Office 365 Series

Faculty & Staff

Office 365 Outlook Web App: Advanced

Quick Reference Guide

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California State University, Bakersfield

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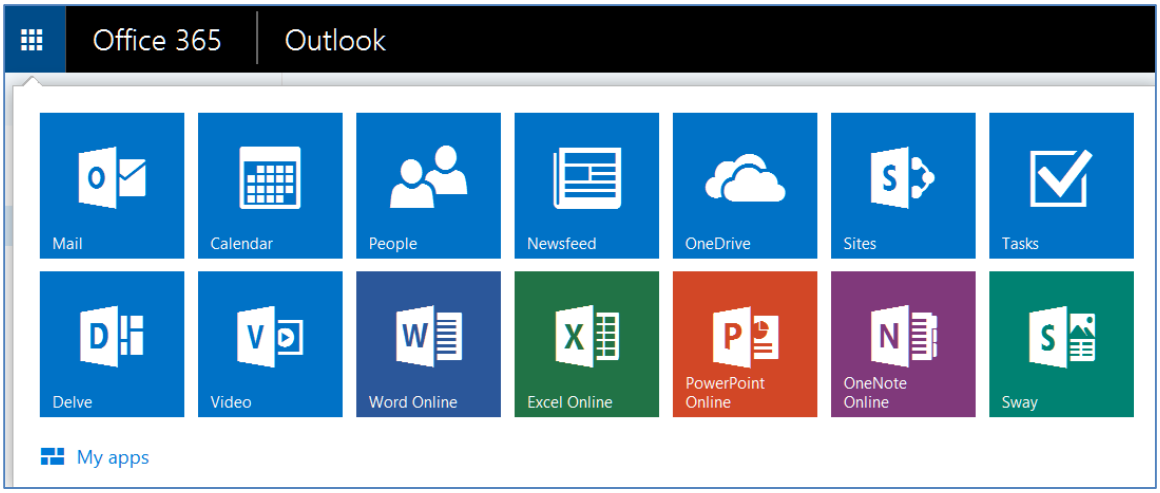
1.0 Introduction

Office 365 is the official email system for CSUB. Office 365 allows you to send and receive messages, schedule appointments, manage tasks, work with your address book, and organize your mailbox. With Office 365, you can access your email and calendar from any place at any time.

1.1 Office 365 Overview

Office 365 offers a full suite of applications for increasing your productivity. Using Office 365, you have all your mail, appointments, documents, and files all in one place. The best news is it is accessible anywhere you have an Internet connection. You can move quickly from app to another using the App Launcher, .



Summary of Office 365 Applications and Functions

App	Function
Mail (Outlook)	Send and receive email
Calendar	Schedule appointments and meetings
People	Maintain your contacts or address book
Newsfeed	Post and reply to online conversations in your organization
OneDrive	Store and retrieve documents and files in a secure cloud
Sites	Create and share a workspace for collaborative projects
Tasks	Create To Do lists with due dates and much more
Delve	Identify documents of interest based on shared documents
Video	Upload, share, and play videos in your organization
Word Online	Create and edit documents online
Excel Online	Create and edit spreadsheets online
PowerPoint Online	Create and edit presentations online
OneNote Online	Capture and organize ideas, notes, etc in one place
Sway	Create and share interactive documents and presentations

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1.2 About this Guide

Office 365 offers many applications for your use. However, this guide will focus on advanced tasks using the Outlook features. The topics covered include the management of your:

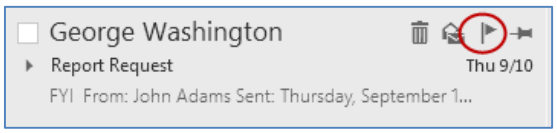
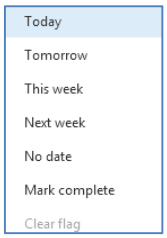
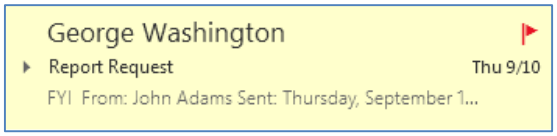
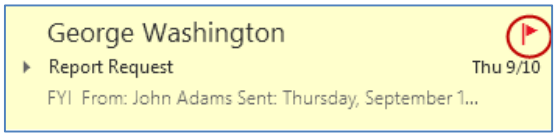
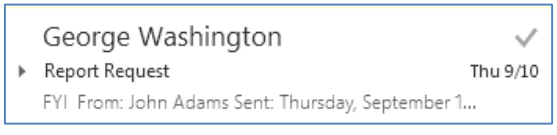
For more information about the Office 365 basic functions, see the Outlook Web App Basics guide. For information on other Office applications, see Office.microsoft.com.

2.0 Working with Messages

With Office 365, you can work with your messages in a number of ways. You can flag messages for follow-up, change the importance level, request delivery and read receipts. You can filter, arrange, and sort messages. Additionally you can organize your messages in folders.

2.1 Flagging Messages for Follow-up

Some messages may require additional action on your part. When this happens, you can flag these messages for follow-up. Your flagged messages will appear in your To-do List.

1. To begin, • Hover over the email you want to flag • Right-click on the flag	
2. From the menu, make your selection *Notice that right-clicking the Flag lets you change or remove a flag and set a date reminder for the flag.*	
3. Your flagged email appears in your Inbox. *Notice that the email and flag changed colors.*	
4. To complete a flagged email, click the flag	
5. The flag changes to a check mark indicating completion and the email changes color.	

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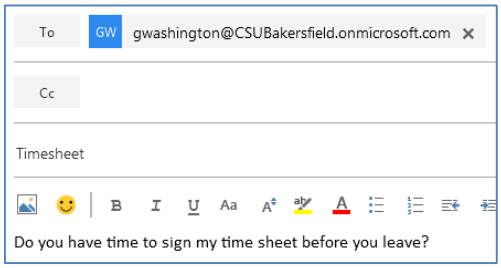
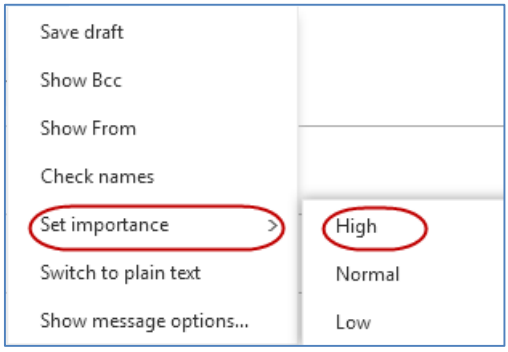
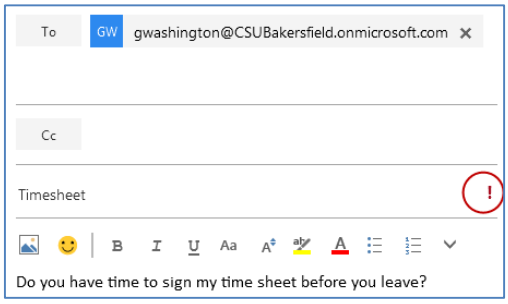
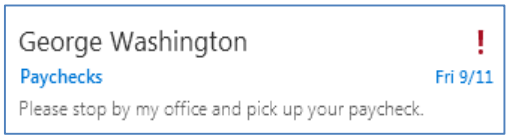
2.2 Changing the Importance Level

At times, you may need to send a message and indicate its importance. Outlook allows you to send messages as normal (the default), low importance, and high importance. Low importance messages will display a blue down arrow. High importance messages will display a red exclamation point.

1. Create your email	
2. On the **Navigation bar**, click the Ellipsis button	
3. From the menu, • Click **Set importance** • Click **High Importance, Normal,** or **Low Importance**	
4. Notice that the selected importance level is added to your email.	
5. Click **Send**.	
6. If you selected High Importance, the email will appear in the recipient's Inbox with a red exclamation point.	

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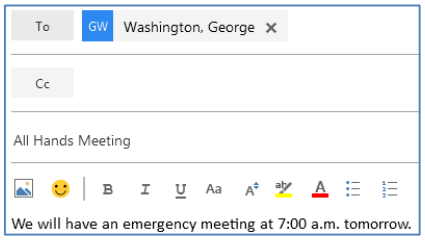
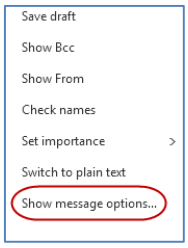
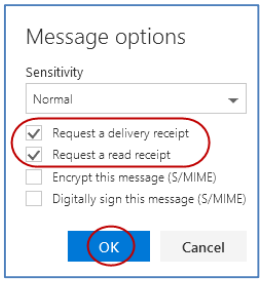
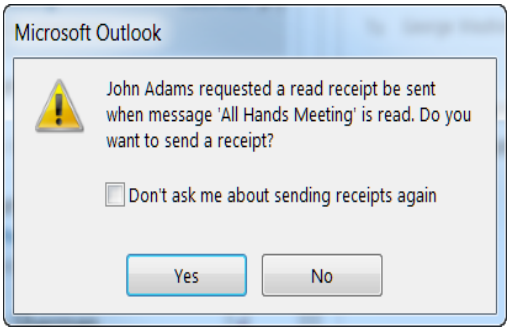
2.3 Requesting Delivery and Read Receipts

To ensure that your recipient received, read, or both, you can request delivery and read receipts. A delivery receipt shows the date and time your email reached the recipient's mailbox. A read receipt shows the date and time the recipient opened your email. The delivery and read receipts will appear in your Inbox.

1. To begin, create your email	
2. On the **Navigation bar**, click the Ellipsis button	
3. From the menu, click **Show message options**	
4. On the Message Options menu, • Check **Request a delivery receipt, Request a read Receipt,** or **both** • Click **OK**	
5. Click **Send** to send your message.	
6. When the recipient opens your message, they will receive a message indicating your request for a receipt. ***Please note:*** *You will receive a receipt only if the recipient opened the email as opposed to viewing it in the preview pane **AND** if the recipient chose to send a receipt.*	
7. If the recipient chose to send a receipt, the receipt will appear in your Inbox.	

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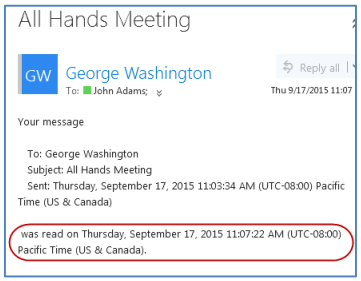
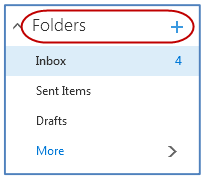
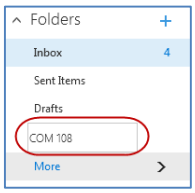
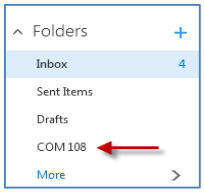
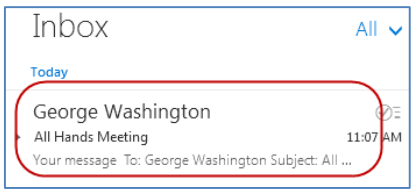
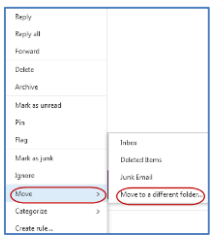
8. The receipt contents will show the date and time information.	

2.4 Using folders

Folders allow you to organize your messages by grouping related items together. For example, you can create folders for your classes, i.e. COM 108 or your projects, i.e. Office 365.

1. From the folder pane, • Hover over **Folders** • Click the **+**	
2. When the empty box appears, • Enter your folder name • Press Enter on your keyboard	
3. In the Folder pane, your new folder appears	
4. To move messages to your new folder,right-click the message you want to move	
5. From the menu, • Click **Move** • Click **Move to a different folder…**	

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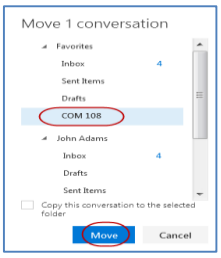
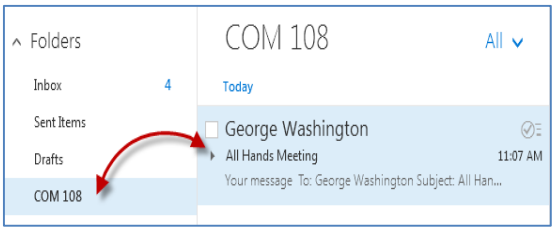
6.	On the Move 1 conversation, • Select a folder • Click **Move**	
7.	Your message is moved from your Inbox to the selected folder. *If you checked, copy this conversation to the selected folder, the message is copied to the folder, leaving the original in your Inbox.*	

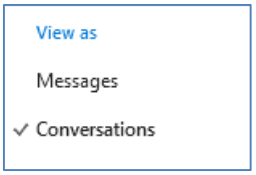
2.5 Sorting Messages

With Office 365, you can change the sort order of your messages. For example, you sort your messages by date, sender, recipient, subject, and more. This can be helpful in finding messages quickly.

1.	From your Inbox, click the **Inbox More** button,	
2.	From the menu, make your selection. *By default, your messages are sorted by date in descending order.*	

2.6 Arranging Messages

With Office 365, you can change the arrangement of the messages in your Inbox. For example, you view your messages as conversations or as messages. When you view your messages as conversations, related messages are grouped together. This can be helpful in following a conversation thread by thread.

1.	From your Inbox, click the **Inbox More** button,	
2.	From the menu, make your selection. *By default, messages are organized as conversations.*	

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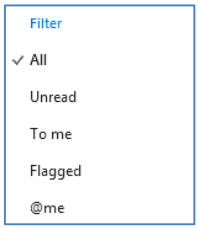
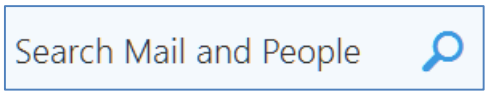
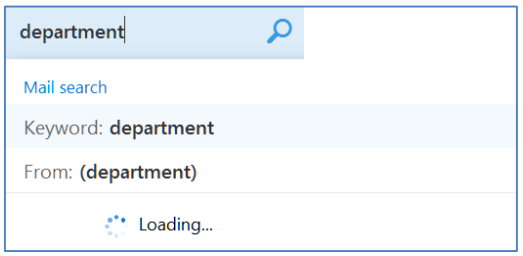
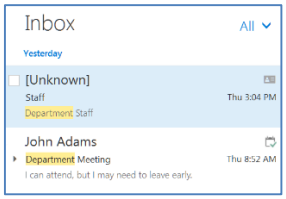
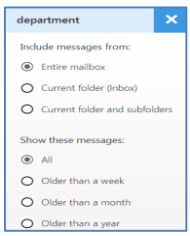
2.7 Filtering Messages

With Office 365, you can filter your messages. For example, you set your filter to show only unread messages or ones addressed to you. This can be helpful in locating messages faster.

1.	From your Inbox, click the **Inbox More** button,	
2.	From the menu, make your selection. *By default, your Inbox shows all your messages.*	

2.8 Searching for Messages

Searching for messages is a quick way to filter through your emails and locate the desired message. You can use this tool from your Inbox.

1.	On the Navigation bar, click **Search Mail and People**	
2.	To search for a message, • Enter your search criteria in the search box. • Click the Search button, As you type, search criteria will appear. You can keep your original criteria or select one of the suggestions.	
3.	The content pane will show your search results.	
4.	You can refine your results by make selections on the folder pane. For example, you can search your entire mailbox or current folder. You can show all messages or ones that are older than a week.	
5.	To remove your search criteria click the X.	

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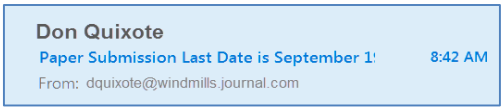
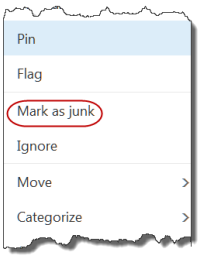
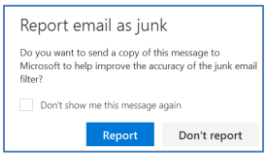
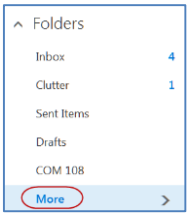
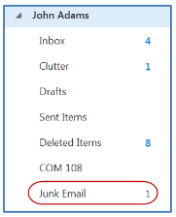
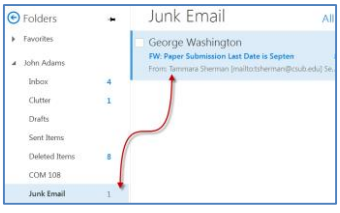
2.9 Blocking Junk Mail

Office 365 allows you to block email from senders. When you block a sender, Office 365 places the email in your Junk Email folder. Office 365 will place certain types of messages in your Junk Email folder, as well. This level of protection is in addition to the SPAM processing performed by CSUB.

1.	From your Inbox, right-click on the sender's email you want to block	
2.	From the pop-up menu, click **Mark as Junk**	
3.	On the Report email as junk, make a selection.	
4.	To view your Junk Email folder, click **More** on the folder pane	
5.	Click **Junk Email**	
6.	Outlook moves the message to the Junk-Email folder. The sender's email address is added to your Blocked Senders list in Office 365.	

3.0 Working with your Personal Contacts (People)

The global address book contains the email addresses for people at CSUB. However, you may communicate regularly with people, who are external to CSUB. You can add the contact information for these people to your personal address book. Additionally, you can create groups or distribution lists for groups of people from inside and outside of CSUB.

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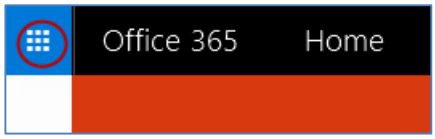
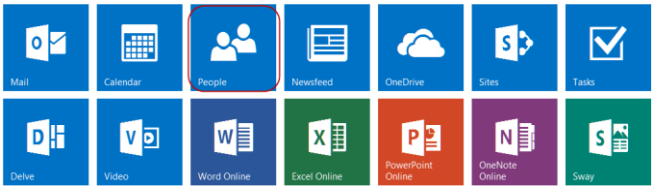
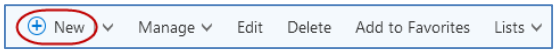
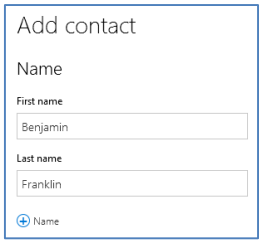
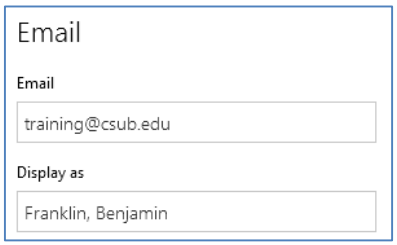
3.1 Accessing the People App

To access the People app,

1. Click the **App Launcher** button, .	
2. On the Apps page, click the **People** button	

3.2 Creating Contacts

You can add contact information for people outside of CSUB to your personal address book. These instructions cover the steps to add a person to your Contacts.

1. From the **Navigation bar**, click New	
2. When the **Add contact** window opens, • In the First Name, enter the person's first name • In the Last Name, enter the person's last name	
3. Under **Email,** • In the **Email**, enter the person's email address • In the **Display as**, enter the person's name • (optional) If desired, you can scroll down and add the person's phone number, address, and other information.	
4. To save your entries, click **Save**	

3.3 Updating Contacts

These instructions cover the steps to update a person in your address book.

1. To update a contact, click the desired contact	

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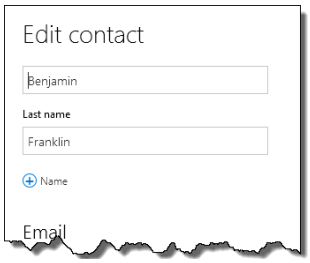
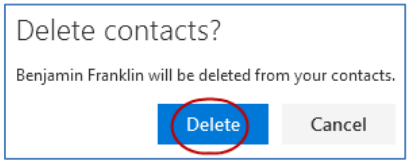
2.	From the Navigation bar, click **Edit**	
3.	Make your changes.	
4.	When you are satisfied, click **Save**	

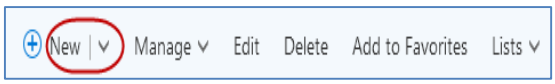
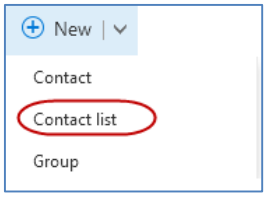
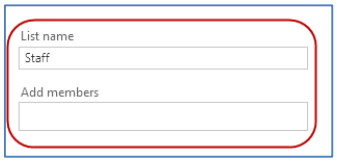
3.4 Deleting Contacts

These instructions cover the steps to add a person to your address book.

1.	To delete a contact, select the desired contact	
2.	On the **Navigation bar**, click **Delete**	
3.	On the **Delete contacts?,** click **Delete**	

3.5 Creating Contact Groups

These instructions cover the steps to create a contact group.

1.	From the **Navigation** bar, click **New**	
2.	From the menu, click **Contact list**	
3.	On the **Contact Group** window, • In the **List** name, enter a name for the contact list • In the **Add members,** start typing a name	

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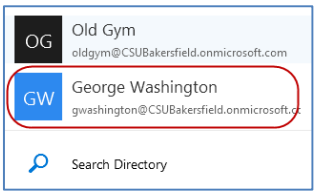
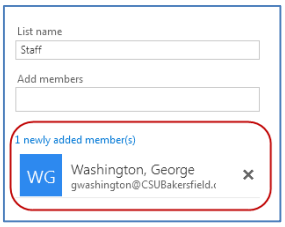
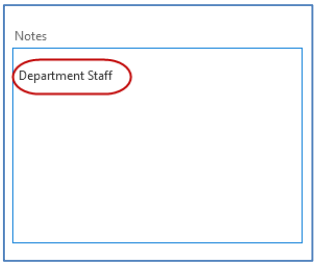
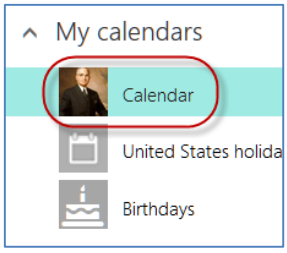
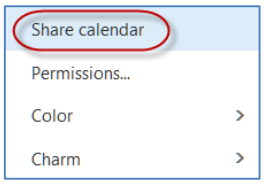
4.	From the search results, select the member to add or click Search Directory	
5.	The new member is added. Continue clicking in the **Add members** box to add more members.	
6.	(Optional) In the **Notes** window, • Add any notes	
7.	When finished, click **Save**	

4.0 Working with Calendars

The Outlook Calendar offers flexibility and ease in managing your calendars. This session focuses on advanced calendar functions, such as sharing your calendar, setting permissions, and delegating access.

4.1 Sharing your calendar

You can share your calendar with other people at CSUB. You also can specify how much of your calendar to share.

1.	In the folder pane and under **My Calendars**, right-click the calendar you want to share.	
2.	From the menu, click **Share Calendar**	

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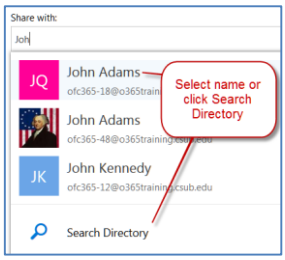
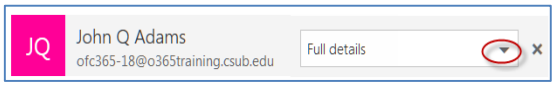
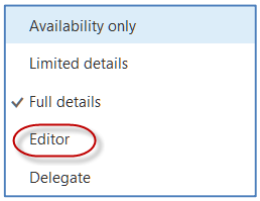
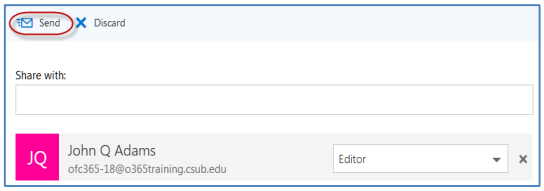
3. In the **Share with**, • Start typing the person's name • Select the name from the drop down or click Search Directory • Repeat for additional people	
4. To set the permission, click the down arrow	
5. From the menu, click the desired permission level *For more information on Sharing Permissions, see Section 4.1 Sharing Permissions*	
6. Click **Send**	

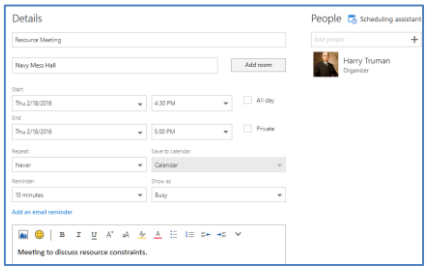
4.2 Sharing Permissions

When sharing your calendar, you can specify the level access to your calendar information. The table below summarizes their descriptions.

Permissions	Descriptions
Availability Only	Provides free and busy information
Limited Details	Provides free, busy, and title of event
Full Details	Provides free, busy, title, location, attendees, and description
Editor	Provides read full details and create capability
Delegate	Provides the ability manage another person's calendar on behalf of the person

4.3 Creating private appointments or meetings

On occasion, you may need to create a private appointment or meeting.

1. Create the appointment or meeting as usual.	

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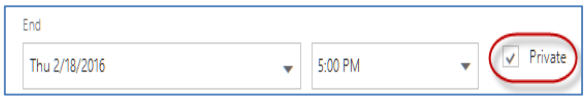
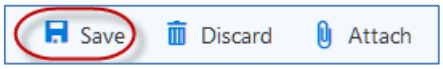
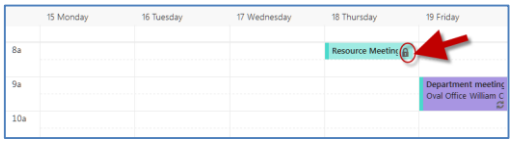
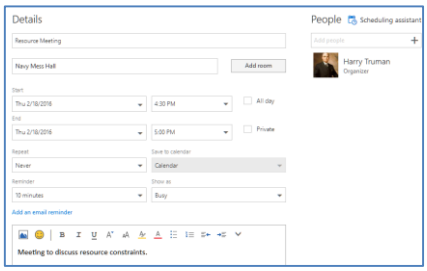
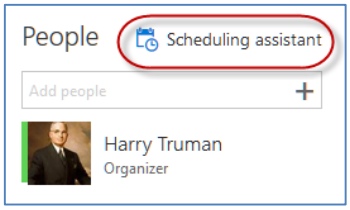
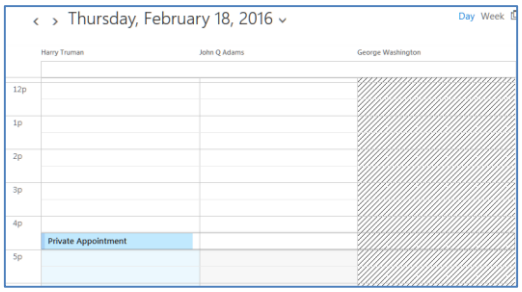
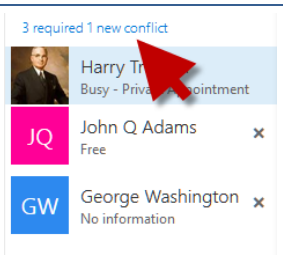
2. To right of the end time, click **Private**	
3. Click **Send**	
4. The appointment or meeting will appear on your calendar with a lock icon, indicating it as private.	

4.4 Using the Scheduling Assistant

At times, you will need schedule meetings with many attendees. The Scheduling Assistant can help you find times that works for most attendees.

1. Create the meeting as usual.	
2. On the left, click **Scheduling Assistant**	
3. The Scheduling Assistant opens showing the availability of the attendees'	
4. Above the Attendees, it will indicate if there is a conflict.	

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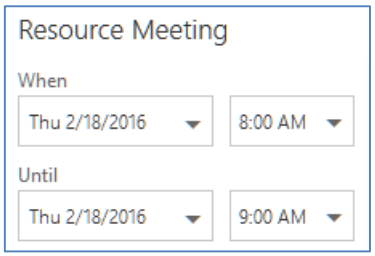
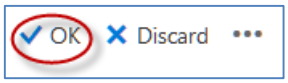
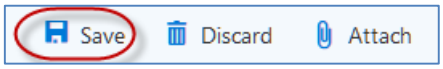
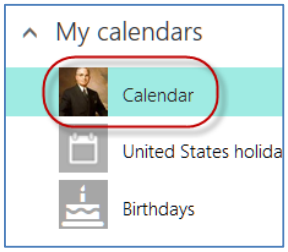
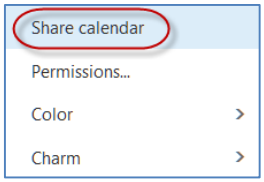
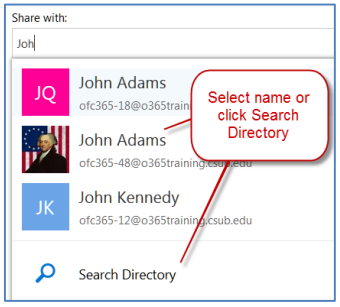
5.	From the scheduling screen, change the date and times using the Start and End Times boxes to eliminate the conflict.	
6.	To close the Scheduling Assistant, click **OK.**	
7.	Click **Send**	

5.0 Working with Delegated Access

Depending on your work environment, you may need to give others permission to receive items and respond to items on your behalf. Outlook refers to this process as delegating access. You can delegate access to your calendar, tasks, Inbox, Contacts, and Notes.

5.1 Granting Delegate Access (start here)

These instructions will assist you granting delegate access to another person.

1.	In the folder pane and under **My Calendars**, right-click the calendar you want to share.	
2.	From the menu, click **Share Calendar**	
3.	In the **Share with**, • Start typing the person's name • Select the name from the drop down or click Search Directory • Repeat for additional people	

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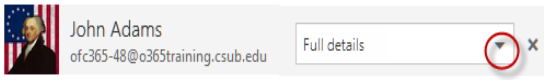
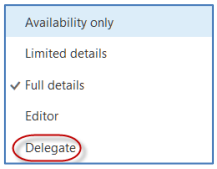
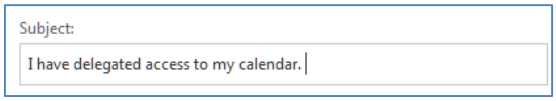
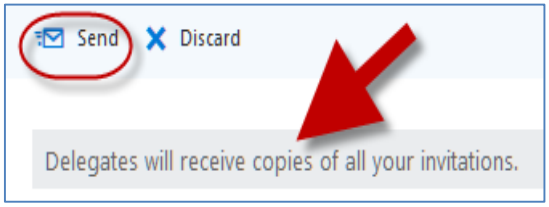
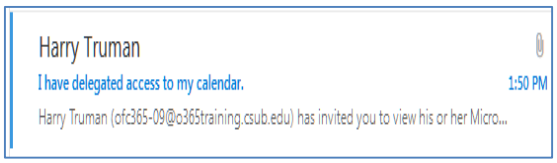
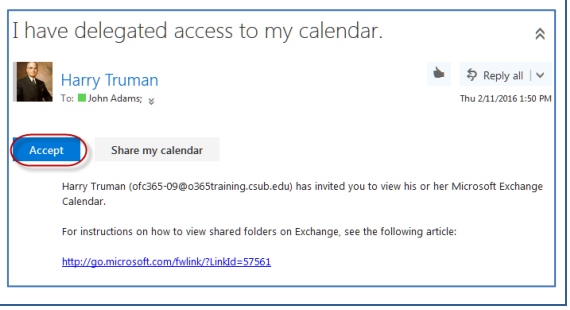
4. To set the permission, click the down arrow	
5. From the menu, click the **Delegate**	
6. (Optional) If you want the delegate to see your private appointments and meetings, check the box.	
7. (Optional) In the Subject, type your message	
8. Notice the information message about your delegate receiving copies of your meeting invitations. • Click **Send** *The delegate will receive an email confirming the permissions given.*	

5.2 Opening Delegated Items

Depending on your work environment, you may need to give others permission to receive items and respond to items on your behalf. Outlook refers to this process as delegating access. You can delegate access to your calendar, tasks, Inbox, Contacts, and Notes.

1. From your Inbox, open the delegate access invitation email	
2. From the preview pane, **Accept**	

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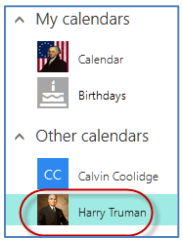
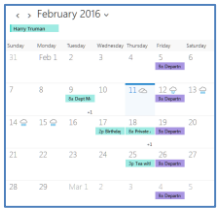
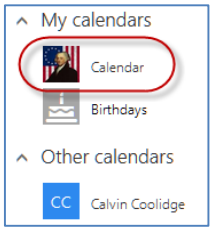
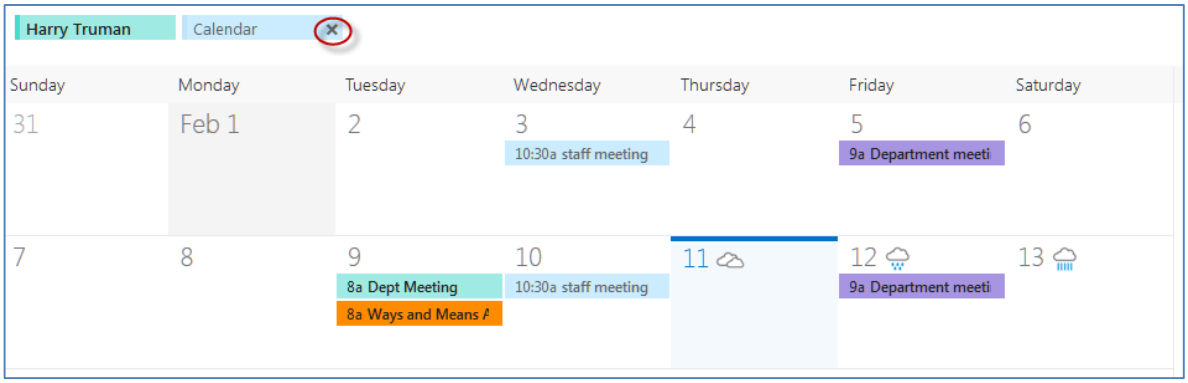
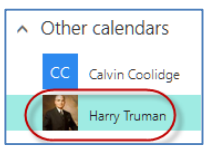
3. When click Accept, your calendar opens. The delegated calendar will be located under **Other Calendars** in your folder pane. • Click the person's name, such as Harry Truman to open their calendar	
4. Their calendar appears.	
5. To return to your calendar, check your calendar under **My Calendars.**	
6. You will see both calendars as overlays. To close a calendar, click the **X** for one you want to close.	

5.3 Creating Appointments on Shared Calendars

Creating appointments or meetings on Shared Calendars works the same as for your calendar. The difference between the two is you will need to select the calendar first.

5.3.1 Scheduling an Individual Appointment

An individual appointment creates a single entry on your calendar for an event, such as a meeting, conference, etc. These instructions will help you with creating an individual appointment.

1. Under **Other Calendars** in your folder pane.	

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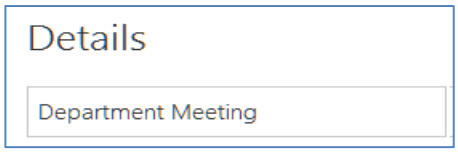
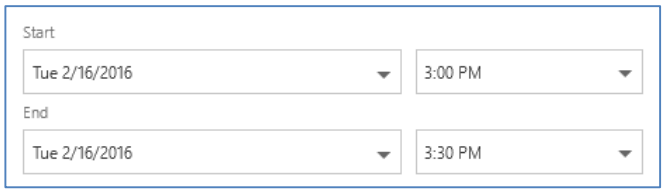
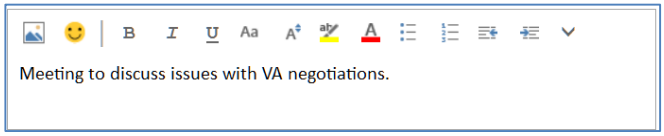
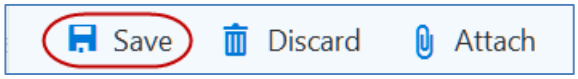
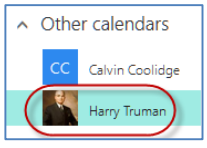
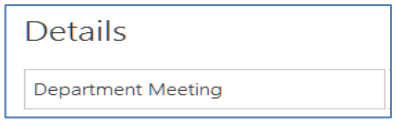
	• Click the person's name, such as Harry Truman to open their calendar	
2.	From the Navigation bar, click **New**	
3.	In the **Details**, type subject of your appointment	
4.	In the **Add a Location** field, type the location for your appointment	
5.	In the **Start time**, • Use the down arrow to select a date • Use the down arrow to select a time In the **End time**, • Use the down arrow to select a date Use the down arrow to select a time	
6.	In the body, type the appointment information, such as purpose and the agenda.	
7.	When satisfied, click the **Save** button.	

5.3.2 Scheduling a Recurring Appointment

A recurring appointment creates multiple entries on your calendar for a single event, such as monthly department meetings, vacation, etc. These instructions will help you with creating a recurring appointment.

1.	Under **Other Calendars** in your folder pane. • Click the person's name, such as Harry Truman to open their calendar	
2.	From the Navigation bar, click **New**	
3.	In the **Details**, type subject of your appointment	

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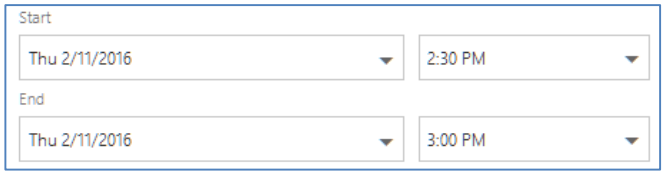
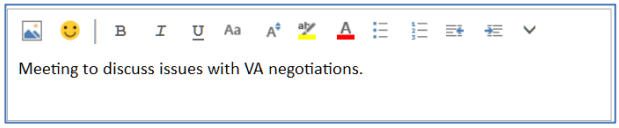
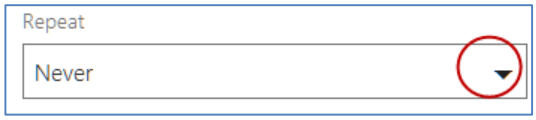
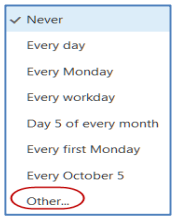
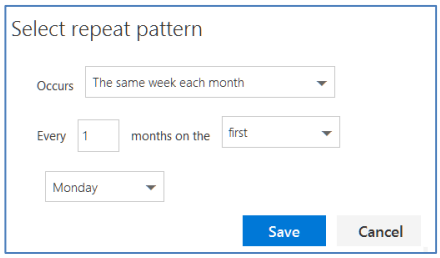
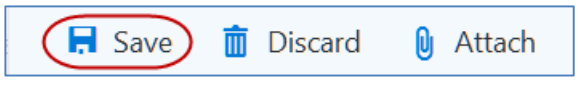
4. In the **Add a Location** field, type the location for your appointment	
5. In the **Start time**, • Use the down arrow to select a date • Use the down arrow to select a time In the **End time**, • Use the down arrow to select a date Use the down arrow to select a time	
6. In the body, type the appointment information, such as purpose and the agenda.	
7. In the Repeat, click the down arrow	
8. From the menu, • Make your selection or click Other… to specify your recurrence pattern	
9. On the **Select Repeat Pattern**, • In Occurs, use the down arrow to select a frequency, such as *The same week each month* • In the Every, select 1 for every month • In the next box, specify the week of the month, such as *first* • In the next box, specify the day of the week, such as Monday • Click **Save**	 *This example creates a meeting for the first Monday of every month.*
10. For the recurrence range, • In the From, use the date selected or select a different date • (Optional) In the To, use the down arrow to select an ending date	
11. When satisfied, click the **Save** button.	

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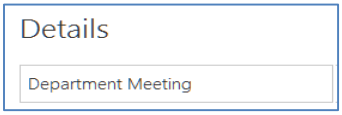
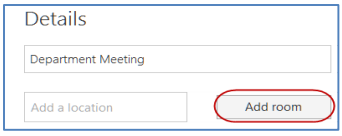
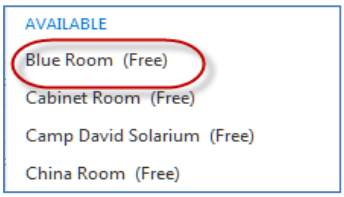
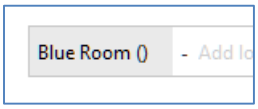
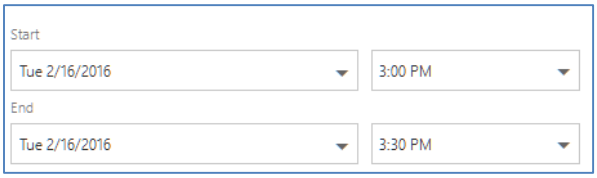
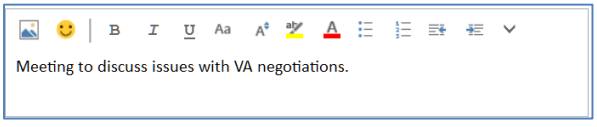
5.4 Scheduling Meetings on Shared Calendars

Scheduling meetings is similar to scheduling appointments. The main differences between scheduling meetings and appointments are the additional tasks for inviting participants and scheduling meeting rooms. Additionally, scheduling a meeting will send a meeting request to the selected attendees. Like appointments, you can schedule individual or recurring meetings.

Please note that 25Live is the primary event scheduling application for reserving rooms, such as class rooms, labs, large venues, and some conference rooms. As such, the meeting rooms referred to in this section are ones that are not used by 25Live, such as private conference rooms i.e. ADM 101, etc.

5.4.1 .Scheduling Individual Meetings

An individual meeting creates a single entry on your calendar for an event, such as a meeting, conference, etc. These instructions will help you with creating an individual meeting.

1. From the Navigation bar, click **New**	
2. In the **Details**, type subject of your appointment	
3. Click **Add room**	
4. From the list, make a selection	
5. The **Add a Location** field will populate automatically with your selection	
6. In the **Start time**, • Use the down arrow to select a date • Use the down arrow to select a time In the **End time**, • Use the down arrow to select a date Use the down arrow to select a time	
7. In the body, type the appointment information, such as purpose and the agenda.	

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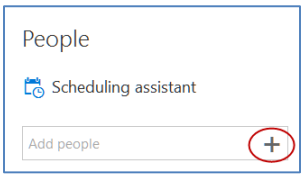
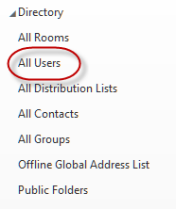
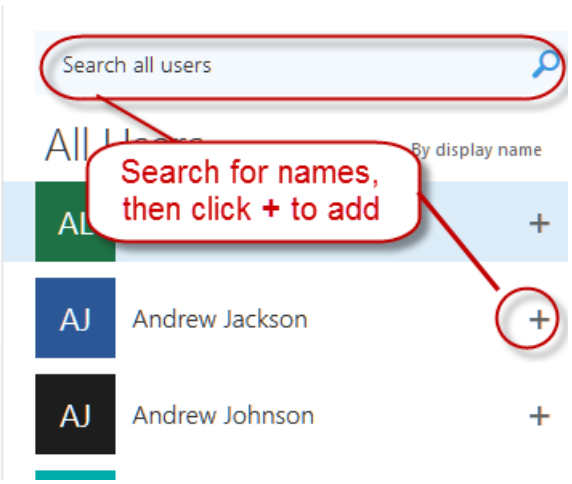
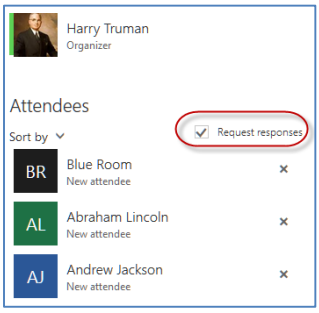
8. Under the People Scheduling Assistant, click the + to add people (right-hand side of screen)	
9. Expand the folder pane, click the » on the left	
10. From the menu, click **All Users**	
11. To select people, • Double-click the person to add or click Search all users • Repeat for each person	
12. Click **Save**, when you are finished adding people.	
13. On the right side, you will see a list of your attendees and the room • If you want to request responses, check Request Responses	
14. When satisfied, click the **Send** button. *A meeting request will be sent to the selected participants.*	

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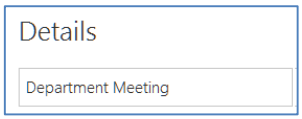
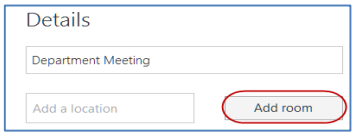
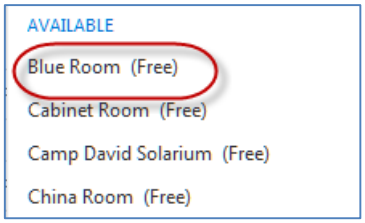
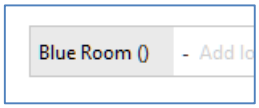
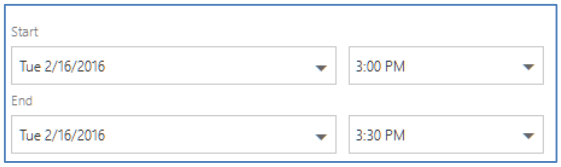
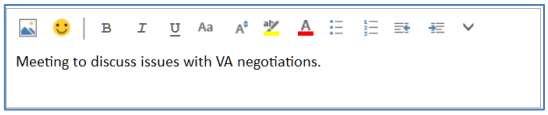
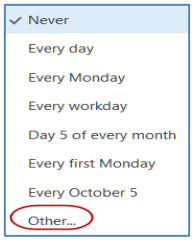
5.4.2 Scheduling Recurring Meetings

A recurring meeting creates multiple entries on your calendar for a single event, such as monthly department meetings, etc. These instructions will help you with creating a recurring meeting.

1. From the Navigation bar, click **New**	
2. In the **Details**, type subject of your appointment	
3. Click **Add room**	
4. From the list, make a selection	
5. The **Add a Location** field will populate automatically with your selection	
6. In the **Start time**, • Use the down arrow to select a date • Use the down arrow to select a time In the **End time**, • Use the down arrow to select a date • Use the down arrow to select a time	
7. In the body, type the appointment information, such as purpose and the agenda.	
8. In the Repeat, click the down arrow	
9. From the menu, • Make your selection or click Other… to specify your recurrence pattern	

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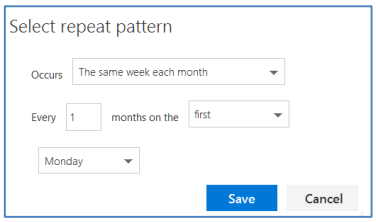
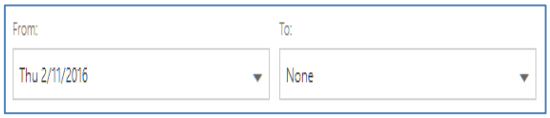
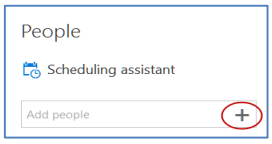
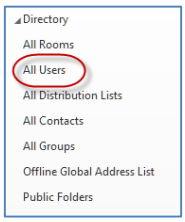
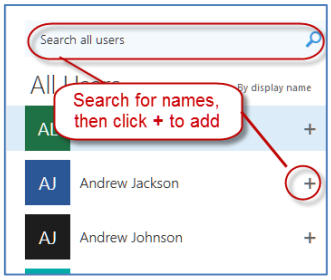
10. On the **Select Repeat Pattern**, • In **Occurs**, use the down arrow to select a frequency, such as *The same week each month* • In the **Every**, select 1 for every month • In the next box, specify the week of the month, such as *first* • In the next box, specify the day of the week, such as Monday • Click **Save**	 *This example creates a meeting for the first Monday of every month.*
11. For the recurrence range, • In the **From**, use the date selected or select a different date • (Optional) In the **To**, use the down arrow to select an ending date	
12. Under the People Scheduling Assistant, click the + to add people (right-hand side of screen)	
13. Expand the folder pane, click the » on the left	
14. From the menu, click **All Users**	
15. To select people, • Double-click the person to add or click Search all users • Repeat for each person	
16. Click **Save**, when you are finished adding people.	

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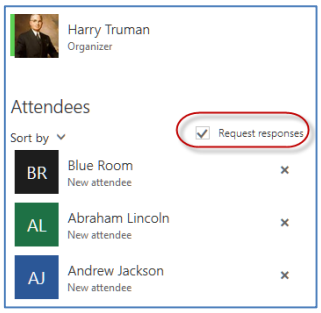
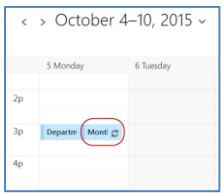
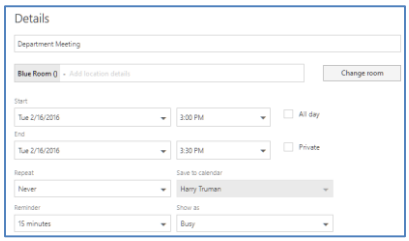
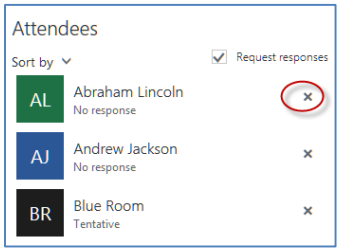
17. On the right side, you will see a list of your attendees and the room • If you want to request responses, check Request Responses	
18. When satisfied, click the **Send** button. *A meeting request will be sent to the selected participants.*	

5.5 Updating Meetings

You can quickly update your meetings from your calendar or by opening your meetings. These instructions will guide you in opening your meetings for updating.

1. From your Calendar, double-click the meeting you would like to update.	
2. If you open a recurring meeting, you will see a message at the top of the screen. • If you want to edit the series, click Edit Series • Otherwise continue	 *You can either update the one meeting occurrence or update the entire series.*
3. When the meeting opens, make the desired changes	
4. If you need to remove people, click the X beside the person's name.	

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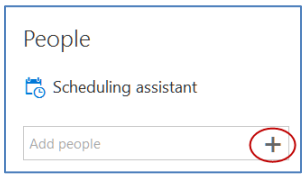
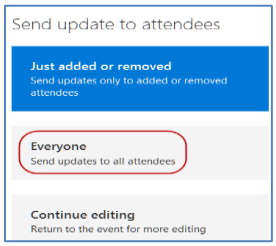
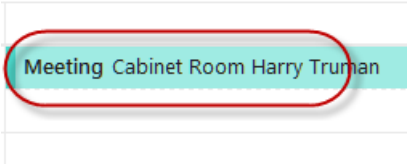
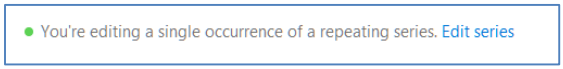
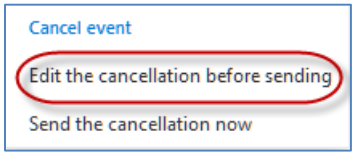
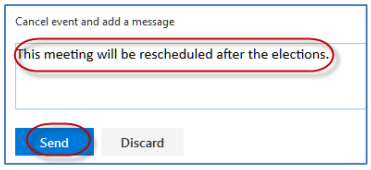
5.	If you need to add people, • Under the People Scheduling Assistant, click the + to add people (right-hand side of screen)	
6.	When satisfied, click the **Send** button.	
7.	On the Send update to attendees, make a selection *The options displayed will depend on your changes. The selected participants will receive a meeting request, depending on your response.*	

5.6 Canceling Meetings

From your calendar, you can cancel meetings quickly. These instructions will assist you in cancelling a meeting from your calendar.

1.	From your Calendar, double-click the meeting you would like to cancel.	
2.	If you open a recurring appointment, you will see a message at the top of the screen. • If you want to delete the series, click Edit Series • Otherwise continue	 *You can either update the one appointment occurrence or update the entire series.*
3.	From the menu bar, click **Cancel**	
4.	From the pop-up window, click **Edit the cancellation before sending**	
5.	As a courtesy, it is good practice to provide a message when canceling a meeting. • In the message box, type your message • Click **Send**	

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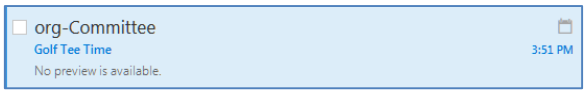
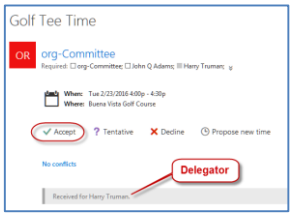
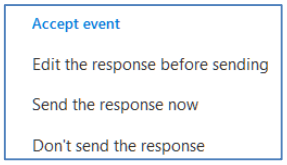
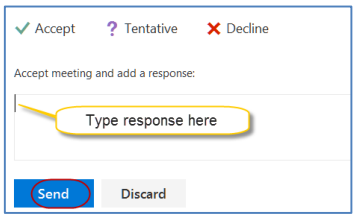
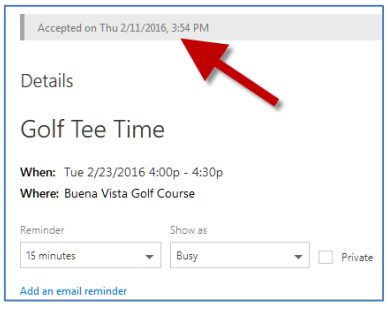
The invitees will receive a meeting request showing that the meeting was canceled. It will include your reason.	

5.7 Responding to Meeting Requests on Behalf of Delegator

Meeting requests will appear in your Outlook Inbox. You can quickly respond to the message from your preview pane. You have several options when responding to meeting requests. You can accept, accept tentatively, and decline. Additionally, you can accept tentatively and propose a new time or decline and propose a new time.

5.7.1 Accepting A Meeting Request for Delegator

You can accept a meeting request for your Delegator from your preview pane. When responding you will have the choice to make a comment before sending, to send the response immediately, or not to send a response. These instructions will guide you in tentatively accepting a meeting request.

1. From your Inbox select the meeting request you would like to respond to.	
2. When the meeting request opens, notice the note that you received this email for your delegator. • From the Preview Pane, select **Accept**	
3. From the Accept event menu, select the desired option.	
4. If you selected, Edit the response before Sending, • Add your comments • Click Send	
5. After responding, the meeting request will disappear from your Inbox. The meeting will appear on your calendar, showing the date and time of your acceptance.	

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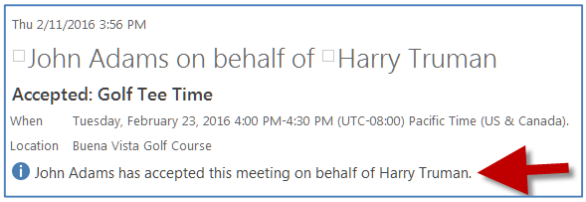
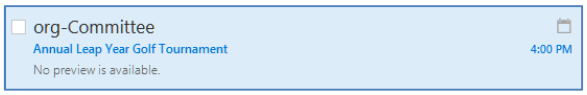
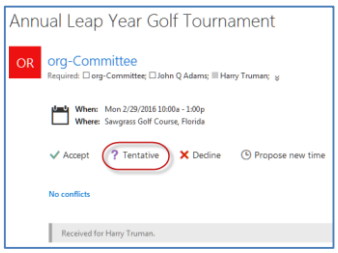
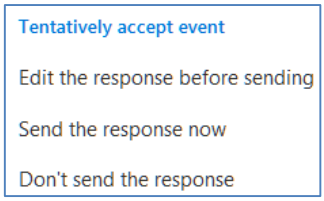
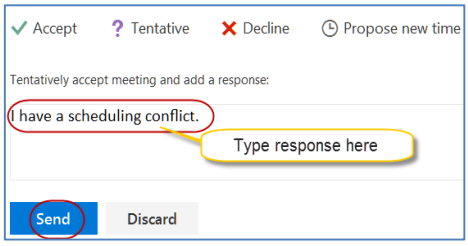
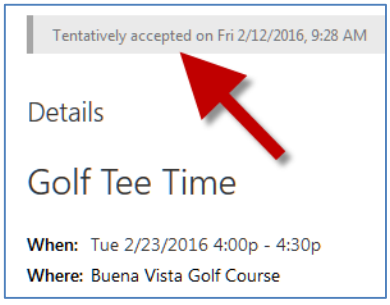
6. The meeting initiator will receive your response in their Inbox. *Notice it says that the meeting was accepted by the delegate on behalf of the delegator.*	

5.7.2 Tentatively Accepting a Meeting Request for Delegater

You can tentatively accept a meeting request from your preview pane. When responding you will have the choice to make a comment before sending, to send the response immediately, or to not send a response. These instructions will guide you in accepting a meeting request.

1. From your Inbox select the meeting request you would like to respond to.	
2. From the Preview Pane, select **Tentative**	
3. From the **Tentative accept event** menu, select the desired option	
4. If you selected, **Edit the response before sending**, • Add your comments • Click Send	
5. After responding, the meeting request will disappear from your Inbox. The meeting will appear on your calendar, showing the date and time of your tentative acceptance.	

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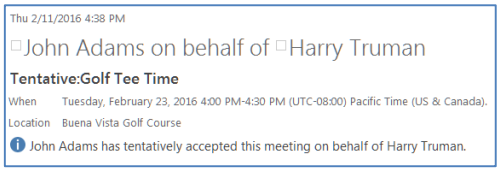
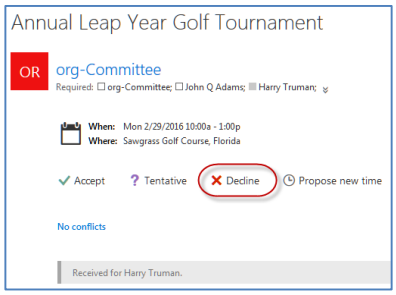
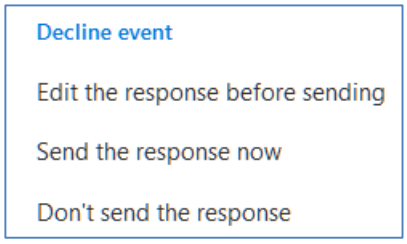
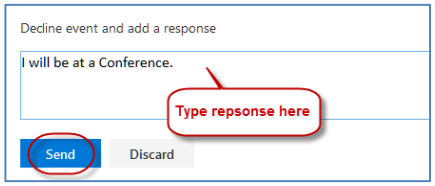
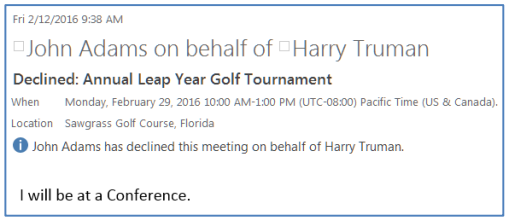
6. The meeting initiator will receive your response in their Inbox.	

5.7.3 Declining a Meeting Request for Delegater

You can decline a meeting request from your preview pane. When responding, you will have the choice to make a comment before sending, to send the response immediately, or not to send a response. These instructions will guide you in declining a meeting request.

1. From your Inbox select the meeting request you would like to respond to.	
2. From the Preview Pane, select **Decline**	
3. From the **Decline event** menu, select the desired option.	
4. If you selected, **Edit the response before sending**, • Add your comments • Click Send	
5. When you decline a meeting request, the request disappears from your Inbox and it does not appear on your calendar.	
6. The meeting initiator will receive your response in their Inbox.	

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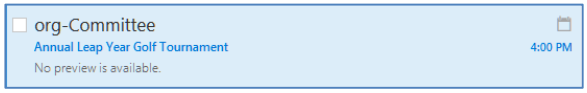
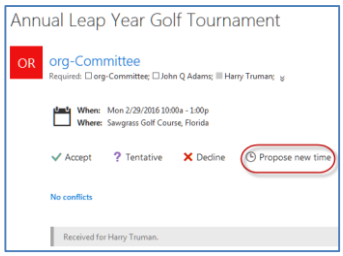
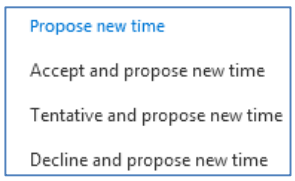
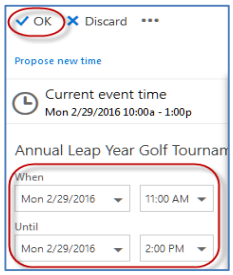
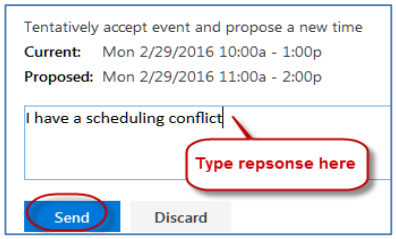
5.7.4 Proposing a New Times for Delegater

You can respond to your meeting requests from your preview pane. When responding, you propose a new time, while accepting tentatively or declining. These instructions will guide you in proposing a new time.

1. From your Inbox, select the meeting request.	
2. In the preview pane, select **Propose New Time.**	
3. From the **Propose New Time** menu, select the desired option.	
4. On next screen, • Make your changes • Click OK	
5. Next, • Add comments, if desired • Click **Send**	
6. • *If you declined the request and proposed a new time, the meeting request will not appear on your calendar.* • *If you accepted or accepted tentatively and proposed a new time, the meeting request will appear on your calendar.*	
7. The meeting initiator will receive your response in their Inbox.	

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6.0 Email Related Policies

CSU Bakersfield has several policies that relate to email and other sensitive data. The list below are a few of the policies involved with email.

- Email Policy
  http://www.csub.edu/its/about/security/supplemental/email/index.html
- Email Blocking Policy and Procedures
  http://www.csub.edu/its/about/policies/tech/emailblock/index.html
- Confidentiality of Email Policy
  http://www.csub.edu/its/about/policies/tech/emailpolicy/index.html
- Instant Messaging Policy
  http://www.csub.edu/its/about/security/supplemental/instantmessage/

For more information, visit the Information Security website at:
http://www.csub.edu/its/about/security/index.html

7.0 Getting Help

If you are unsure or need assistance, please refer to the resources below:

- Resources on the Web

  Outlook 2013
  www.csub.edu/training/staff/desktop/outlook/2013/index.html
- For general training questions

  Tammara Sherman, Ed.D.
  Campus Training
  661-654-6919
  tsherman@csub.edu
  www.csub.edu/training/index.html
- For help with computer-related Issues

  Help Desk
  661-654-2307
  helpdesk@csub.edu

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