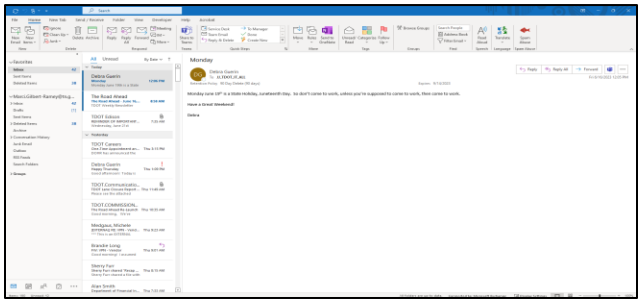
M365 Outlook Basics Job Aid

Accessing Outlook

To access Outlook on your Desktop:

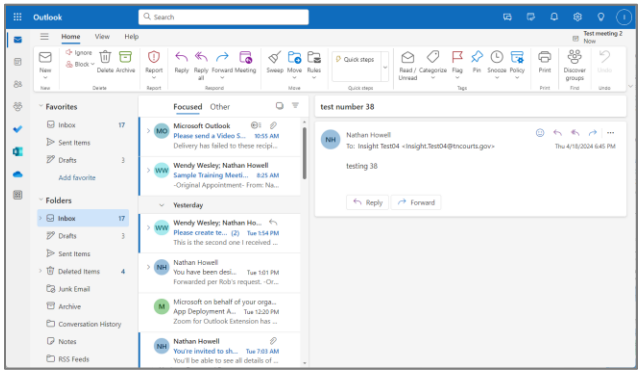
1. Double-click the Outlook desktop shortcut.

Result: Outlook displays:



To access Outlook on the web:

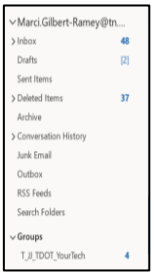
1. Type outlook.office.com in your Internet browser.
2. Log in using your email address and Microsoft 365 password and click **Sign In**.
   Result: Outlook Web App displays.



To access Outlook on a mobile device:
Install the Outlook app. Do not use your device's native Mail app.
Note: Instructions for installing the Outlook app on iPhone (iOS) or Android devices are available here.

Outlook Mail Navigation

The panel on the left-hand side offers menu items:



- **Inbox** provides access to your email.
- **Drafts** displays emails you started but have not sent.
- **Sent Items** displays all sent emails.
- **Deleted Items** lists all of your deleted emails.
- **Archive** displays any archived emails (intended for long-term retention).
- **Conversation History** displays conversation history.
- **Junk email** displays email filtered or manually designated as junk.
- **Outbox** displays emails in process of being sent. (If working offline, these will send when online again.)
- **Search Folders** provides access to search Outlook folders.
- **Groups** displays M365 groups.

Search

Use the **Search** field at the top of the screen to locate emails, meetings, attachments, etc.

Tip: Change **Current Mailbox** selection to a subfolder to narrow searching or **All Outlook Items** to include contacts, meetings, mail, etc.

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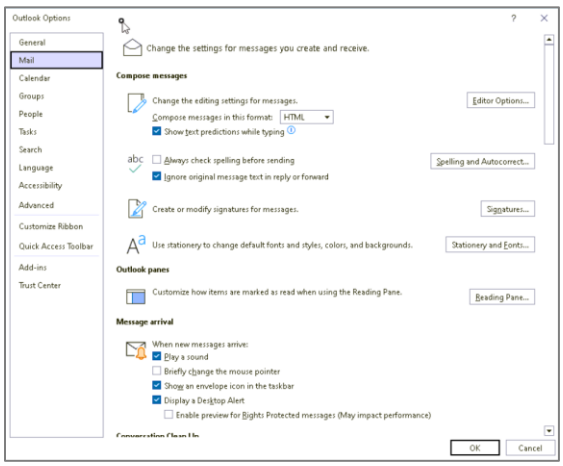
File Menu and Options

Select the **File** tab and to see available options.

- **Info**- Provides access to create Out of Office replies, delegate mail and calendar, set up email rules, and more.
- **Open & Export**- gives you access to open a calendar, a data file, import and export files and open another user's folder (after they made you a delegate).
- **Save As**- enables you to save an email in a variety of formats.
- **Save as Adobe PDF**- enables you to save an email as a PDF.
- **Save Attachments**- enables you to save an attachment from a selected email.
- **Print**- enables you to print the selected email.
- **Office Account**- displays your Microsoft 365 account information.
- **Feedback**- enables you to give feedback to Microsoft.
- **Options**- provides access to customize Outlook (image below). **Tip**: Become familiar with this important feature.



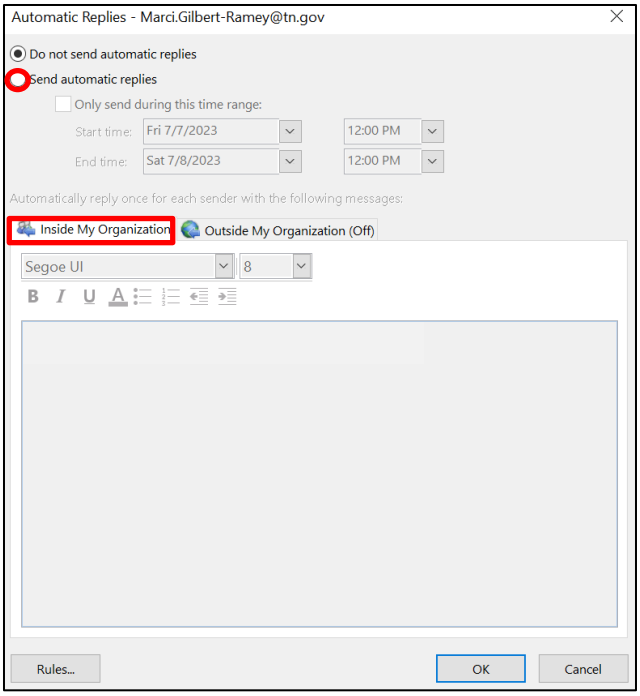
Set Up an Out of Office Reply

Outlook refers to "out-of-office replies" as Automatic Replies. Replies can be sent internally and outside of tncourts.gov.

To set up an Out of Office reply

1. Click the **File** tab.
2. Select **Automatic Replies (Out of Office)**.

The **Automatic Replies** window displays:



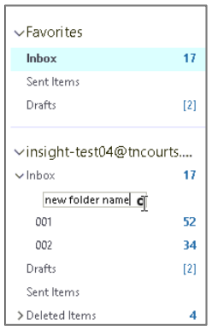
3. Confirm you are on the **Inside my Organization** tab.
4. Click the **Send automatic replies** radio button.
5. Check the **Only send during this time range** checkbox, if desired. (If you do not check this box, auto-replies begin immediately).
6. Enter a start and end dates and times.
7. Enter the reply you want people to receive when they email you.
8. To turn on, click the **OK** button.

To set up an Out of Office Rely for outside of tncourts.gov:

1. Copy and paste your message from "Inside My Organization" to the "Outside My Organization" tab.
2. Modify as needed, and then click **OK**.

Use Folders to Organize Email

Outlook's Search capability is so efficient that many Outlook users do not bother sorting emails into folders. Perform these steps to use folders.



To sort mail into a folder:

1. Drag emails onto a folder and drop it.

To create a new folder:

2. Right-click the mail folder under which you would like to add a folder (Inbox in the example), select **New Folder**, and type the desired name in space provided, then press **Enter**.

Use Categories to Color-code Email

You can create as many categories as you want and apply them to anything in Outlook including emails, calendar events, tasks, notes and even to your contacts.

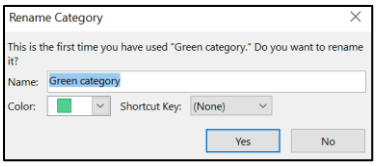
To categorize an e-mail:

1. Select the email message or messages you want to flag.
2. Click the **Tags** drop-down arrow.
3. Select **Categorize** from the **Tags** group.

The Categorize menu displays:

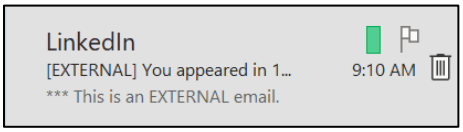
4. Select a **Category**.

The **Rename Category** page displays:



5. Enter a name for the category.
6. Click the **Yes** button.

Result: The category color displays on the email.

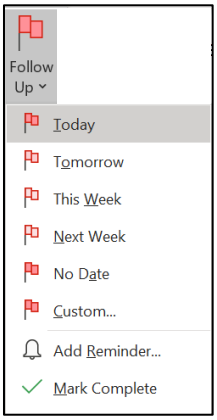
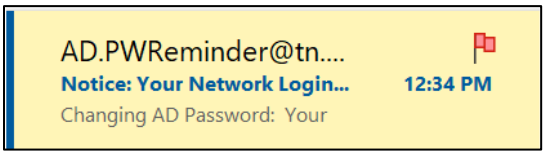


Add a Tag to an email

Flags are very popular for identifying emails that require further action and/or provide reminders.

To add a Flag to an email:

1. Select the email message or messages you want to flag.
2. Click the **Tags** drop-down arrow.
3. Select **Follow-up** from the **Tags** group.
   Result: The Follow Up options display:



4. Select a desired follow up flag, **Add Reminder...** or **Mark Complete**, as appropriate.
   Result: The flag displays on the email.