Get started with Outlook Online email

This guide is for staff and research postgraduates
Welcome to Outlook Online email!

Outlook Online is one component of the Microsoft Office 365 suite, an integrated suite of tools. Over time an increasing number of University systems will be replaced by tools within the suite, so that everything works together.

This guide covers the following basic tasks:

- Open Outlook Online
- Set your email signature
- Read, reply to, forward, delete and search emails
- Create a new message
- Organise your email with folders, flags and categories
- Set your out-of-office message
- Access shared mailboxes
- Mark messages as junk mail or not junk
- Use rules to control the flow of incoming mail
- Should I use the desktop or online version?
- Further support resources

Hint: this denotes something new or something that is done differently
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Open Outlook Online

To open Outlook Online and view your folders:

1. Open any web browser, go to www.bristol.ac.uk/email and click the button for staff and PGR email (alternatively you can go direct to https://outlook.com/bristol.ac.uk)
2. Sign in using the long version of your University username, e.g. ab1234@bristol.ac.uk, and your standard University password.
3. When you first open Outlook Online you will see an option in the left-hand pane for ‘Folders’ – if this is collapsed, click on the arrow next to it and then click on ‘More’ to view your folders (you may need to click on the arrow next to your name to see the folders).

To get back to Outlook Online from anywhere in the suite:

1. Click the ‘App launcher’ in the top left corner, and select ‘Mail’.

To sign out of Outlook Online:

1. Click on your name in the top, right-hand corner of the window and select ‘Sign out’.

Alternative ways to access Outlook email

You can also access Outlook email:

- Via the desktop version (Windows and Mac)
- On mobile devices

Getting started guides for these are available via www.bristol.ac.uk/email (in the Microsoft support section, select ‘Outlook email and calendar’ to see all support resources).

Most things you need to do can be done from Outlook Online, and it is simple and easy to use. Power users - people with multiple shared mailboxes or many calendars - may find that the desktop version suits them better.

Set your email signature

Note that your email signature may not be migrated from your Google account, so you may need to set this up first thing on day 1.

- Make sure that you know how the University expects you to format your signature: see guidance at http://www.bristol.ac.uk/style-guides/visual-identity/email/
To set your email signature:

1. Click on the ‘Settings’ cog and select ‘Mail’ from the ‘Your app settings’ section.
2. In the ‘Options’ pane that opens, select ‘Email Signature’ from the ‘Layout’ section.
3. Tick both options and add your signature in the correct format, then click on ‘Save’.
4. Click on the arrow next to ‘Options’ to return to your inbox.

You will need to do this for each mailbox you have access to if using the online version, or you can use the desktop version to create and manage signatures for all mailboxes in one place.

Read, reply to, forward, delete and search emails

Read your email

This is straightforward and shouldn’t cause any issues; just do one of the following:

- If an item is in your inbox, simply click on it in the list of mails to open and read it.
- If not in the inbox, select the folder that the email is in and do the same as above.
- If you can’t remember where an email is, search for it (see section on searching below).

Reply to, reply to all, and forward emails

Replying to the sender only is the default, even where there are multiple recipients, though you can also choose to reply to all or to forward the email. Both are done the same way.

To reply to all or forward an email:

1. Click on the ‘Reply’ drop-down and select ‘Reply all’ or ‘Forward’ from the pop-up menu.
Delete an email

The easiest way to delete an email is to hover your mouse over the message in the email list and click on the dustbin icon that appears next to the message details. When you delete an email, it goes into the ‘Deleted Items’ folder. After 30 days, it will disappear completely.

If you want to remove the email from your Inbox but keep it elsewhere in Outlook, so you can still search for it later if you need it, use the Archive function. Tick the box in the top, left-hand corner of the email, to select it, and choose ‘Archive’ to remove the email from your inbox to your ‘Archive’ folder. The first time you do this, you will be shown a menu asking you to either create an archive folder or choose an existing folder.

There is very large amount of space available for email and Calendar in Outlook, so there is no need to delete messages just to save space.

Search for email

To search for an email:

1. Click in the search box field – note that the default is to search all folders, not just the current folder.
2. Enter the search term; e.g. if you want to find messages from edward.elgar@bristol.ac.uk, type edward.elgar@bristol.ac.uk in the search box.
3. Click on the magnifying glass icon (or press ‘Enter’).
4. Clear the search by hovering over the search box and clicking on the ‘X’ that appears.

It is easy to search for messages from a specific person and also to specify what results are returned, for example:

- To find all emails containing the word Edward, type Edward
- To find just messages from Edward, type from:Edward
- To find all emails from Edward sent this week, type from:Edward received: this week
- To find emails from Edward that include attachments, type from:Edward hasattachments@yes

Create a new message

1. Click on the drop-down arrow next to ‘New’ and select ‘Email message’.
2. In the compose window, start to type the recipient’s name into the ‘To’ field and hit ‘Enter’ when it is highlighted in the list. See below for information on external contacts.
3. Enter a short and meaningful message subject, write the email – keep it short and to the point, with most important information at the start – and click on ‘Send’.
If you have previously sent an email to an external contact, Outlook remembers them and will show the email address for you to select as you start to type their email address.

Send a message with an attachment or with a Modern Attachment

1. Click on the drop-down arrow next to ‘New’ and select ‘Email message’.
2. Type the body and subject of your email as normal.
3. Click the ‘Attach’ button and choose your file (see ‘hint’ below) - either:
   a. Upload and attach as a OneDrive file (Modern Attachment)
   b. Attach as a copy (classic attachment)

Hint: on a University computer, after clicking ‘Attach’, you will find MyFiles and other existing file storage locations by selecting the ‘Computer’ option; to find your OneDrive files select ‘OneDrive - University of Bristol’.

What are Modern Attachments?
You have a choice of how to attach files in Outlook. You can send a file attached to your email. You can also choose to send the file as a link within your OneDrive - a Modern Attachment.

The problem with classic attachments is that as soon as you send one, you have created multiple versions of the file, and you no longer know which should be the definitive and correct version. When comments or changes are needed, everyone on the circulation list sends you a different version back, and it generally becomes difficult to reconcile all the changes.

Modern Attachments solve this. You choose the file from your OneDrive, and Outlook sends a link to the file out by email. This means there is only ever one copy.

If the file is a Word, Excel or PowerPoint document, any comments appear immediately, and everyone can see them. If changes are needed they can be made by any recipient, and are seen immediately by all. There is full version control, with roll back to a previous version if required.

Modern Attachments work even if the recipient is not a member of the University, or if they are accessing the file on a computer which does not have Microsoft Office installed.

Add a contact to your personal contact list (address book)
To email someone outside the organisation, type in their full address. Next time you starting typing the same address it will be recognised automatically. You can also add email addresses, phone numbers etc to your contact list if you wish.

To save a new contact:

1. Click on the ‘People’ icon at the bottom, left of the ‘Navigation pane’.
2. Click on ‘New’, choose ‘Contact’ and add the relevant details.
Drafts

If you want to save the current email as a draft, click on the three dots next to the ‘Discard’ option above the email (not the one below) and select ‘Save as draft’. Find saved drafts in the ‘Drafts’ folder.

Organise your email

You can organise your mail using a combination of folders, categories and flags.

Folders

You can organise your email into a normal folder structure.

In Outlook, the primary method of organising emails is folders. You can only store an email in one folder at a time. This is different to Google, where an email can appear under multiple labels. However, if you want one email to appear in more than one place then use Outlook categories as well – see information on categories below.

Note that you may not see all your folders. If this is the case, click on ‘More’ in the ‘Navigation pane’ to expand the list.

To create a new top-level folder:

1. In the ‘Navigation pane’, click on ‘More’, right-click on the mailbox account name in the expanded section of the list and select ‘Create new folder’.
2. Enter a relevant name and press ‘Enter’.

To create a sub-folder:

1. Navigate to the folder under which you want the new folder to appear and right-click on it.
2. Do the same as above (the option will say ‘Create new subfolder’).

To move email to a folder:

1. If just one email, click and hold the mouse on an email and drag to the required folder.
2. If multiple, contiguous emails, hover over the first email and tick the box that appears, then hold down the ‘Shift’ key and tick the box on the last, then click and hold the mouse on one of the selected emails and drag to the folder.
3. If multiple, non-contiguous emails, tick the box on all the emails you want to move, then click and hold the mouse on one of the selected emails and drag to the required folder.
Categories

Colour categories work like labels in Google and let you easily identify and group associated items. You can assign a category to a group of interrelated items, such as contacts, appointments, and emails, so that you can quickly track and organise them.

You can also assign more than one category to items. The biggest advantage here is that an email can belong to, for example, your Most urgent category as well as to your Project XXX category, and you will find it when checking either category. Note that if you want to search by or view categories, you should use the desktop version.

To add a category to an email:

1. Right-click on the email, click on ‘Categorise’, and select the relevant category.
2. To add further categories, with the email selected just repeat step 1, above.

To create a category:

1. Right-click on the email, select ‘Categorise’, followed by ‘Manage categories’.
2. In the pop-up, select ‘Add new category’ type a name, select a colour from the drop-down and click on ‘OK’.
3. In the ‘Manage Categories’ pop-up, click ‘OK’ to close it.

Flags

Applying a flag to a message gives you a visual reminder of it. Note that if you want to create a custom flag, you should use the desktop version.

To set a flag:

1. Hover over the email and when a flag icon appears, right-click on it and then choose a category (i.e. ‘Today’, ‘Tomorrow’, etc.).

To search for flagged emails:

1. Click on ‘Filter’ and select ‘Flagged’ from the pop-up menu.
Set your out-of-office message

Your out-of-office message will only be migrated from Gmail to Outlook if it happens to be active on switchover. Otherwise, you will need to set it up again in Outlook.

To create an out-of-office message:

1. Click on the ‘Settings’ cog, then select ‘Automatic Replies’.
2. Select ‘Send automatic replies’, followed by ‘Send replies…’ to select the dates between which you will be away.
3. You have several, quite sophisticated possibilities, including sending different messages to those within and outside the University; you can also automatically decline meeting requests.
4. Choose the relevant options, add your message and click ‘OK’.

Access shared mailboxes

Shared mailboxes have most of the same functionality as your personal University account, which means that you can organise emails with folders, categories and flags and create signatures. See the above section for information on creating signatures for shared accounts.

To access a shared mailbox:

1. Click on your name in the top, right-hand corner and select ‘Open another mailbox…’
2. Start to type the email address or shared account name of the other mailbox that you want to open and choose it from the list that appears; this opens the mailbox in a separate window.

Note that if you spend much time working with shared mailboxes, you may be better advised to use the desktop version.
Mark messages as junk mail or not junk

You need to train Outlook so that it understands what you consider or do not consider to be spam. You may get more spam than you used to in Google at the start, this will improve as you train Outlook. By sending an unwanted message to the Junk folder, or retrieving a wanted message from the Junk folder, the spam filtering will improve.

To send an email to your ‘Junk’ folder:

1. Tick the box to select the email.
2. Click on the drop-down next to the ‘Junk’ option in the top menu and choose ‘Junk’. Alternatively, if you think the email is an attempt to steal your password, choose ‘Phishing’.

While the spam filter is learning, you should check your Junk folder more often than you did in Google.

If you find something in your ‘Junk’ folder that isn’t spam:

1. Tick the box to select the email.
2. Select ‘Not junk’ from the top menu to move it back to your inbox.

Use rules (filters and forwarding) to control the flow of incoming mail

Filters and forwarding in Gmail are called ‘Rules’ in Outlook, and you can set these up to automatically move (or delete) incoming messages to specific folders. Right-click on an email and select ‘Create rule...’ From the pop-up menu to get started.

Should I use the desktop or online version?

Most everyday things can be done from the web version, and it is simple and easy to learn. However, power users - people who deal with multiple calendars and multiple mailboxes - will probably find that the desktop version will suit them better.
Further support resources

See the University’s Outlook support resources and frequently asked questions: www.bristol.ac.uk/email

Outlook also has its own internal help. Click on the question mark next to your account name and type into the ‘Tell me what you want to do’ box.

If you can’t find out what you need to do by using the above support resources, you can also contact the IT Service Desk for support:

- Web self-service: https://servicedesk.bristol.ac.uk/tas/public
- Email: service-desk@bristol.ac.uk