LACOE-ITO
Basic Workplace Technology Training Guide
Email and Calendar
Office 365

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Overview of Session

This Guide will be discussing Email and Calendar using Office 365

First, we'll jump into Outlook, show you around, help you to setup a profile, and then use other features available in Outlook.

Along the way, we may need to create a "parking lot" for some of your questions, so we can address them at an appropriate time along the way, or towards the end of the session during Q&A.

Outlook

Objectives:

 Introduced to Outlook and discuss the features that are available

 Learn time-saving ways to make Outlook Email and Calendar work for them

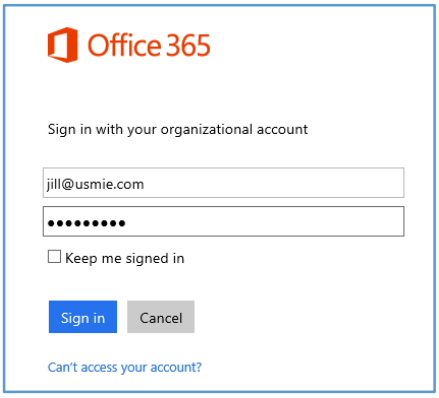
 Have the opportunity to discuss and strategize on how Outlook could be integrated and implemented at their site

Outlook Introduction

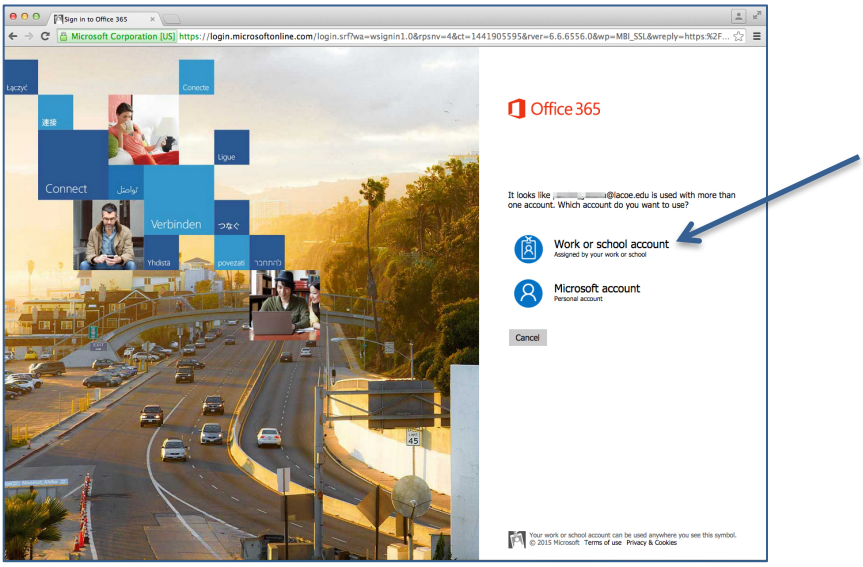
Let's get started with Outlook! During the majority of this workshop, you will want to follow along on your computer with what we cover. Feel free to ask questions along the way, and as mentioned,

Go to the Office365 site by opening a browser (we will use Chrome today). Click on the Chrome Icon in your Task Bar. When the browser window opens type the URL **outlook.office365.com** in the address bar at the top of the window.

Sign in using your LACOE email address for your username and your privately created password. Your username is formatted as follows: lastname_firstname@lacoe.edu

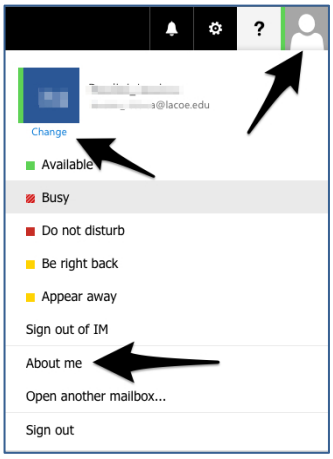


If you had previously created an Office 365 account using your LACOE email address, you may see a screen stating that your email address is associated with more than one account. And it will ask you which account you would like to use. Select **Work or school account.**



Once you are in, at the top of Office 365, you'll find a set of links that will take you to different parts of your Office365 account.

Basic Office 365 navigation for participants.



1. Click on the Avatar (picture of a person) in the top right corner to access Personal Settings.

2. Click **About me** and **Edit Profile** to change personal details. Click **Save all and close** to update changes.

3. Click **Change** to add a personal photo.

Now that we are in let's take a look at some of the features of Outlook.

Outlook Features

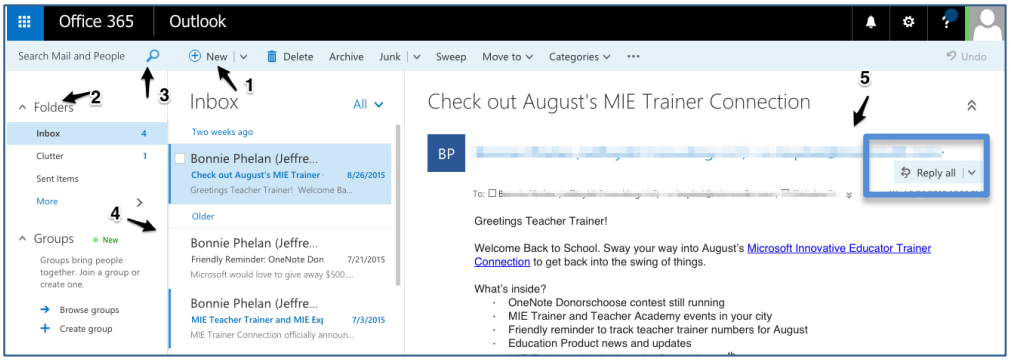
1. New Mail – Click New to create a new message.

2. Folders Pane – Includes a list of folders in your mailbox. Collapse the pane by selecting **Folders** at the top of the list. Expand and collapse folders in this view by selecting the triangle next to the folder names. Add folders by selecting + next to the top-level folder, or right-click (Control + click on a MAC) an existing folder and select **Create new folder** name the folder and click **enter** on you keyboard.

3. Search window – Type the name of a person to locate, a contact or emails from that contact, or type text that you want to search for to find a particular message, and then select .

4. Inbox list - Displays how many messages there are in a conversation and how many are unread, or if there is an attachment, flag, or category associated with the messages. Select All in the upper right of the list to filter, sort, or choose how to view your emails (as messages or conversations).

5. Reading pane - Displays messages or conversations that you select in the folders pane. Respond to any message in the conversation by selecting it and then selecting Reply. Print an email here by selecting the **Reply all** menu and then selecting Print.



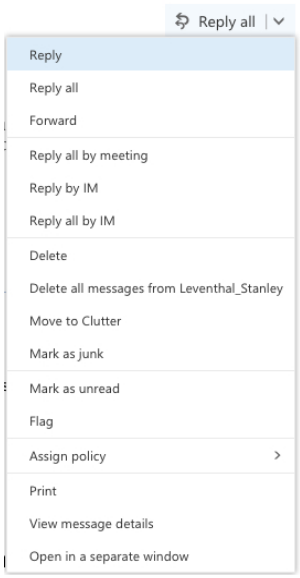
Opening an email

To see an email in the reading pane, click on the email in the inbox list. To open the email in a new window, double click on the email in the reading pane.

Writing an email

When you have opened an email and you wish to reply to the person who sent you the email, you select **Reply** from the **Reply all** menu at the top right of the email window.

A window will open, automatically addressed to the person who sent you the email, and listing you in the From field. The subject field will place “Re” in front of the original text in the subject field. “Re” stands for reply.



If you select on **Reply** the return email will be sent only to the person who sent the original email. If you select the **Reply All** button, the reply will go to all recipients of the original email. If you wish to send the email to someone else, select **Forward**. When the new email window opens, it will contain the original message in the message window. You may then type in the address of the person to whom you wish to send it. In the subject field, “Fw” appears before the original subject, indicating the message has been forwarded.

Creating a New Message

Before discussing how to compose an email, let's review the components of an email address:

The Three Main Components of an Email Address

Ordinarily, there are three parts to an email address: your user name, a domain name that is usually the identity of your ISP (Internet Service Provider), and an extension. The extension could indicate whether your email account is from the government, from an educational institution, or from a commercial entity.

A typical email address for someone who uses Outlook, for example, looks like this:

lastname_firstname@outlook.com

The extension—.com —indicates that Outlook is an Internet establishment. Other common extensions are .gov for government users and .edu for educational users. Email addresses outside the United States may include letters that indicate the country of the user's ISP.

Create an email message

Let's create an email message. Click on the **New** button at the top of your mailbox. Select a partner from the class and enter that person's email on the To field. Click in the field and type the address, be sure to include all three parts of the email address.

Using CC and BCC

You may want to send a copy of your message to a third party, or to a group of recipients. Type the address(es) in the CC field. The term cc indicates that a copy of the same message has been sent to others. Cc is an abbreviation for carbon copy. If you add a recipient's name to this box in a message, a copy of the message is sent to that recipient, and the recipient's name is visible to other recipients of the message.

Sometimes you may want the name of your cc recipients to be invisible to your primary recipients.

Then you click on the pop-up menu, and select BCC. Bcc is an abbreviation for blind carbon copy. If you add a recipient's name to this box in a message, a copy of the message is sent to that recipient, and the recipient's name is not visible to other recipients of the message.

Add a Subject Line and Message

Now fill in the subject line. Subject lines need to be clear and concise. The subject line should give the recipient a good idea of what information will be included in the body of the email. Emails with poor subject lines are often ignored.

Now compose your message.

Send an Email

When you have finished addressing your email, adding a subject and composing the message, simply click on the **send button** at the top of your message to send your email.

Sent Folder

Once you have sent an email you can locate a copy of that email in your sent folder.

Delete, Save, and Print Email

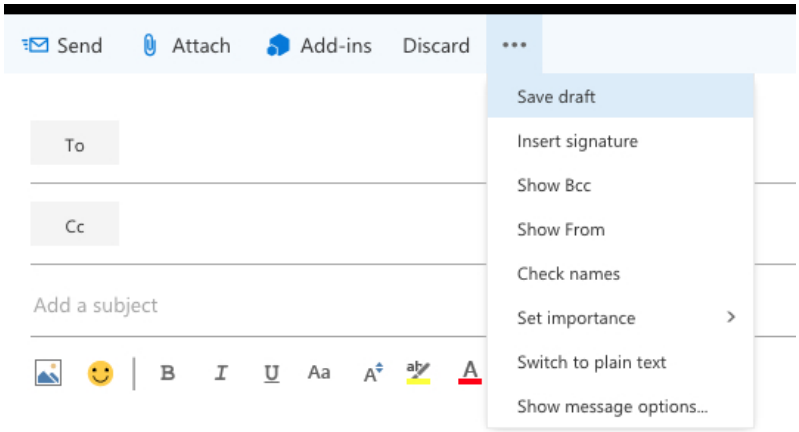
To delete an email message, click in the box in front of the message, and click on the

Delete key on your keyboard or the **Delete** button at the top of the pane .

Note: Messages will be moved to the Deleted folder. They will remain there for 30 days and then be permanently deleted.

Email messages sent to you will remain on the server for a set amount of time. You do not need to save them. But it is good practice to either delete messages you are done with or put them in a folder if you wish to save them.

If you need to save an incomplete message to be finished at a future time, just click on the **'Save Draft'** button at the top of the message. It is located at the top of your email in the ellipses drop down menu (….). The message will appear in your Drafts folder the next time you log on.



To print an email message, go to the Ellipses menu (…) and select **Print**. A print window will pop-up. Select your preferences for printing and click the **Print** button.

Recognizing and Using Embedded Web Links

Sometimes you will receive an email with a web address listed. These addresses are usually in the form of a clickable link. If the link does not open when you click on it hold the control button on your keyboard and click the link. A new tab should open in your browser. If this does not work copy the link and paste it into a new tab.

Attaching a File

Occasionally, you will wish to send a file to someone. You do this in the form of an attachment. After you have addressed and written your message, click on the attach button.

A dialog box will open. Navigate to the file that you wish to attach. Click on it once to select it, and then click the **Open** button. Click **Attach as a copy**. You will be taken back to your email window.

When you are done composing the email, click on the **Send** button to send your email with its attachment.

Receiving and Opening an Attachment

When you receive an attachment, it will appear at the top of your email.

Click on the arrow next to the attachment and select Download to download your file. When the download is complete, you will see a link appear in the bottom left corner of the Chrome browser window. Click on the link to open the file.

To save the file use the SAVE As option. You may now name and save the file where you wish.

In order to open your attachment, you must have the application in which the file was created or a compatible application. For example, if someone sends you an Excel file, you cannot open it unless you have Excel on your computer.

Adding a Signature

1. On the navigation bar, choose Settings > Options.

2. Under Options, choose MAIL > Layout > Email signature.

3. Under Email signature, in the text box, type the signature you want to use. Use the formatting mini toolbar to change the appearance of the signature.

4. If you want your signature to display at the bottom of all outgoing items, including replies and forwards, select **Automatically include my signature on new messages I**

compose and/or **Automatically include my signature on messages I forward or reply to**. If you don't select this option, you manually can add your signature to any message. For details, see Manually add a signature to a new message.

5. Choose Save.

Mail Forwarding:

You may have all of your email sent to another email address. To do so, choose Settings > Options > Accounts >Forwarding, then click in the button next to Start forwarding and type the address to which you want your email sent. Then click Save. Click in the button next to Stop forwarding and click Save to stop the process.

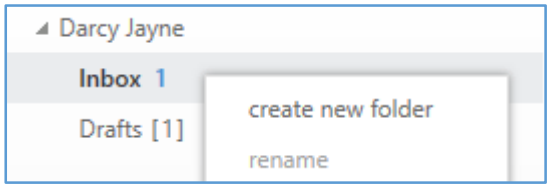
Creating Folders

It is very important to keep your email organized. For example, if you are a teacher, you may want to create folders for each of the periods you teach. Or if you are an administrator, you may want to create folders for various projects or initiatives that you are working on.

To create a new folder, target the location in which you want to create the folder, and then right- click its parent folder. For a top-level folder (a folder at the same level as your Inbox), use your mailbox as the parent folder.

To create a folder that's a subfolder of your Inbox:

1. Right-click your Inbox.
2. Click Create new folder.
3. Type the desired name for this folder.
4. Press Enter or click away.



Most of what you can do with a folder will be found in the right-click men (control +click on a MAC).

Actions you can take include:

 Create new folder – Allows for creating a new subfolder by right-clicking the folder where you would like it placed.

 Rename – Allows the folders (except default folders such as the Inbox) to be renamed.

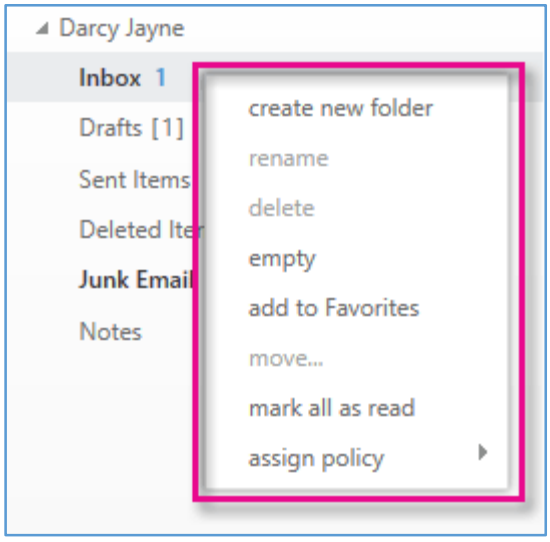
 Delete – Allows the folder to be moved to the Deleted Items folder.

 Empty – Deletes everything in the folder (including any subfolders).

 Add to Favorites – Allows the current folder to be added to your Favorites.

 Move – Allows the current folder to be moved to a new folder. You can also move a folder by clicking and dragging it to the desired location.

 Mark all as read – Allows every item to be marked as read.



Favorites

It's not unusual to end up with so many folders that you can no longer keep track of important information.

Make it easier to keep track of those folders by adding them to your Favorites. Favorites don't appear in your folder list until you've added at least one folder. Adding a folder to Favorites doesn't move the folder – instead it links to that folder location.

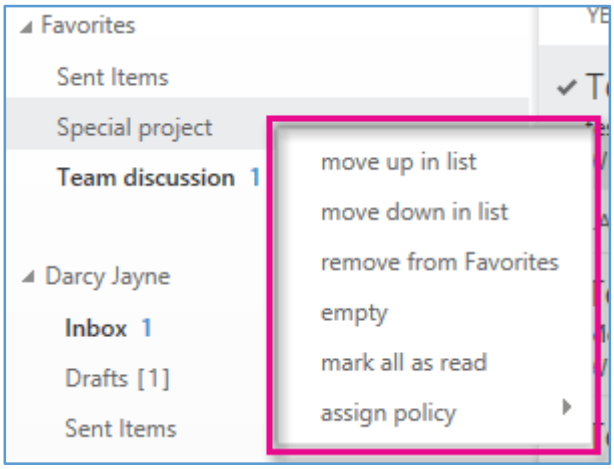
 To add a folder to Favorites, right-click it and click Add to Favorites.

 You can re-order folders in Favorites by clicking and dragging, or by right-clicking and then clicking move up in list or move down in list.

 To remove a folder from Favorites, right-click the folder in Favorites and click remove from favorites. This only removes the link to the folder from Favorites; it won't delete the folder from your mailbox.

Create a Folder

Practice creating at least one folder for the people who contact you the most.



Other important things to remember

 The folders you create can be at the same level as your default folders (for example, the Inbox or Sent Items folders).

 You can create subfolders within any existing email folder (for example, you can create subfolders within your Inbox).

 You may need to refresh your browser to view a folder that you just created in the folder list.

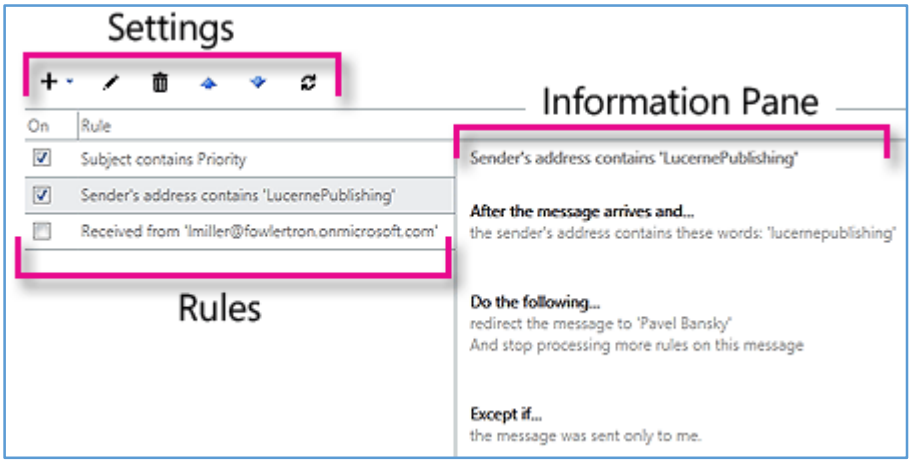
 If you want to create a personal information folder as a subfolder to a mail folder, you

can create the folder and then move it to the desired location. Some folders can't be moved to another location or be renamed (for example, the Inbox). If the folder can't be renamed, the Rename option in the menu will appear dimmed.

Creating Rules

To help you stay organized, it can be really helpful to create and apply rules to incoming messages. For example, you can create a rule to automatically move all mail sent from one of your member groups to a specific folder.

To manage rules, click the gear icon Settings > Options > Mail> Automatic Processing > Inbox and Sweep Rules.



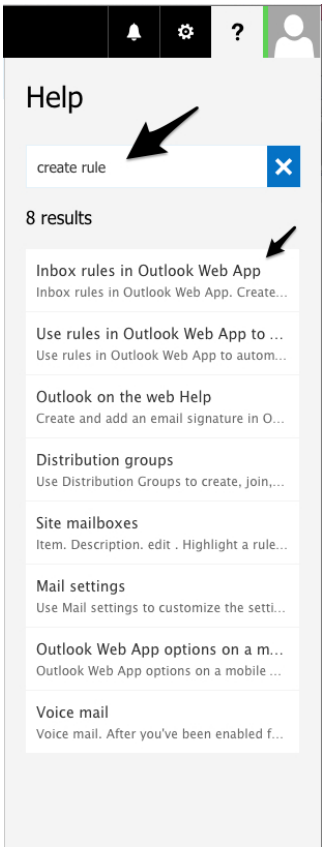
The Inbox Rules tab

The Inbox Rules tab shows you an overview of all your Inbox rules. From here, you can review what a rule does, turn rules on or off, and create, edit or delete rules that you no longer need.

ITEM	DESCRIPTION
+ new	Use this to create a new Inbox rule.
edit	Highlight a rule, and then click this to view or edit the details of a rule.
delete	Highlight a rule, and then click this to delete it.
move up	Use this to move the selected rule up in the list. Rules are processed from top to bottom.
move down	Use this to move the selected rule down in the list.
refresh	Use this to refresh the list of rules.
On	Use the check box next to a rule to turn it on (box checked) or off (box not checked).
Name	The name of the rule.

Help

The help feature is available in most applications. In Office 365 it is the ? question mark at the top right of your screen. To use the Help feature, click on the question mark, then type the topic in the search bar. Once the results are in click on the title of the article which best addresses your issue.



Automatic replies (formerly Out of office assistant)

Let people who send you email messages know when you're not available by setting up automatic replies in Outlook Web App.

Set up an automatic reply

You can turn on or modify automatic replies.

Sign in to Outlook Web App..

On the navigation bar, choose Settings > Set automatic replies.

Use the following information to help you set up your automatic reply.

Setting	Description
Don't **send** automatic replies	Select this option to turn off automatic replies.
Send automatic replies	Select this option to turn on automatic replies.
Send replies only during this time period	Select this check box, and then set a start time and end time to control when automatic replies are sent. If you don't set a time period, your automatic reply remains on until you turn it off. And you're reminded you automatic replies are turned on each time you sign in to your mailbox.
Send a reply once to each sender inside my organization with the following message	Use the text box to create a message that is sent only to senders who are inside your organization. This option may not be available.
Send automatic reply messages to senders outside my organization	Select this check box if you want automatic replies to be sent to senders outside your organization. If you select the check box to send automatic replies to persons outside your organization, two other options are made available. Choose one of the following: Send replies only to senders in my Contacts list Select this to limit automatic replies to senders who

Setting	Description
	are in your Contacts folder. Senders who aren't in your Contacts folder won't receive the automatic reply. Send replies to all external senders Select this to send your reply to all senders outside your organization.
Send a reply once to each sender outside my organization with the following message	If you select Send replies to all external senders, in the text box type the reply message you want sent.

Email Etiquette

Here some common sense do's and don'ts when sending email.

Have a clear, specific subject in the subject field.

Follow rules and conventions of writing like proper spelling, punctuation and capital letters. Do not use abbreviations or acronyms. You may know what BTW, or LOL stand for, but your recipient may not. (BTW – by the way; LOL – laugh out loud).

Do not write in ALL CAPITAL letters; it is considered "yelling."

Avoid using emoticons or smileys in your email. ;-) They are not professional.

Close with your name and contact information.

Finally, if you are using a district email system or Internet, know the terms of the

Acceptable Use Policy.

Safety and Security

Here are some simple rules to follow for students (and you).

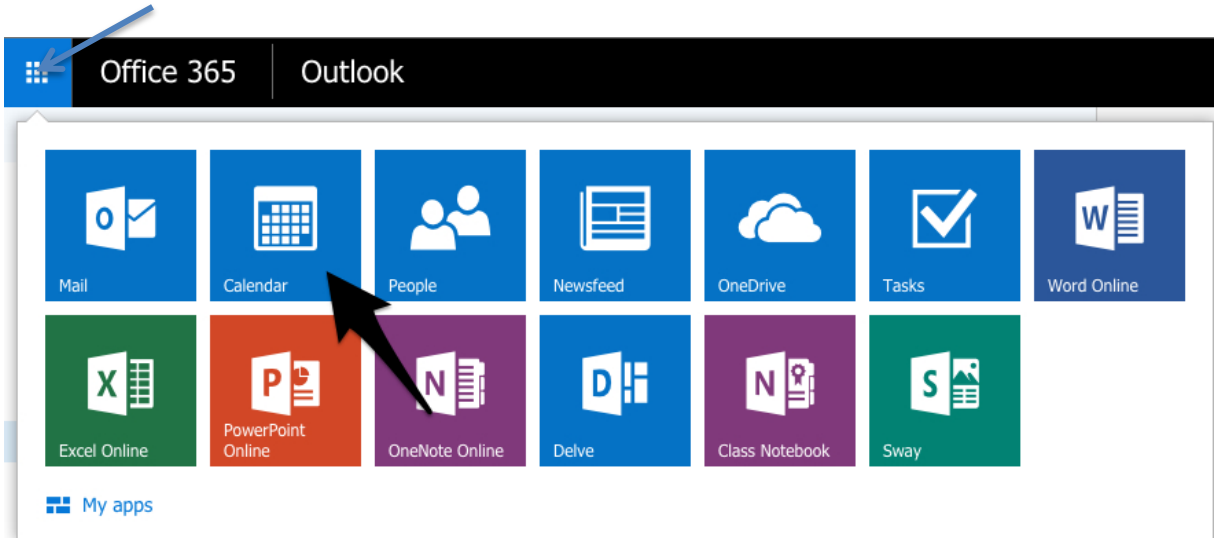
1. Never, never share personal information or where you live.
2. Do not arrange to meet with someone that you met over the Internet.
3. Unsupervised chat rooms can be dangerous places. You never know what types of predators may be lurking.
4. Do not send pictures of yourself through email.
5. Do not fill out any forms on the Internet without parent or teacher permission.
6. Never let someone else use your email account.

Calendar

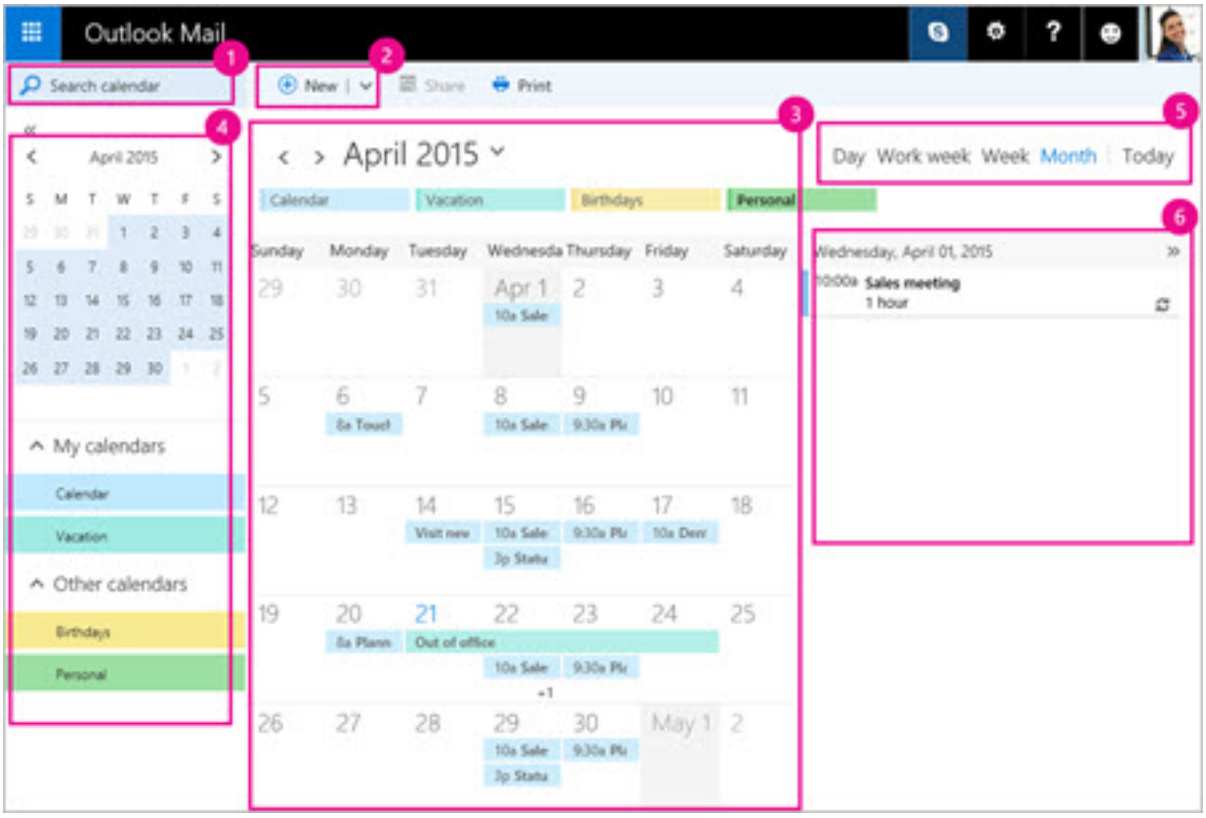
Calendar Features

After your Inbox, the calendar is probably the next greatest asset when using Outlook Online. You can view your calendar in four different ways: Day, Work Week, Week, and Month.

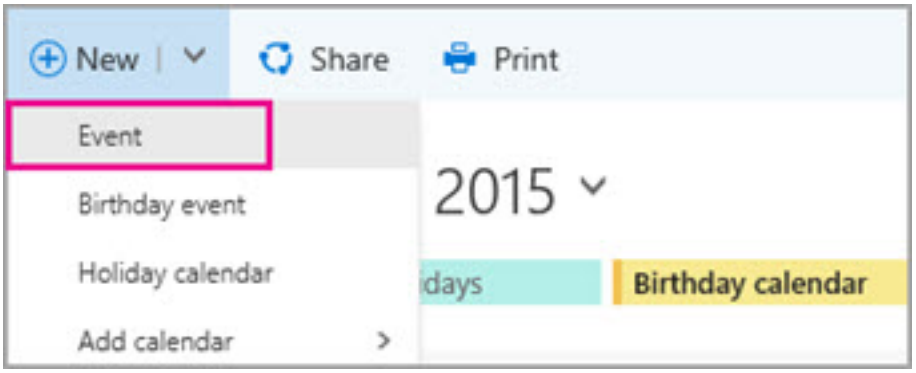
Let's switch to Calendar by clicking on the Waffle Icon at the top right corner of the navigation bar. Then select Calendar.



Keep track of appointments, meetings, or any other event from anywhere you have Internet access. Add, edit, or delete events by using daily, weekly, or monthly views.

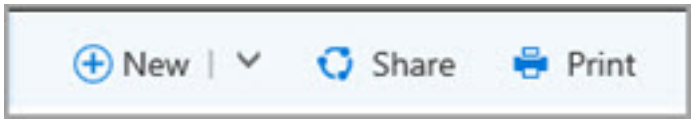


1. Search calendar - Begin typing the name of a person or an event to locate a meeting or appointment containing a particular contact or event title, and then select .
2. New event - Create a new event by selecting **New** > **Event**.



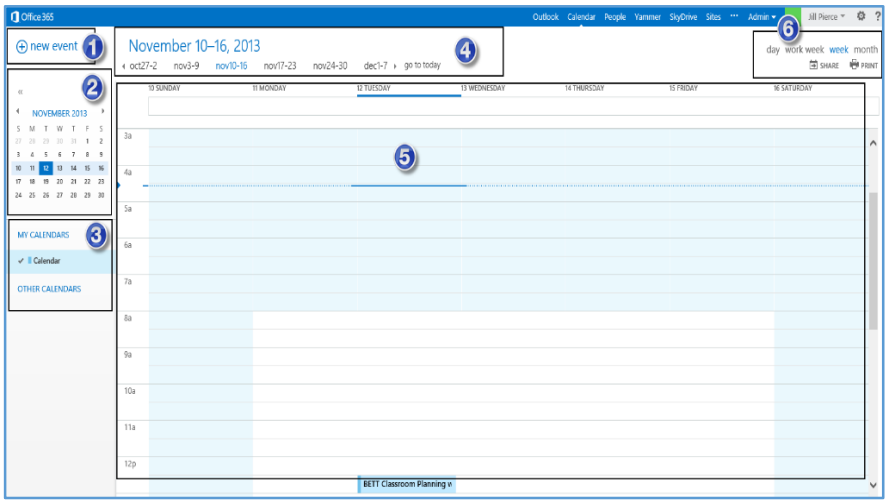
3. Calendar - Displays the calendar in month view. You can move through the months by selecting the forward or back arrows. Selecting a particular date highlights that date in the main, larger calendar view. The current date is always highlighted.

4. My calendars - View more than one calendar at a time and create other calendars, such as a calendar to use for a specific project or to track personal appointments. You can view multiple calendars in a single view, or select which calendar to display. To create a new calendar, right-click **My calendar** and select **New calendar**. To rename or remove a calendar, right-click the calendar and select **Rename** or **Remove**.
5. View options - Choose whether you want to see your calendar in Day, Work week, Week, or Month view.
6. Calendar pane - Calendars are displayed based on the view you want to use. Create a new appointment here by double-clicking a day or time slot.
7. Share and print - Use the command bar above the reading pane to share or print your calendar.



8. Month view - If you have a lot of events, the month view of a calendar can be very busy and difficult to read. Select any day in the calendar pane for a clearer view of all the events for that day.

Week View



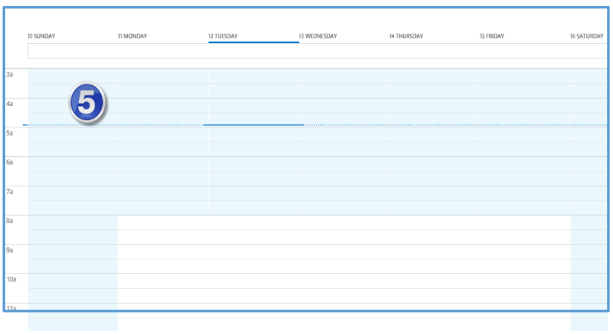
Week view is the default view shown when you first visit your calendar in Outlook Online. You can change it to Day, Work Week, or Month by using the options in the upper right-hand corner.

1. Create a new event by clicking New. An event can be an appointment, a meeting, or an all-day event.

2. Use the calendars to navigate from one date to another. Shading indicates the week you're currently viewing, and darker shading marks the current date. You can use the calendar icon at the top to collapse or expand this side of the calendar view.

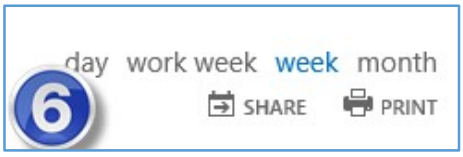
3. You can view more than one calendar at a time, and even create other calendars such as one for a specific project or to track personal appointments. If you select multiple calendars to display, they'll be merged into a single view with each calendar given a different color.

4. This is another area that you can use to navigate from one day to another. Click any date to jump to that date, or click the arrows on either end to see the dates before or after those displayed.



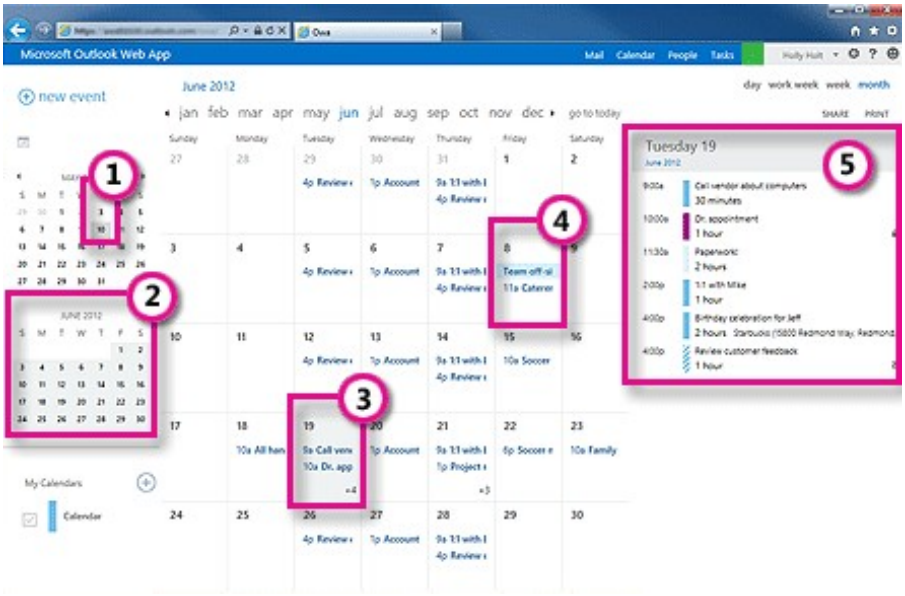
5. The main window, where calendars will be displayed. Double-click any white space in this window to create a new calendar item, or click and drag to create a new item in the time you've selected.

6. Select the desired view, and share or print your calendar.



Day View

The day view is most useful if you have a very busy schedule, or if you want to view multiple schedules side-by-side. The controls remain the same, only the view has changed.



1. Current date – Indicated by the day being shaded.

2. Selected month – Indicated by slightly lighter shading.

3. Selected day – Indicated by the day that is shaded. The number tells how many non- displayed items there are on each day. Double-click an item to open it, or to create a new event on any date by double-clicking the white space on that date.

4. All-day event – Indicated by the item being shaded.

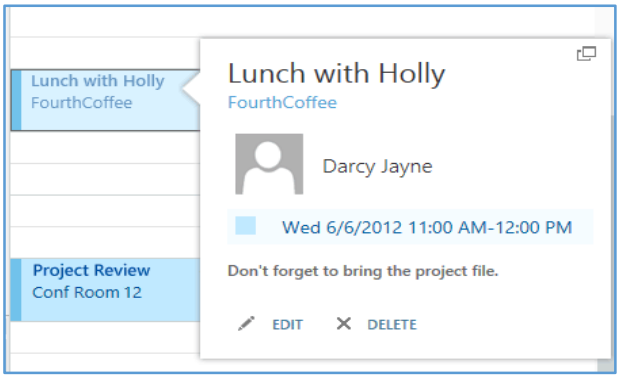
5. Agenda for the selected day – You can create a new item on the current date by double- clicking the white space in the agenda.

Month View

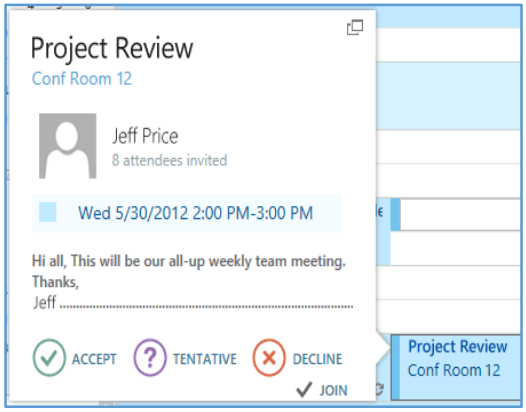
The month view gives you a quick view at-a-glance of the entire month, however it can become very crowded and hard to read. To make it more usable, there's an agenda displayed for the selected day on the right side of the calendar.

Event Details

You can click any event in your calendar to see a quick view of that event. If you created the event, you will be displayed as the creator and you will have a link to edit or delete the event.



If you've been invited to a meeting, you will see the organizer and links to respond to the invitation. If the organizer has included an online meeting invitation, you'll see a link to join the meeting in the body of the invite.



Creating Calendar Items

To open a new calendar item in any view, you can click + new event or double-click any white space on the calendar. In the Day, Work Week, and Week view, you can select a 30-minute block of time or drag to select a longer block, and then type the subject directly on the calendar. From there, you can double-click the new item to open it and add other details.

Create an Appointment

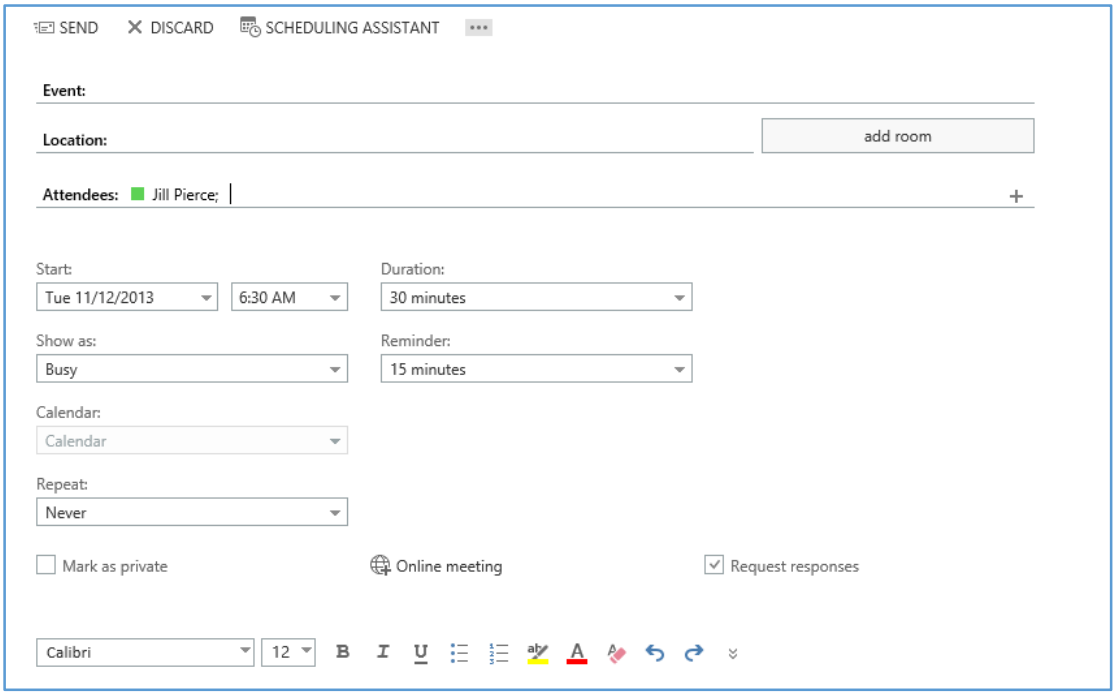
Click New event or double-click the calendar to open a new calendar item form.

Create a Meeting

This is one of the most under-used features. People will often just send out an email letting everyone know that there is a staff meeting every other Wednesday from 3:15 to 4:00 pm. A more effective strategy is creating a “meeting” and inviting the entire staff – this way, if a meeting is canceled or needs to be moved, everyone will receive a calendar update.

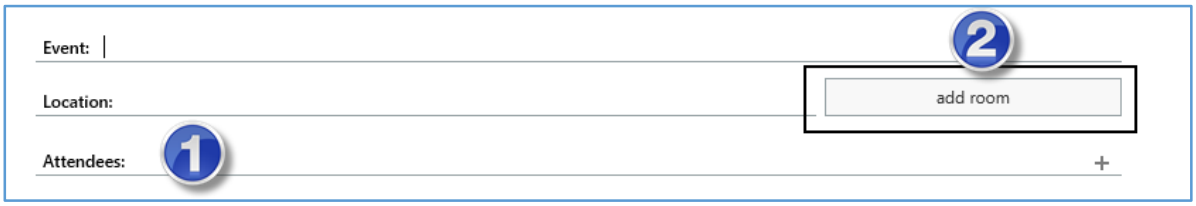
A meeting is a calendar event that you send to other people. You create a meeting the same way you do an appointment, but you invite attendees and may add a resource such as a conference room.

After you’ve selected New event, you follow most of the same steps. To turn a calendar item into an invitation, start by entering the names of people you want to invite in the Attendees field.

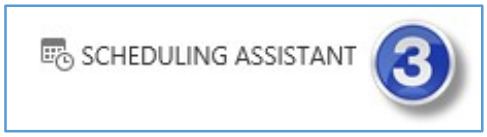


1. By typing directly, the Attendees field allows you to add names to your event.

2. Enter a location, or select Add a room to see a list of available conference rooms from your organization's address book.

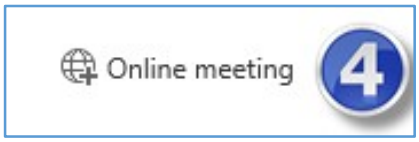


3. To see the availability of attendees and resources such as conference rooms, select Scheduling Assistant. When you're done, click ✔ OK to save your changes or ✕ discard to cancel. Both will take you back to the event form where you can make any other changes you want before sending.



4. If online meetings are enabled for your account, you can add an online meeting link by selecting Online meeting.

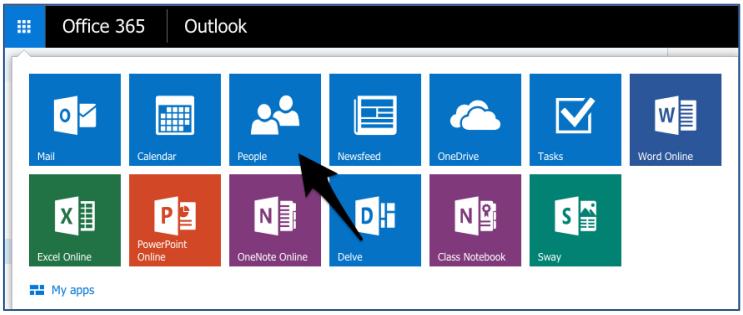
5. By default, Request responses is turned on, but you can turn it off if it's not important to know who has accepted or declined the invitation. If you leave request responses on, you'll receive a message as each attendee accepts or declines your invitation.



6. Click Send to save your changes and send the invitation to the attendees or ✕ Discard to cancel.

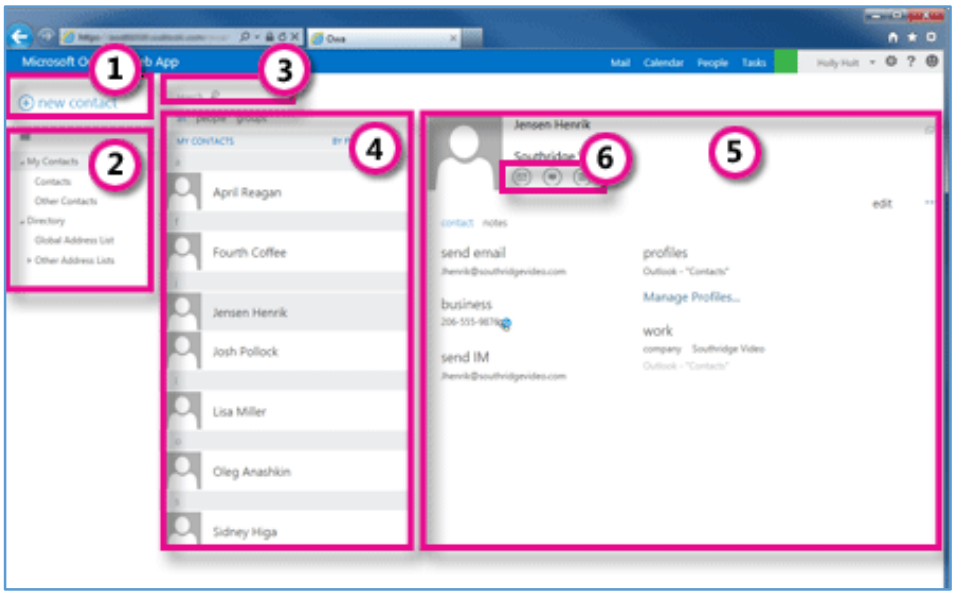
People

The People tool allows you to find people or groups in your organization. You can also add personal contacts and create a personal group (also called a distribution list or "DL").



Create a new contact by selecting + New.

1. Add new contact.
2. Organize contacts.
3. Search contacts – Type a person's name to search for them in your contacts and in your organization's address book. For more information, see **Search in Outlook Web.**
4. List of contacts.
5. Contact selected –The contact card for the selected person.
6. Actions for contact (send mail, schedule a meeting, instant message) – Actions you can take directly from the contact card. Select the icons to send a message, start an IM session, or create a meeting request. (See numbered diagram on the next page.)



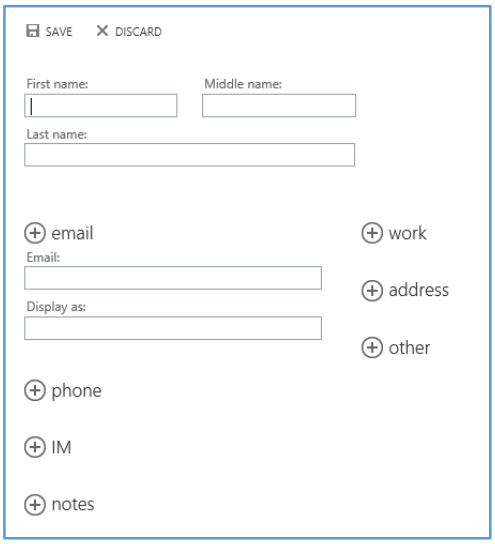
Creating a New Contact

When you receive an email address or contact information from someone that isn't a part of your organization, you can add them here. For example, if you are a teacher, you could collect the email addresses of students and/or parents, and store them here.

To create a contact, select the folder under My Contacts that you want to create the contact in, then select **New** and select **Contact**.

This will open a blank contact form. Fill in any desired details, and then select the + icon to see more options for that type of information. For example, if the person you're adding to your contacts has multiple phone numbers, select the + next to Phone to add phone numbers.

When you're done, select Save to save your changes or Cancel to Discard



Create a Group

You can create a personal group in Outlook Online that is stored in your Contacts folder which can contain entries from your personal Contacts and from your organization's address book.

If you are a teacher, and have collected all of your students' and parents' email addresses, this is where you can create a group so you can easily send important messages or newsletters to an entire group of parents and/or students.

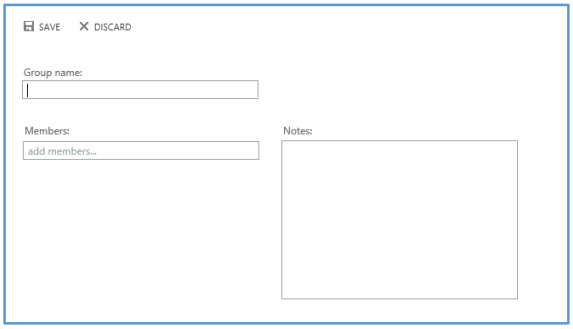
To create a personal group, select the folder under My Contacts in which you want to create the group, then select **New** and select **Group**.

This will open a blank group form. Enter the desired group name and any notes. To add members, type the name of the desired person to add in Members.

Outlook Online will search for a match in your Contacts and in your organization's address book. If a match isn't found, you can search for that person. You can also type an email address directly in Members.

Press Enter to add your selection to the group.

When you're done, select Save to save your changes or cancel to discard changes.



Creating a Contact from a Message

An even better way to collect parent and student email addresses is to have them send you a quick email from their email and then create a contact from that message.

To add a contact from a message:

1. Click on the name/email address of the person who sent you the email.
2. A new card appears. Click on the Add button to add to contacts.
3. Add any additional information you want.
4. Select Save to add the card to your Contacts or cancel to discard.

Email Vocabulary

Definitions are provided below for terms that you may encounter when using email.

Inbox folder: Email that is sent to you is placed in your Inbox. You read your new email messages by clicking on them in your Inbox folder.

Sent folder: Email that you compose and send will be placed in the Sent folder.

Deleted folder: Email that you have deleted from any of the other folders (e.g. Inbox, Drafts, and Sent Items) is placed in the Deleted folder.

Email Address: An email address contains a user name (located before the "@" sign) and the name of the email server (following the "@" sign). For example, an email address may look like this: Doe_John@lacoe.edu.

Reply: When you wish to respond to an email message, you may hit the Reply or Reply ALL button. A new email window will open which automatically places your name in the From field and the person's email to whom you are replying in the To field. The Subject field will contain the same text preceded by Re:.

Address Book: You can create an address book that contains a list of people with their email addresses and other information that you consider important to have, such as their addresses and phone numbers.

Attachment: When you wish to share a digital file such as a word-processed document or image, you may send it along with your email message as an "attachment."

Auto responders: If you are going to be out of the office and are unable to read and respond to your email for a few days, you may set-up your email to reply automatically to any emails with a message that you write prior to leaving. You might write something like "I will be out of the office until April 14th. I will reply to your message as soon as I return."

Bounced Message: Occasionally you will receive a notice that your message could not be delivered. The recipient's server may be down or the email address may not be correct.

Flame: An email, which expresses rudeness or inappropriately expressed anger.

Mailing List or Group: A collection of email addresses identified by a single name. Creating a group or mailing list allows you to create a single message addressed to the list or group, and all will receive the message. Examples of groups could be "Parents," "School Improvement Committee," or "Period 5 Students."

Netiquette: Network etiquette. Defines appropriate use of email and the Internet.