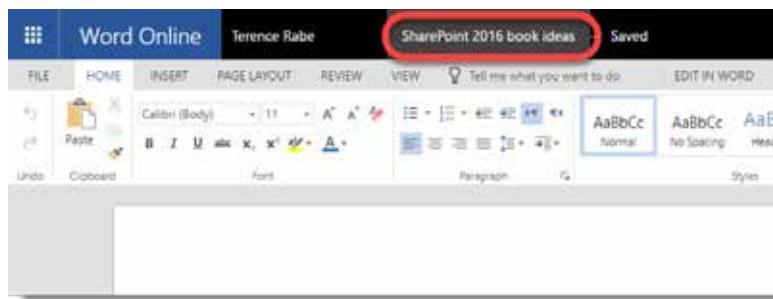


Figure 7-18 A new file name.

7.3.3 SAVING CHANGES

You may notice that Office Online web apps do not have a save button. This is by design; changes are automatically saved every few seconds when data is being added to the file.

1. Add some data to the file.
2. The file status displays “Saving” while data is being added.

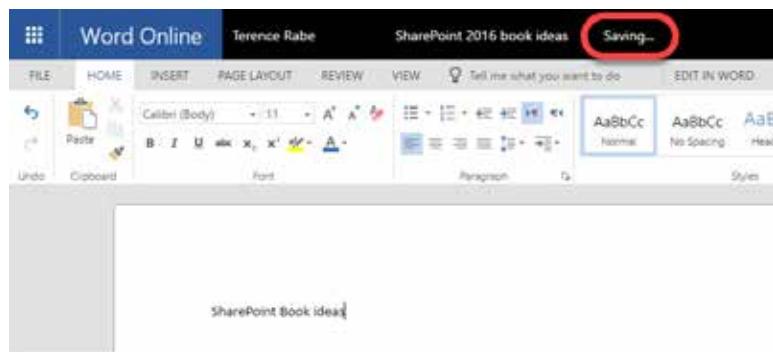


Figure 7-19 Document saving status.

7.3.4 OPENING FILES IN THE DESKTOP APPLICATION

The Office Online web apps include most of the commonly used functions found in the full Office desktop applications. If a required function is not found in the web app, the file can be opened in the desktop application as follows:

1. Click the **Edit in...** link.

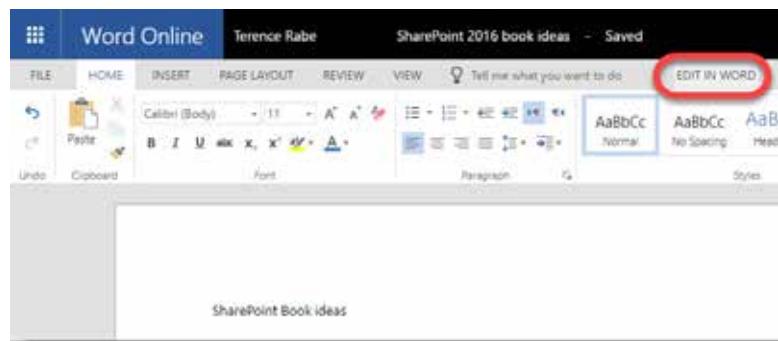


Figure 7-20 The “Edit in...” link.

2. The desktop application will attempt to open the file; if you see a warning about the file coming from a trustworthy source, click **Yes**.

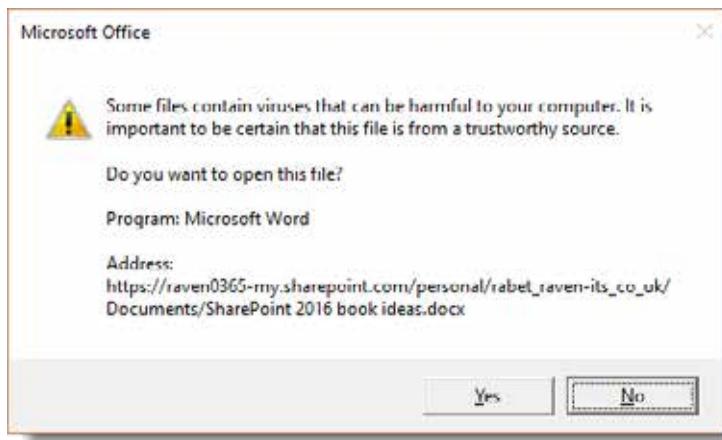


Figure 7-21 The “Trusted source” warning.

3. If this is the first time you are using a desktop application to open a file from OneDrive, you may see an authentication prompt: enter your Office 365 username and password, check the *Remember my credentials* box, and click **OK**.



Figure 7-22 Windows Security dialogue box.

4. The file will open in the desktop application.

7.3.5 CLOSE A FILE

You should close the file if it successfully opened in the desktop application or if you have just finished working with it in the web app.

1. Switch back to the web browser.
2. Click on your **username** to navigate back to OneDrive; this action will close the file.

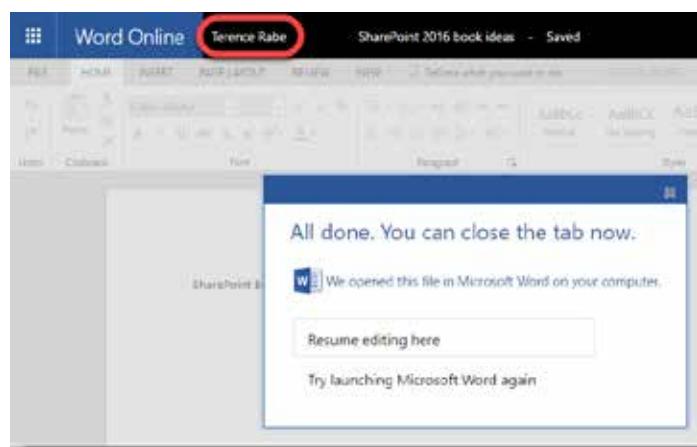


Figure 7-23 The username link.

7.4 VERSION HISTORY

File versioning is enabled by default in OneDrive. When a file is edited, OneDrive creates a new version of the file with the same name and a higher version number. Any changes made to the file are saved in the new version, which then becomes the latest version when the file is closed. Clicking the file name in the OneDrive web app will always open the latest version.

NOTE: New versions are created only when a file is opened for editing, not every time it is saved.

7.4.1 BENEFITS OF ONEDRIVE VERSION HISTORY

- The correct version of the file can be restored if someone accidentally saves over the file.
- Incorrect edits by the user, or someone who has shared access to the file, can be reversed by restoring an earlier version of the file.
- It is no longer necessary to add version information to the file name; this skipped step will help to reduce the confusion created by conflicting versioning schemes.

NOTE: Versioning does not protect your files from deletion. When a file is deleted, all the version history is moved to the recycle bin, as well. Restoring the file from the recycle bin will also restore the version history.

7.4.2 VIEW VERSION HISTORY

The version history shows when a file was edited and by whom.

1. Select the file by clicking on the **selector** icon.

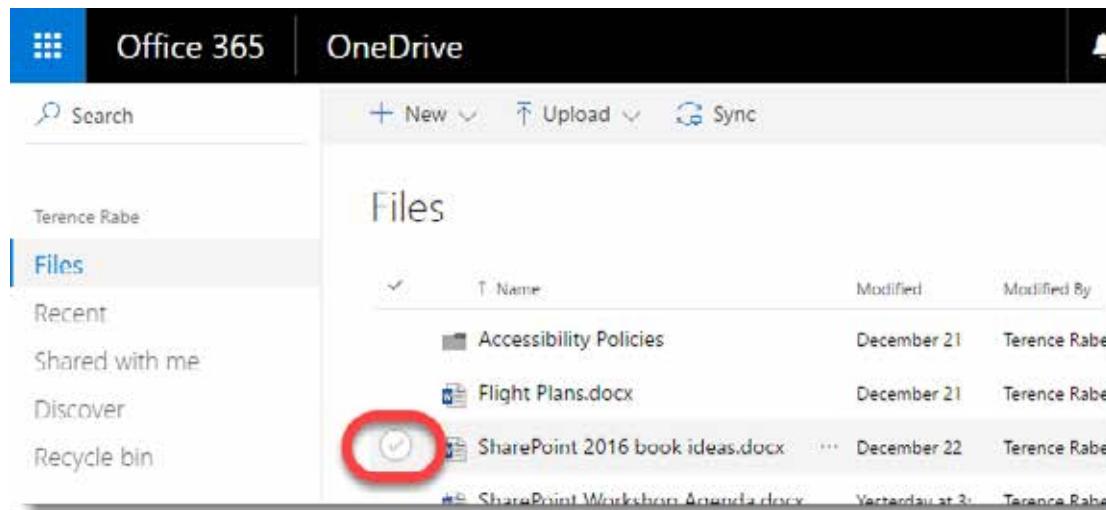


Figure 7-24 The file selector.

2. If the **Version history** button is not visible, click the ellipses button on the toolbar.

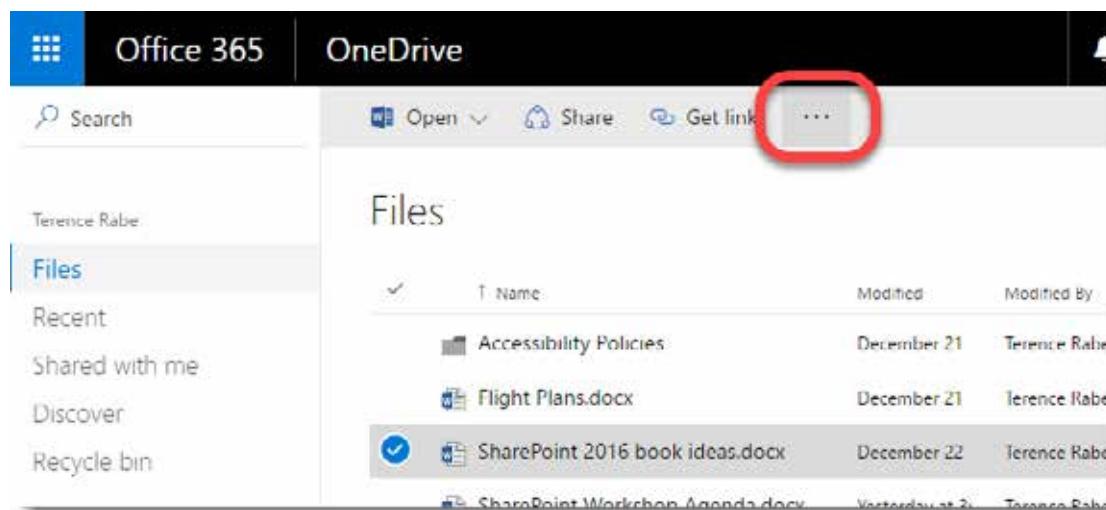


Figure 7-25 The ellipses button.

3. Select **Version history** from the context menu.

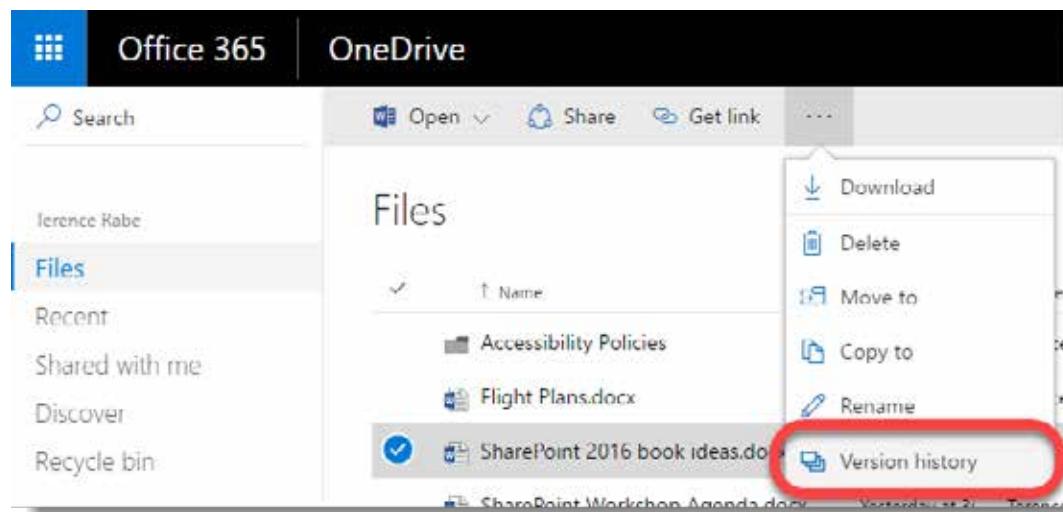


Figure 7-26 The “Version history” option.

4. The file’s Version history dialogue box will be displayed; versions are numbered with whole numbers, i.e.: 1.0, 2.0, 3.0, etc.



Figure 7-27 The Version history dialogue box.

7.4.3 VIEW A PREVIOUS VERSION

You can view the contents of a previous version of a file.

1. Follow the steps in the previous topic to access the file's version history.
2. Click on the **date-and-time** link to open the version created at that point in time.

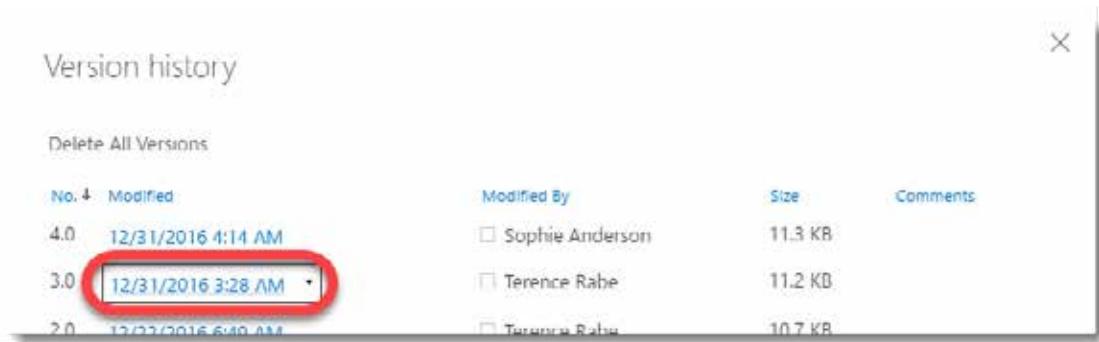


Figure 7-28 The time and date link.

3. The previous version will open in the desktop application if it is available; otherwise, it will open in the web app.

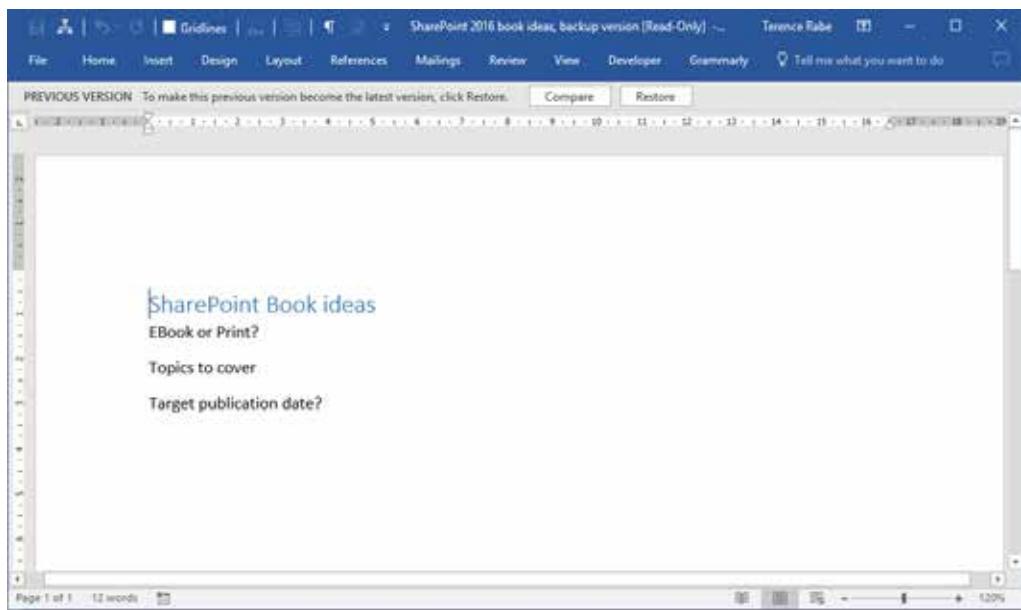


Figure 7-29 A previous version opened in Word.

4. Notice that the file name indicates that it is a backup version and is read-only.

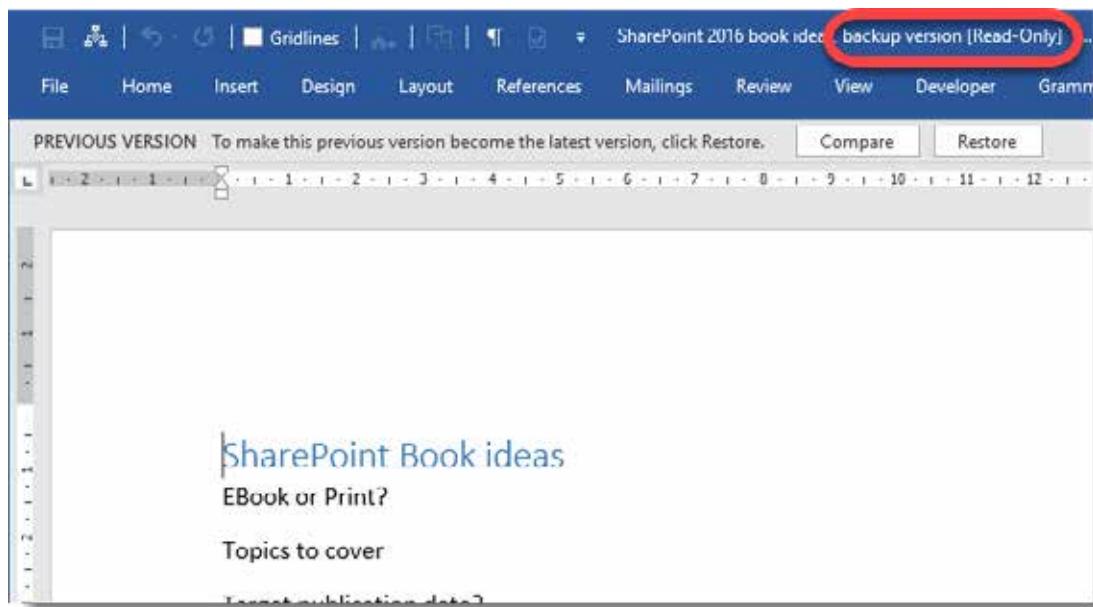


Figure 7-30 Previous version file name suffix.

7.4.4 RESTORE A PREVIOUS VERSION

Once you find the version that you want, you can restore it as follows:

1. Follow the steps in the earlier topic to access the file's version history and establish which version of the file you want to restore.
2. Click on the arrow next to the date-and-time link of the version you want to restore.

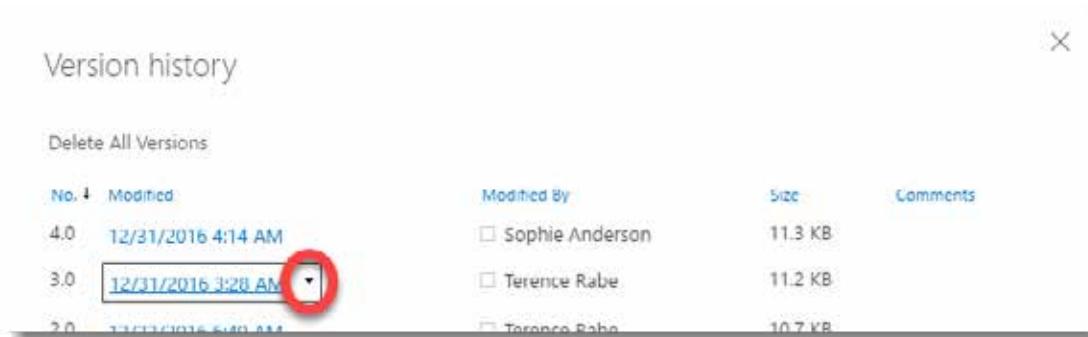


Figure 7-31 Previous version drop-down arrow.

3. Choose **Restore** from the options menu.

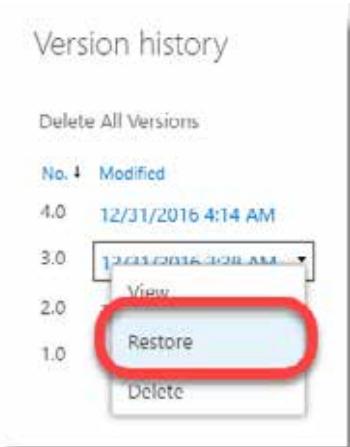


Figure 7-32 The Restore option.

4. Click **OK** to confirm that you wish to restore the previous version.



Figure 7-33 The OK button.

5. The *Version history* will refresh to display the newly restored version; the restored file has a new version number.

The screenshot shows the 'Version history' dialog box after restoration. The table now includes a new row for version 5.0, which is circled in red. The row details are: No. 5.0, Modified 12/31/2016 6:28 AM, Modified By Terence Rabe, Size 11.2 KB, and Comments (empty). The other four rows remain the same as in Figure 7-32.

| No. | Modified | Modified By | Size | Comments |
|-----|--------------------|-----------------|---------|----------|
| 5.0 | 12/31/2016 6:28 AM | Terence Rabe | 11.2 KB | |
| 4.0 | 12/31/2016 4:14 AM | Sophie Anderson | 11.3 KB | |
| 3.0 | 12/31/2016 3:28 AM | Terence Rabe | 11.2 KB | |
| 2.0 | 12/31/2016 6:40 AM | Terence Rabe | 10.7 KB | |

Figure 7-34 Restored version.

NOTE: The previous version is not overwritten but is retained in case it contains valuable data.

7.4.5 DELETE A PREVIOUS VERSION

A specific version can be deleted if it is no longer required. The deleted version will be stored in the recycle bin. Deleted versions can be restored if the file, itself, has not been deleted.

1. Follow the steps in the earlier topic to access the file's version history.
2. Click on the arrow next to the date-and-time link of the version you want to delete.

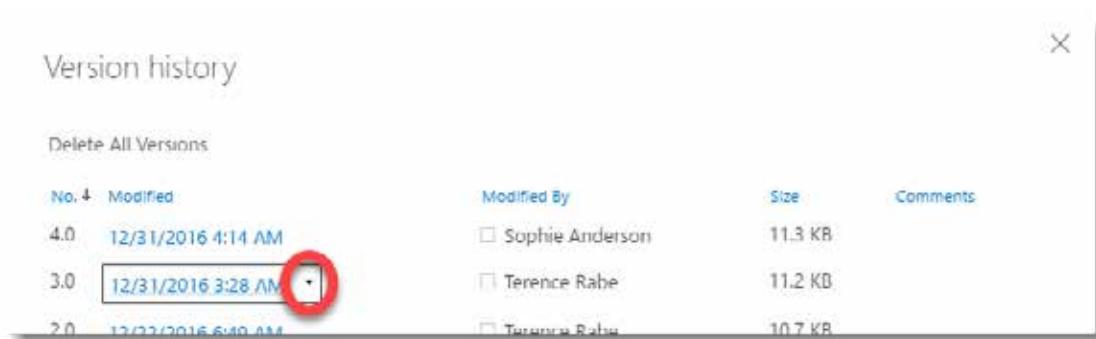


Figure 7-35 Previous version drop-down arrow.

3. Choose **Delete** from the options menu.

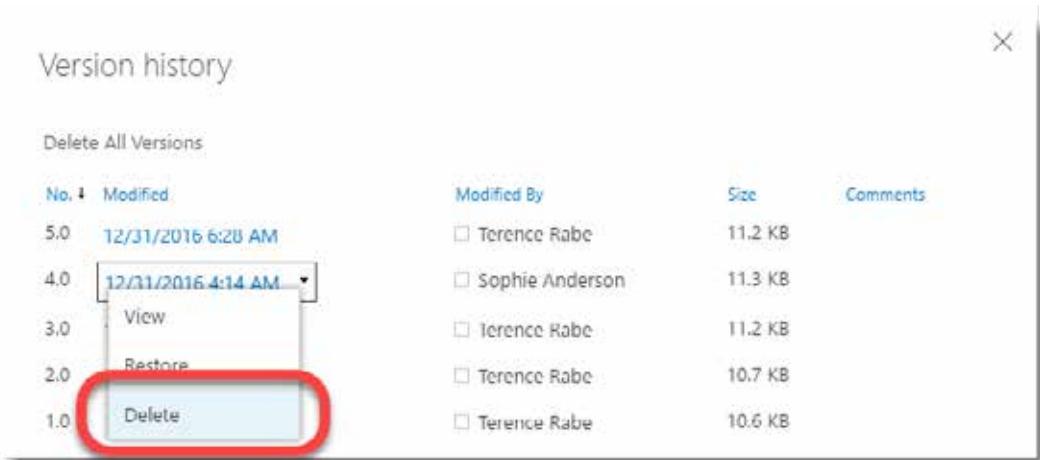


Figure 7-36 The Delete option.

4. Click **OK** on the confirmation dialogue box to delete the version.

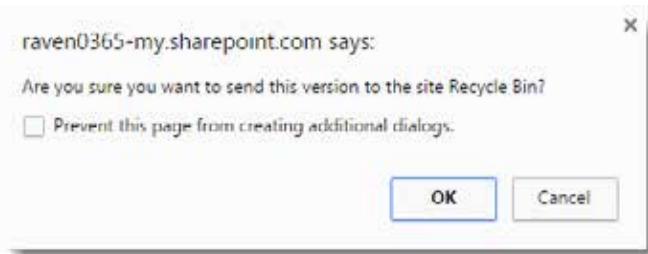


Figure 7-37 Version delete confirmation.

7.4.6 LIMITATIONS OF ONEDRIVE VERSIONING

OneDrive versioning is very useful for personal backup, but it lacks more advanced document management features, such as the following:

- Version comments.
- Check in and check out.
- Draft versioning and publishing.
- Content approval.

If you need these advanced versioning features, the document should be stored in a SharePoint site. Please refer to the SharePoint chapter for more information on SharePoint's document management features.

7.5 ONEDRIVE VIEWS

OneDrive offers several views that can help you find files more easily.

7.5.1 FILES

The *Files* view is loaded by default when opening OneDrive. It displays all files and folders, and items are sorted in ascending alphabetical order (A–Z).

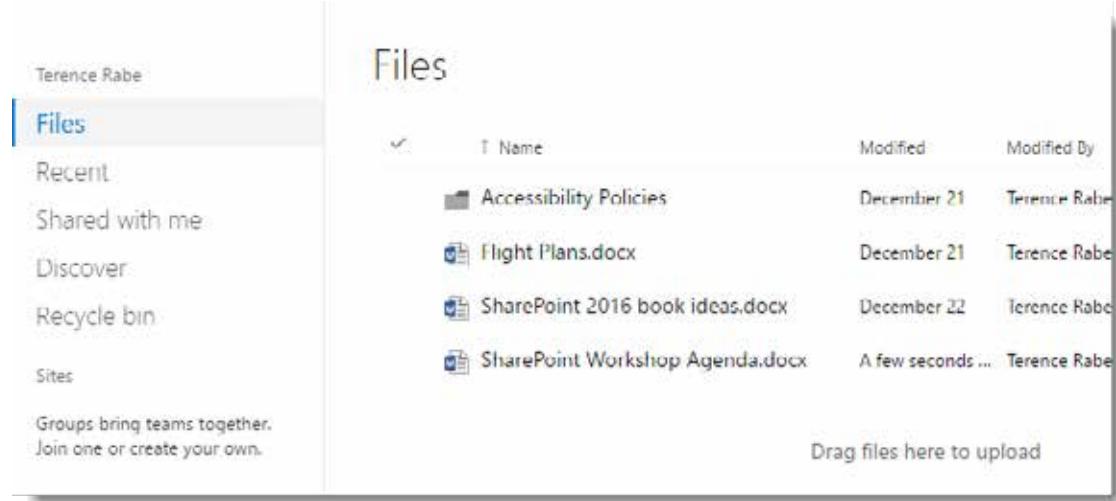


Figure 7-38 Files view.

7.5.2 RECENT

The *Recent* view shows preview tiles for the most modified. Files are sorted by descending modification date with the newest first.

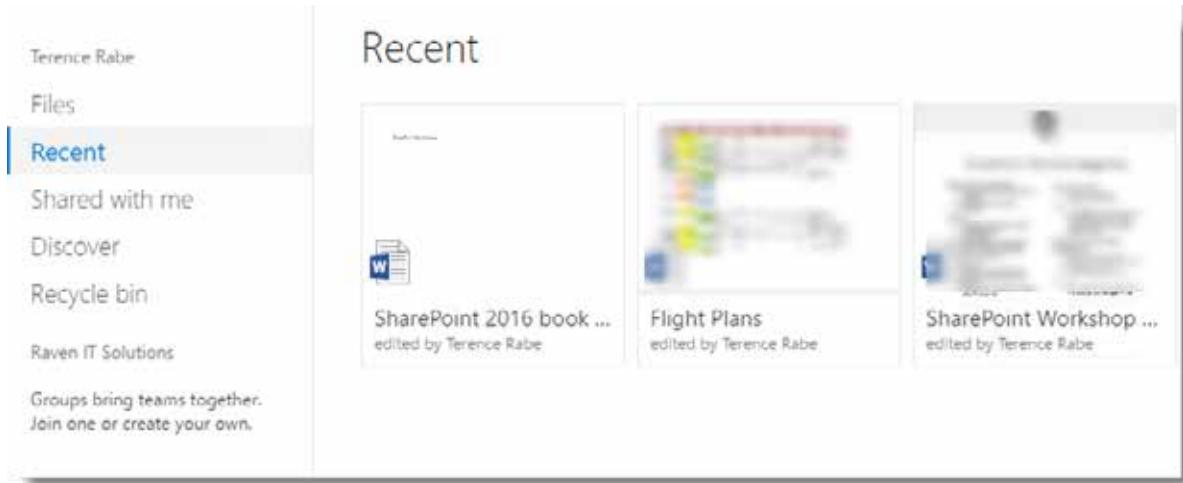


Figure 7-39 Recent view.

7.5.3 SHARED WITH ME

The *Shared with me* view displays files that have been shared with you. These files can be stored in another users' OneDrive or in SharePoint sites. The files are displayed in descending modification date order with the newest first.

| Name | Modified |
|--------------------------------|-------------|
| 2017 Development Pipeline.xlsx | 8 hours ago |
| Candidate Resume | 7 days ago |

Figure 7-40 "Shared with me" view.

7.5.4 DISCOVER

The *Discover* view displays *trending* documents from all content sources in Office 365. Trending documents are documents that are popular with people with whom you work closely.

Office 365 analyses those with whom you communicate and on what they are working on and tries to predict what documents may be useful to you.

Figure 7-41 Discover view.

NOTE: Only documents that you have permission to access will be displayed in *Discover* view.

7.5.5 RECYCLE BIN

The *Recycle bin* view shows files that the user has deleted from their own OneDrive. The Recycle bin is covered in more detail in a later section of this chapter.

7.6 SEARCHING ONEDRIVE

OneDrive for Business benefits from the powerful search feature built into Office 365. You may find that it is quicker, easier, and more accurate to locate a file using search than trying to remember in which folder or view a file can be found.

NOTE: OneDrive Search results display files from the user's own OneDrive, as well as files shared with the user from SharePoint sites and other OneDrives. Search results will not include any file that you do not have permission to access.

7.6.1 ENTER SEARCH KEYWORDS

1. Position the cursor in the Search field.

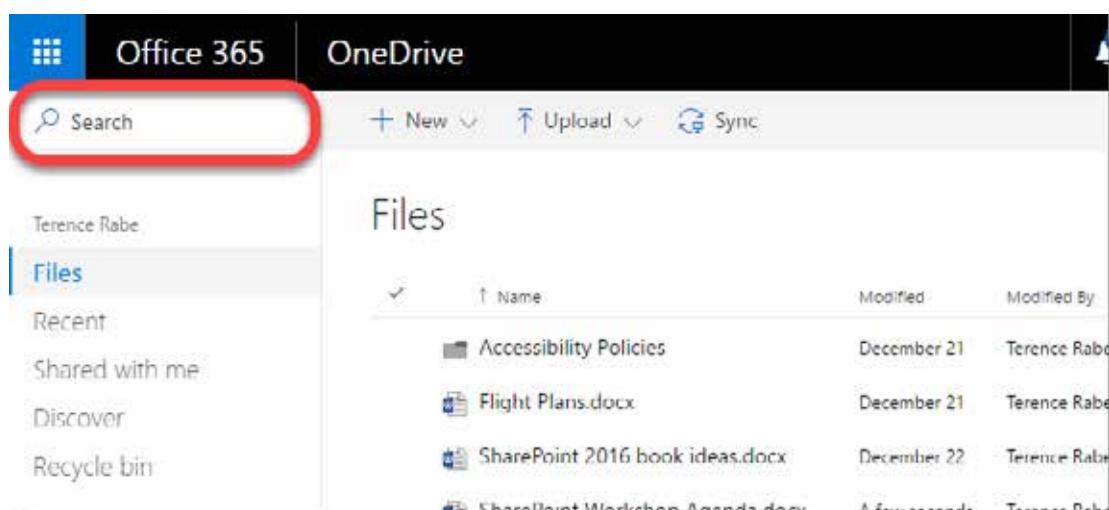


Figure 7-42 OneDrive Search.

2. Start typing a search term; notice that suggested results will be displayed below the search field as you begin to type.

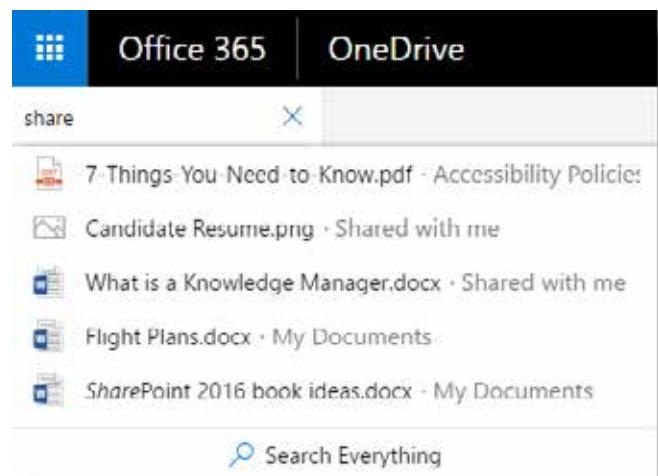


Figure 7-43 Suggested search results.

3. If the file you need is not shown in the result preview, continue to type one or more search terms (keywords) and press **Enter**.
4. The search results will display.

A screenshot of the OneDrive web interface. On the left, there's a sidebar with 'Terence Rabe' at the top, followed by 'Files', 'Recent', 'Shared with me', 'Discover', and 'Recycle bin'. The main area has a search bar with 'sharepoint'. Below it, the title 'Search results for "sharepoint"' is displayed. A table lists the search results:

| Name | Modified By | Date modified |
|-------------------------------|------------------|---------------|
| Accessibility Policies | Terence Rabe | 9 days ago |
| 7-Things-You-Need-to-Know.pdf | Terence Rabe | 1/27/2015 |
| Candidate Resume.png | Sophie Anders... | 7 days ago |
| Flight Plans.docx | Terence Rabe | 0 days ago |

Figure 7-44 OneDrive search results.

7.7 CREATING FOLDERS

OneDrive supports the use of folders for organising how files are stored.

7.7.1 CREATE A FOLDER

1. Click **New**.

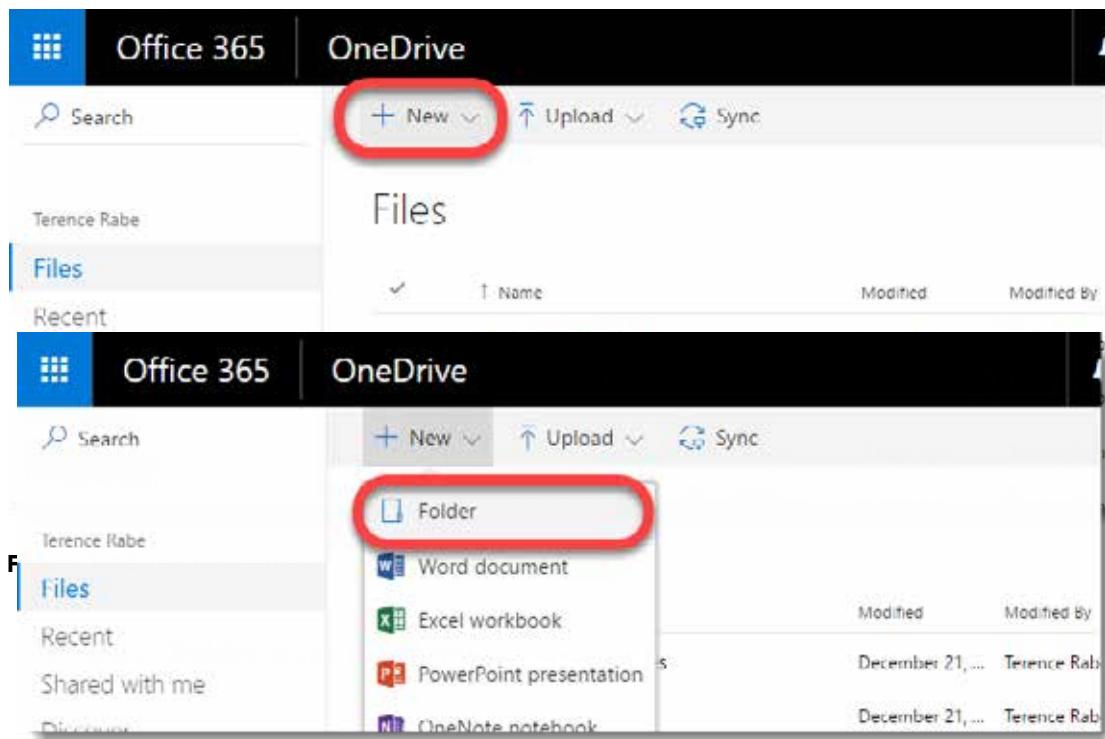


Figure 7-46 The Folder option.

3. Type a folder name and click **Create** when the *Folder* dialogue box displays.

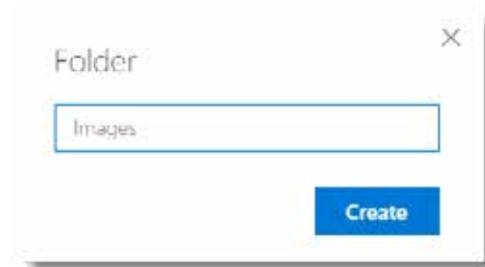


Figure 7-47 The "Folder" dialogue box.

4. The OneDrive web app page will refresh and display the new folder.

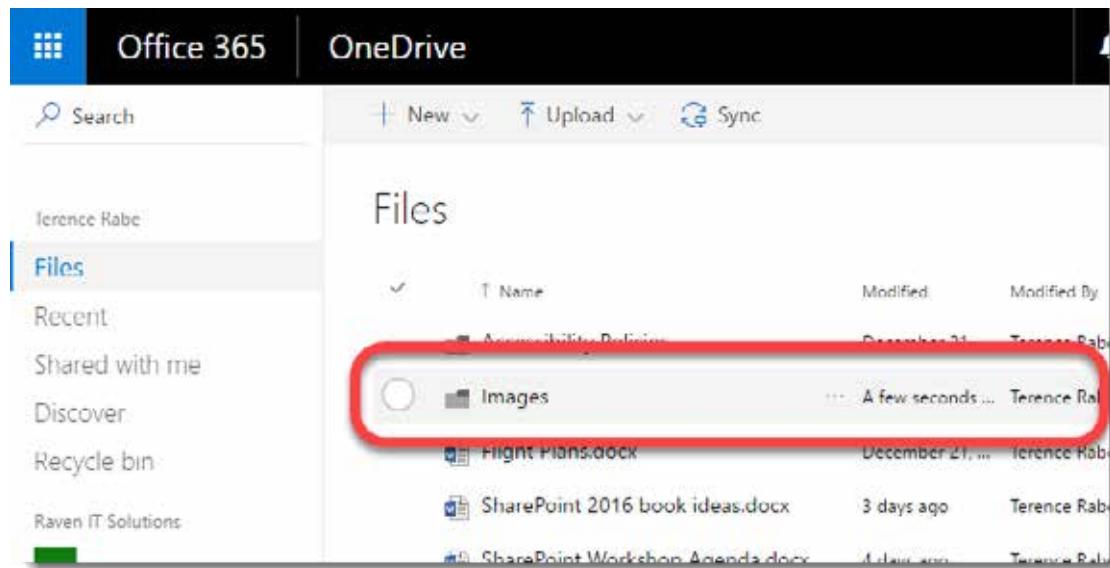


Figure 7-48 A folder in OneDrive.

7.7.2 RENAME A FOLDER

1. Select the folder that you want to rename.

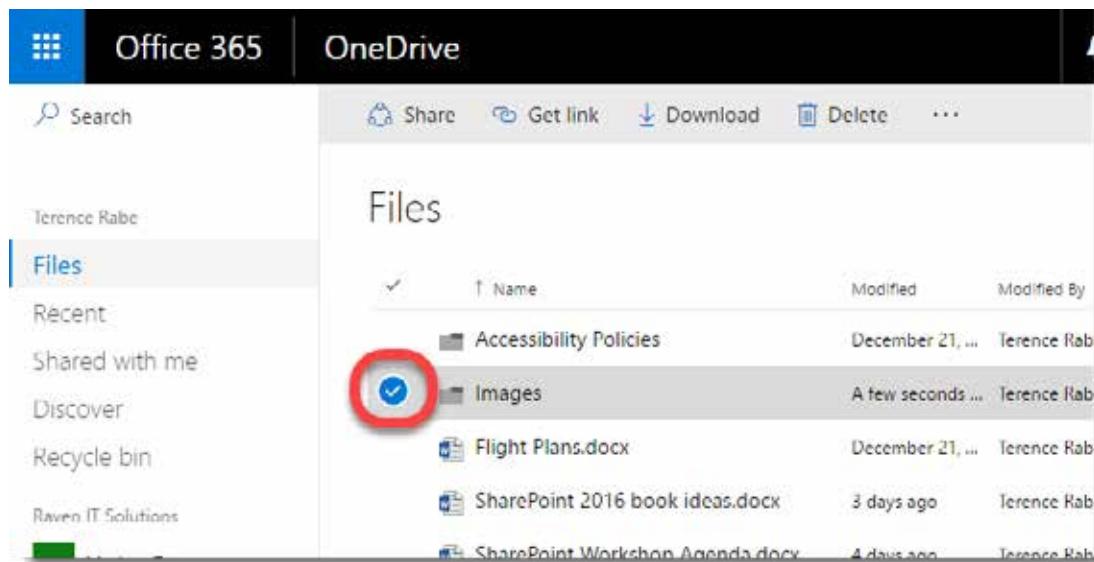


Figure 7-49 The folder selector.

2. Click the ellipses button if the **Rename** button is not visible on the toolbar.

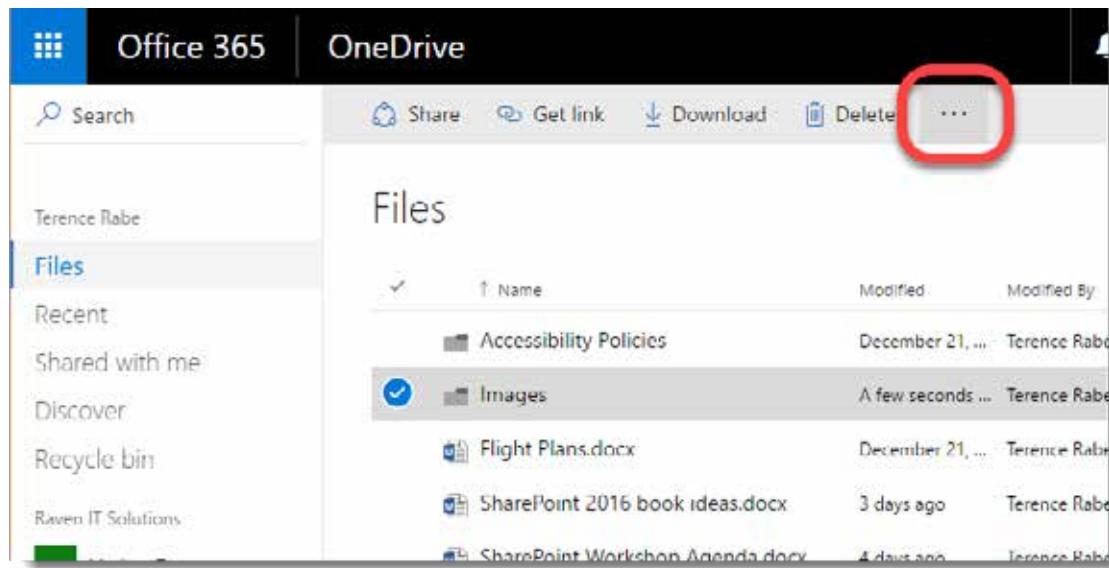


Figure 7-50 The ellipses button.

3. Select **Rename**.

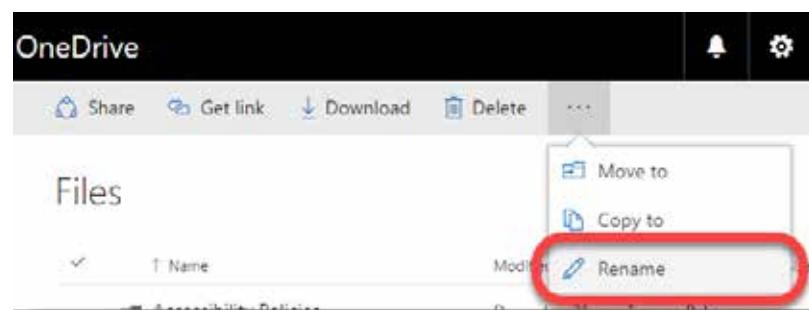


Figure 7-51 The Rename option.

4. Clear the current name, type in the new name, and click **Save** on the *Rename* dialogue box.

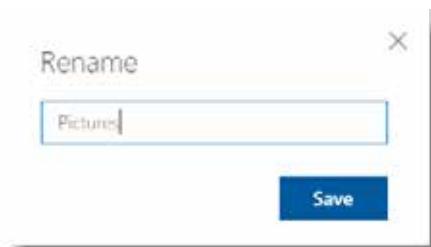


Figure 7-52 The "Rename" dialogue box.

7.7.3 DELETE A FOLDER

When a folder is no longer required, it can be deleted. All subfolders and files within that folder will also be moved to the OneDrive recycle bin.

1. Select the folder that you want to rename.

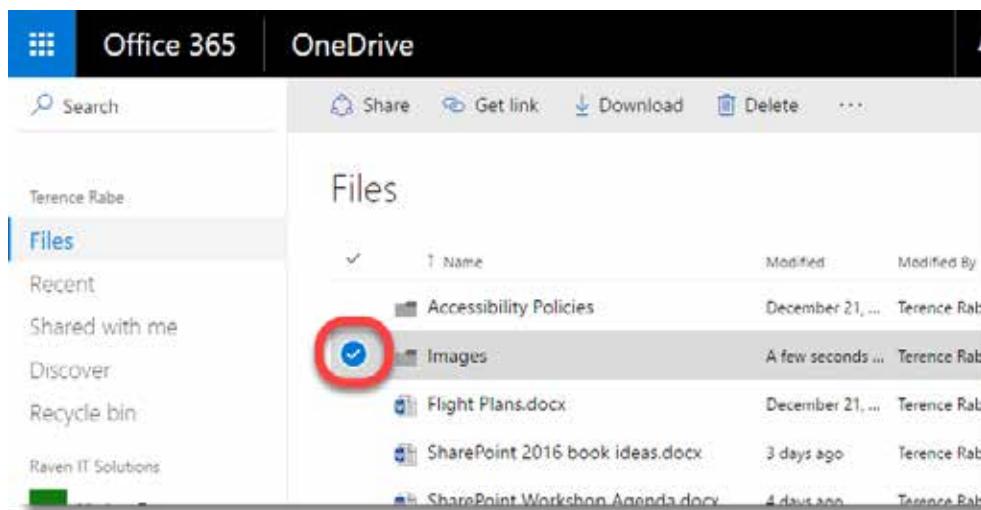


Figure 7-53 The folder selector.

2. Click **Delete**.

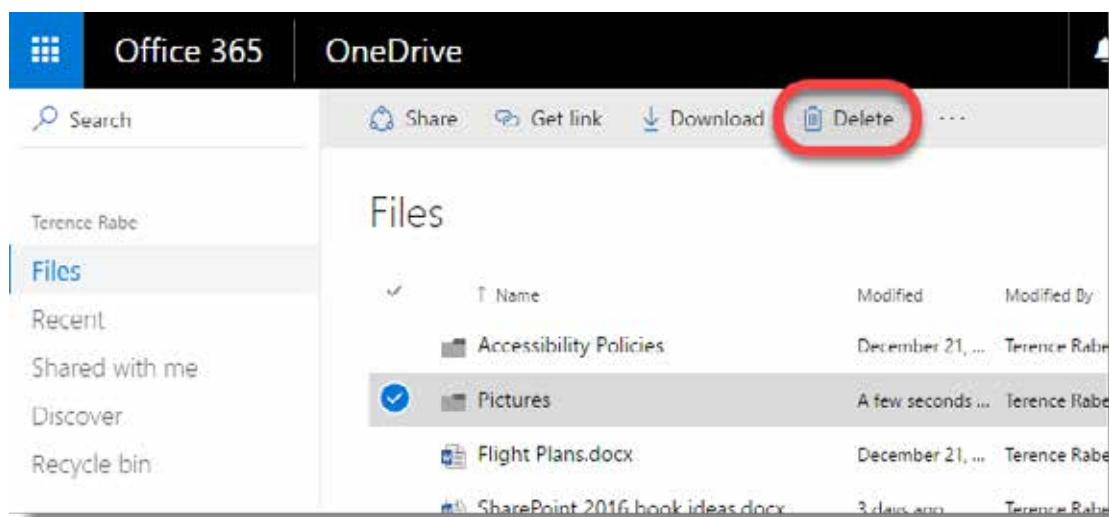


Figure 7-54 The Delete button.

3. Click **Delete** on the *Delete* confirmation dialogue box.

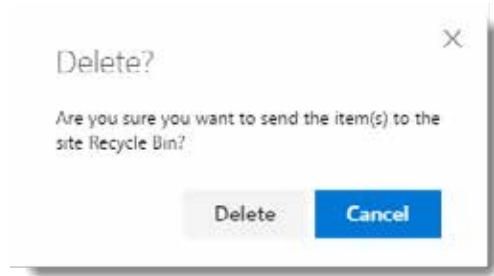


Figure 7-55 The "Delete" dialogue box.

4. The folder will be moved to the OneDrive recycle bin.

7.8 MOVE AND COPY FILES

You may want to move a file if you experience any of the following:

- The file was created in the wrong location.
- You want to move it to a folder with different sharing settings either to start sharing it or to stop sharing it.
- You want to start or stop synchronising it.

NOTE: The steps described below apply to moving folders, as well:

7.8.1 MOVE FILES WITH DRAG-AND-DROP

You can use drag-and-drop to move files in the OneDrive web app but only if the destination folder is visible on the screen.

1. Click on the file name with the left mouse button.
2. Hold the button down and drag the mouse pointer over the destination folder.

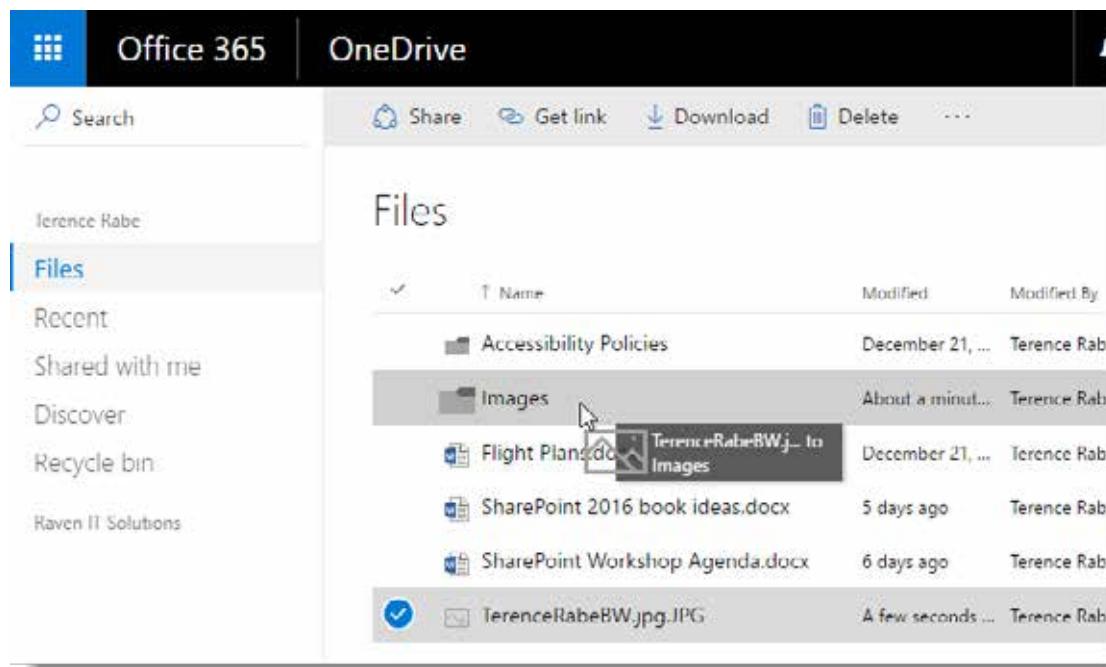


Figure 7-56 Drag-and-drop to move a file.

3. Release the mouse button to drop the file.
4. The file will be moved into the folder.

7.8.2 MOVE FILES WITH THE MOVE TO BUTTON

If you need to move a file and the destination folder is not visible, you can use the button.

1. Select the file by clicking on the selector icon.

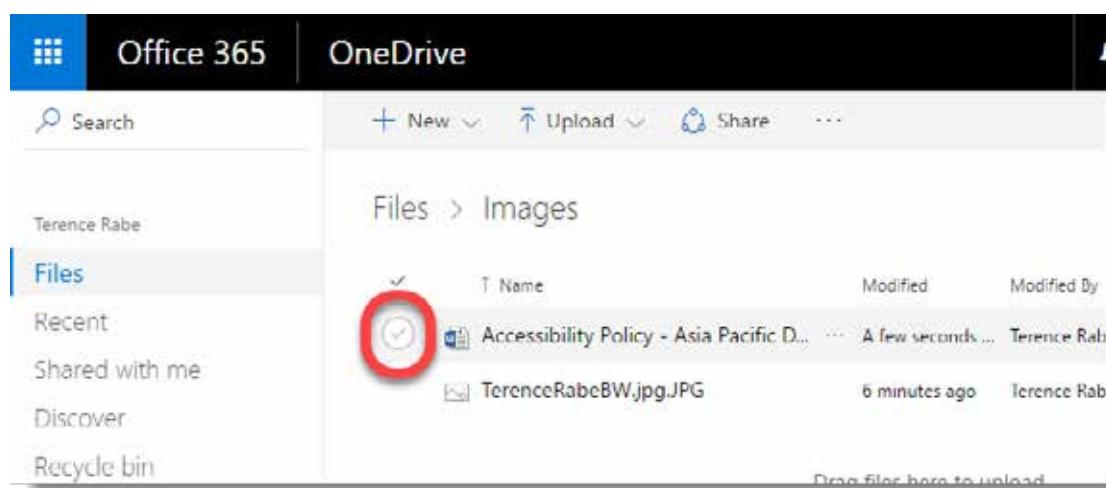


Figure 7-57 The file selector.

2. Click the *ellipses* button if the **Move to** button is not visible.

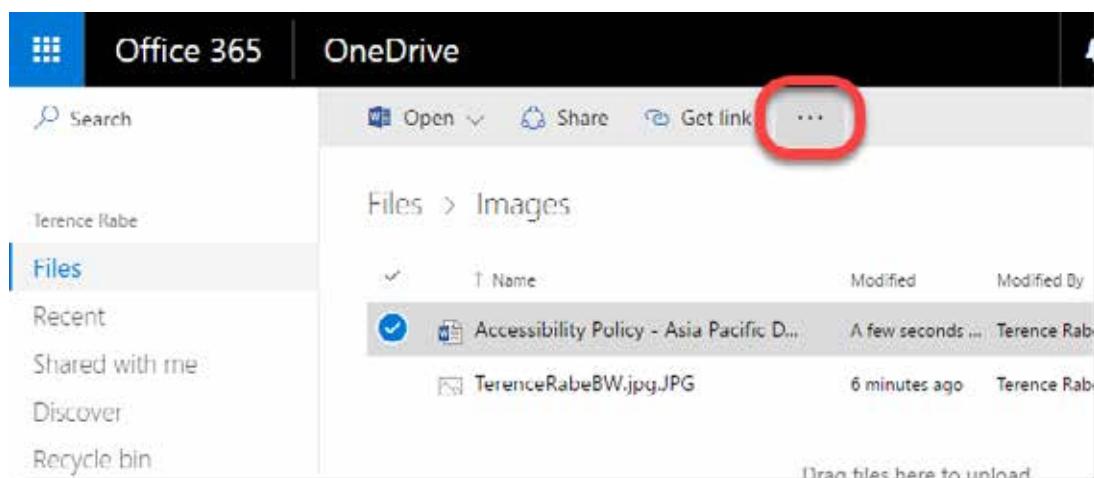


Figure 7-58 The ellipses button.

3. Select **Move to**.

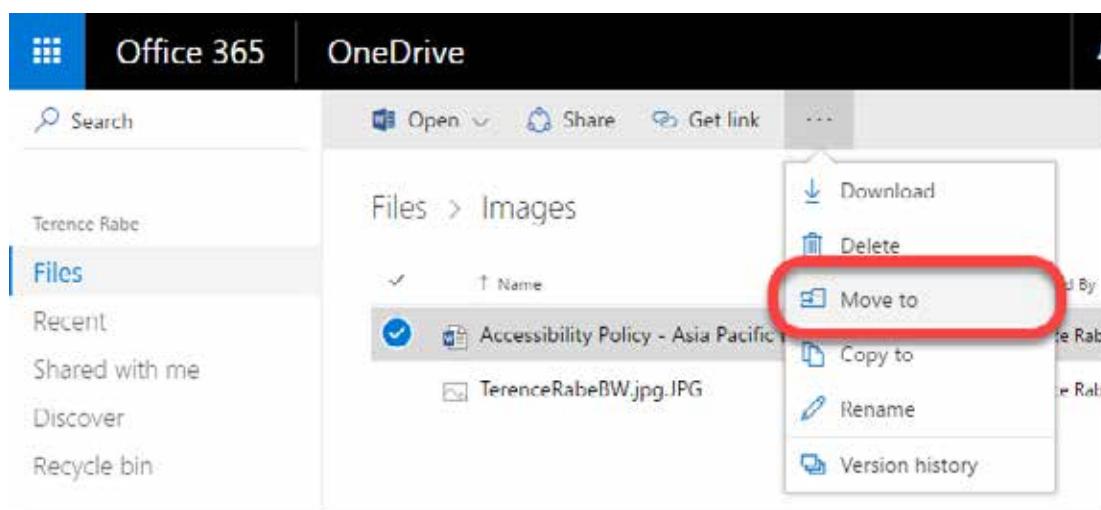


Figure 7-59 The "Move to" option.

4. The *Move item* pane will display.

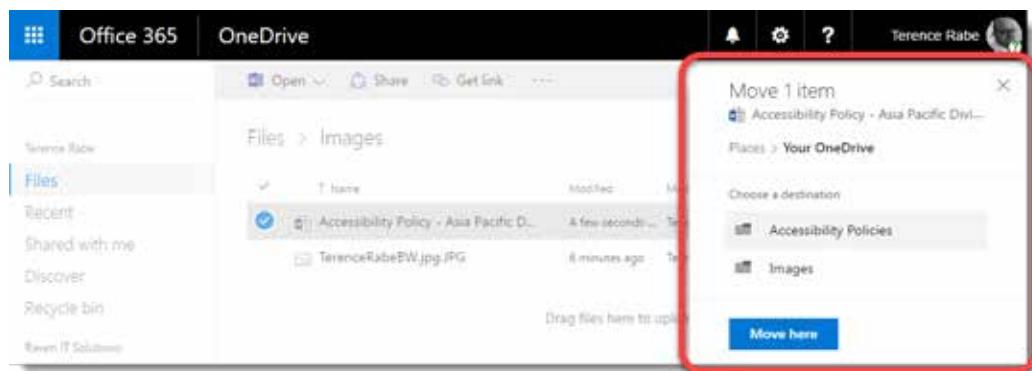


Figure 7-60 The “Move item” pane.

5. Click the destination folder link to select it.

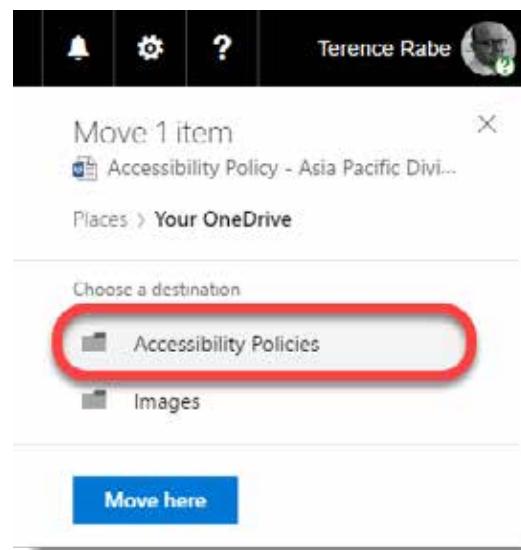


Figure 7-61 The destination folder link.

6. The destination folder will open in the Move item pane.

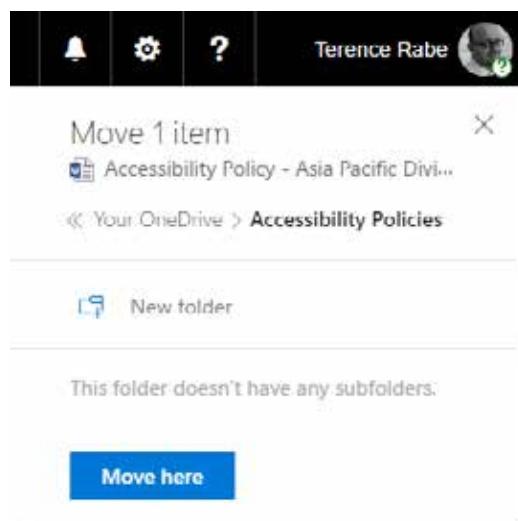


Figure 7-62 The destination folder.

7. Click **Move here** to move the file.

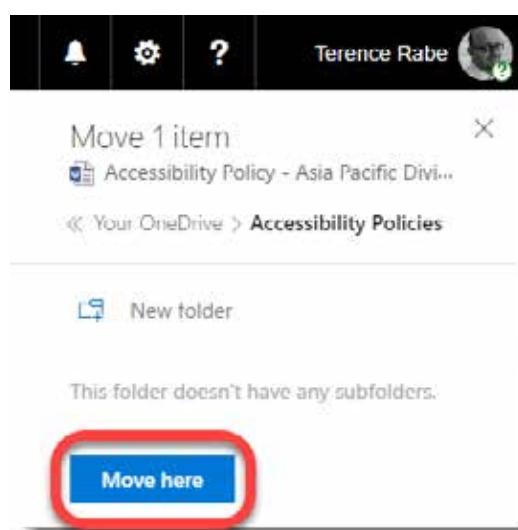


Figure 7-63 The "Move here" button.

7.8.3 COPY FILES

Although it is possible to copy files from your OneDrive to other locations in Office 365, it is usually not recommended because each copy creates a separate version of the file, which can be confusing when other users do not know which version of the file to use.

NOTE: If you need to copy a file, it is good practice to delete the original so that only one instance of the file exists. If you are concerned about file backup and archiving, please seek recommendations from your IT department.

7.9 SHARING FILES AND FOLDERS

Files that will be shared with other users should ideally be created in an appropriate SharePoint site. If a SharePoint site does not exist and cannot be created in time, you may wish to share the file from your OneDrive.

7.9.1 SHARE A FILE

1. Select the file by clicking on the selector icon.

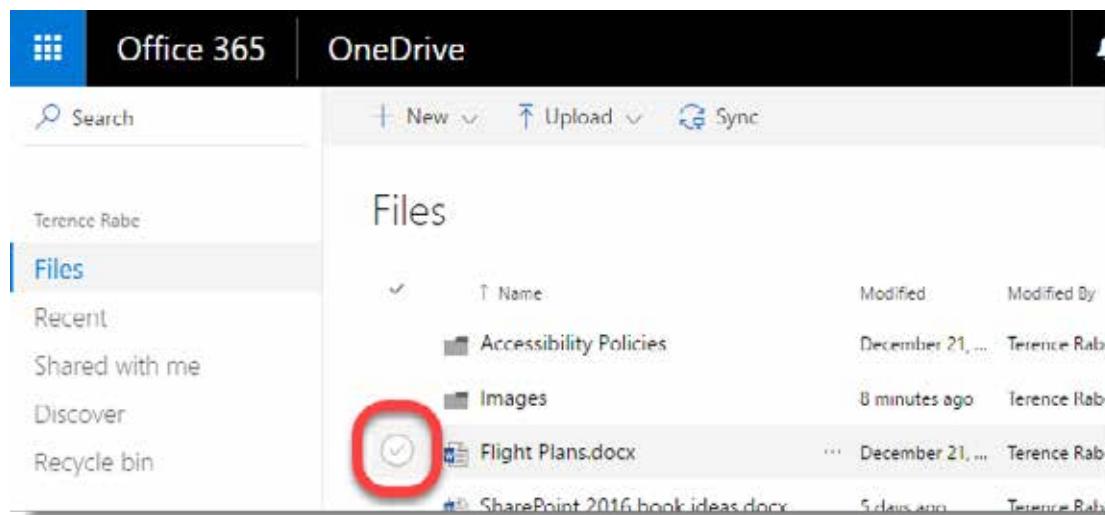


Figure 7-64 File selector.

2. Click **Share**.

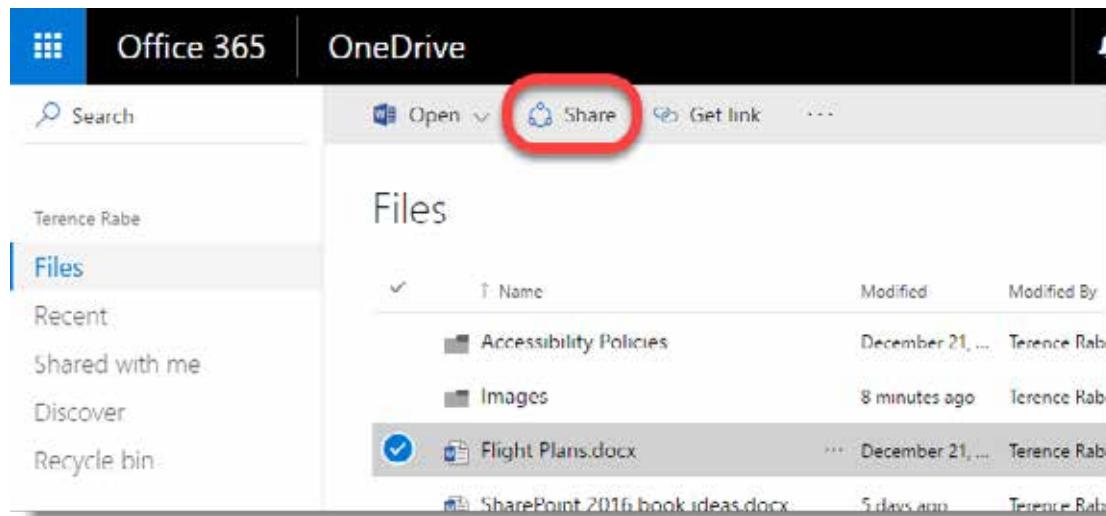


Figure 7-65 The Share button.

3. The *Share* dialogue box will open.
4. Type the name or email address of the person with whom you wish to share the document.

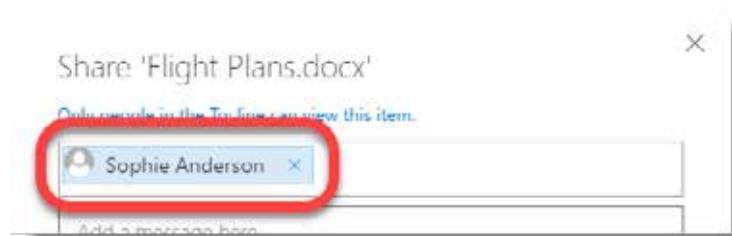


Figure 7-66 A sharing invitation recipient.

5. Add a personalised message if needed.

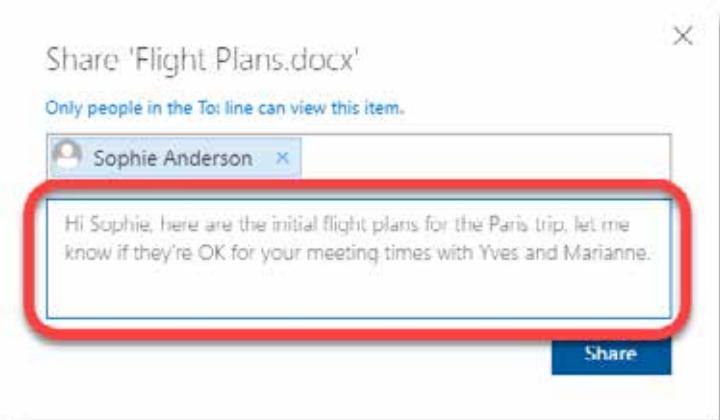


Figure 7-67 A personalised message.

6. To change how the file is shared, click the link below the file name.

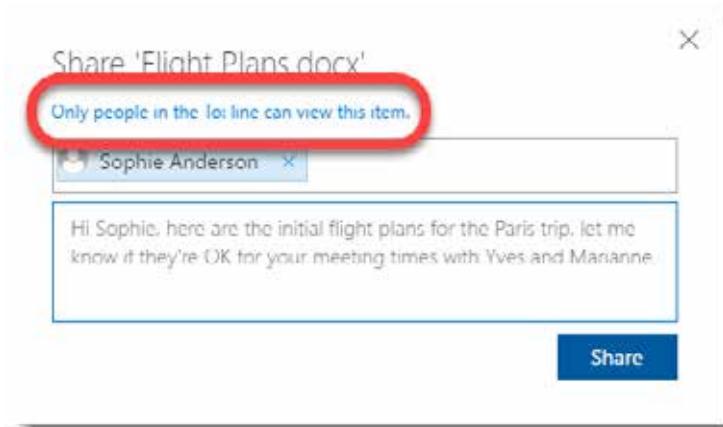


Figure 7-68 The “Anyone with this link can edit this item” link.

7. The Permissions pane will be displayed.

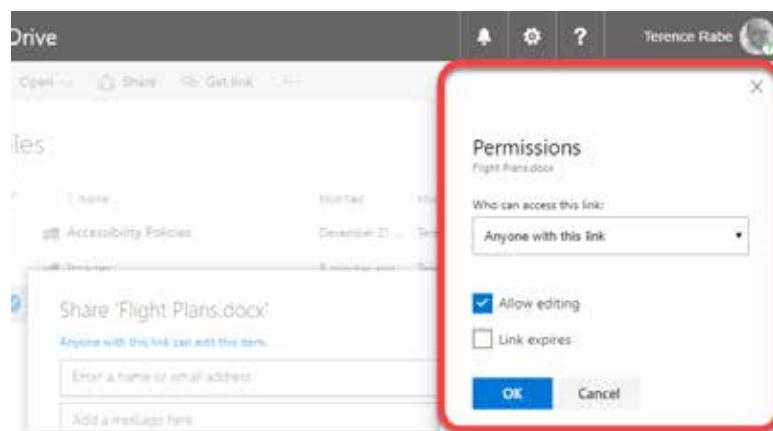


Figure 7-69 The Permissions pane.

8. Click on **Who can access this link** to display the list of options.



Figure 7-70 The “Who can access this link” options list.

9. Select the appropriate group of users.

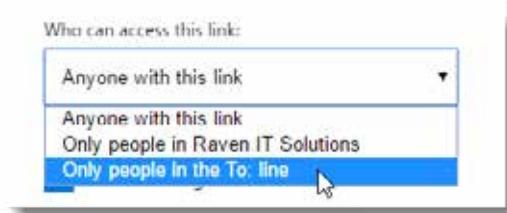


Figure 7-71 Selecting an option on the list.

10. Check the Allow editing box to control whether recipients of this message can edit the file.



Figure 7-72 The "Allow editing" checkbox.

11. If you allow access to anyone who has the link, you can use the *Link expires* check box to set an expiry date on the link.
12. Select the **Link expires** check box and type in the number of days for which the link will be valid.

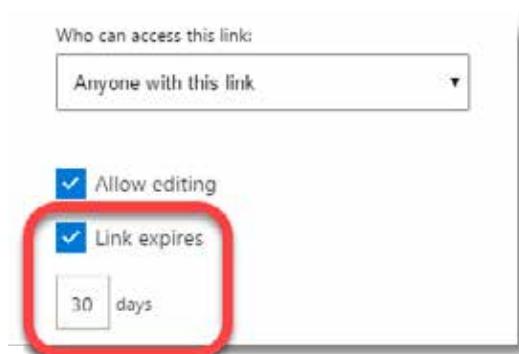


Figure 7-73 The "Link expires" checkbox and expiry value.

13. Click **OK** to save the settings on the Permissions pane.

14. Click **Share** on the *Share* dialogue box so share the file and send the email invitation.

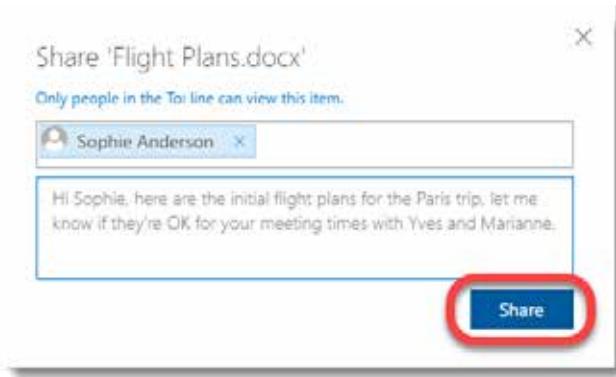


Figure 7-74 The Share button.

7.9.2 SHARE A FOLDER

The steps for sharing a folder are the same as the steps described above.

All the files and subfolders contained in the shared folder will be accessible to the user(s) with whom you share the folder. It may be more convenient than sharing a folder and moving files into it than sharing many files individually with the same settings.

7.10 ONEDRIVE RECYCLE BIN

When you delete a file from OneDrive, the file is not immediately erased but moved to the Recycle Bin.

7.10.1 ACCESS THE RECYCLE BIN

1. Click **Recycle bin** on the list of views.

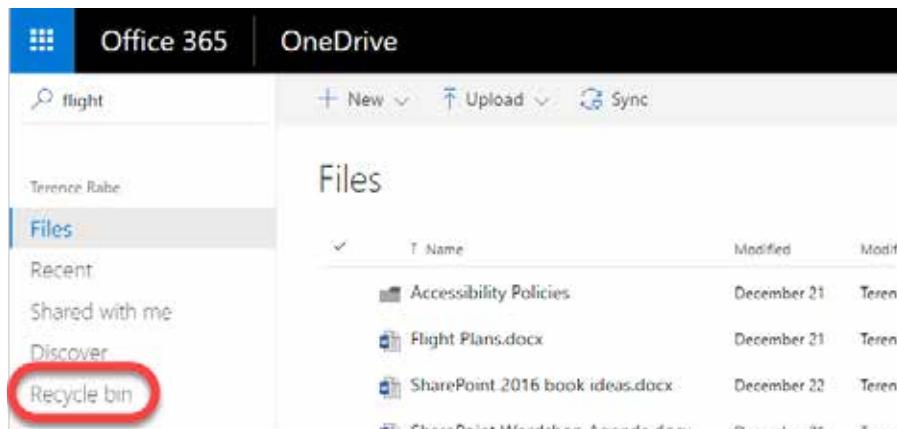


Figure 7-75 The Recycle bin link.

2. The Recycle bin will be displayed.

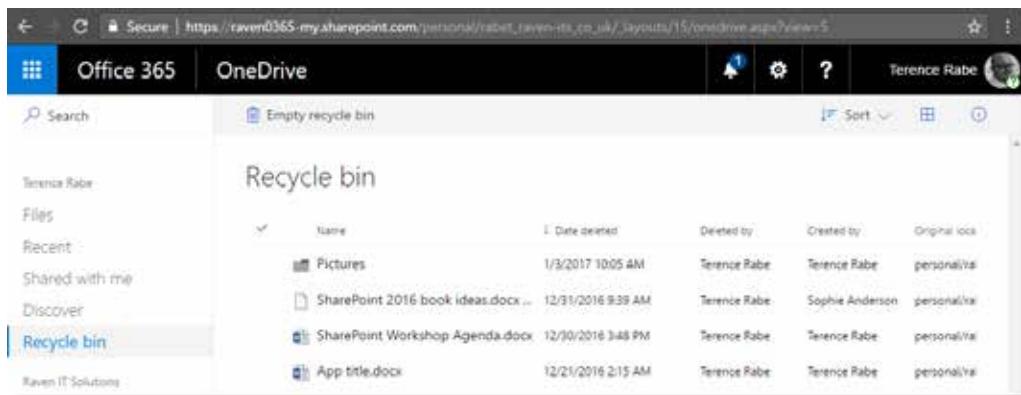


Figure 7-76 The Recycle bin.

7.10.2 RESTORING FILES AND FOLDERS

1. Select the files and/or folders that you want to restore by clicking on the selector icon.



Figure 7-77 The selector icon.

2. Click **Restore**.

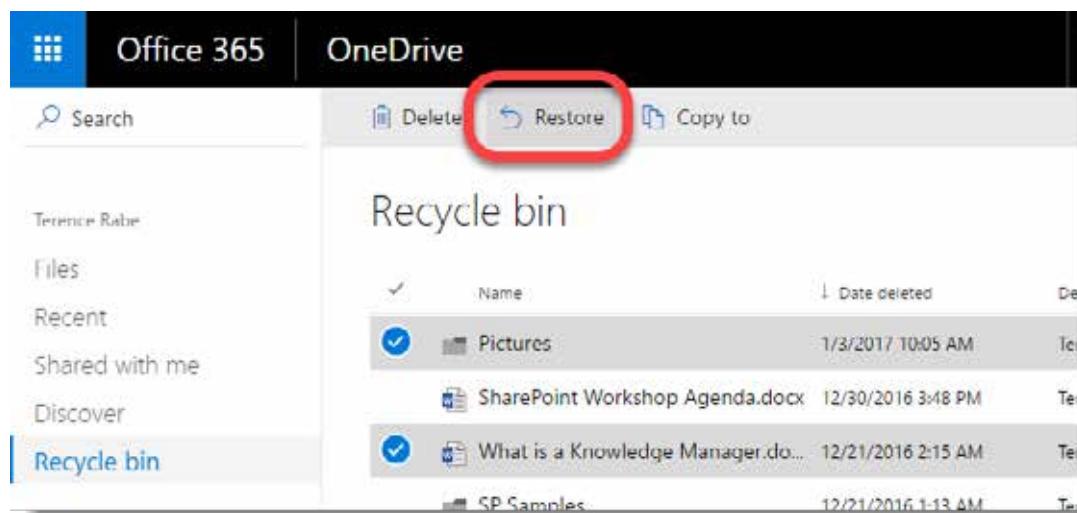


Figure 7-78 The Restore button.

3. Wait while the item(s) are restoring.



Figure 7-79 "Item restore" indicator.

4. The page will refresh and the restored items will no longer be listed in the Recycle bin view.

NOTE: Items are restored to the original location from where they were deleted.

7.10.3 DELETE FILES FROM THE RECYCLE BIN

1. Select the files and/or folders that you want to permanently delete by clicking on the selector icon.

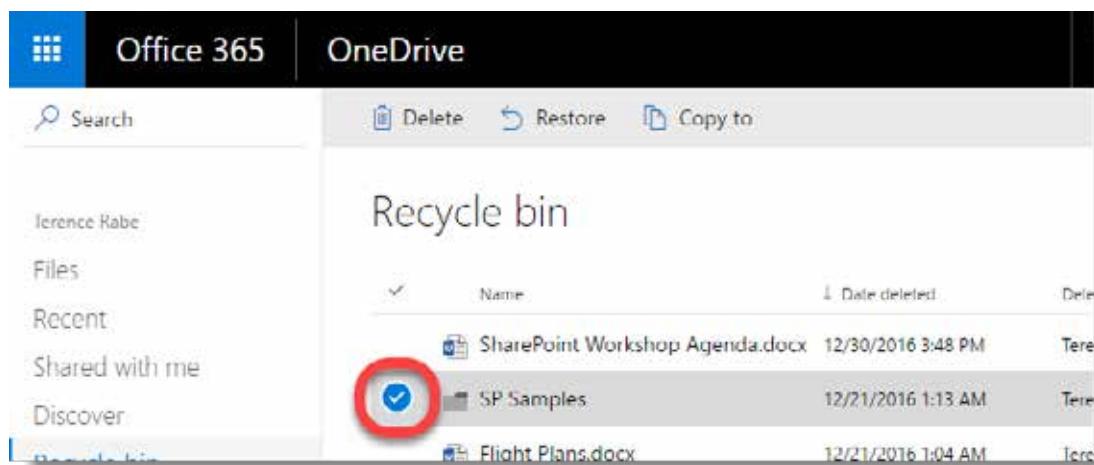


Figure 7-80 The selector icon.

2. Click **Delete**.

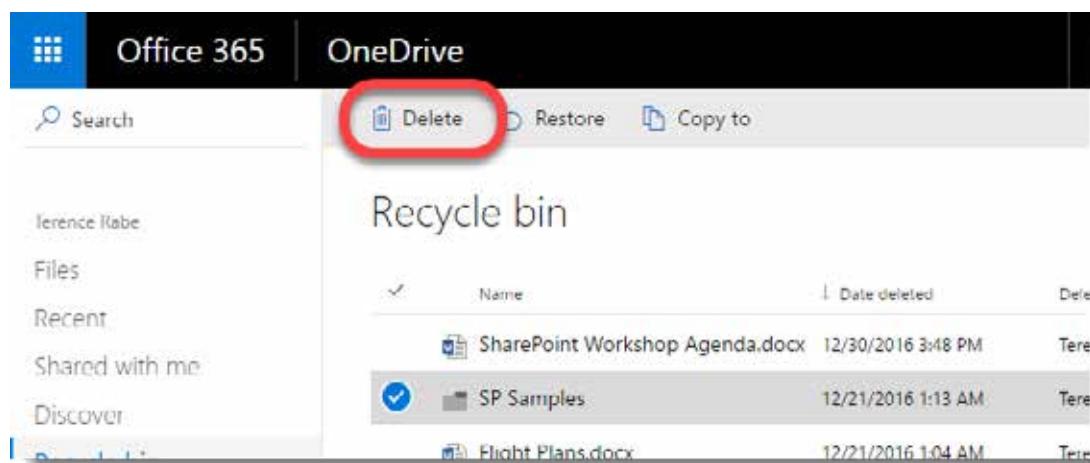


Figure 7-81 The Delete button.

3. Click **Delete** on the *Delete* confirmation dialogue box.

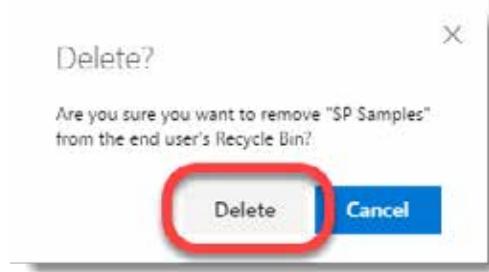


Figure 7-82 The Delete confirmation button.

4. The page will refresh and the deleted items will no longer be listed in the Recycle bin view.

WARNING: When a file is deleted from the Recycle bin, it is permanently erased and cannot be recovered.

7.11 ONEDRIVE SYNC

7.11.1 WHAT IS ONEDRIVE SYNC?

OneDrive is a cloud-based service; it is accessible only while you are connected to the internet.

The OneDrive for Business desktop application is a synchronisation, or *sync*, tool. It creates a local replica folder on your computer hard drive and then syncs the contents of your Office 365 OneDrive to your computer, which means that the replica files on your computer can be read or edited while you are offline.

OneDrive continually monitors your network status and will sync automatically while you have internet access. As soon as you save changes to a file stored in OneDrive, the application will update the replica on your computer. If a file on your computer is changed, the OneDrive application updates the online file immediately.

Changes are saved to the local replica file if no internet connection is detected. Changes are automatically synchronised when the connection to the internet is restored.

7.11.2 SET UP THE ONEDRIVE DESKTOP APPLICATION

The OneDrive synchronisation application is built into Windows 10; therefore, it does not need to be installed.

For older versions of Windows or non-Microsoft operating systems, you will need to install the application. If you need help installing the OneDrive application, please contact your IT helpdesk for assistance.

If the application is installed, it can be set up as follows:

1. Open the OneDrive web app and click the **Sync** button.

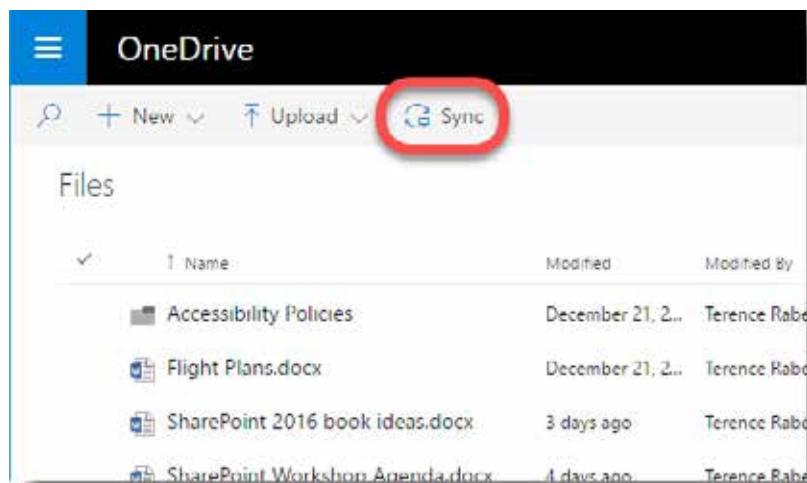


Figure 7-83 The Sync button.

2. The *Getting ready to sync* dialogue box will be displayed.



Figure 7-84 The "Getting ready to sync..." dialogue box.

3. The next dialogue box may take a while to open; do not click the *get the latest version of OneDrive* link until you've checked whether your browser is waiting for you to allow OneDrive to open or not.
4. Acknowledge the prompt if your browser displays a security warning like the figure below.



Figure 7-85 Web browser security prompt.

5. The OneDrive setup wizard will display the *This is your OneDrive folder* welcome screen.

6. Click **Next**.

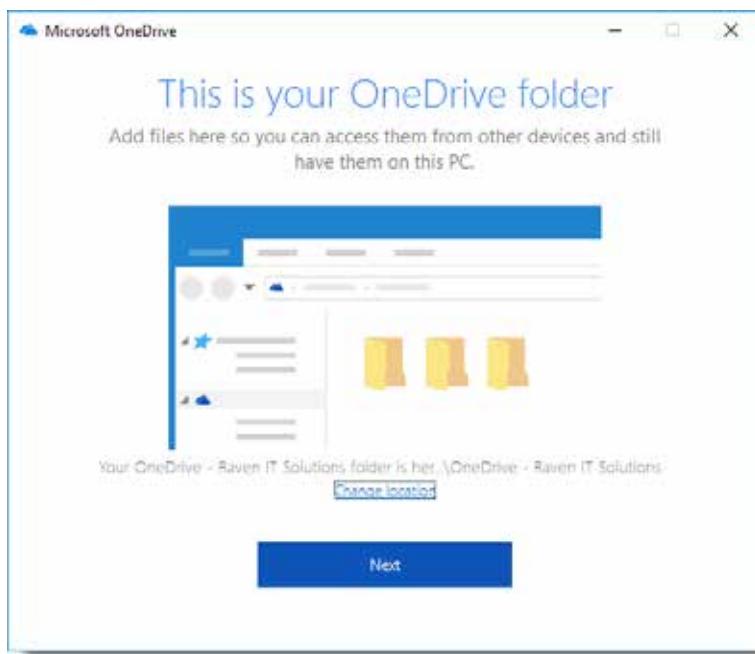


Figure 7-86 The “This is your OneDrive folder” screen.

7. When the *Set up OneDrive* screen is shown, confirm that your email address is correct and click **Sign in**.

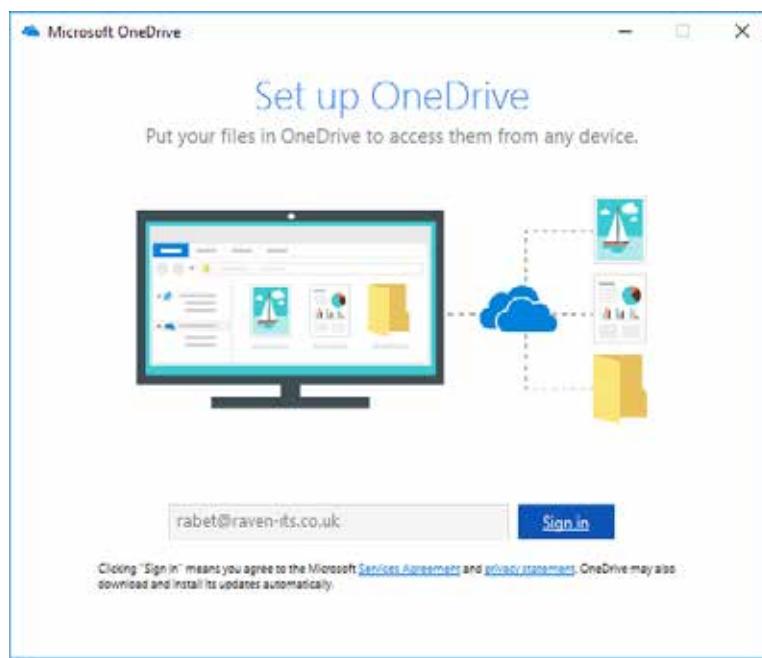


Figure 7-87 The “Set up OneDrive” screen.

8. Enter your password and click **Sign in** on the Office 365 sign in screen.



Figure 7-88 The Office 365 sign in screen.

9. Check the boxes to select which folders are synchronised and click **Next**.

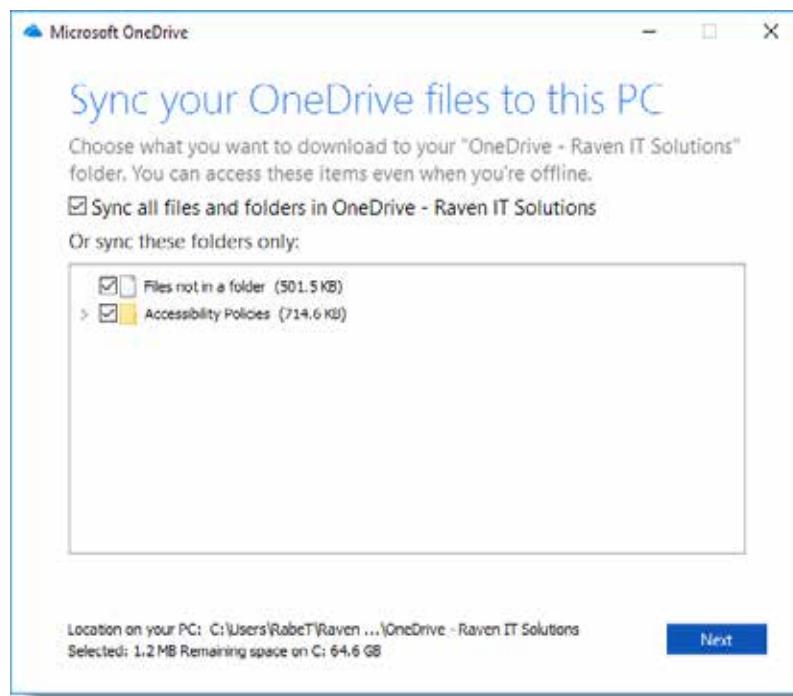


Figure 7-89 The "Sync your OneDrive files to this PC" screen.

10. The Your OneDrive is ready for you screen will be displayed; click the **Open my OneDrive...** link or close the screen.

NOTE: The OneDrive application will begin synchronising files as soon as the screen above is displayed, but it may take some time to fully sync all files to your computer, depending on how much data is stored and on your internet connection speed.

7.11.3 THE ONEDRIVE SHORTCUT IN FILE EXPLORER

After the OneDrive for Business application has been installed on your computer, you will find a OneDrive for Business shortcut listed under *My Computer* in the File Explorer application. The shortcut will be named “**OneDrive – x**” in which x is the name of your Office 365 organisation.

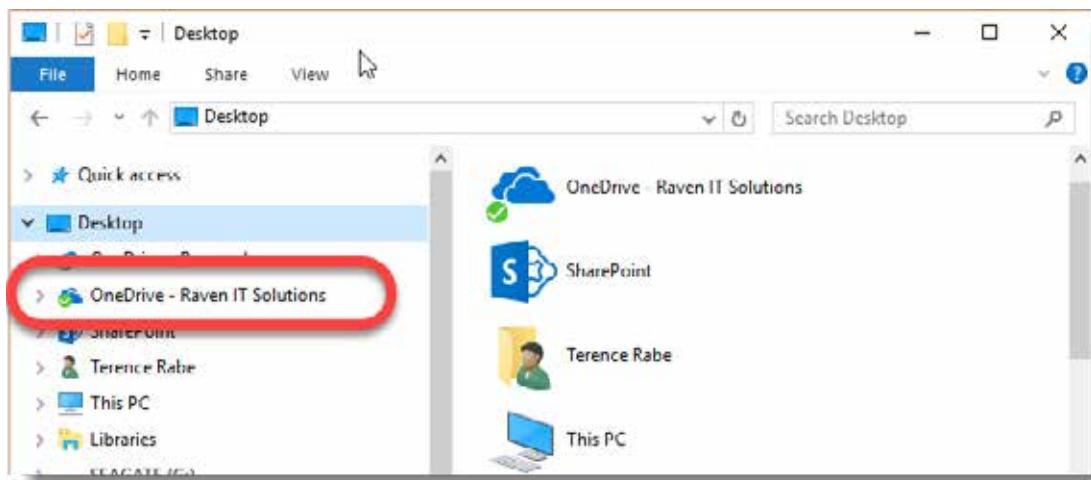


Figure 7-90 OneDrive for Business shortcut.

7.11.4 CHOOSE ONEDRIVE FOLDERS TO SYNC

OneDrive can store up to 1TB of data, which is more than the storage capacity of many computers, laptops, and mobile devices. Synchronising your entire OneDrive can cause your device to run out of storage space.

You can change which folders are synchronised if you find that your device is running low on storage.

1. Open File Explorer.
2. Make sure that Desktop is selected in the folder list.

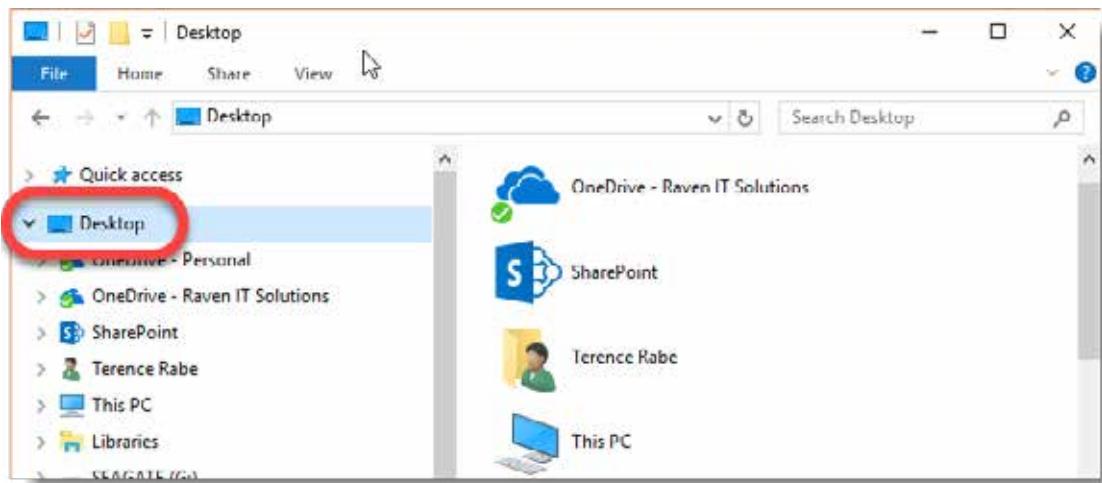


Figure 7-91 The Desktop shortcut in File Explorer

3. Right click the OneDrive – x (where x is your Office 365 Organisation name) icon.

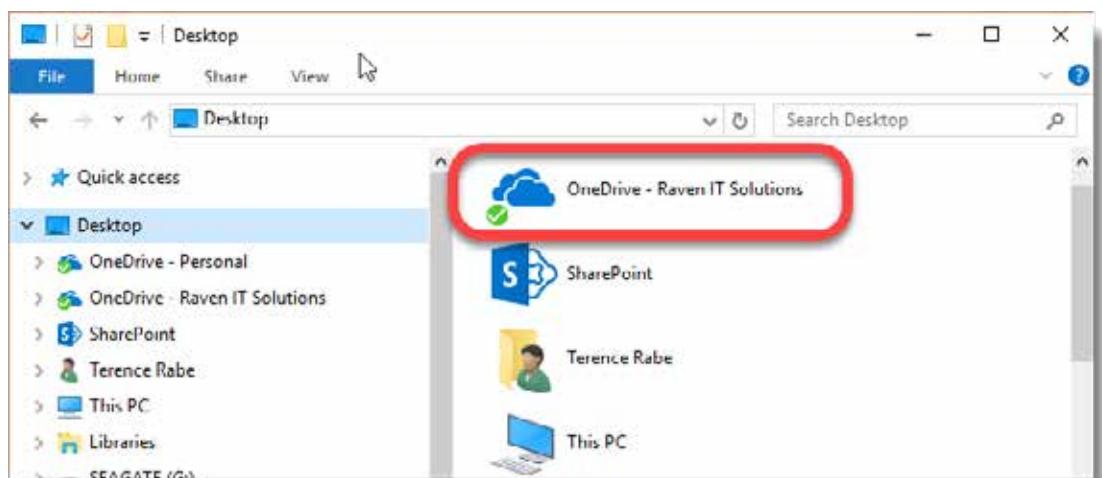


Figure 7-92 The OneDrive icon.

4. Select **Choose OneDrive folders to sync** from the context menu.



Figure 7-93 The “Choose OneDrive folders to sync” option.

5. Check the boxes to select which folders to sync and click **OK**.

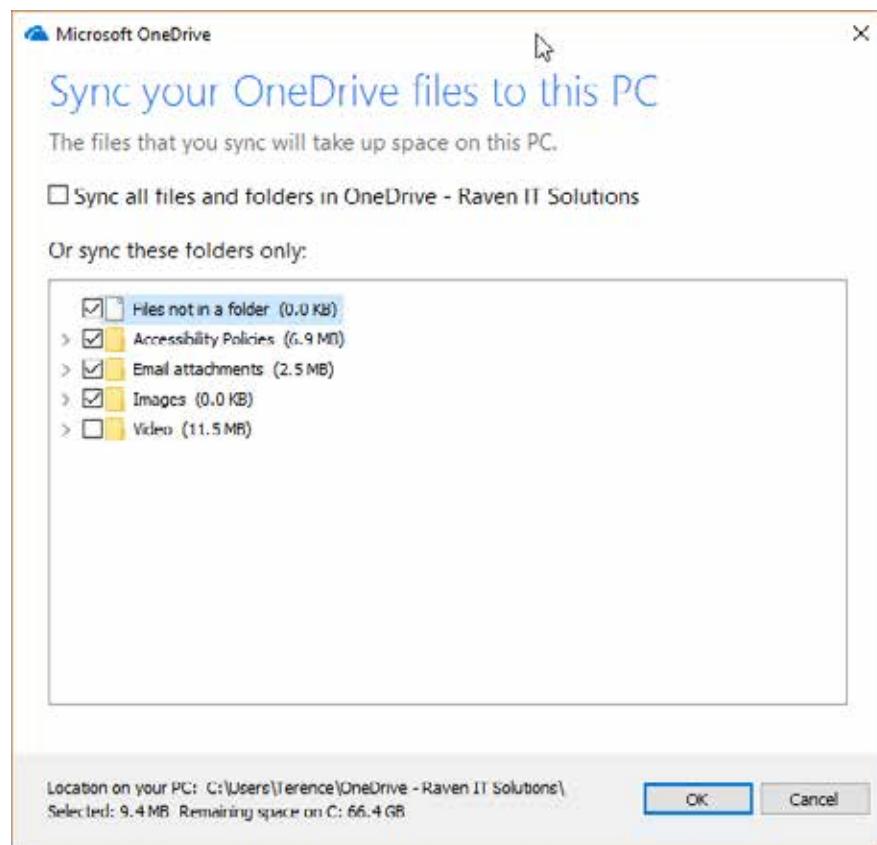


Figure 7-94 The “Sync your OneDrive files to this PC” screen.

6. The folders displayed in the OneDrive shortcut in File Explorer will be updated.

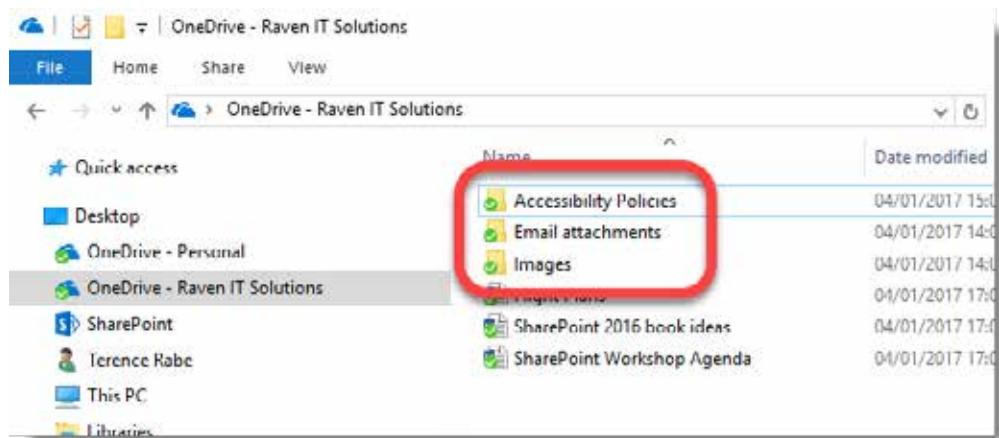


Figure 7-95 Synchronised folders in File Explorer.

7.11.5 UPLOAD FILES

After the OneDrive for Business application has been set up, you can upload files to OneDrive via the OneDrive shortcut in File Explorer.

1. Select the file, group of files, or folder that you want to upload.

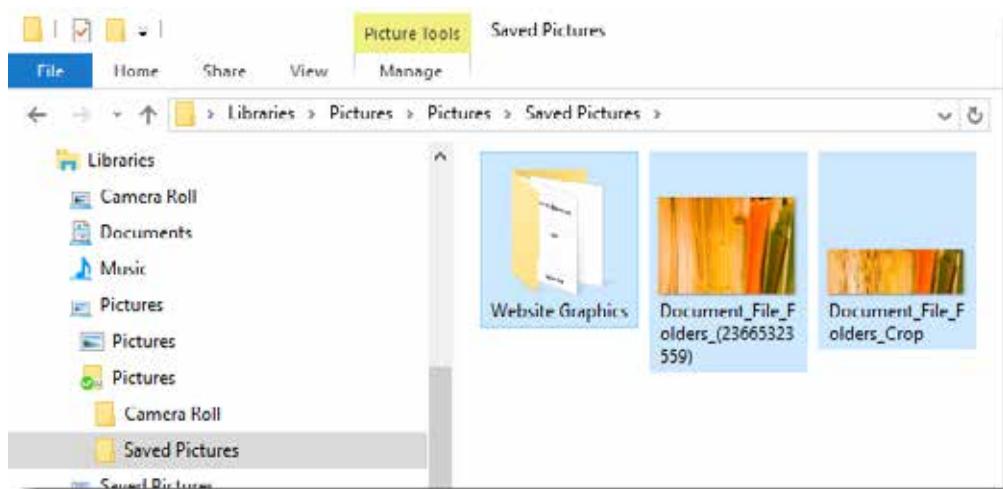


Figure 7-96 Selected files.

2. Right-click one of the selected files and choose **Copy** (if you want to copy files to OneDrive), or (if you want to move the files to OneDrive).

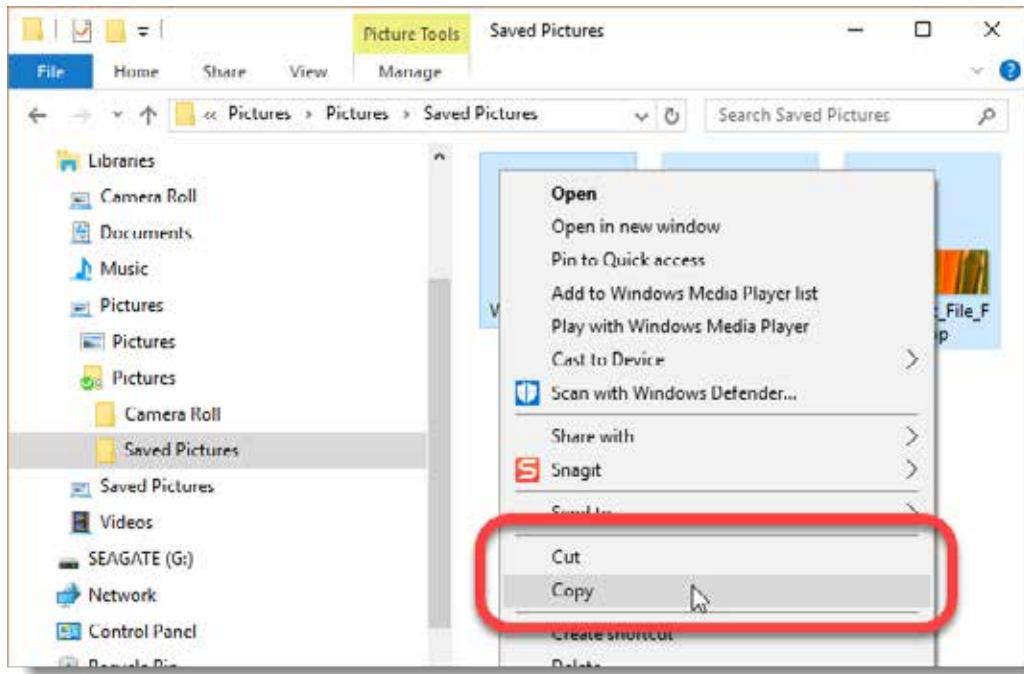


Figure 7-97 Cut and Copy options on the context menu.

3. Locate and select the OneDrive shortcut.

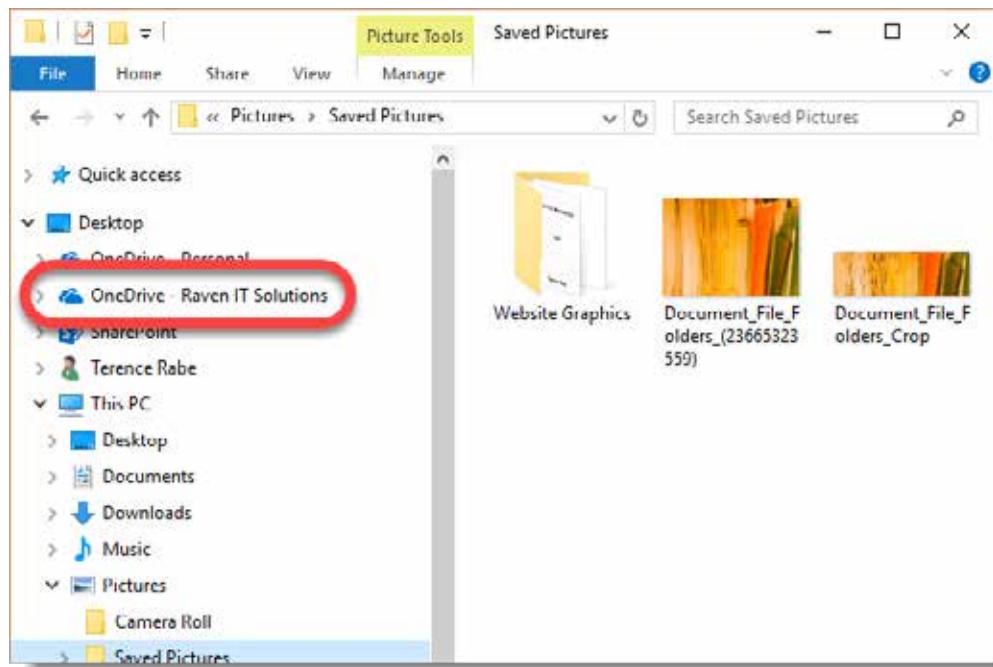


Figure 7-98 The OneDrive shortcut.

4. Right-click in the target area to open the context menu.

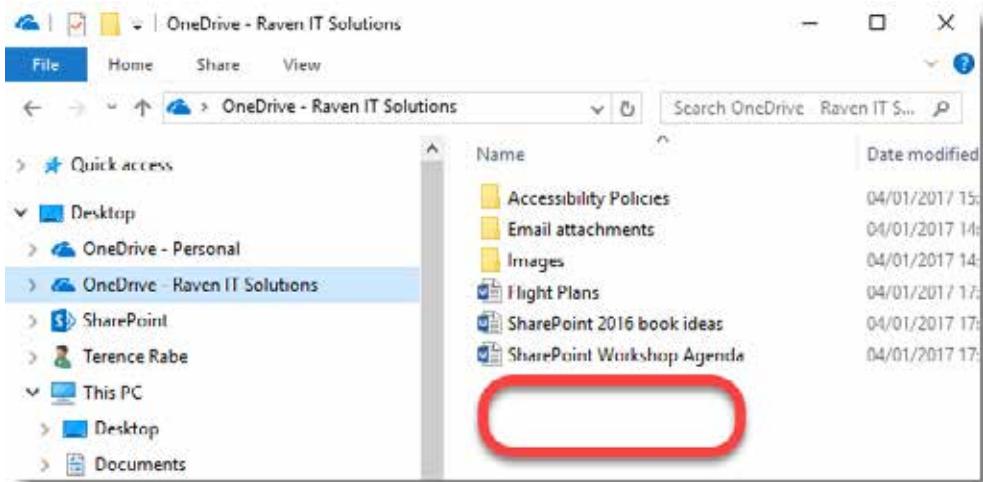


Figure 7-99 Blank space in the File Explorer window.

5. Select **Paste** from the options menu.

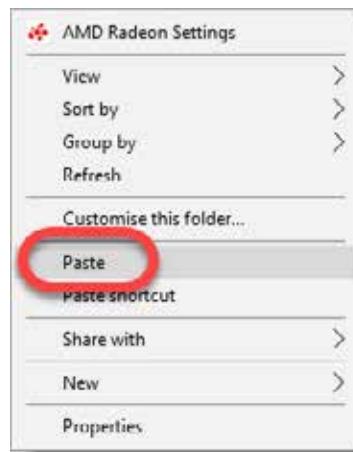


Figure 7-100 The Paste option.

6. The files will be *copied* or *moved* to the OneDrive folder, depending on whether you chose to copy or cut in step 2.
7. Synchronisation will begin immediately once the files are displayed in the OneDrive folder.

7.11.6 FILE OPERATIONS

Files and folders stored in OneDrive folders in File Explorer can be moved, renamed, and deleted as with any other files stored on your computer hard drive.

NOTE: If you delete a file from the OneDrive folder in File Explorer, it will be moved to the Recycle Bin on your computer desktop. When OneDrive sync occurs, the file in the web app will also be moved to the Office 365 OneDrive recycle bin.