

Microsoft Outlook (Microsoft 365) — Complete User Guide

0) Scope & Audience

This guide is for employees and students using an organizational Microsoft 365 (work/school) account. It explains what Outlook is, how to sign in, change passwords, set up apps on all platforms, send/organize mail, manage calendars, collaborate, keep data secure, and fix common issues. Admin-only items are labeled (*Admin*).

1) What is Outlook?

Outlook is Microsoft's email, calendar, contacts, and tasks app. You can use it:

- **In a browser** at **outlook.office.com** (Outlook on the web)
- **On Windows** (two flavors exist: **new Outlook** and **classic Outlook**)
- **On macOS** (Outlook for Mac)
- **On mobile** with the **Outlook app** (iOS/Android)

Outlook connects to **Exchange Online** (part of Microsoft 365) for your mailbox, calendar, and contacts. It also integrates with **Teams**, **OneDrive/SharePoint**, **To Do**, and **Microsoft 365 Groups**.

2) Where to Log In

- **Webmail** (works anywhere): open a modern browser → go to **<https://outlook.office.com>** → sign in with your work/school email.
- **Microsoft 365 portal**: **<https://office.com>** → **Sign in** → click **Outlook**.

- **Mobile:** install **Microsoft Outlook** from the iOS App Store or Google Play → open → **Add Account**.
- **Windows/macOS apps:** launch Outlook → sign in with your work/school account.

Tip: Your organization may require **MFA** (multi-factor authentication). Keep the **Microsoft Authenticator** app installed and working on your phone.

3) How to Change Your Password

For work/school accounts managed by your organization.

A) Self-Service (recommended)

1. Go to **<https://passwordreset.microsoftonline.com>**.
2. Enter your work/school email → follow the steps (text/phone/app prompts).
3. After changing, **re-sign in** to Outlook, Teams, OneDrive, and any VPN.

B) From Your Account Security Page

1. In a browser: **<https://myaccount.microsoft.com>** → **Security info**.
2. Add/update methods (Authenticator app, phone, email).
3. If allowed, choose **Change password** and follow prompts.

C) On a Windows work PC (if joined to your org)

- Press **Ctrl + Alt + Delete** → **Change a password**.

After a password change, you may see repeated prompts in Outlook on one device. Sign out/in once, or remove/re-add the account if the prompts loop.

4) Install & Set Up Outlook

4.1 Windows: New Outlook vs Classic Outlook

- **New Outlook (Windows):** Modern UI, tight integration with web features. Installed via Microsoft Store or toggled from classic Outlook in some builds.
- **Classic Outlook (Windows):** The long-standing Win32 Outlook with COM add-ins, full ribbon, PST/OST features, and extensive options.

Your org may standardize on one. If unsure, stick to the app IT recommends.

4.2 Windows — Add Your Account

New Outlook (Windows)

1. Open **Outlook** → **Get started**.
2. Enter work email → sign in (MFA if prompted).
3. Mail and calendar appear; settings are via **Settings (gear)**.

Classic Outlook (Windows)

1. Open Outlook → if prompted, enter email and sign in.
2. If already set up and adding another account: **File** → **Add Account** → enter email and complete sign-in.

If Outlook was previously configured and is now unstable, create a fresh profile (see **§10.2 Rebuild Profile**).

4.3 macOS — Install & Add Account

1. Install Outlook from **Microsoft 365** installer or the **Mac App Store** (organizational licenses usually prefer the Office installer).
2. Open Outlook → **Settings** → **Accounts** → **Add Account** → sign in with your work/school email → complete MFA.
3. If Outlook behaves oddly, use **Outlook Profile Manager** (inside the app bundle) to create a new profile (see **§10.2**).

4.4 Mobile — iOS & Android

1. Install **Microsoft Outlook** (App Store / Google Play).
 2. Open app → **Add Account** → enter your work/school email → complete sign-in and MFA.
 3. Turn on **Contacts** and **Calendar** sync when prompted if allowed by policy.
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5) First-Run Checklist

- Verify **Time Zone** (web: **Settings** → **General** → **Language & time**; desktop: OS time zone).
 - Set your **signature** (see §7.4).
 - Adjust **Focused Inbox** preference (see §7.7).
 - Confirm **Working hours & time zone** (Calendar settings).
 - If you'll use large shared mailboxes, ensure **Cached Exchange Mode** is on and tune sync sliders (classic Outlook, see §9.1).
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6) Sending & Receiving Email

6.1 Compose Basics

1. **New mail** → type recipients (Outlook checks your directory).
2. **Subject** and message body.
3. **Attach** files or **Insert link** to cloud files (preferred).
4. **Send**.

6.2 Attachments vs Cloud Links

- Prefer **OneDrive/SharePoint links** to avoid size limits and ensure everyone sees the latest version.
- When attaching, you can **Upload and share** to convert a local file to a cloud link with permissions.

6.3 Formatting, Mentions, Delivery Options

- Use the formatting toolbar for fonts, tables, images.
- Use **@Mentions** to notify someone in the thread.
- **Delay Delivery** (classic Outlook): **Options** → **Delay Delivery**.
- **Request read receipts** (org policy may block them).

6.4 Recall/Resend (Classic Outlook)

- **Message** → **Actions** → **Recall This Message** (works only under specific conditions within the same organization and if the recipient hasn't read it; not guaranteed).

7) Organizing Mail

7.1 Folders, Favorites, Views

- Create folders for projects/clients.
- Right-click a folder → **Add to Favorites** for quick access.
- Use **View settings** to toggle reading pane, sort, and filters.

7.2 Categories & Flags

- Apply **Categories** (color tags) to group related mail.
- **Flags** set follow-ups and reminders.

7.3 Rules (Automation)

- Example: Move invoices to an “Invoices” folder: **Rules** → **Create Rule** (classic) or **Settings** → **Mail** → **Rules** (web/new).
- Keep rules simple; avoid loops (e.g., move + forward simultaneously).

7.4 Signatures

- **Web/new Outlook:** **Settings** → **Mail** → **Compose and reply** → create default signatures for new messages/replies.
- **Classic:** **File** → **Options** → **Mail** → **Signatures**.

7.5 Templates & Quick Parts

- **Web:** use **My Templates** add-in for canned replies.
- **Classic:** **Quick Parts** to save reusable blocks; also **Quick Steps** for multi-action shortcuts.

7.6 Sweep, Clean Up, Ignore

- **Sweep** (web/new): quickly move/delete or keep only the latest messages from a sender.
- **Clean Up** (classic): removes redundant messages in a conversation.
- **Ignore:** mutes a thread.

7.7 Focused Inbox

- Toggles between **Focused** and **Other**. If you miss messages, turn it off or regularly review **Other**.

8) Search (Email, Attachments, People)

8.1 Search Everywhere

- Use the **Search bar** at the top. Outlook searches subject, sender, content, and attachments (server-side for M365).

8.2 Filters & Operators (examples)

- `from:alice` — messages from Alice
- `subject:"quarterly report"` — phrase in subject
- `hasattachments:yes` — messages with attachments
- `to:team@company.com` — messages sent to a group
- `received>=01/01/2025 received<=01/31/2025` — date range

8.3 Save Frequent Searches

- Web/new Outlook: after a search, use **Save search** (if available) or pin filters.
 - Classic: create a **Search Folder** (e.g., mail from your manager).
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9) Calendars, Meetings, and Scheduling

9.1 Working with Your Calendar

- Set **work hours** and **time zone** (Calendar settings).
- **New Event/Meeting** → add attendees → use **Scheduling Assistant** to find a free time.
- Add **Teams** meeting link (button in the event editor).
- Add a **Room** (if your org manages room lists).

9.2 Recurring Meetings & Time Zones

- Choose repeat patterns (daily/weekly/monthly).

- When scheduling across regions, enable **time zone** fields and confirm everyone's correct local time.

9.3 Sharing Calendars

- Right-click your calendar → **Sharing permissions** → choose people and permission level (Can view free/busy, limited details, full details; delegate options vary).
- **Open another calendar** to view a colleague's shared calendar.

9.4 Delegates & Send on Behalf

- In Outlook, add a **Delegate** who can receive meeting requests and manage your calendar.
 - Email permissions differ: **Send As** vs **Send on behalf of** (requires admin approval).
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10) Shared Mailboxes, Groups, and Additional Accounts

10.1 Shared Mailboxes (help@..., info@...)

- If IT granted you access, it may **auto-map** into Outlook.
- If not visible, **Add shared mailbox**:
 - **Web/new Outlook**: Your avatar → **View all Outlook settings** → **Mail** → **Shared mailboxes** → **Add**
 - **Classic**: Right-click your account name → **Add shared folder** → enter the shared mailbox.

10.2 Rebuild Profile (Fixes Many Issues)

Windows (classic)

1. Quit Outlook.

2. Open **Control Panel** → **Mail** → **Show Profiles**.
3. **Add** a new profile → set to **Always use this profile** → open Outlook and sign in.

macOS

1. Quit Outlook.
2. Open **Outlook Profile Manager** (inside the Outlook app bundle).
3. Create a new profile → set as default → open Outlook and sign in.

Creating a fresh profile fixes a large share of connection, search, and UI problems.

11) Storage, Archiving, and Retention

11.1 Mailbox Size and Online Archive

- Your mailbox has a quota set by IT. If you get quota warnings, delete large items or move old mail to **Online Archive** (if enabled).
- Avoid using local **PST** archives in enterprise setups (hard to back up and can corrupt).

11.2 Recover Deleted Items

- **Deleted Items** → **Recover items deleted from this folder** (server-side recovery of recently purged mail).

11.3 Retention Policies

- Some folders/items display policy tags (e.g., delete after 1 year). Policies are set by IT and apply automatically.
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12) Security & Privacy

12.1 MFA & Authenticator

- Keep at least two sign-in methods (Authenticator + phone).
- If you replace your phone, add the new device to your **Security info** page before wiping the old one.

12.2 Recognizing Phishing

- Be cautious with unexpected attachments, password reset prompts, and requests for gift cards or wire transfers.
- Use Outlook's **Report** button (Report phishing/Junk) so security can investigate.

12.3 Sensitivity Labels & Encryption

- Apply labels like **Public / Internal / Confidential** if available.
- You can **Encrypt** mail (IRM/S/MIME depending on your org). Encrypted mail may require recipients to sign in or use special viewers.

12.4 External Recipients

- Outlook often shows **External** banners for mail from outside your domain. Treat with caution.
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13) Common Issues & Fixes (Ticket-Proven)

13.1 Outlook Won't Start / Crashes

- **Safe Mode** (Windows): **Win+R** → `outlook.exe /safe` → **OK**. If it opens, disable add-ins and re-enable one by one.
- **Repair Office** (Windows): **Settings** → **Apps** → **Installed apps** → **Microsoft 365** → **Modify** → **Online Repair** (requires internet).
- **New profile** (see §10.2).

13.2 Stuck on “Trying to connect...” or “Working offline”

- Confirm network access (try a couple of websites).
- Complete any **MFA** prompts.
- In classic Outlook: **Send/Receive** → **Work Offline** (toggle off).
- Recreate the profile if authentication loops continue.

13.3 Search Shows Incomplete Results

- **Classic Outlook (Windows)** uses Windows indexing:
 - Close Outlook → open **Indexing Options** → **Advanced** → **Rebuild** search index.
- **macOS**: ensure Spotlight indexing is healthy; sign out/in to reload the profile if needed.
- **Web/new Outlook** uses server search; try the same query on the web to compare.

13.4 “My emails are missing”

- Check **Other** (if Focused Inbox on), **Junk**, **Archive**, or custom rules.
- Clear any **filters** in the view.
- Search **All mailboxes** for the subject/sender.

13.5 Attachments Won’t Send / Message Stuck in Outbox

- Large file? Use **Upload and share** (cloud link).
- If it’s stuck, open the message, remove the attachment, and try again using a link.

13.6 Shared Mailbox Missing / Not Updating

- Wait 5–15 minutes after access is granted. Restart Outlook.

- Manually **Add shared mailbox** (see §10.1).
- In classic Outlook with very large shared folders, disable “Download shared folders” or keep the cache slider modest (see §9.1 below for where).

13.7 Calendar: Meeting Times Wrong / Not Appearing

- Ensure **time zone** is set correctly (OS and Outlook).
- Use **Scheduling Assistant** to place meetings; avoid editing recurring series too often (prefer exceptions carefully).

13.8 Constant Password Prompts After Password Change

- Sign out/in once in Outlook, Teams, OneDrive, and any VPN.
 - If prompts loop, remove and re-add the account or **rebuild the profile**.
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14) Advanced Settings (Classic Outlook & Power Users)

14.1 Cached Exchange Mode (Windows classic)

- **File → Account Settings → Account Settings → (Your account) → Change**
 - **Use Cached Exchange Mode** (on for most laptops).
 - **Mail to keep offline**: choose a range (e.g., 6–12 months).
 - For large shared mailboxes, uncheck **Download shared folders** to reduce OST size.

14.2 Data File Locations

- **OST** (cached mailbox) and **PST** (personal archive) live in your user profile’s **AppData** (Windows) or in the user library (Mac). Don’t move them by hand while Outlook is open. Avoid PSTs if your org discourages them.

14.3 Useful Outlook Command-Line Switches (Windows)

- `outlook.exe /safe` — open without add-ins
- `outlook.exe /profiles` — show profile chooser
- `outlook.exe /resetnavpane` — reset folder pane customizations
- `outlook.exe /cleanviews` — reset custom views (use carefully)

14.4 Repair Tools

- **Inbox Repair Tool (scanpst.exe)** fixes PST/OST data structure issues (close Outlook first).
 - **Online Repair** for Office reinstalls components (see §13.1).
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15) Collaboration Tips

15.1 Teams Integration

- Use the **Teams Meeting** button when creating events.
- Meeting chat/notes live in Teams; attach files from **OneDrive** so everyone sees the same document.

15.2 OneDrive & SharePoint

- Prefer cloud links over attachments.
- Use **Share** to set **Can edit / Can view**, audience (organization vs specific people), and expiration if allowed.

15.3 Groups and Distribution Lists

- **Microsoft 365 Groups** provide a group mailbox, calendar, and files.

- **Distribution lists (DLs)** only forward mail; ask IT to add/remove members.
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16) Keyboard Shortcuts (Highlights)

Global

- **Ctrl+N** (Cmd+N on Mac): New email
- **Ctrl+Enter**: Send
- **Ctrl+F**: Forward
- **Ctrl+R**: Reply; **Ctrl+Shift+R**: Reply all
- **Ctrl+E**: Search
- **Ctrl+Shift+M**: New message (classic)
- **Ctrl+Shift+K**: New task

Calendar

- **Alt+N**: New appointment
 - **Ctrl+G**: Go to date
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17) Escalation Checklist (Use When Contacting IT)

Provide these details up front for faster resolution:

- **Your info**: Name, department, location, phone.
- **Device**: Windows/macOS version, asset tag, on corporate network or home/VPN.
- **Scope**: Only you or others as well? (names/emails)

- **Exact error text** + screenshots.
- **Recent changes:** password change, new device, OS updates, travel.
- **Tried already:** Safe Mode, new profile, web works/doesn't, network tested.
- **Logs:** If requested (e.g., Outlook logs, Windows Event Viewer entries).

18) Quick Reference: Where Things Are

Task	Web (Outlook on the web)	New Outlook (Windows/Mac)	Classic Outlook (Windows)
Sign in	outlook.office.com	App sign-in screen	App sign-in screen
Change password	passwordreset.microsoftonline.com or myaccount.microsoft.com	Open account in browser	Open account in browser / Ctrl+Alt+Del (domain PC)
Add account	Settings → Accounts → Add	Settings → Accounts → Add	File → Add Account
Signature	Settings → Mail → Compose and reply	Settings → Compose and reply	File → Options → Mail → Signatures
Out of Office	Settings → Mail → Automatic replies	Settings → Automatic replies	File → Automatic Replies
Rules	Settings → Mail → Rules	Settings → Rules	File → Manage Rules & Alerts
Add shared mailbox	Settings → Mail → Shared mailboxes	Settings → Accounts → Shared mailboxes	Right-click account → Add shared folder
Teams meeting	New event → Toggle Teams	New event → Teams button	New meeting → Teams Meeting

19) Appendix A — New Profile & Indexing (Step-by-Step)

Windows (Classic Outlook)

1. Close Outlook.
2. Open **Control Panel** → **Mail** → **Show Profiles** → **Add** → sign in → set **Always use this profile**.
3. Launch Outlook; let it sync.

Windows Search Index Rebuild

1. Close Outlook.
2. Start menu → type **Indexing Options** → **Advanced** → **Rebuild**.
3. Reopen Outlook and test search after the index finishes rebuilding.

macOS Profile Manager

1. Quit Outlook.
2. Finder → Applications → (Right-click) Outlook → **Show Package Contents** → **Contents/SharedSupport/Outlook Profile Manager**.
3. Create a new profile → set as default → open Outlook and sign in.

20) Appendix B — Data Hygiene & Good Habits

- Keep **mailbox under quota**; archive or delete routinely.
- Prefer **cloud links** over attachments.
- Don't use **PST** unless IT explicitly allows it.
- Use clear **subjects** and **@Mentions** for accountability.

- Set **OOO** for vacations and keep your **calendar current**.
 - Report **phishing**; never send passwords or MFA codes via email.
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Final Notes

- Company settings and screens may vary slightly due to admin policy or app version.
- If a screen looks different, use the **Search box** in settings to find the option by name (e.g., “signature”, “automatic replies”, “rules”).