Outlook Guide – useful settings

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Connecting to M365 mailbox
Outlook screen
Menu bars description on the top banner for e-mails
Menu bars description on the top banner for calendar
File – Options
Recommended Outlook settings
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Connecting to an M365 mailbox

It is recommended to start some M365 application first (e.g. Word) and activate the product by logging to your university account (xy@cuni.cz). You will be redirected to CAS. When M365 is registered, start Outlook and the connecting will be easy as shown on pictures here.
**Home**

New – quick opening of new e-mail / other new items (calendar, tasks, etc.)

Delete
- Archive = moving email to folder Archive
- Junk – you can manage the rules for e-mails if they should fall to Junk folder

Respond – see contextual help
- Meeting – make a meeting from a mail message

Quick Steps – use carefully. AI offers often used tasks.

Move
- Move – you can do the same with a mouse transferring the mail to other folder
- Rules – here you can automatize the transfer of new e-mails based on rules

Tags
- Assign policy – set of policies for information retention – do not use
- Categorize – you can tag e-mail by color and category description
- Follow Up – useful function how not to forget a deadline mentioned in e-mail (can be set for you or addressees)

Find – people or filter messages based on criteria
Send / Receive

This becomes reasonable when you work offline. If working online, sending / receiving is automatic. Use contextual help.

If working offline (e.g. slow connectivity issues), you should control sending and receiving yourself.

„Work offline“ icon is marked by a rectangle when offline mode is on.
Folder

New

• New Folder – creates new folder
• New Search Folder – you can find messages by a pre-set filter (e.g. from your manager) in this folder

Actions – see contextual help

Clean Up – see contextual help, use carefully

Favorites – Add to Favorites – adds selected folder to Favorites section

Properties – Folder properties shows all in one window – do not use
**View**

**Current view**
You can create your own view (add a field in the message view, etc.) and name it. You can then apply this to one folder or to all folders. This setting is saved on the server, it will also be transferred to your laptop.

**Messages**
- **View as a conversation** – emails stored in the Inbox and sent mails, linked to the Subject, will be combined into a conversations as you know it from other programs (WhatsApp, Messenger, etc.).

Focused Inbox – switched off by organization. If switched on AI manages what message are important for you and hides the others. You really do not want this.

**Arrangement** – see contextual help. Most can be done with the mouse on the field bar (From, To,...)

**Layout** – here you choose how the Outlook screen should look (what is on it or not).

**Window** – see contextual help.
Help

Interesting for you:

• Help – opens a window where you can write down what you are looking for and what you need help with

• Show Training – offers courses with pictures or videos on how to do things in Outlook

• In any window (new mail, new meeting etc.):

„a bulb“ offers help or the appropriate menu after typing the subject
Calendar – Home / View

Interesting for you:

- New meeting – opens a window for adding meeting members
- Add Calendar – adds calendar of selected person (if you have access to it)
- Share Calendar – you can share your calendar with choosing what the person can see
- Overlay – displays several calendars in one grid
File
from here you can access Outlook on the web (looks directly at the server)

here you can set automatic replies in case of absence. ATTENTION - you have to set both inside and outside the organization

here you manage rules and notifications (mail sorting, etc.)

Here is another pack of Outlook behavior settings.
Search settings

File – Options – Search
Signature settings

New message – Signature
you can create more than one
signature

here you choose whether you
always want a signature

The signature is not transferred
between computers
Outlook on-line (OWA)

outlook.office365.com

Left panel (mailboxes, folders, groups)
Switching Mail / Calendar / Tasks etc.

Settings

Open a shared mailbox
The shared mailbox must be added manually by right-clicking on Folders - Add shared mailbox.
Outlook on a mobile device

Since M365 is a public cloud service, there are plenty of tutorials on the internet for different mobile devices.

Instructions for different devices directly from Microsoft

For Charles University, authentication is handled via CAS. It may happen that the mailbox xy@matfyz.cuni.cz cannot be connected, then you need to select the option to use another account and enter yourIDnumber@cuni.cz