Microsoft Outlook
Your 60-second primer

What is Microsoft Outlook 2016?
Outlook is an email, calendar, and contact management application. Outlook is now cloud-based (accessed over the internet), meaning you can also access your email and schedule from any online device, either through a browser or a dedicated app.

What can I do in Outlook?
- Stay in contact thanks to email access from any online device
- Manage your day with your Outlook calendar
- Stay organised with To Do
- Access your address book contacts anywhere with People

What problems does Outlook 2016 solve?
- Check emails and calendar on the go from any device
- Massive mailbox size upgrades, meaning:
  - No more ‘Your mailbox is full’ messages or need for PST folders
  - Easier attachments – automatically choose the last few files you’ve worked on

How do I use Outlook?
- Log in to Outlook securely from any browser, using Multi-Factor Authentication
- Download the relevant Outlook app to smart device
- Access Outlook directly from your NHS computer

No more moving messages to PST folders!
Outlook: signing in

1. Access directly from your NHS computer
   - If you have access to your own dedicated NHS computer (laptop or desktop), you will be able to access Outlook directly
   - Open the Start menu
   - Search for and select Outlook
   - You will not need to log in as you are using an NHS-owned device
   - If you’re using Windows 10, right click on the Outlook app to pin it to your start menu or task bar for easier access in future

2. Sign in directly to Outlook from any browser
   - From any web-enabled device, open a browser and go to: portal.office.com
   - Enter your work email address, and usual password.
   - Respond to the multi-factor authentication prompt.
   - Once you’ve signed in, you will be able to access your NHS email account using Outlook on the web.

3. Navigate from elsewhere in Office 365
   - If you are already signed in to Office 365 at portal.office.com, look for a 3 x 3 pattern of dots or squares in the top left of your screen (colours vary)
   - This is your waffle – the Office 365 navigation menu
   - The waffle allows you to navigate between different Office 365 apps (e.g. Outlook & Word)

3. Sign in from a Microsoft app
   - You can download an official Microsoft Outlook app for free, available for Apple, Android, and Windows devices.
   - You can also log into your NHS email via your CUHB Intune mobile app, also available for Apple, Android, and Windows devices.
   - You’ll need to log into either app by entering your work email address and usual work password, and respond to the multi-factor authentication prompt when asked.

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**See full Microsoft guidance on different Outlook apps**
Outlook: your inbox (accessing on a dedicated NHS computer)

**Search**
Type key words to search for anything, filtering by relevant mailbox.

**Switch between functions**
Choose from Mail, Calendar, People, To Do or more.

**Email folders**
Navigate between email folders. Use the View tab to hide or show this pane.

**Menu**
Use the Outlook menu to access a range of commands.

**Sort**
Sort your email folder by date, sender, importance, etc.

**Reading pane**
See the content of an email at a glance. Use the View tab to hide or show this pane.

**Check connectivity**
Check whether your inbox is connected or offline.

**New inbox capacity**
Means no more moving messages to PST folders!
Outlook: your home screens on mobile apps

**INBOX**
- **Focused or Other**
  Choose Focused Inbox to see your most important messages first
- **Click on a message to read in full**
- **Switch between functions**
  Choose Mail, Calendar or Search
- **Compose**
  Sort messages by date, sender, subject etc.
- **Filter**
  Sort messages by date, sender, subject etc.
- **See number of responses**
  The small blue number shows the number of replies
- **RSVP**
  Accept meeting invites at the touch of the RSVP button
- **Swipe left**
  Delete messages by swiping them to the left
- **Change between Reply, Reply to All and Forward**

**INDIVIDUAL MESSAGE**
- **Click to go back to the main inbox**
- **Click in box to type a reply**
- **Use for deleting or filing specific messages**
- **Click on three dots menu for further options**

**CALENDAR**
- **Click to create a new meeting**
- **Click on calendar entries to view**
- **Switch between dates**
- **Green ticks show acceptances**

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Outlook: common queries

Using the BCC field

• Need to send a message to a large group – and want to keep email addresses private or avoid Reply Alls? Add email addresses to the Bcc (Blind carbon copy) field.
• In the full version of Outlook on an NHS computer, click New Email
• Under Options, click Bcc from Show Fields.
• In Outlook for the web, accessible through any browser, click on New message
• You’ll see the Bcc option in the far right of the To bar

Setting up an Automatic Reply

• Need to create an automatic email reply, advising about opening hours, availability, or even that you’re out of the office?
• In the full version of Outlook on an NHS computer, click on File in the upper left
• Choose Automatic Replies (Out of Office) to create a rule
• In Outlook for the web, accessible through any browser, click on Settings (the cog icon in the top menu).
• Select Mail and then Automatic replies to create a rule

Sharing calendars

• To share your calendar in the full version of Outlook on an NHS computer, navigate to your calendar and choose Share Calendar from the top menu
• You can also choose E-mail Calendar to send access to your calendar straight to someone’s inbox
• In Outlook for the web, go to your calendar, and choose the Share option from the top. Change the settings to give the appropriate level of access.
• To request access to another person’s calendar, choose Add calendar (Outlook for web), or Open calendar (full version of Outlook) and select the person or shared calendar from the directory
• This will send them individual a request to access their calendar, which they can accept or deny

Adding a personal email signature

• To add or amend an email signature, in the full version of Outlook on an NHS computer, click on New Email and then Signature
• In Outlook for the web, click on New message, and choose the three dots menu at the top of the new email. From here, select Insert Signature
Outlook: Cool things to try

See out of office messages even before you’ve sent the email
If you add someone to the To field, but they have set an out of office message, you’ll see that message without sending your email, meaning you can redirect your email straight to their alternative contact.

Set your location in the calendar, and you’ll see weather forecasts local to Cardiff and the Vale – or to somewhere different if you’re intending to travel.

Easier attachments
When you attach a file, you’ll automatically be offered the choice of the last few files you’ve worked on – meaning you don’t have to navigate to an older file to attach. It’s a handy time saver.

Never forget an attachment
• If you use the words attach or attachment in your email, but don’t attach anything, Outlook will spot this and show you a reminder before you send the email.

See availability at a glance
As you add names to a meeting invitation, you’ll automatically receive a view on how many people are available – even without checking the Scheduling Assistant.

Use emojis and GIFs
Add emojis or GIFs to email to convey sentiment and bring the chat to life. But be mindful of their use and overuse – particularly in sensitive exchanges.

See out of office messages even before you’ve sent the email
Get someone’s attention by @ mentioning them in an email. This will automatically add them to the email’s To field, and people can filter their inbox for all the emails where they have been @ mentioned.

Never forget an attachment
• If you use the words attach or attachment in your email, but don’t attach anything, Outlook will spot this and show you a reminder before you send the email.

A calendar that tells you the weather
Set your location in the calendar, and you’ll see weather forecasts local to Cardiff and the Vale – or to somewhere different if you’re intending to travel.