

Outlook Online Basics

(to navigate to a specific section, press CTRL key and click on the name of the section)

Contents

Contents.....	1
GLOSSARY.....	2
GETTING STARTED.....	3
EMAILS	5
NEW MESSAGE.....	5
To/ CC/BCC.....	5
Commands:.....	5
ATTACHING DOCUMENTS TO AN EMAIL	6
RECEIVING YOUR EMAILS.....	9
RECEIVING AN EMAIL WITH A SHARED DOCUMENT	10
My Day	11
Focused inbox	12
CALENDAR.....	13
View.....	13
New Event	13
Creating an appointment:.....	14
Creating meetings.....	14

GLOSSARY

Web browser: this is just what you use to get onto the internet, such as Google Chrome, Internet Explorer or Microsoft Edge.

Device: whatever you are using to access your work on – desktop PC, laptop or smartphone.

Cloud: in simple terms, the cloud is the internet. It's all of the things you can access remotely over the Internet, such as data and programmes. When something is in the cloud, it means it's stored on special internet computers (called 'servers') instead of solely on your device.

Online/offline: whether you are connected to the internet or not.

Application: the different programmes within O365 are called applications, e.g. Outlook, Word, PowerPoint, Teams. Often shortened to App(s).

Icon: the 'logos' of the different applications (e.g. Word is a blue W, Excel is a green E, OneDrive is a blue cloud) or web browsers (e.g. Chrome is a coloured circle)

Desktop apps: applications that are available on your laptop/computer by clicking onto the icon. They may be on your bottom taskbar, or in your Start menu. You don't have to be online to see and access them.

Window: In computer terms, a window is an area on the screen that displays information about a programme. You can have multiple windows open, displaying different websites, documents and applications.

File Explorer: the 'folder' icon that displays along your bottom taskbar; the one you have been using to find your documents, downloads, pictures and desktop.

GDPR: the General Data Protection Regulations. It was introduced to standardise data protection law and give people in a digital world greater control over how their personal information is used.

Ellipsis: the 3 dots you will find next to various names and commands. An ellipsis tends to be used when there is not enough room to display all options.

Uploading: means data is being sent from your computer to the Internet. For example, when you move a document from your desktop into your OneDrive, that is uploading because you are moving it to the Cloud.

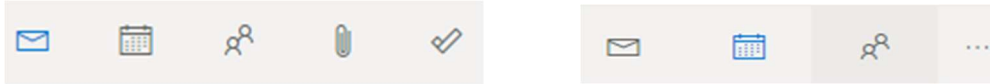
Downloading: means your computer is receiving data from the Internet. For example, if you want a document from a website, you can download it to your desktop.

Windows Key: this is a bottom-left key on your keyboard with the Windows icon on it.

URL: short for Uniform Resource Locator, this is your web address. It shows the location of a document or website on the internet, including your OneDrive.

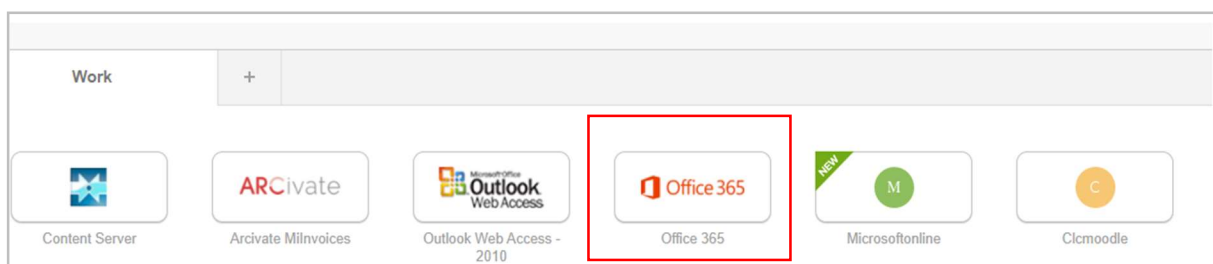
GETTING STARTED

There are 5 sections to Outlook, all represented by icons in the bottom left of your application: Emails, Calendar, People, Files and To Do. Depending on space, some may not display and may be hidden in the ellipsis (the ...).



Navigation and opening Outlook online:

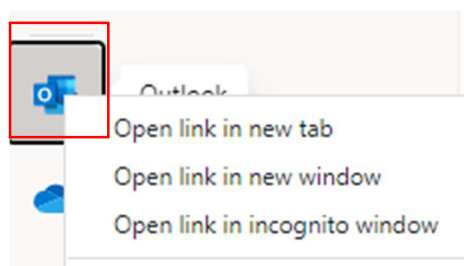
Log onto Office.com <https://www.office.com> or choose it from your Barnardo's OKTA Dashboard screen <https://login.barnardos.org.uk>.



From your O365 home page, you can open Outlook via the Outlook icon on the left of your page.



Right click onto Outlook icon and you will see 3 ways of opening it:



- New tab: opens as a tab along the top of your existing window. Some prefer this option as it keeps everything in a row.

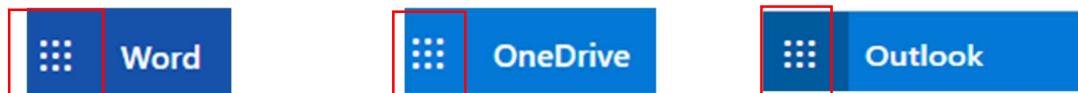
(Tip: You can use CTRL + Page up/Page down to move easily between tabs on your browser. This is useful if you have no mouse.)

New window opens in a separate window to the rest of your currently opened systems. This is useful if you want to be able to move them around or need to view two apps/ systems at once, either via a dual screen set-up or using the 'snap' feature in Windows 10 (*Select the window you want to snap and press the Windows Logo Key + left arrow or right arrow to snap the window to the side of the screen where you want it to be. You can also move it to a corner manually*)

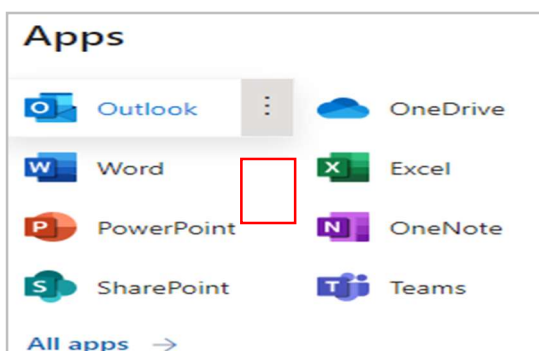
(Tip: You can use Alt + Tab to move easily between the windows.)

- *You will rarely, if ever, use 'incognito window.' It is to do with hiding browsing history.*

Navigation tip: when you are in any Office 365 online application, you can open another application by using the O365 app launcher. This box of 'dots' appears in the top left corner of all O365 applications

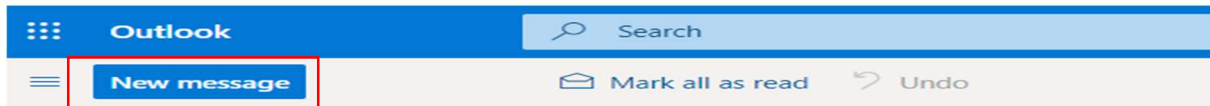


Note: If you click straight onto one of these app icons below, it will open the new app in place of the one you are in. However, if you click onto the 3 dots, you can open the new app in a new tab.



EMAILS

NEW MESSAGE

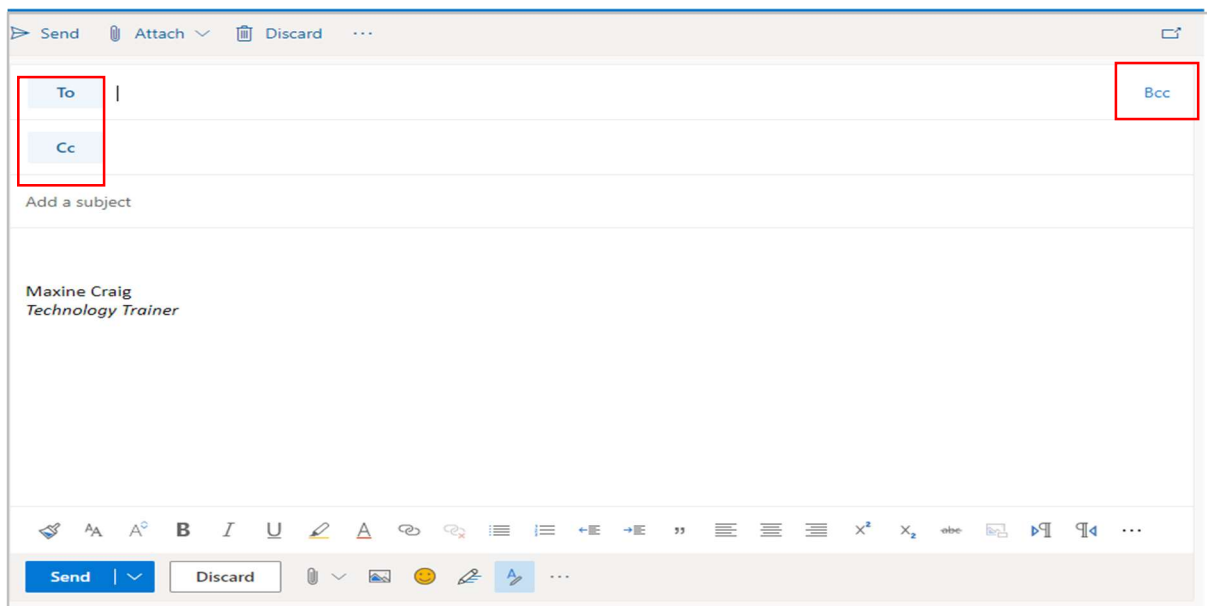


Clicking on this opens a blank email draft ready for you to type into.

To/ CC/BCC

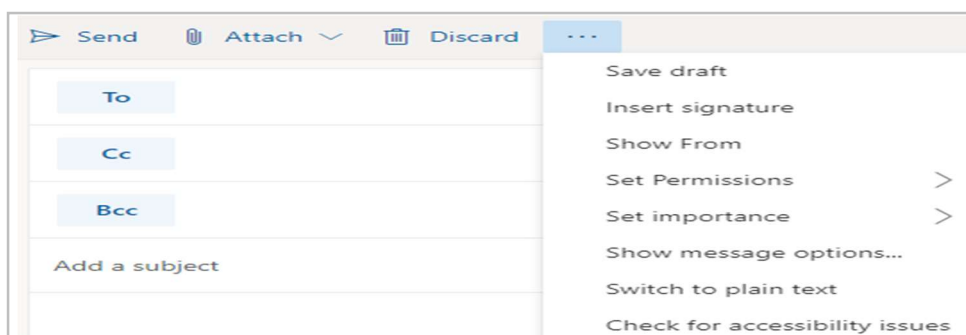
You can click on 'To' and 'CC' and use Add Recipients to find the person you wish to email or copy in, or you can start typing a name into the To/ CC fields and the system gives you suggestions.

In the right-hand corner is BCC. Click on this to add another recipient field that you can use when an email address should not be seen by others in the email. It is common practice to use the BCC field when emailing a very long list of recipients, or a list of recipients who may not know each other. This is particularly important when sending to people using their personal email addresses.



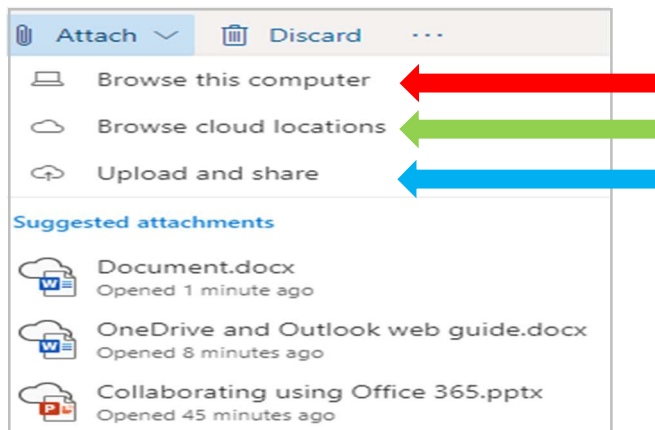
Commands:

Along the top of the email draft are some commands, most of which are found within the ... drop-down. Click on Send once you are happy with your content and recipient list unless you want to attach a document.





ATTACHING DOCUMENTS TO AN EMAIL

To attach a file to an Outlook message, click on 'Attach' and it displays a drop-down box:



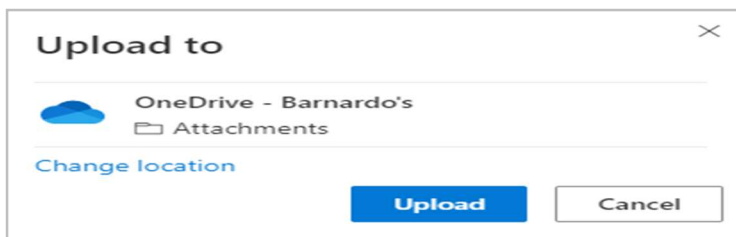
What do these mean?

 Browse this computer – allows you to attach a document straight from your computer's desktop. This will be a **copy** of the document, not the live document itself.

 Upload and share – allows you to upload a document from your computer to OneDrive **and** attaches it to your email from the cloud at the same time.

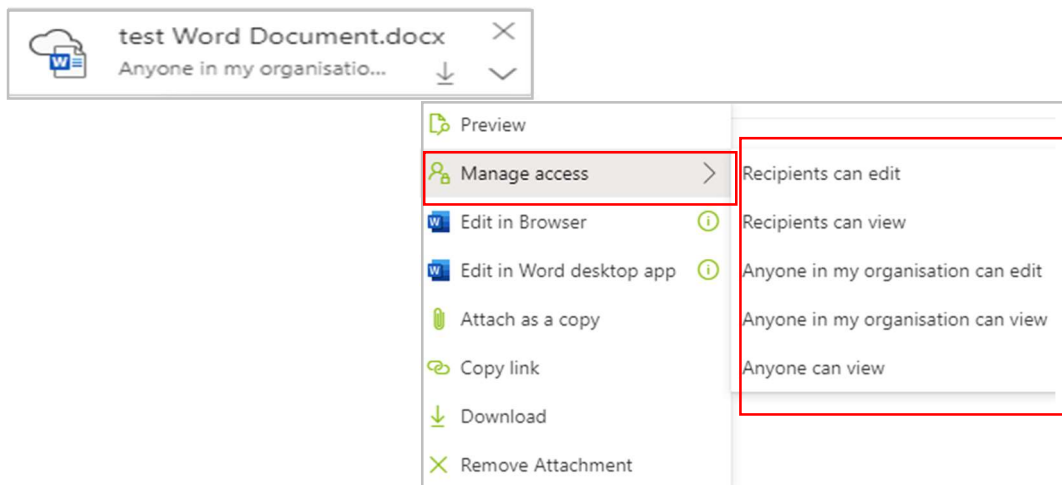
If you choose this option, your file explorer will open for you to select a document; click on your document and press open.

A box will then open asking to upload as below to your OneDrive – if you don't want the document to go into the folder named (e.g., below is Attachments folder), click on 'change location' and choose the correct folder. Then press 'upload'



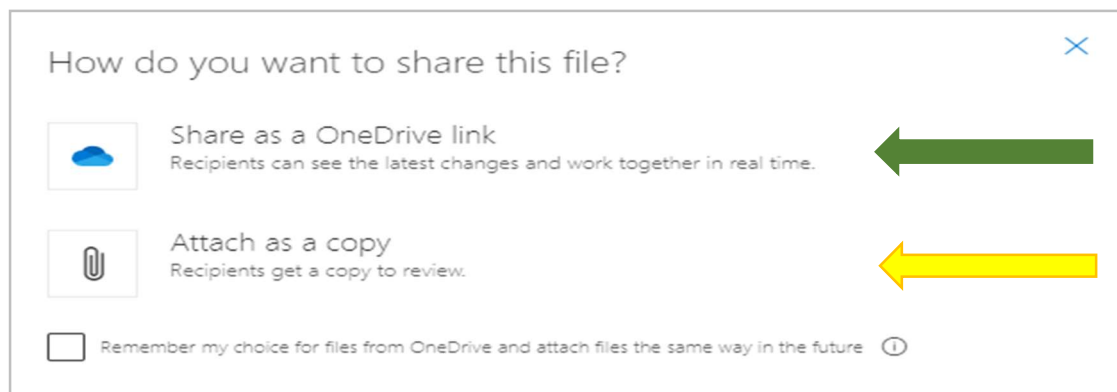
Once done, use the drop-down box on your attachment to perform other actions, including Manage Access.

You can also change your mind and attach it as a copy instead.



The two 'edit' options will allow you to edit your document before you send your email, for example, if you remember something you needed to change. Bear in mind that any changes you make will update the existing copy of the document in OneDrive.

➡ Browse cloud locations – allows you to share documents currently online. It will open a list of your OneDrive documents. Click against the document you want to attach, then it will display Next at the bottom of the page. Click on Next and you get a choice of how to attach:

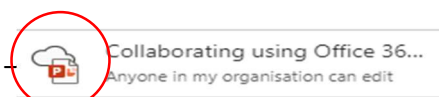


What is the difference?

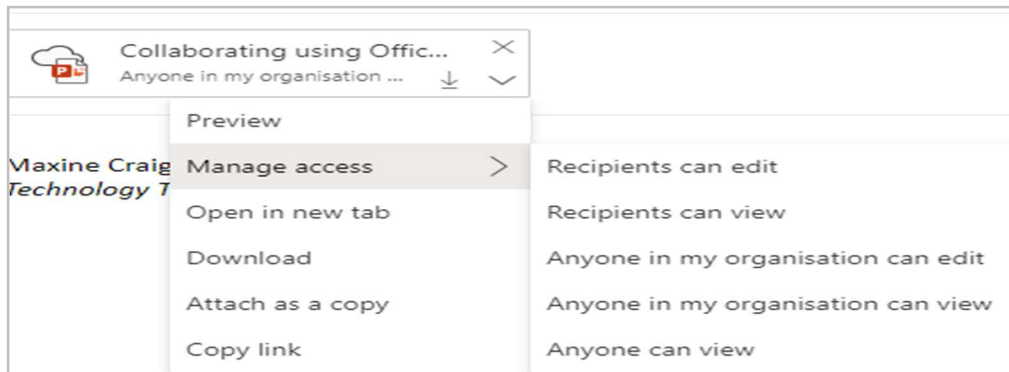
➡ Attach as a copy does take up space on your email because it attaches a physical copy to it. **This is a copy, NOT a live version** so it's important to remember that this means each recipient gets their 'own' copy. Current Outlook limit for file size is 20mb.

➡ Share as a OneDrive link takes up **no space** on your email because it simply attaches the link to your **LIVE** document. This way, your recipients can collaborate on it in real time. The attachment size limit for OneDrive files is 2GB.

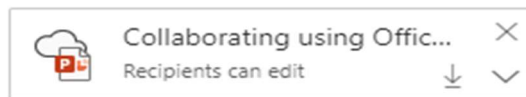
To clarify, it displays your attachment with a cloud icon



If you have chosen 'share as a OneDrive link', you can use the drop-down box to manage its access before you send the email.

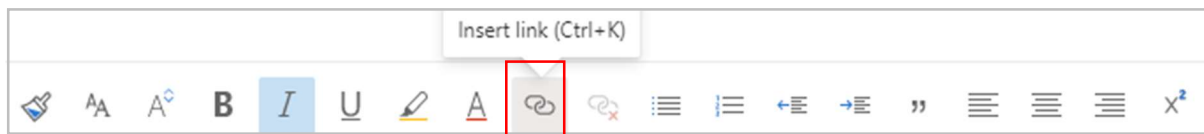


For example, choose 'recipients can edit' and the permission under the document name will amend itself:

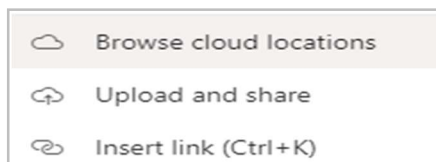


As you can see, you can also easily switch to 'attach as a copy' if you change your mind.

However, if you wish to insert a hyperlink to your document into the body of your email instead, you need to use the 'Insert Link' function that appears in the lower taskbar on your email draft.



You will get a box asking how to attach:



Use 'browse cloud location' to find your document, click onto the document and click on Next.

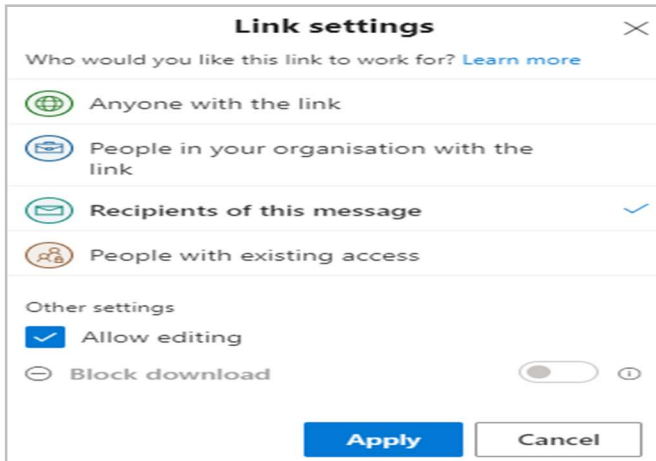
Outlook will automatically replace the URL (the long 'http' file path) with the name of the file and the corresponding icon in the body of your email.

Click onto the link now showing in your email (as with test excel below) and you can select some options:



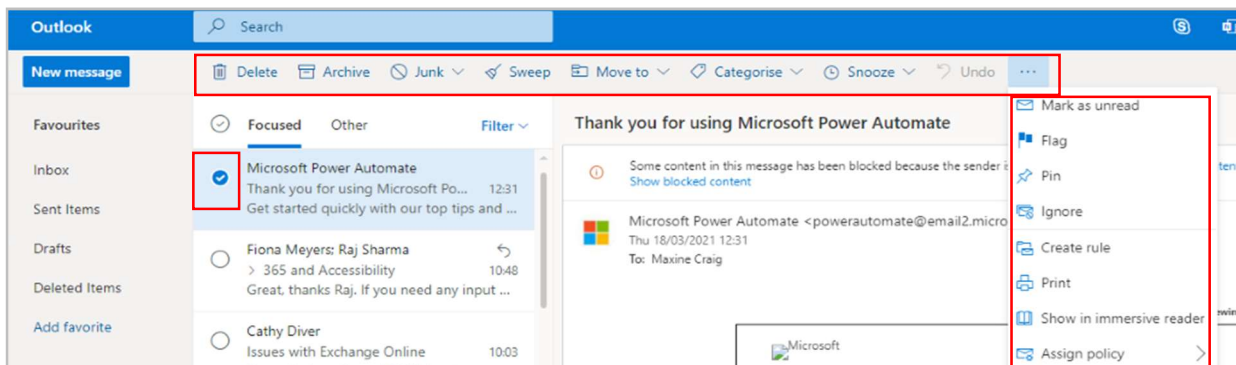
Attach as a copy - switches it back to a physical attachment.

Where the example above reads 'People in Barnardo's with the link can edit', you can click on the arrow to amend access to your document link. These options are the same as your OneDrive sharing protocols, except 'Recipients of this message' which only appears via an email sharing route.



RECEIVING YOUR EMAILS

Once you click on the button against an email you have received, another line of commands appears, including several inside the ... drop-down box as shown below.



Delete and Archive:

Choosing one of these will immediately move the email into the delete or archive folder; it does not ask 'are you sure'. If you move an email by accident, don't panic- just go into the 'delete' or 'archive' folder, find the email you moved in error, and drag it back into the inbox. For Archive, there is actually no difference in the retention period of emails either within the Archive folder or Inbox (including subfolders); there is a default 2yr retention period across all emails in a user's mailbox.

REPLYING TO EMAILS

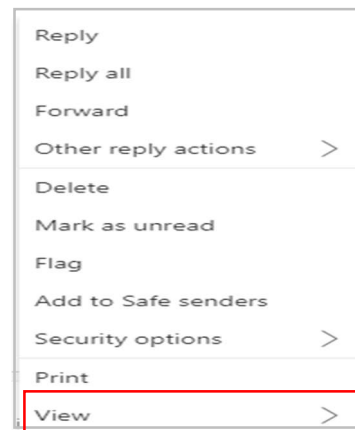
When you need to send a reply to an email you have received, there are some commands in the top right of the open email:



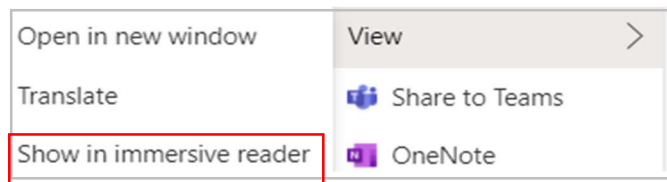
Reply – reply to the sender of the email only

Reply all – reply to all recipients

Forward – send the email on to another person

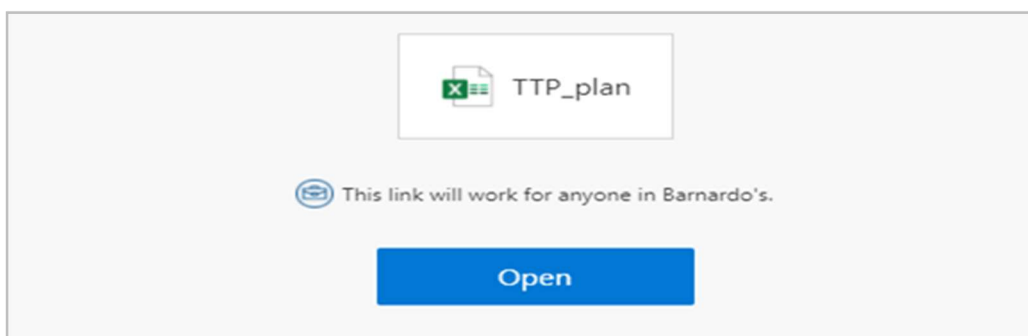


Within the View option, you will find an option to show the email in Immersive Reader, a useful accessibility tool that enlarges text, changes background colour, or reads it for you.



RECEIVING AN EMAIL WITH A SHARED DOCUMENT

If a document is shared with you, you get an email that says who has shared what file with you. You can either click on the actual document icon or the 'open' button to access the document. Just remember, this takes you to the live document, not a copy. That is fine if your colleague has shared it for you to collaborate!



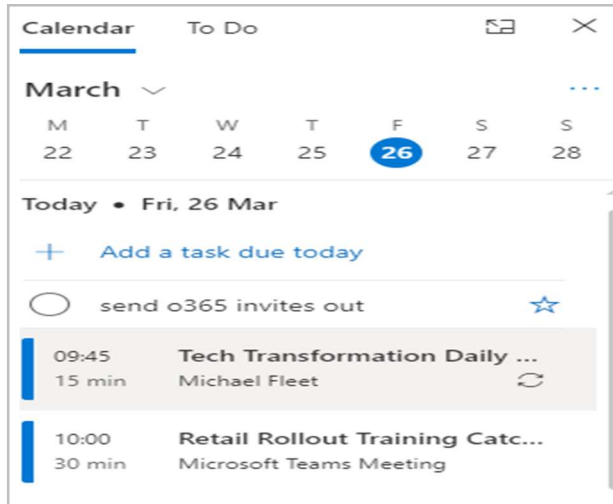
Please don't be nervous about opening and potentially working on someone else's live document. OneDrive has Version History built in, so if you accidentally type over something, you or your colleague can revert to a previous version (see [OneDrive Guide](#) for further information). Find it on Inside Barnardos 'Microsoft 365 Training and Guidance' page.

When you open this, the sender will be informed by email that you have done so. If you make changes, the sender gets told this and can go into the document to look at your comments or changes.

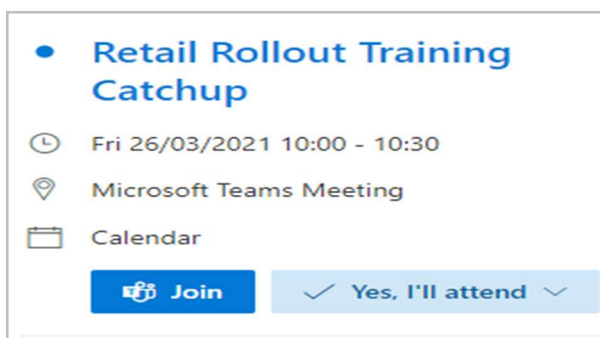
My Day



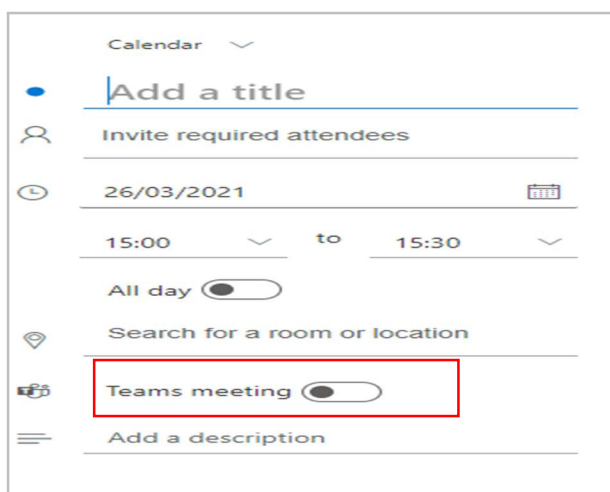
You can look easily at your calendar from within your email screen via this My Day icon



Click onto any meeting showing in this calendar pane and you can join straight from your Outlook email screen:

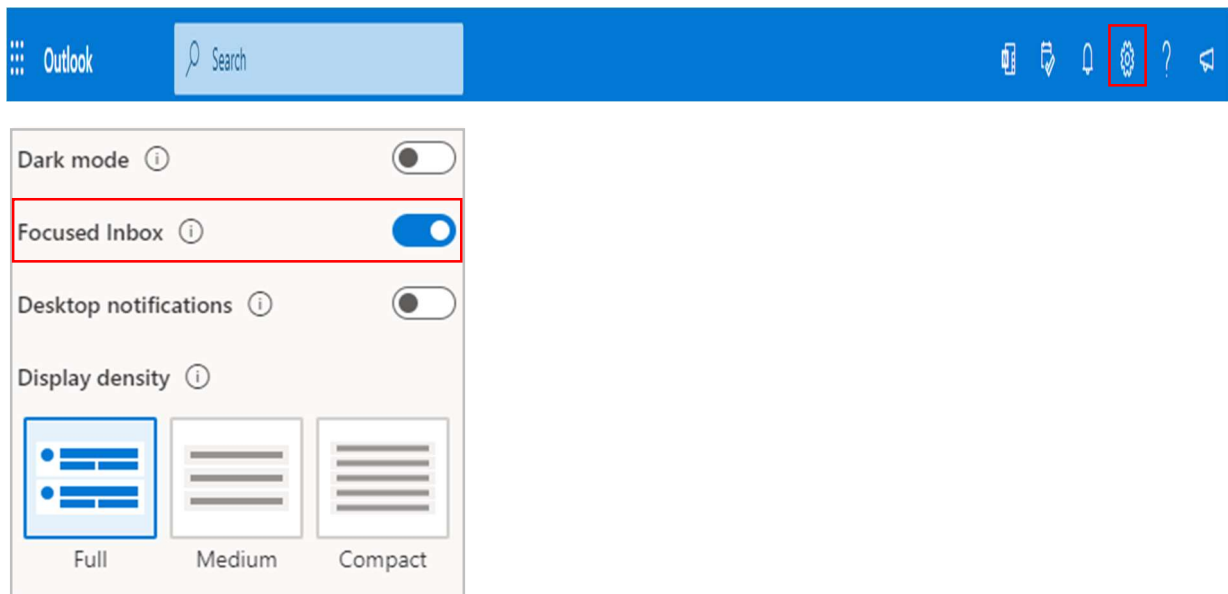


If you click onto 'New event' at the bottom, you can even set up a meeting without leaving your email screen. As with any Outlook meeting set-up, you can switch the appointment to become a Teams meeting.



Focused inbox

This sorts your inbox into Focused and Other, but you can switch this off using the toggle button as seen above under Settings.

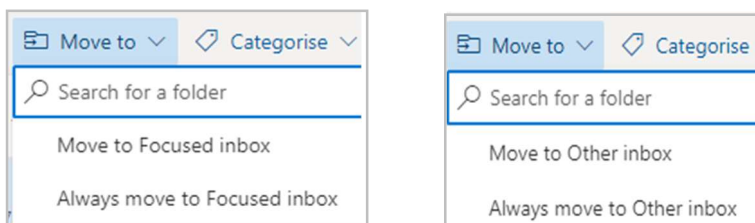


The emails that are auto-delivered into the Other folder tend to be from 'non-people' or sometimes to large groups, so emails generated by Workplace, generic emails from Microsoft, etc.

It's important to remember that Other is not the same as the Junk folder, it is just how Outlook separates those emails that may be less immediately important to you.

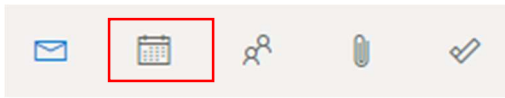
Outlook 'learns' from your habits too so if you do move emails from the same sender from Focused into Other, it learns that you want put those into Others and vice versa.

If you select an email in Other and click on Move To in the actions bar along the top, you can make sure that emails from a particular source can always be delivered into Focused.



CALENDAR

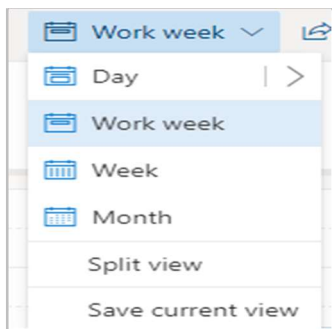
You can click onto the calendar along the bottom left of your Outlook screen (below your folders)



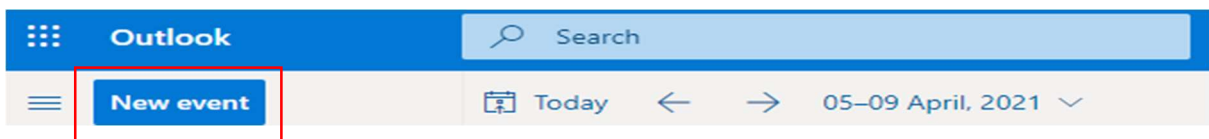
Your calendar will then be displayed in whichever 'view' has been selected - usually a week.

View

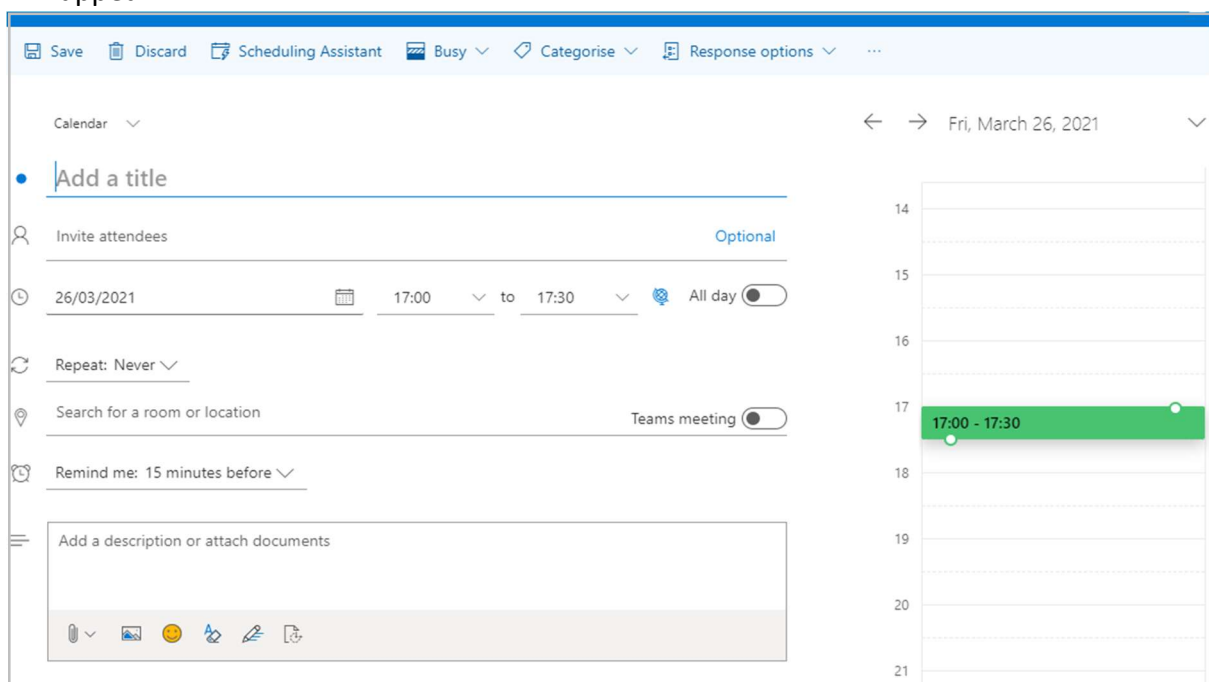
In the top right corner you can amend this viewing choice by choosing the drop-down box:



New Event



To create a new appointment or meeting, click on the New Event button. The creation box will appear

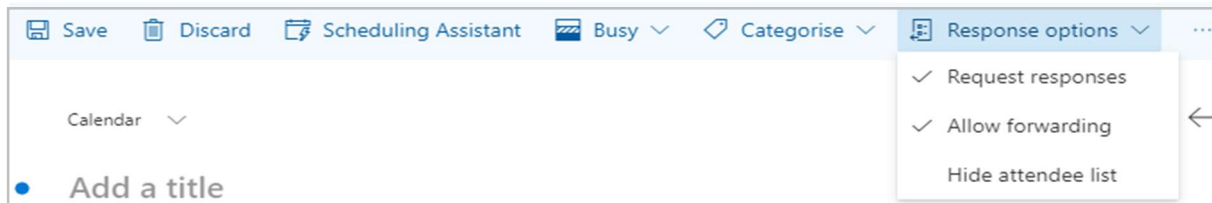


Creating an appointment:

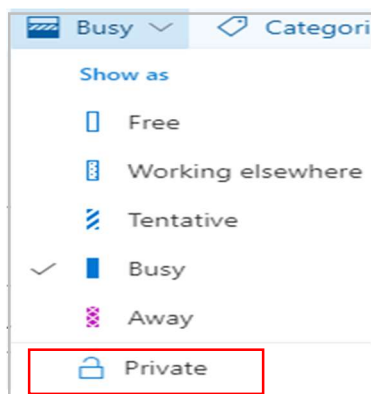
If you do not use the 'invite attendees' option, this will remain an appointment sitting in your calendar to remind you of a task or report you have to do, or an appointment you have to attend.

However, you can easily change an appointment into a meeting. Click onto the appointment and select Edit. Add your attendees and choose Teams meeting if that is how you wish to meet. It will now be a meeting in your calendar.

There are some commands along the top of your open event window.

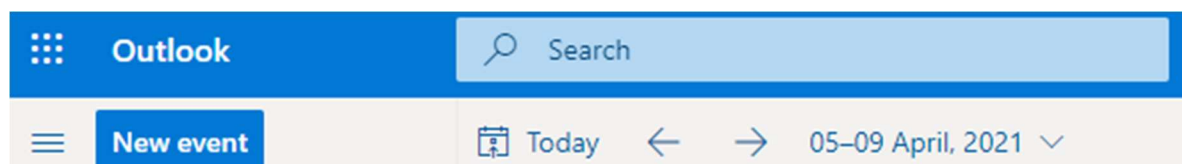


For appointments within your own calendar only, the main one will be Busy with which you can set yourself as free, busy, away, etc, and possibly Categorise. You can also make your appointment **private** so it will not show anyone else the name or details of the event. The other commands are relevant to Meetings and will be explained in that section of the guide.

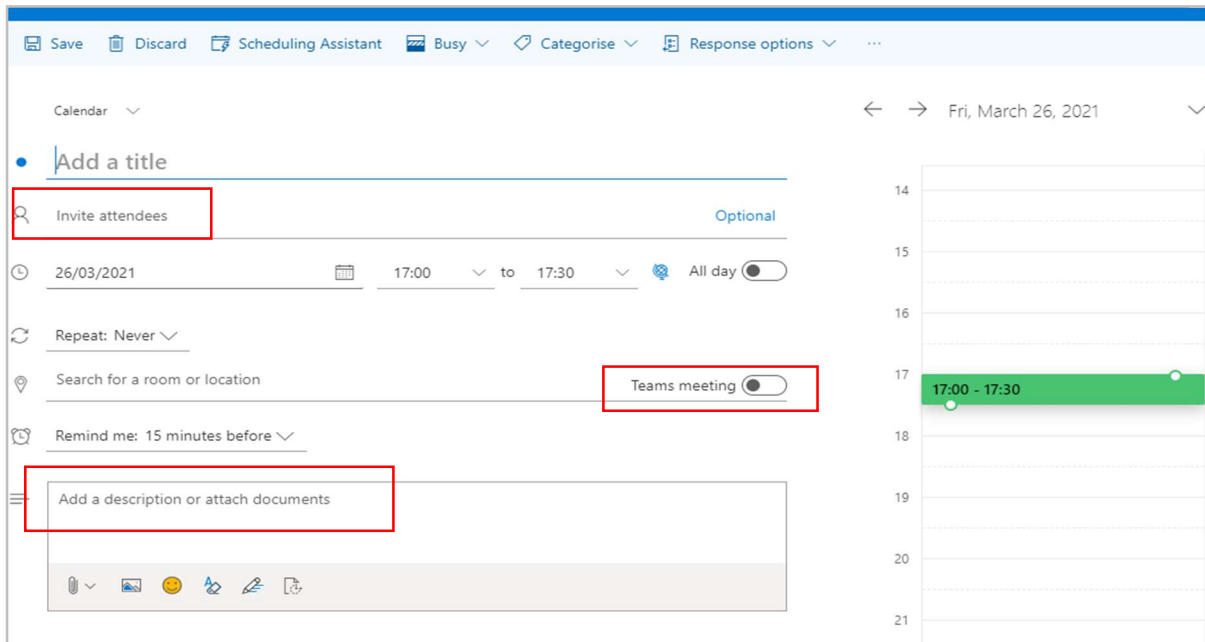


Creating meetings

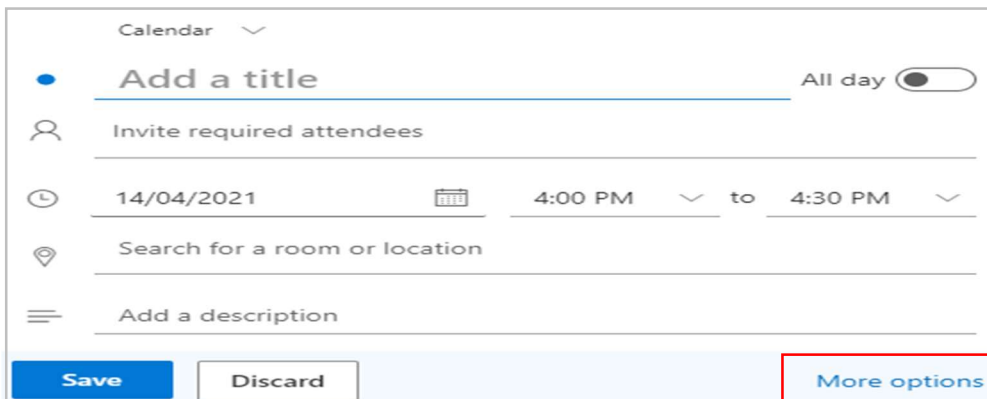
Use the New Event button



Which will bring up the same creation box as with appointments, but for meetings you should invite attendees.



Note that you can also use a 'quick compose' approach and simply click onto a free time in your calendar, which will then bring up a small box for you to create an event or meeting - as below. Clicking onto More Options produces the larger event box shown above.



- Name your meeting by adding a title
- Invite your attendees - if you have people who are not mandatory, click onto Optional and it will divide your attendee field into Required and Optional.
- Remember to set your date and time – the open event will default automatically to current date and time, and it is easy to forget to amend this.
- Choose Repeat if required – Custom lets you choose a more complicated option, e.g. if your meeting needs to be on Wednesdays and Thursdays every week.



- Either search for a room or turn this into a Teams meeting by switching the Teams button. Making it a Teams meeting will insert a meeting link automatically into the invitation, you do not have to search manually for the link.
- Remind me – you can set a reminder for your meeting, ranging from at the time of the event through to a week before, including 5 minutes, 15 minutes, 1 hour, 1 day before. Or you can set up an email reminder for Outlook to email you at a chosen period before your meeting.
- Don't forget to add a description of the meeting to let your attendees know what the agenda will be, etc. Add documents that are relevant to your meeting using the same approach as with email attachments.

