Training Guide for Office 365 Email

This guide provides easy instructions for the most commonly used email features for Outlook Web App (OWA) and Samsung Galaxy 4. Click on any topic heading to jump to that section in the document.

Topics

![Office 365]

Training Guide for Office 365 Email

How to access and login to OWA

Click on the O365 Email icon on your desktop to login.
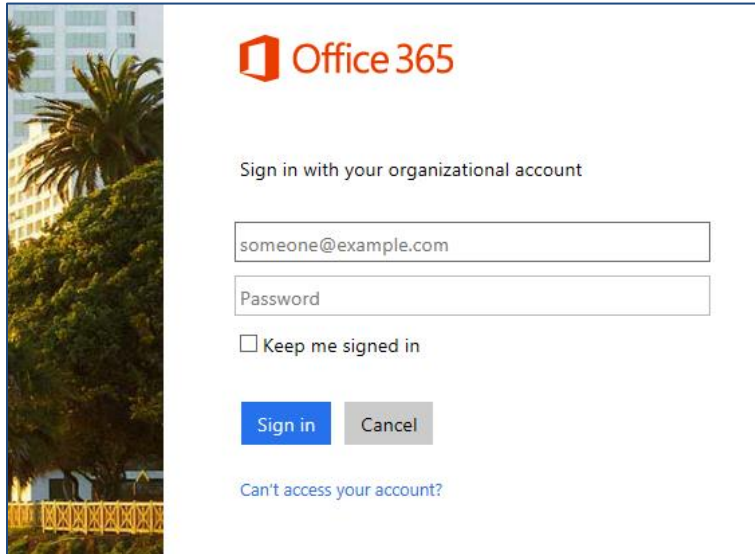
You can also enter the following URL into the address bar of any browser, of any computer, at work or off-site.

http://mail.office365.com

Login using your username and password. PLEASE NOTE: The password is case sensitive

Your username is your **full** sfgov.org email address. For example: pat.smith@sfgov.org
Once you're logged in, OWA defaults to the Outlook view of your inbox and its contents.
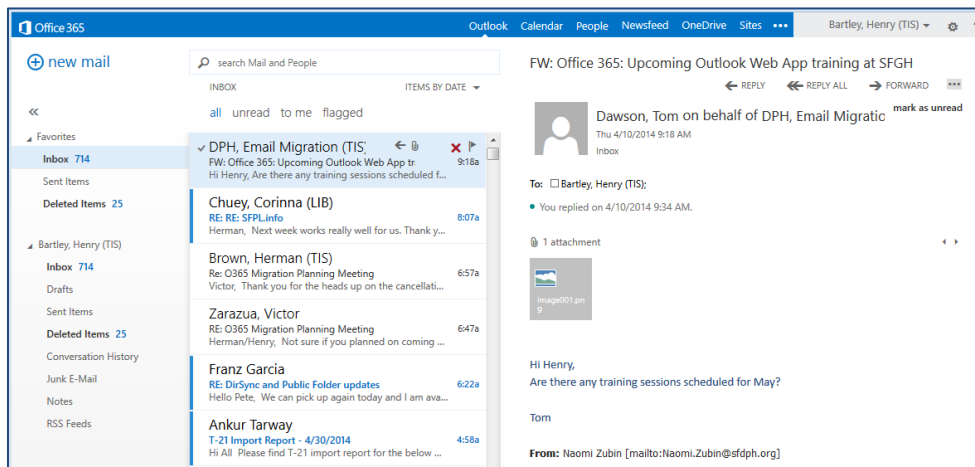
Navigating within OWA
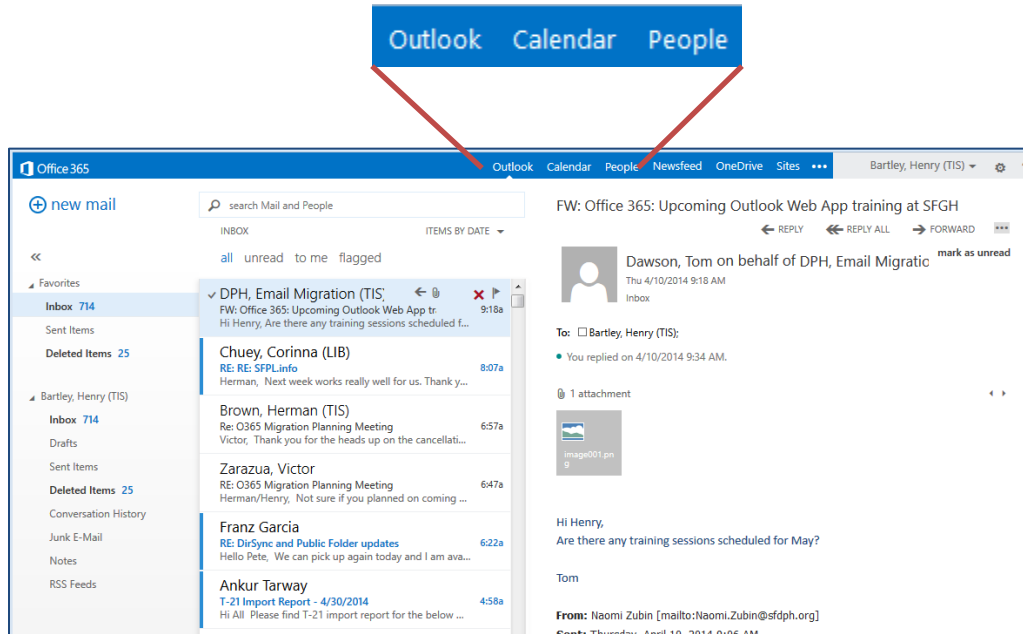
In the top left of the OWA window you'll find the OWA navigation menu that lets you quickly switch between:

- Outlook – your email
- Calendar – your calendar
- People – your contacts

No matter which screen you are in within OWA this navigation menu is always available in the top left of the screen.

Note: any time you are composing, replying to, or forwarding an email OWA is automatically saving your work. If you are in the middle of editing an email and you click to go to the Calendar or People view, OWA saves the email you were working on and puts it in your Drafts folder.

Setup a Signature
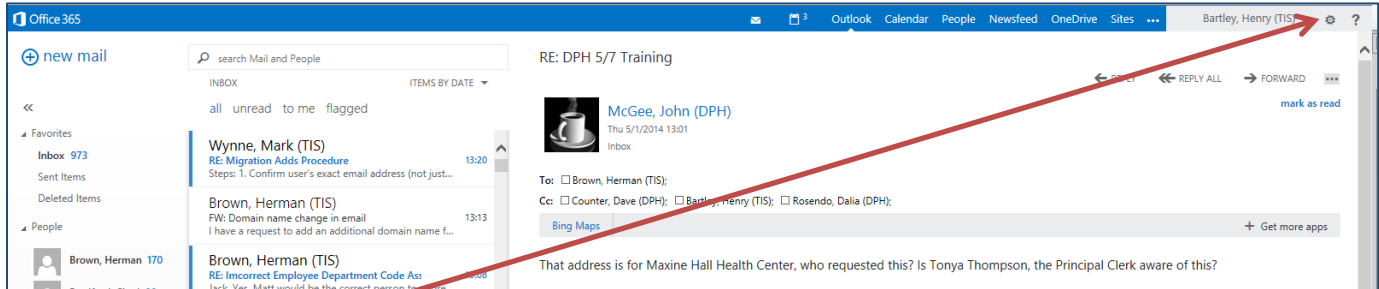
Click the **Settings** ⚙ icon and select Options > Settings > Mail.
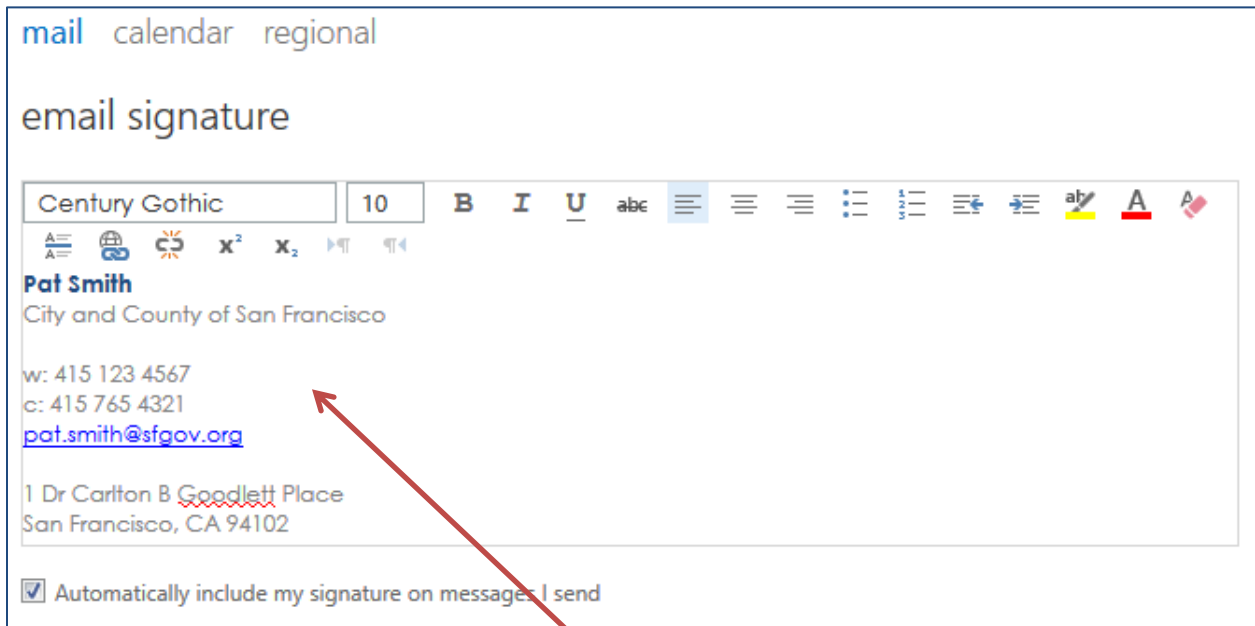
Create your email signature in the text editing window provided, check the "Automatically include my signature on messages I send" to include your signature on every email you send.

Click the **Save** button at the bottom of the page to save your changes.

Set-up phone text alert for important email

This section explains how to set-up OWA to send your mobile device a text message when an important email arrives. NOTE: You MUST FIRST have connected a mobile device to your Office 365 account for these instructions to work.
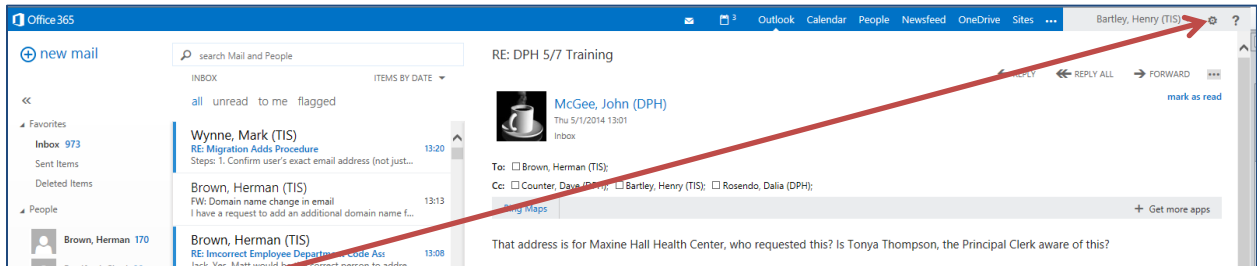
Click the **Settings** ⚙ icon and select Options > Phone > text messaging.
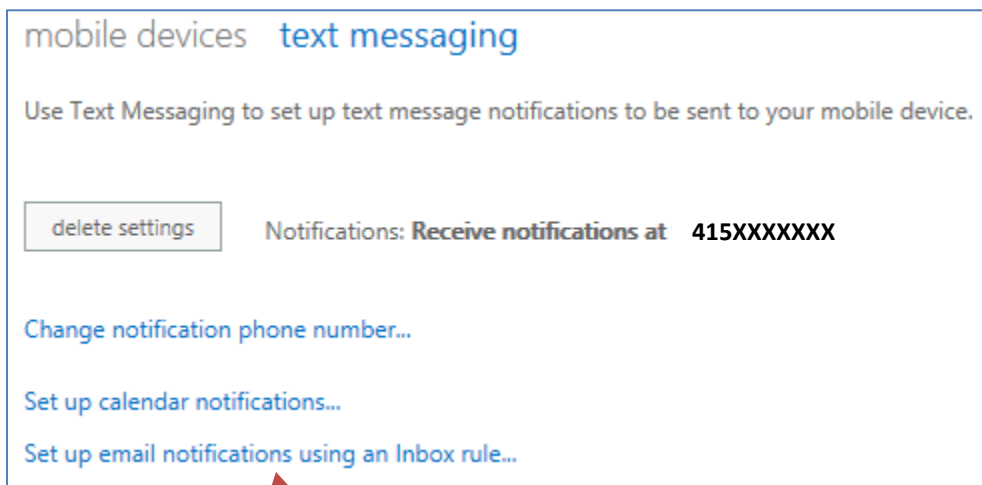
Clink the Set up email notifications using an Inbox rule… link to open the New Inbox Rule dialog box (see next page).

Office 365

new inbox rule

Help

Apply this rule...

1

Name:

*When the message arrives, and:

2

Select one ▼

Do the following:

Send a text message to... ▼   *Select one... **3**

More options...

4   save   cancel

Follow these steps:
1. Enter a name for your new inbox rule in the Name box (Example: Email from my manager)
2. Click the *When the message arrives, and: drop down and select it was received from…. This will open the contacts list where you will search and select the person whose emails you want a text alert generated.
3. Click the *Select one… link. The phone number for your mobile phone will be listed. Click on your phone number.
4. Click the save button.

Now whenever you receive an email from the contact you selected you'll receive a text message on your mobile phone.

Check messages
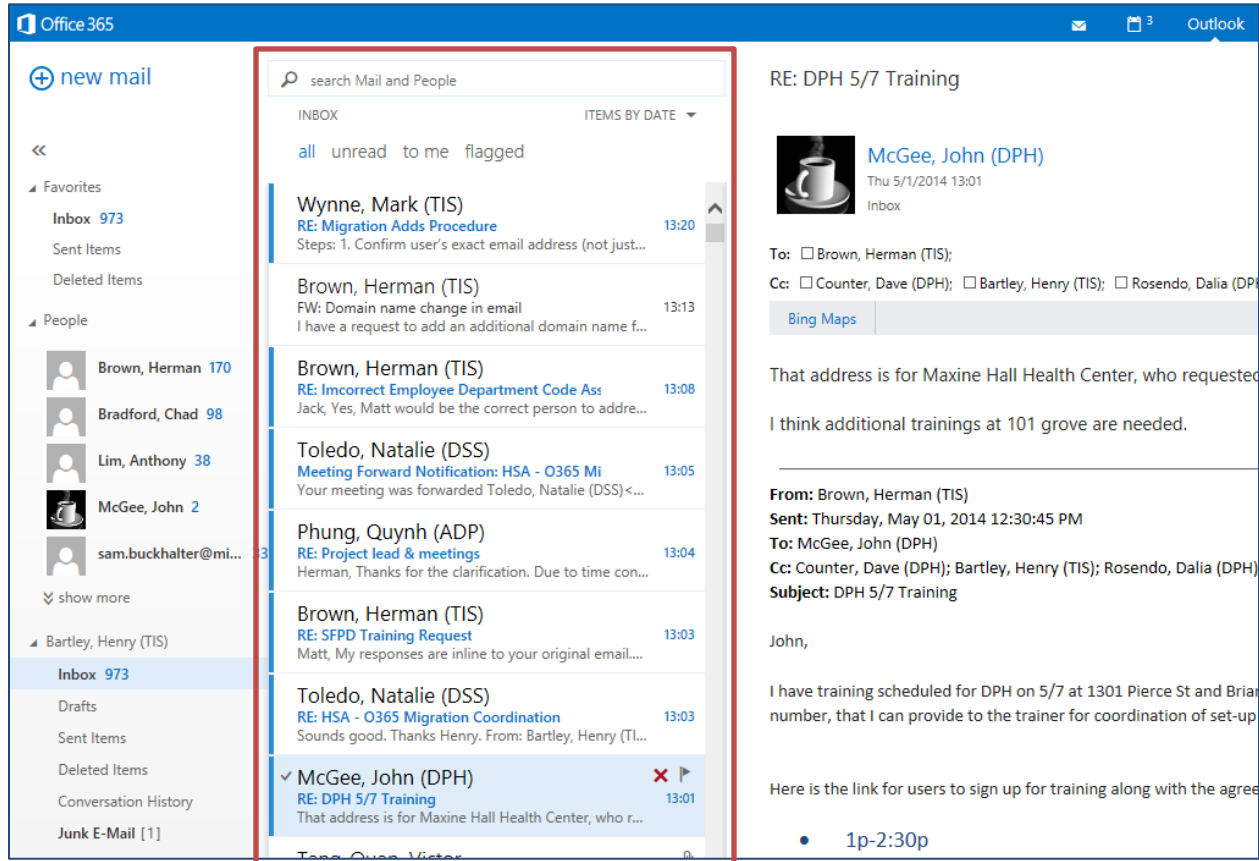
The center of the Outlook view is the Message List which contains a scrollable list of all the messages in the active folder. Clicking on a message selects it, shows its contents in the reading pane (section to the right of the message list).

When a message is selected you can delete it, or add a flag using the ✕ ⚑ icons.
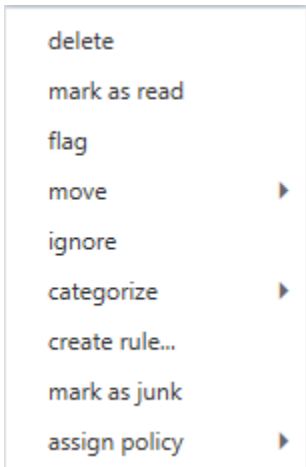
A right mouse click on any message displays the full list of options available for that message.

Training Guide for Office 365 Email

Compose a New Email

1. Click ⊕ new mail in the top-left corner of the Outlook view page to open a new message area (shown above) in the reading pane.
2. Enter e-mail addresses in the **To:** field, or click the **To:** label to open the Address Book.
3. Enter e-mail addresses in the **Cc:** field, or click the **Cc:** label to open the Address Book.
4. Enter the subject of the message in the **Subject** box. Typing the word "Secure" anywhere in the subject line will encrypt the message when sent
5. Enter the text of your message in the text box.
6. Use the Message Actions menu at the top of the message entry window to:
    a. ⊠ SEND - click to send the message
    b. ✕ DISCARD - click to delete the draft
    c. 📎 INSERT - click to insert a picture, attachment, or signature
    d. 🔊 APPS - click to create a simple message template that can be inserted into a new mail
7. ••• - click for more message options
    a. **Save** – click to save this message in the Drafts folder
    b. **Show Bcc:** - click to show the Bcc: field
    c. **Show From:** - click to show the From: field
    d. **Check names** – click to search address book for names entered in the To:, Cc:, and Bcc: fields
    e. **Set Importance** – click to set message importance to high, normal, or low
    f. **Switch to plain text** – click to switch message from HTML to plain text format
    g. **Show message options** – click to select message sensitivity (*normal, personal, private,* or *confidential*) and to request delivery and read receipts
8. ▭ - click the new window icon in the upper right-hand corner to edit the new message in a separate window

NOTE: If at any time you navigate away from the message you are editing OWA automatically saves a copy in your Drafts folder.

Responding to messages
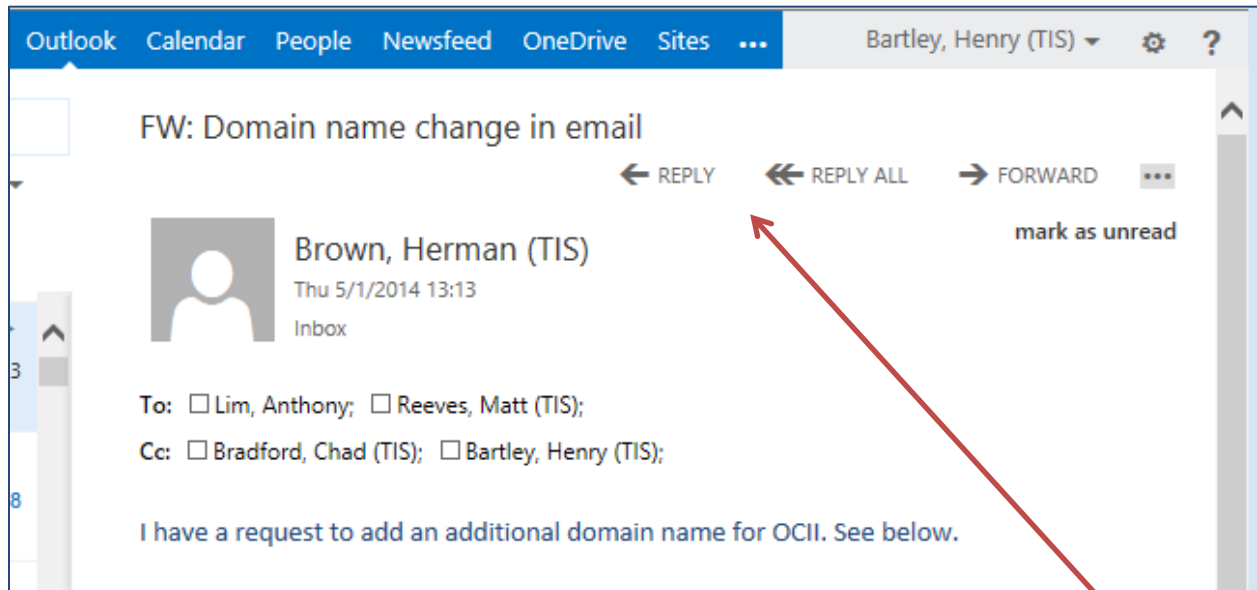
- **Reply to a Message:** Select a message by clicking on it in the Message List. In the top right corner of the reading pane you have the options to ← REPLY or ← REPLY ALL . Clicking one either opens a reply pane where you can type your reply, and click ➥ SEND .

- **Forward a Message:** Select a message from the Message List. Click on the → FORWARD icon in the top right corner enter the e-mail address(es) in the **To** box, enter comments in the **Body** area, and click ➥ SEND .

- **More message options**: click ••• to access the following options:
  a. **Delete** – move message to Deleted Items folder
  b. **Categorize** – color-code messages and define what colors mean
  c. **Mark as junk** – move this message and all future messages from this sender to Junk E-Mail folder
  d. **Open in separate window** – open this message in a separate window
  e. **Print** – print a copy of the message
  f. **Create rule** – create a mail rule for handling future messages from this sender
  g. **Assign policy** – set the archive and retention policy for this message
  h. **View message details** – view the technical routing information for the message

Training Guide for Office 365 Email

Opening shared accounts

**Opening the mail folders of a shared mailbox**

While viewing your Inbox…

1. In the Folder list (left most column), right click on your name.
2. Select 'add shared folder…'
3. Type in the name or email address of the shared mailbox. Click 'add'.
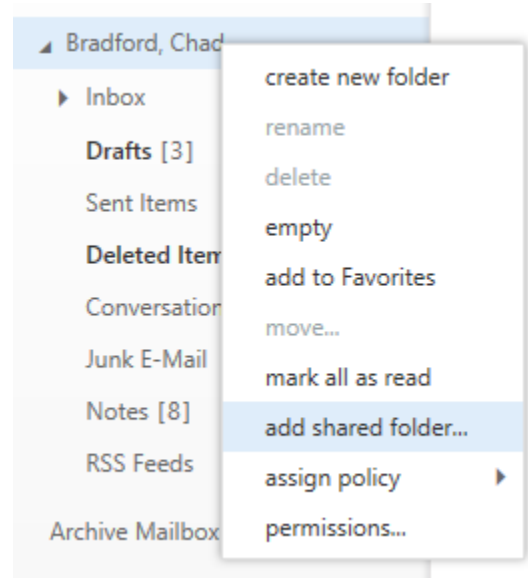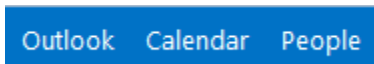

Opening the calendar of a shared mailbox

While viewing your calendar…

1. In the Calendar list (left most column), right click on 'OTHER CALENDARS'.
2. Select 'open calendar'.
3. Type in the name or email address of the shared mailbox. Click 'open'.
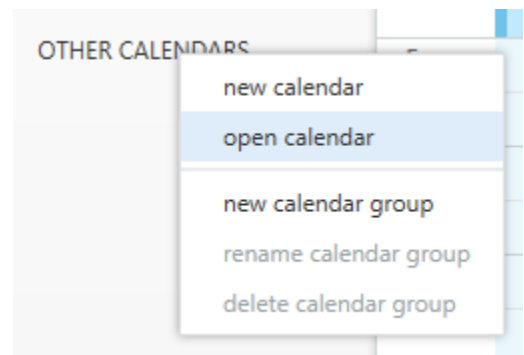
![Office 365]

Training Guide for Office 365 Email

Viewing the Calendar

Outlook   Calendar   People
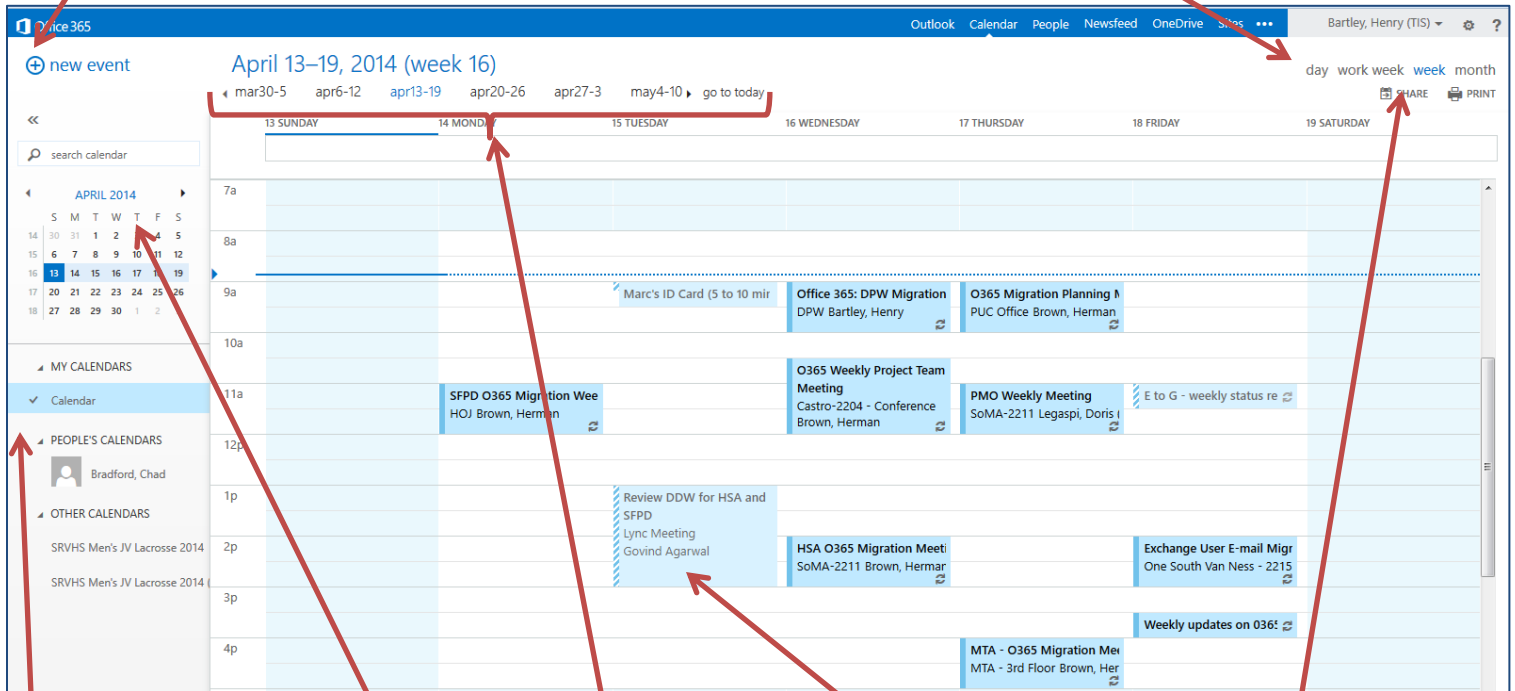
Open your Calendar by clicking on the link in the navigation bar located at the top left of the OWA screen. This opens the calendar view:

New Event: Click to create a new event ([Details on next page])

Calendar View Type: Click the view you want: day, work week, week, or month

Calendar List: Displays the calendars you can access. Click a calendar name to open it in the view pane.

Quick Nav: click on this calendar to quickly navigate to a specific month, week, or day.

Switch the period displayed: click these options to change the calendar period currently displayed.

Pending invitations: events shown "grayed out" indicate invitations you have not responded to. Right click on the meeting to accept or decline.

Share your calendar: click SHARE to create an invitation for another person to share your calendar ([Go to Calendar sharing])

Additional Tips
- Double click on any meeting to view its details
- Double click on an empty spot on the calendar to open a New Event window defaulting to that date
- Right click on any meeting to open a list of quick actions
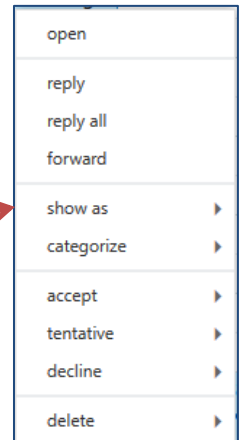
Creating a new meeting

Send or discard: use these options to Send the meeting, or Discard to delete the the event draft.

Scheduling Assistant: click to view availability of the attend

More Options: click to *Insert an Attachment* or picture, or to add a colored *Category*

Add a room: click to find rooms available based on your event date and time

| SEND | DISCARD | SCHEDULING ASSISTANT | APPS | ··· | ✕ |

Event:

Location: add room

Attendees: ☐ Brown, Herman;   +

Start: Duration:
Fri 5/2/2014 ▼   15:00 ▼   30 minutes ▼

Show as: Reminder:
Busy ▼   15 minutes ▼

Calendar:
Calendar ▼

Repeat:
Never ▼

☐ Mark as private   🌐 Online meeting   ☑ Request responses

Century Gothic ▼ 10 ▼ B I U ≡ ≡ ≡ ≡ ᵃᵇ A A ≡ ≡ ≡ ⊞ ⌄

Set event duration: click to select the length of the event. Select **Custom** to set a specific end date and time.

Use the fields in the New Event window to define the specific details for your event.
- **Event** – enter the name of the event
- **Location** – enter the location of the event. Click the add room button to select from a list of rooms available that date and time.
- **Repeat** – if this is a recurring meeting define the pattern here
- **Text entry field** – describe the details of the meeting
- **More Options** – click the ··· button at the top of the window to add an attachment
- **Send** – click the Send link in the top right to send an invitation to the attendees
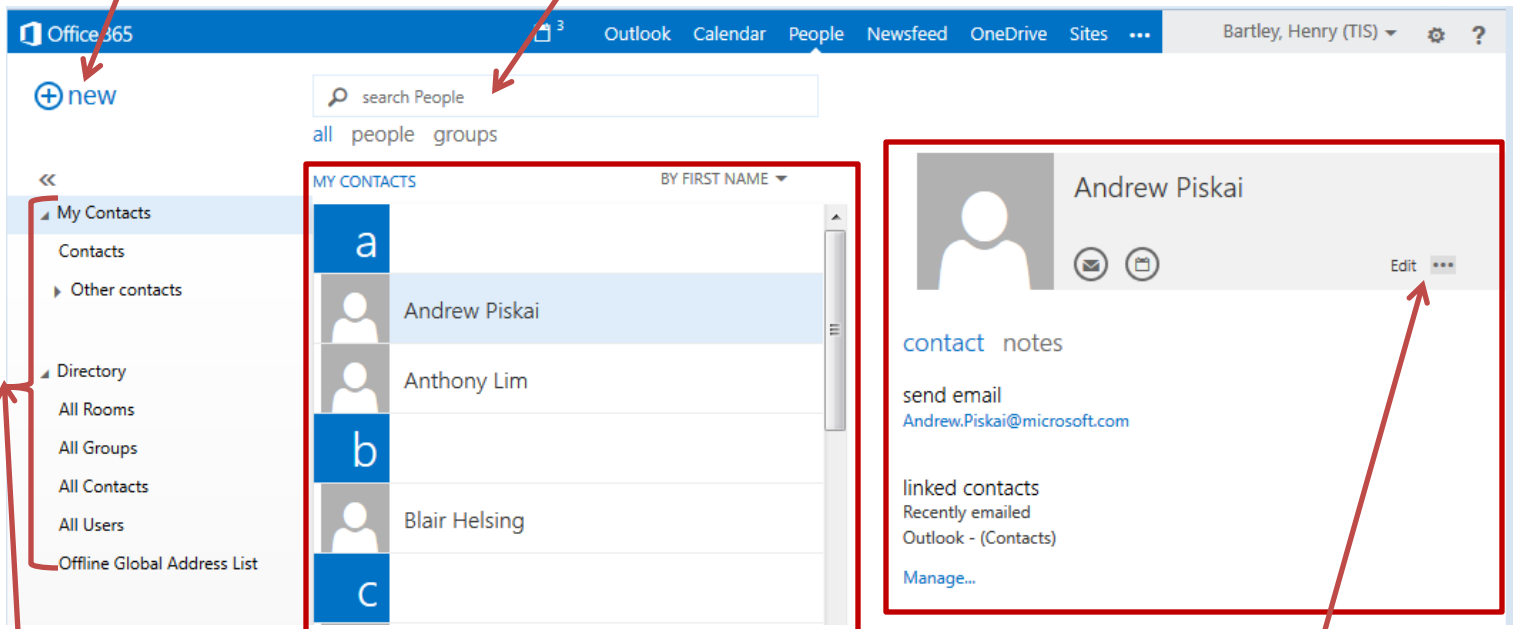
Training Guide for Office 365 Email

Viewing People (Contacts)

Outlook   Calendar   People
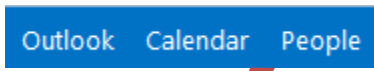
Open your contacts by clicking on the People link in the navigation bar located at the top left of the OWA screen. This opens the calendar view:

New: click to create a new contact or group

Search: enter text to search in the currently displayed list

Office 365   Outlook   Calendar   People   Newsfeed   OneDrive   Sites   •••   Bartley, Henry (TIS)

⊕ new

🔍 search People

all   people   groups

«

⊿ My Contacts

Contacts

▸ Other contacts

⊿ Directory

All Rooms

All Groups

All Contacts

All Users

Offline Global Address List

MY CONTACTS   BY FIRST NAME ▼

a

Andrew Piskai

Anthony Lim

b

Blair Helsing

c

Andrew Piskai

✉ 📅   Edit •••

contact   notes

send email
Andrew.Piskai@microsoft.com

linked contacts
Recently emailed
Outlook - (Contacts)

Manage...

List navigation: click on any of the Contact or Directory names to view its details

List details: this pane shows the details of the selected list

Item details: this pane shows the details of the selected item from the currently active list

Edit and more actions: click Edit to update the item, or click ••• to view a list of more options, like delete.

Creating a new contact

Clicking the ⊕ new button in the top left opens this pop-up menu where you can choose to create a contact or group (a group is a local distribution list)

what would you like to do?

create contact

create group

cancel

Click the *create contact* button to open the create contact window

💾 SAVE   ✖ DISCARD

First name:

Middle name:

Last name:

⊕ email
Email:

Display as:

⊕ work

⊕ address

⊕ other

⊕ phone

⊕ IM

⊕ notes

Fill in the contact details and click SAVE when done, or DISCARD to delete what you've entered or cancel.

Click the ⊕ next to *email, phone, IM, notes, work,* or *address* to enter those details for the contact you're creating. Click *other* for a list of additional contact details you can enter.

web page

school

personal web page

profession

spouse/partner

hobbies

anniversary

birthday

location

![Office 365]

OFFICE 365 EMAIL ON A SAMSUNG GALAXY 4

Setting up Office 365 Email on your Samsung Galaxy Device

1. Tap on Apps
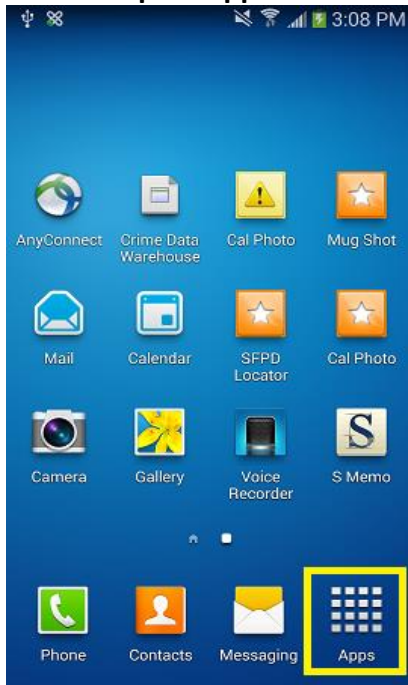
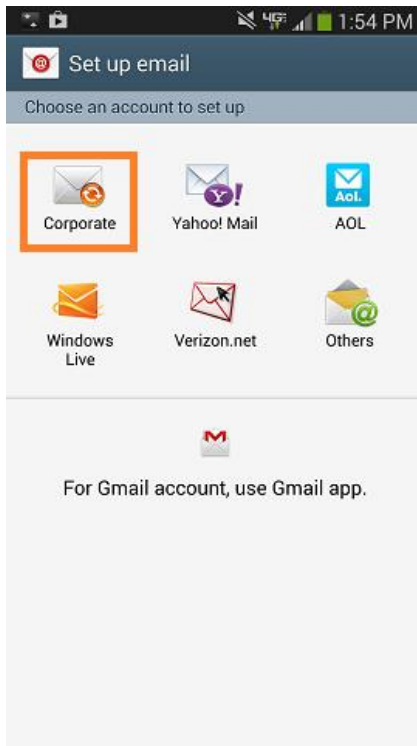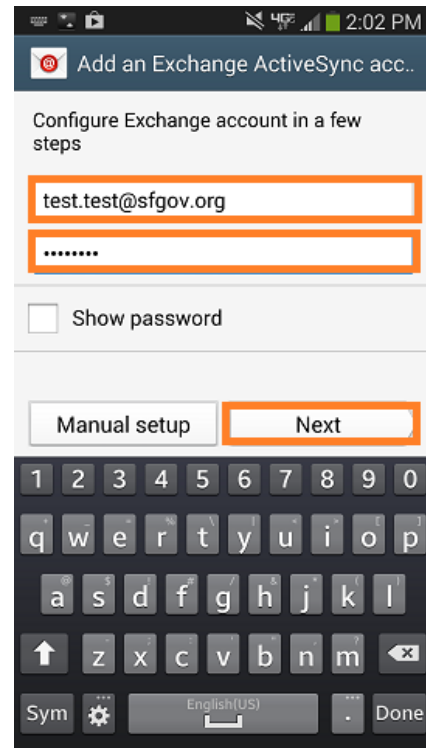**2. Tap on Email**

3. Tap on Corporate
   password

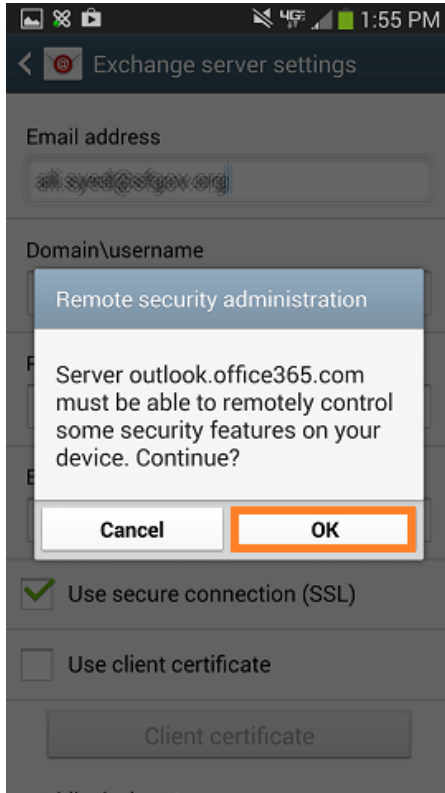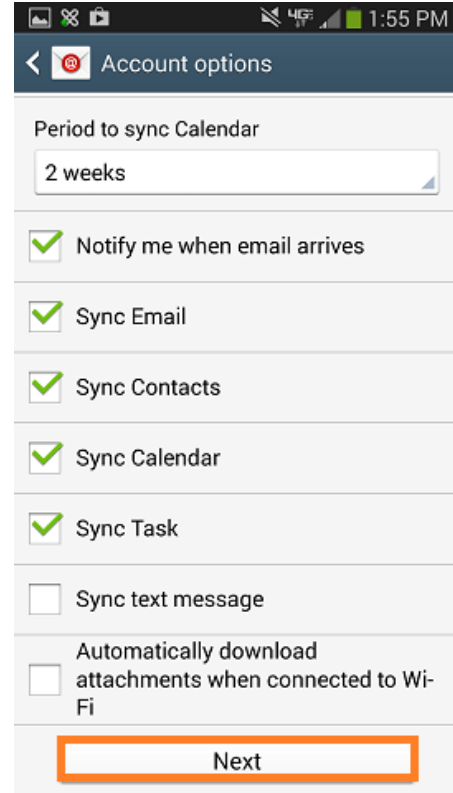**4. Enter full email address and new**

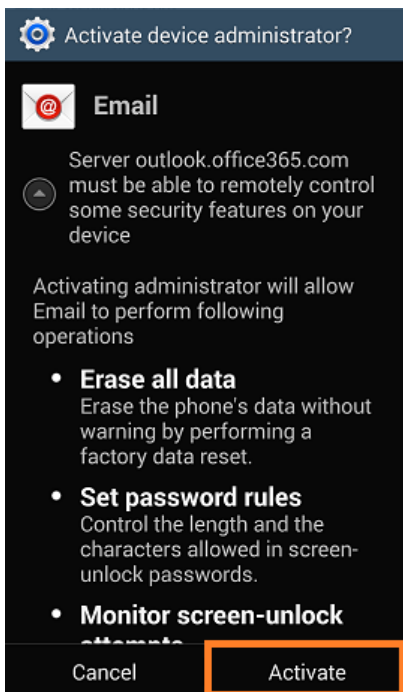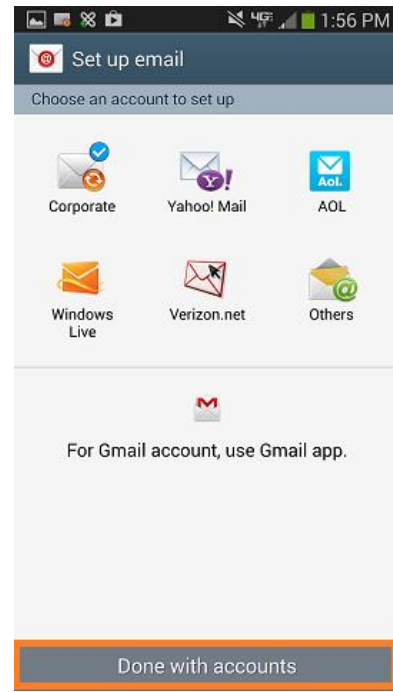# Training Guide for Office 365 Email

5. Tap on OK

6. Tap on Next

7. Tap on Activate

8. Tap on Next
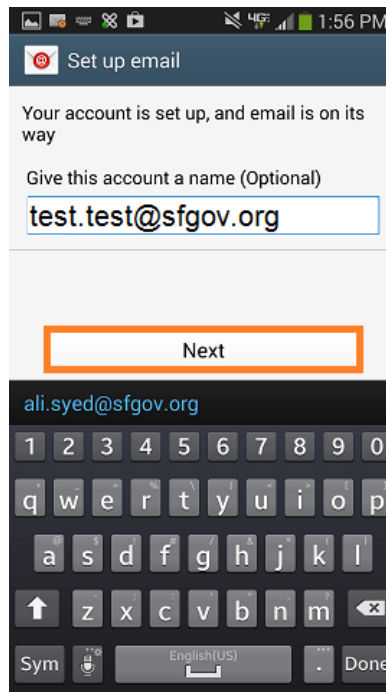
9. Tap on Done with accounts

17

Composing New Email

1. **Tap on Email Client**

2. **Tap on Compose Icon**

Email Client Icon
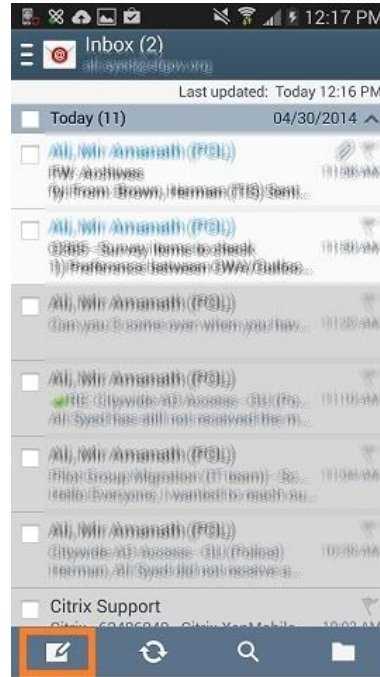
Compose Icon

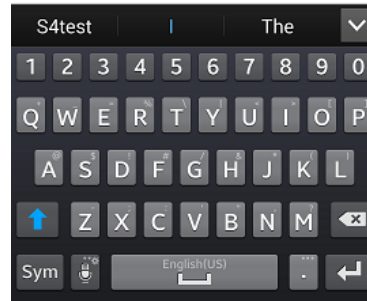3. **Enter recipients Email Address, Enter Subject and Tap on Send button after composing the email.**
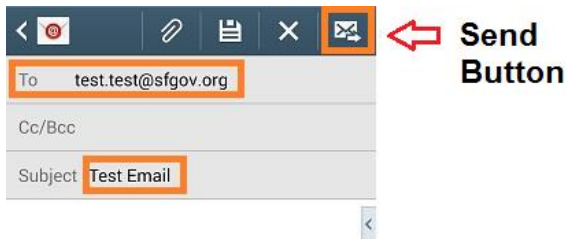
4. **To add attachments to your composed email tap on attachment Icon and select the file from the list.**
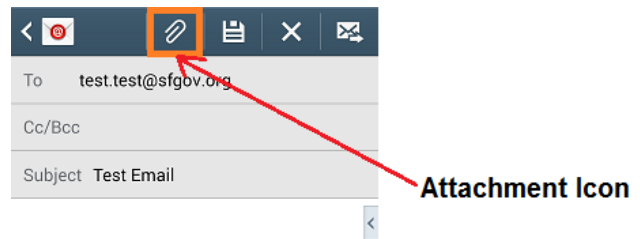
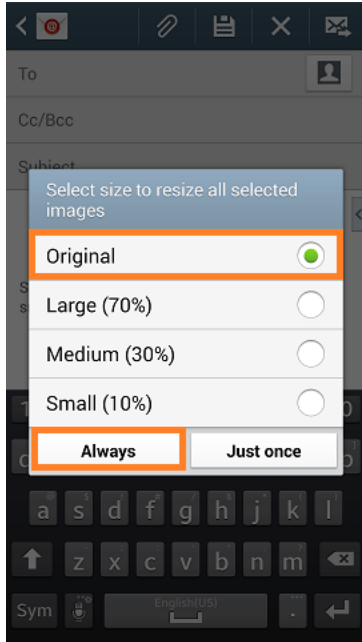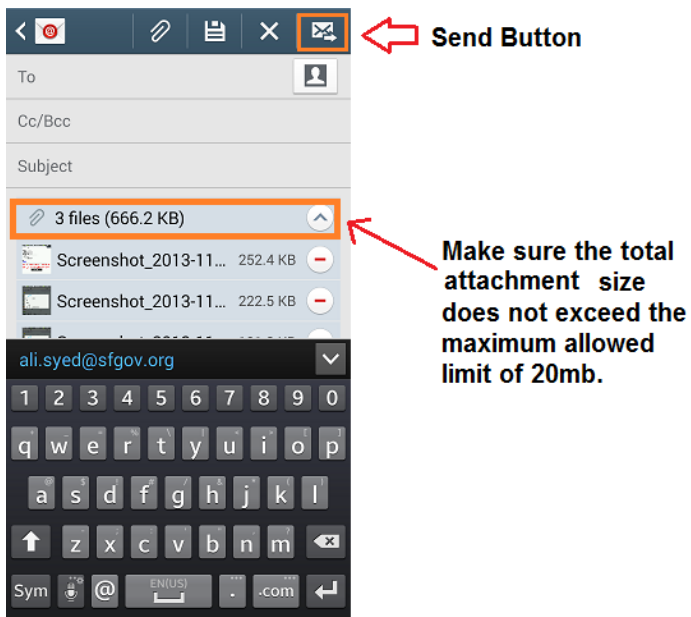5. **Select the file type you would like to attach in this case a picture attached from images.**
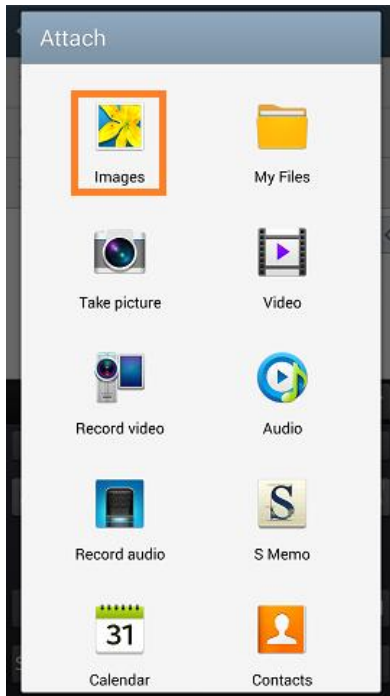
6. **Select the files by checking each file and tap on Done.**

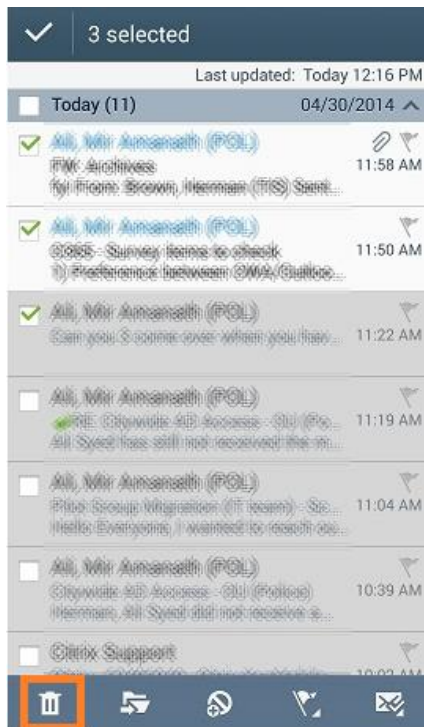7. **Select the resolution to original and tap on Always**

8. **Click on the Send button.**

Deleting Emails

To delete an email select the email and tap on delete button

Delete Button

Training Guide for Office 365 Email
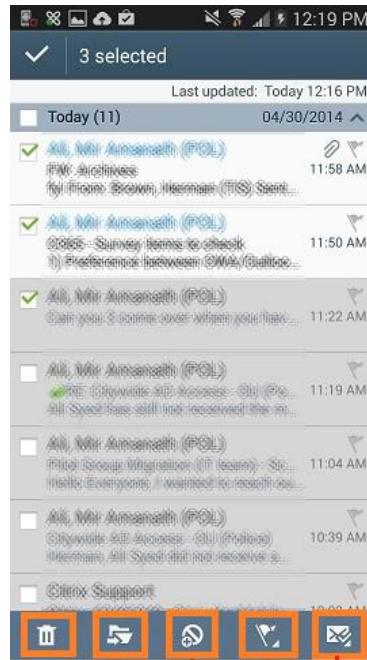
Getting familiar with Icons and their functionality

Folders

Search Email

Manual Sync

Compose New

Mark as Read or Unread

Flag Email

Mark as Spam

Move to Folder

Delete

23

FAQs

What is my Office 365 Username?

Your Notes username was first_name.last_name. Since Office 365 is shared by all City departments, some with different domains (e.g. @sfgov.org, @dcyf.org, @sfpl.org …) it needs your full email address as your username: first_name.last_name@sfgov.org to be unique.

Why is my OWA client automatically logged out after 27 minutes of inactivity?

The San Francisco Police Department is required to comply with the federal CJIS regulations that safeguard data. The logout for inactivity is one of the ways we satisfy CJIS.

If you find your OWA session logged out you should **click your Internet browser's refresh button**, or **press F5** on your keyboard. This will refresh the login screen and prevent you from needing to enter your password twice.

How can I access Office 365 from home?

Since Office 365 is cloud-based you have the option of accessing it from any computer with an internet connection and a browser whether at work or away. OWA is certified to work on the latest versions of the following browsers: Internet Explorer, FireFox, Chrome, and Safari.

You can get to the Office 365 login screen by entering http://mail.office365.com in the address bar of your browser.