Outlook for iOS Guide - iPhone Edition

HCS Technology Group

Outlook for iOS Guide - iPhone Edition

Produced by HCS Training Centers, Ltd.

Contents

Setting Up an Account in Outlook for iOS

Outlook for iOS has options for Microsoft 365, Microsoft Exchange, Outlook.com, Hotmail, Gmail, Comcast, iCloud, and Yahoo! email accounts. You can set up multiple Exchange accounts in Outlook for iOS. Once you're done setting up your account, you can swipe through a brief tutorial to show you how to use the main features. When you're finished you can add more email accounts, or just go right to your inbox.

Add an Exchange or Microsoft 365 account to Outlook for iOS

1. When you first open Outlook for iOS, the startup screen appears and asks you to Add Account.

2. Outlook for iOS will look for an Exchange account by default. Enter your email address and tap Add Account. (See next page for IMAP accounts.)

3. Enter your password and a description for the email account. Tap Sign In.
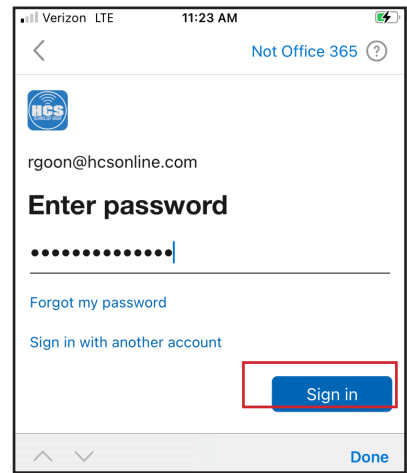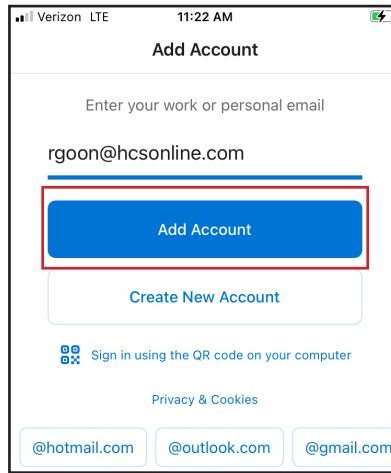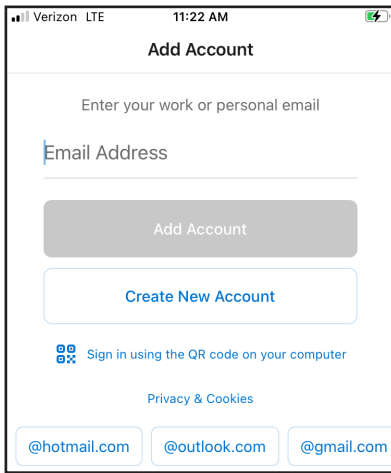
4. If you have multi-factor authentication turned on for your account, select the appropriate authentication.
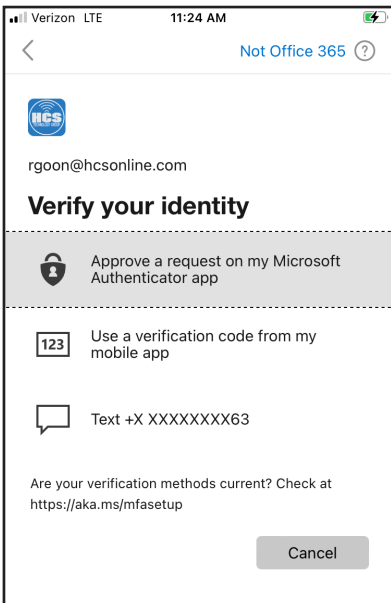
5. In the Add Another Account screen, tap Maybe Later, so you can continue configuring the account you just added.
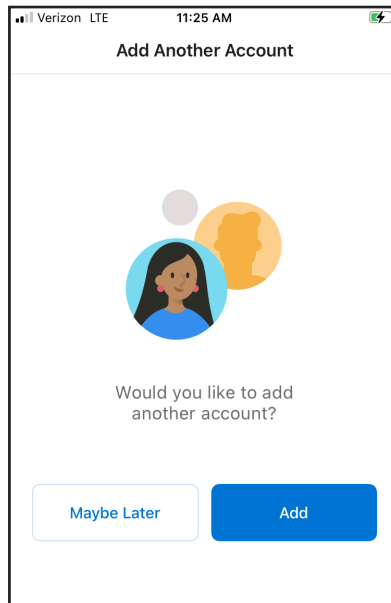
6. After a message appears asking you if you want to Enable Notifications, Tap Turn On. Enabling notifications enables background app refresh. After you tap Turn On, Outlook for iOS can fetch mail and update your badge count on the app icon. Tap Allow to allow notifications on your lock screen and home screen.
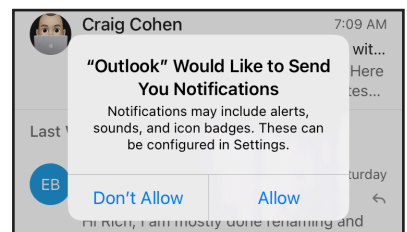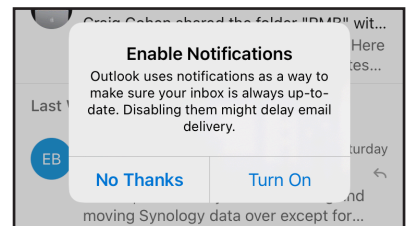
Add an IMAP account to Outlook for iOS
In the previous section you added an Exchange account. Next you'll learn how to add an IMAP account.

1. On the top-left, tap Account Selector (looks like a house).
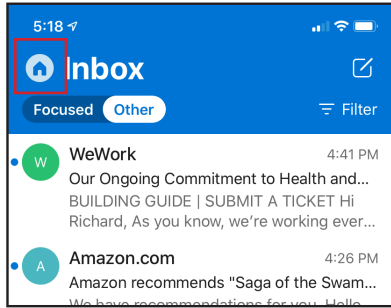
2. On the bottom-left, tap Settings (looks like a gear).
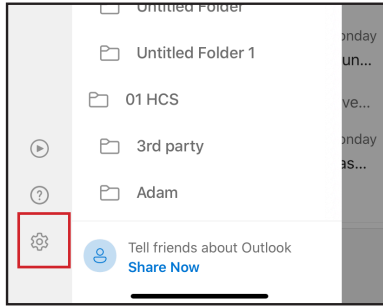
3. Tap Add Mail Account.
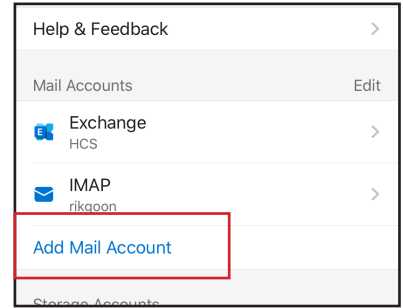
4. Tap Add Email Account.
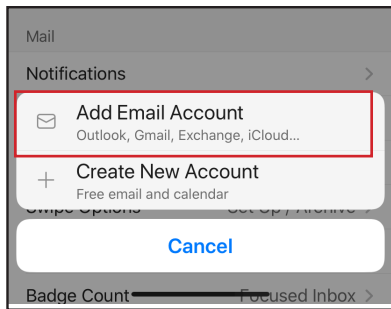
5. Enter your email address and tap Add Account.
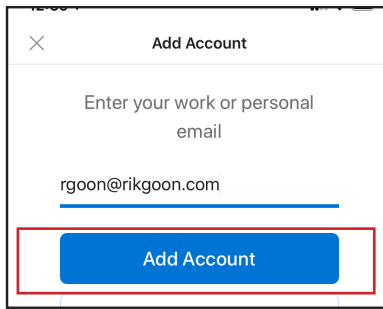
6. Tap Not Exchange
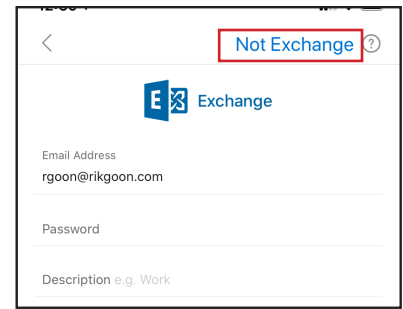
7. Tap Change Account Provider.
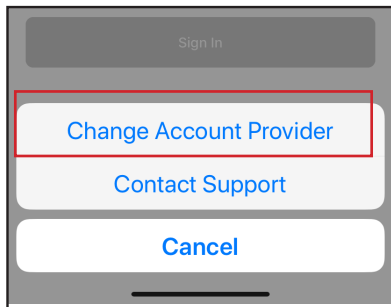
8. Towards the botom-left, tap IMAP.
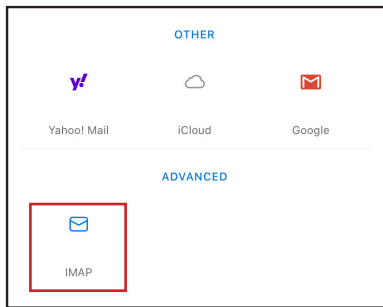
9. Enter your information then next to Use Advanced Settings, tap the switch.
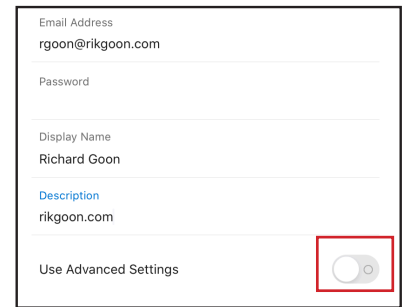
11. Enter your email server information and your IMAP user name & password.
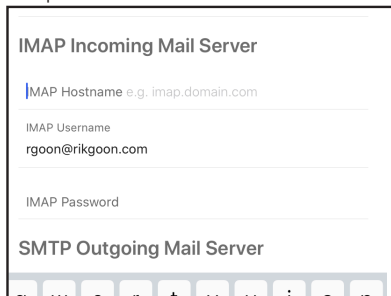
12. Tap Sign-In.
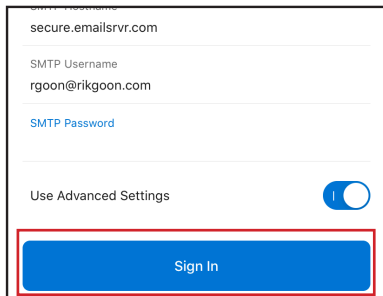
13. After Outlook finishes setting up the account, confirm that it displays the new account under Mail Accounts.
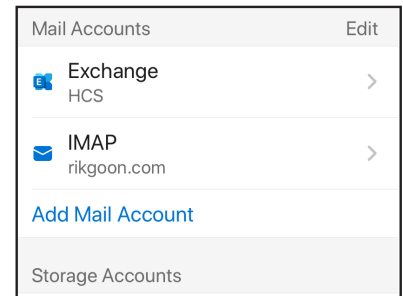
14. Tap Exit (X) on the top-left corner.

![Outlook icon] **Main Screen**

When you open Outlook for iOS, Outlook displays the inbox for your default account. In this view:
- You can switch to another account by tapping the Account Selector and selecting another mail account.
- Each unread message displays a blue indicator next to it.
- If there are multiple messages in a conversation, Outlooks displays the number of messages in the thread to the right of the message.
- Outlook displays the time or date you received the message.
- Outlook displays each message with a few lines of the body of the message as a preview.

Filter
Tap Filter to show only messages that are Unread, Flagged, have Attachments, or contain any mentions of you.

☑ Unread
🏳 Flagged
📌 Pinned
📎 Attachments
@ Mentions Me

Shortcut
Tap to access your calendar

Teams Call
Book Workspace
New Event
Use Voice
Customize This
New Message

Account Selector
You can switch account views with a tap. Manage your Favorites and view other folders in your account(s). You can also access your Settings here.

Note: The icon differs as you choose an individual account. The all accounts icon is a home (🏠).

Mail
Tap to access your mail when you are in another area of Outlook for iOS.

Calendar
Tap to access your calendar.

Search
Tap to search your contacts, events and files. Double-tap for a keyboard search box.

Inbox screen:

4:03

Inbox

Focused Other ≡ Filter

CS CrashPlan Small Busine... 3:32 PM
Request # received: Need...
##- Please type your reply above this line -## Thank you for...

DW Douglas 1:26 PM
DB Follow Up
Hi Craig, Thanks for sending this across - Can you provide me a... 3

Craig Cohen 7:09 AM
Craig Cohen shared the folder "R...
Craig Cohen shared a folder with you Here is a clone of the ELL DB...

Last Week

EB Eric Saturday
Permissions ↩
Hi Rich, I am mostly done renaming and moving Synology... 2

Amazon.com Friday
Download 2 free audiobooks t...
Fit more reading into your life. Try a

Mail   Search   Calendar

Account folders screen:

4:24

Office 365
rgoon@hcsonline.com

Favorites ✎
📥 Inbox
➤ Sent
📝 Drafts
🗄 Archive
👥 Groups 1
🗑 Deleted
📁 Napalitano HVAC
🗃 Junk
📁 01 HCS
📁 3rd party
📁 Adam
📁 Arek
📁 Chris Holmes and Co

Focused and Other

Important emails appear in your Focused inbox, while the rest remain easily accessible, but out of the way in the Other inbox. If you move email in or out of your Focused inbox, Outlook for iOS learns about your habits and tailors Focused to your priorities. The Other inbox may contain emails from mailing lists or newsletters. So from time to time, it is a good idea to check on Other.
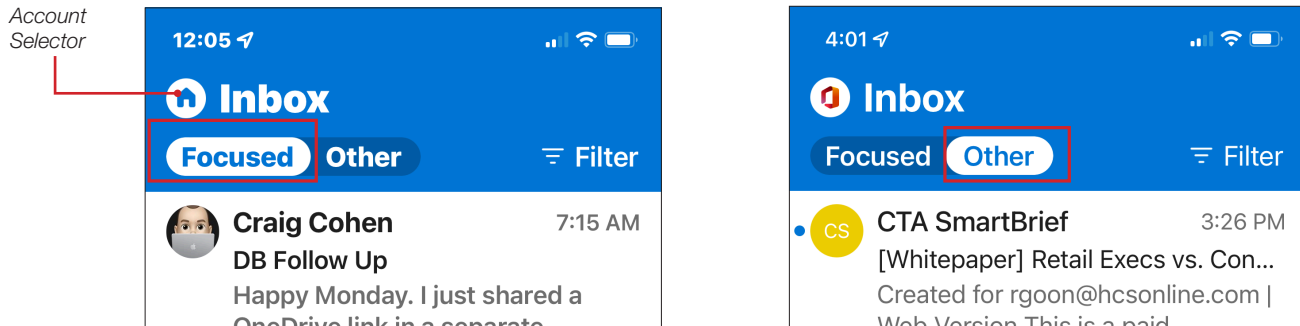
Account Selector

Tips
To disable threaded emails/conversation view:
      1. Tap the Account Selector (🏠)
      2. Tap Settings (⚙).
      3. Scroll down to Organize Mail by Thread and toggle it off.

To turn Focused Inbox off:
      1.Tap on Account Selector (🏠)
      2. Tap Settings (⚙).
      3. Scroll down to Focused Inbox and toggle it off.

To edit the rules that move your emails in and out of the Focused inbox:
Focused Inbox learns as you train it. If there is an email in Other which you want to be in Focused or vice versa, do the following:
      1. Open the specific email.
      2. In the top bar, tap Overflow (three dots).
      3. Select "Move to Other" or "Move to Focused" (See Fig 3).

Each time you select "Move to Other" or "Moved to Focused", you'll be prompted with a dialog and the choices Always Move, Move Once, and Cancel (Fig 4).
      • Always Move - Any emails coming from the email address will be moved to the folder you selected.
      • Move Once - Move the one email you selected, but don't change the inbox for future emails from this sender.
      • Cancel: Don't move the selected email.

Outlook for iOS learns your preference for that email. The next time you get email from that email address, Outlook will store it in the appropriate inbox.
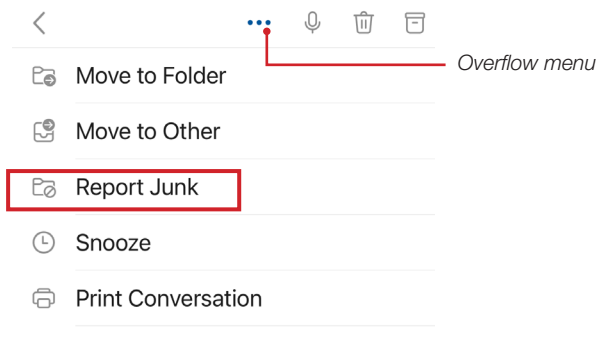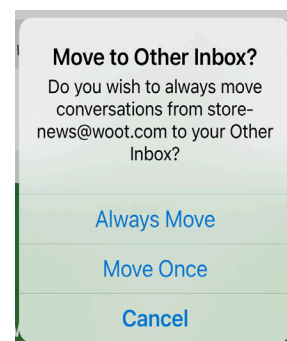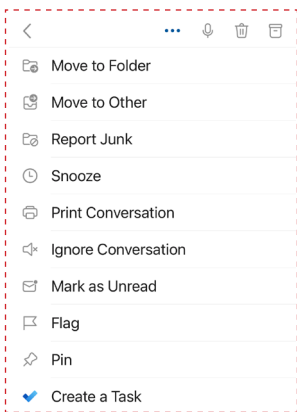

Overflow menu

Fig 3

Fig 4

To learn more about your settings for mail, go to page 15.

![Outlook logo] **Reading and organizing email**

After you have read your email, you have a few options other than to reply to the person. You can flag it with a due date, archive the email, move the email to a folder or just delete it.

📁	Move to Folder
📁	Move to Other
📁	Report Junk
🕐	Snooze
🖨	Print Conversation
🔇	Ignore Conversation
✉	Mark as Unread
🚩	Flag
📌	Pin
✔	Create a Task

Move to Folder
Moves the email in to a selected folder.

Move to Other
Moves the email in the Other inbox. If this email was in the Other inbox, this would be "Move to Focused Inbox."

Mark as Junk
Mark the email as junk and moves it to the Junk Folder.

Snooze
For email that you want to handle later, Snooze removes email from your inbox and return it at the time you choose.

Print Conversation
Prints the email threads to a printer.
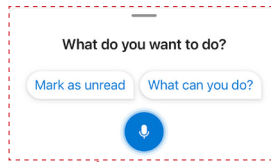
Mark Unread
Marks the email unread.
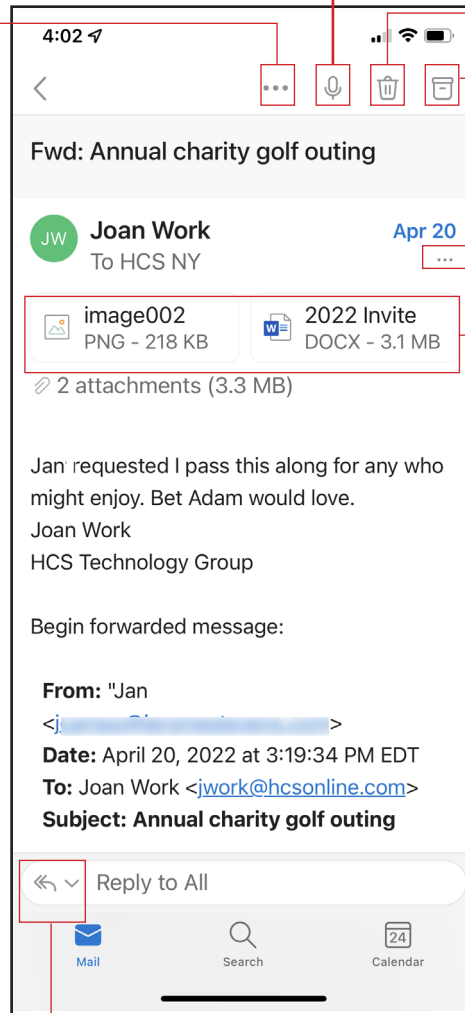
Flag
Flags an email.

Pin
Flags an email.

Create a Task
Creates a task in Microsoft To Do (Microsoft To Do must be installed on your device)

Voice Commands
Tap the microphone to have Cortana do simple tasks such as move the mail to Junk or Other.

What do you want to do?

Mark as unread   What can you do?

Trash
Moves the email to the Deleted Items.

Archive
Moves the email or conversation to the Archive folder.

4:02

Fwd: Annual charity golf outing

JW **Joan Work** **Apr 20**
To HCS NY
...

🖼 image002	📄 2022 Invite
PNG - 218 KB	DOCX - 3.1 MB

📎 2 attachments (3.3 MB)

Jan requested I pass this along for any who might enjoy. Bet Adam would love.
Joan Work
HCS Technology Group

Begin forwarded message:

From: "Jan
<j_____>
Date: April 20, 2022 at 3:19:34 PM EDT
To: Joan Work <jwork@hcsonline.com>
Subject: Annual charity golf outing

Reply to All

Mail   Search   Calendar

Save to Evernote   Send to Slack   Translate Message   Send to OneNote   M Add

Mark as Unread

Flag

Reply
Richard Goon

Forward

Delete

Cancel

Add ons
List of add-on apps that you have allowed Outlook to Have access to.

Mark as Read/Unread
Marks the email read/unread.

Flag
Flags an email.

Reply
Replies to the sender only.

Reply All
Replies to all the recipients of the email.

Forward
Fowards the email to another recipient that is not part of the thread.

Delete
Moves the email to the Deleted Items.

Reply All
Joan Work and HCS NY

Reply
Joan Work

Forward

Edit or View Recipients

Attachments
Shows the amount and total size of attachments on the email. If the attachment is a png or jpg file, the file will be embedded into the email.

Reply Options
You can reply to the sender, reply to all or forward the email. You can also edit the recipients of your reply before sending it out.

Sending emails

Outlook for iOS provides extra options such as Send Availability or Create an Invite. You can also send a link from Dropbox, Microsoft OneDrive or Google Drive.
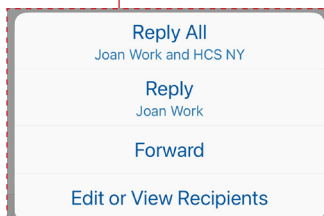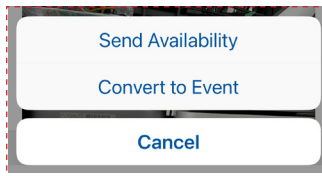
Draft Saved	Discard

Draft
This gives you the option of deleting the draft or save it in the Drafts folder.

| Send Availability |
|---|
| Convert to Event |
| **Cancel** |

Send Availiability
This feature lets you find and share available meeting times in an email. Once you've settled on a time, you can create a meeting invitation.

Convert to Event
This Allows you to send a Meeting invite from the Mail Section instead of the Calendar Section.

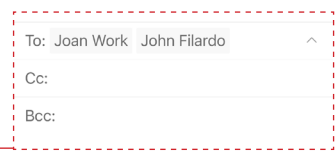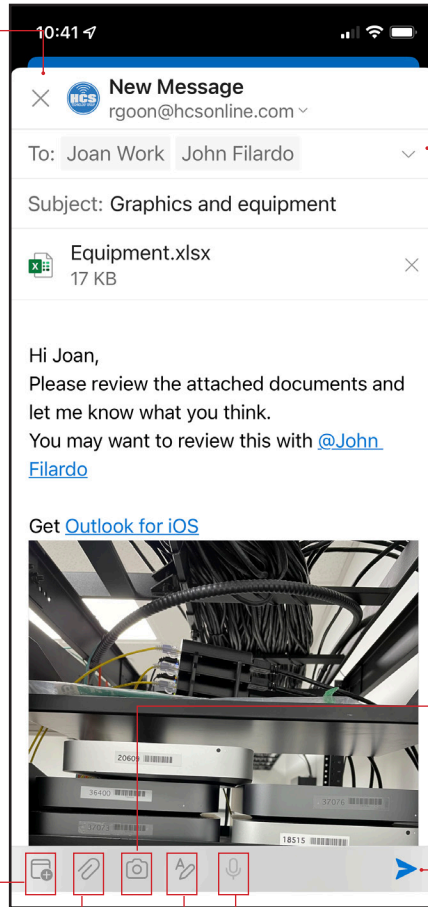| Attach File |
|---|
| Use Last Photo Taken |
| Choose Photo From Library |
| **Cancel** |
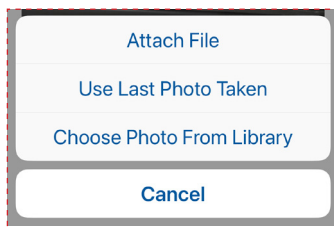
Attach a File
Attach a file from your device or send a Google Drive or Dropbox link to the recipient.

Use Last Photo Taken
Attach the latest photo taken from your camera roll.

Choose Photo from Library
Choose any of your photos from your Photo Library.

New Message
rgoon@hcsonline.com ⌄

To: Joan Work   John Filardo

Subject: Graphics and equipment

Equipment.xlsx
17 KB

Hi Joan,
Please review the attached documents and let me know what you think.
You may want to review this with @John Filardo

Get Outlook for iOS

To: Joan Work   John Filardo
Cc:
Bcc:

Cc/Bcc
Expand this area with a tap to enter an email address in the Carbon copy or Blind carbon copy field.

Take A Photo
The first time you tap this, Outlook asks permission to access your camera, then after you grant permission, this button opens the camera, so you can can take a picture and have it automatically attach the picture to an email in Outlook.

Send email

Formatting tools

Body   B   I   U

Bullet List

Bold

Italic

Underline

Number List

Add Link

Quickly format your email with premade formats.
This includes:
• Body
• Subhead
• Title

Try Saying...

New line
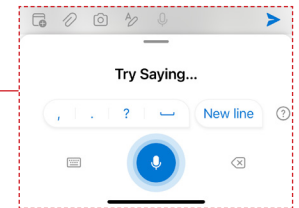
Dictation
Tap the microphone to dictate emails using voice commands.
NOTE: Device needs to be unmuted and the app has access to the microphone in order for dictation to work.

Inbox - tips

How to select multiple emails in your Inbox

While in your inbox (Focused or Other), you may want to select multiple emails to Flag, Move, Trash or Archive. To select multiple emails, do the following:

1. Tap and hold one of the emails until the empty circles appear to the left of each emails.
2. Tap each email to include in the group, and confirm that Outlook displays a checkmark next to each email you tap.
3. Tap one of the following actions:

Flags an email
Tap to Flag emails as reminders

Move
Tap to move emails to a folder.

Archive
Moves email to the archive folder.

Marks emails as Read/Unread

Moves emails to the deleted folder

Selected email

Unselected email

Swipe Left and Swipe Right

You can swipe right or left to perform an action such as archive, delete, move or mark read/unread. By default, swiping left archives the email while swiping right is not configured. To set up the swipe options:

1. Tap Account Selector > Settings (⚙) > Swipe Options.

Swipe items in your inbox to quickly access your most used actions.

Swipe Right   Delete >
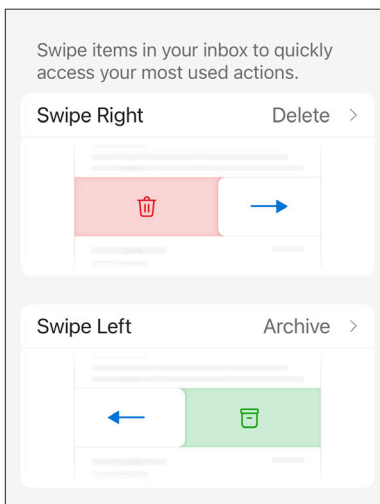
Swipe Left   Archive >

2. Tap Swipe Right.

3. Choose one of the options:
   - Delete
   - Flag/Unflag
   - Move
   - Read & Archive
   - Mark Read/Unread
   - Archive
   - Pin/Unpin
   - Snooze
   - None

4. Optionally: Repeat steps 2 and 3 for Swipe Left.

Example of the Swipe Right option

Amazon.com   1:11 PM
Costa Farms Peace Lily Plant...
We have a recommendation for you
Hello Richard Goon, We found...

PT PROMISE Technolo
Get the FREE Pass to
Booth #N1718 All the
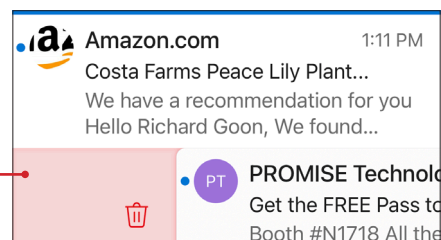
Add a folder

NOTE: You can create a folder only after you set either Swipe Left of Swipe Right to the Move action.

1. Swipe to move an email or if you are on an email, tap the overflow menu and tap "Move to Folder."

Swipe to move email

Overflow menu
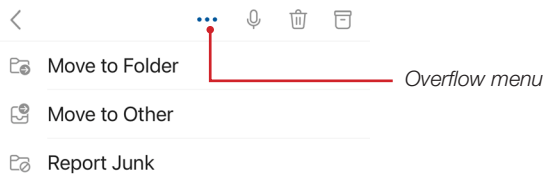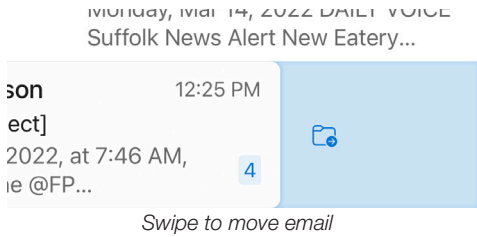
2. In the Move window, tap Add (+)
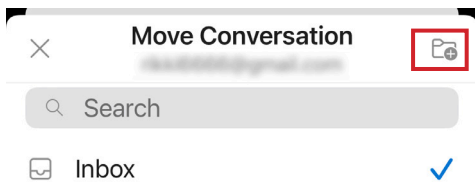
3. Name the folder and tap Create.
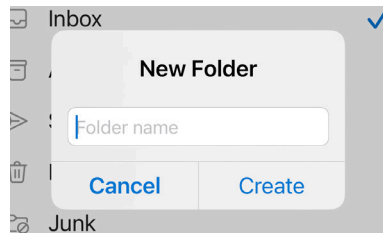
Add a Favorite folder

NOTE: Swipe Option for Move needs to be setup before a folder can be created.

1. Tap the Account Selector.
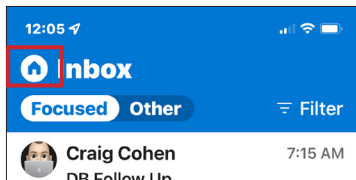
2. In the folder List, tap Edit (looks like a pencil).

3. Tap a star to add a favorite

4. Tap Close (✓).

![Outlook icon] **Calendar**

Outlook for iOS offers tight integration between your mail and your calendar. This allows to interact directly with your calendar, including viewing meeting details, invitees and their attendance status. The "Quick RSVP" feature lets you respond to meetings right from your Inbox, without opening the email.
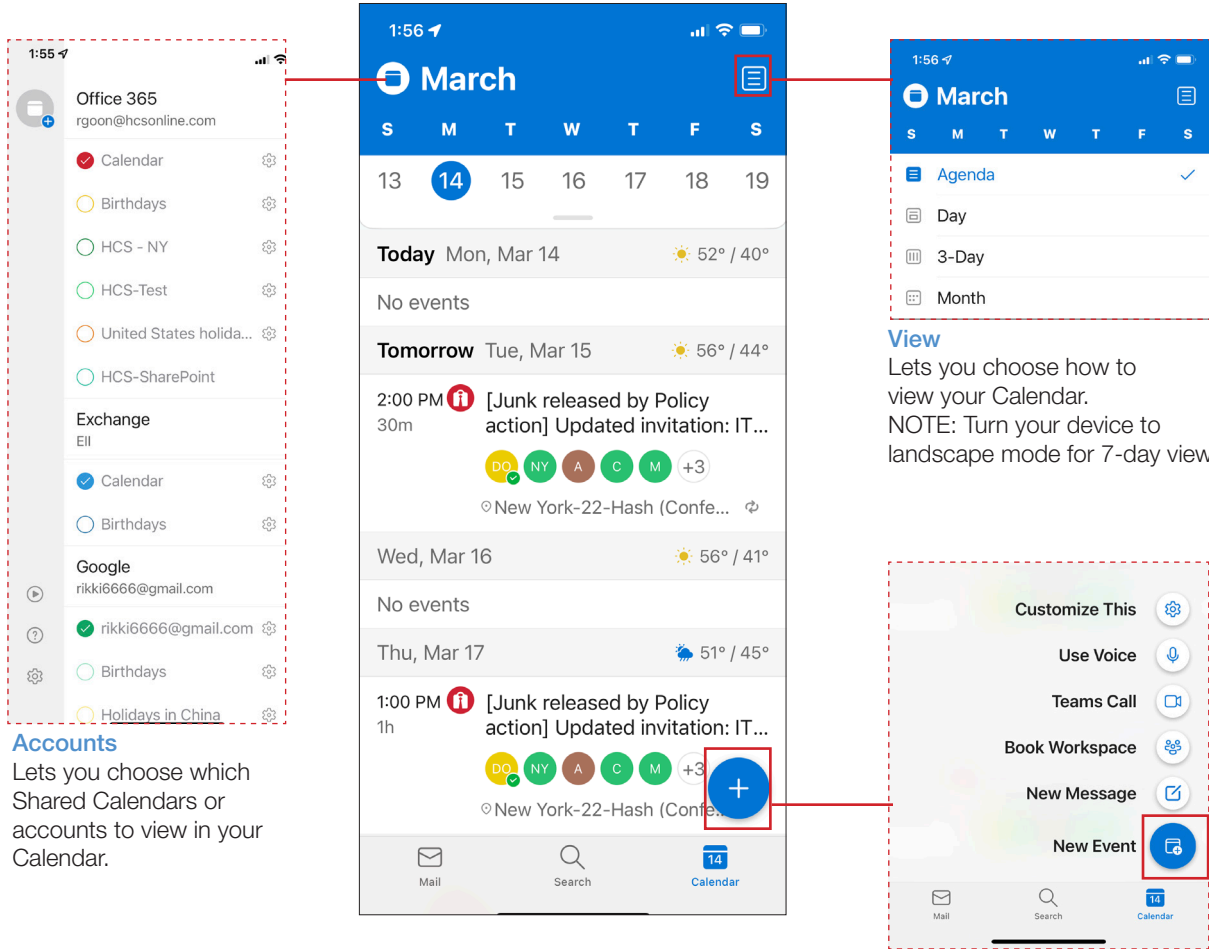
Accounts
Lets you choose which Shared Calendars or accounts to view in your Calendar.

View
Lets you choose how to view your Calendar.
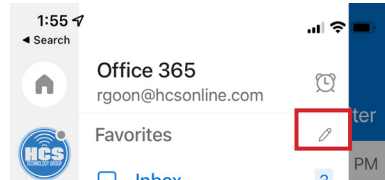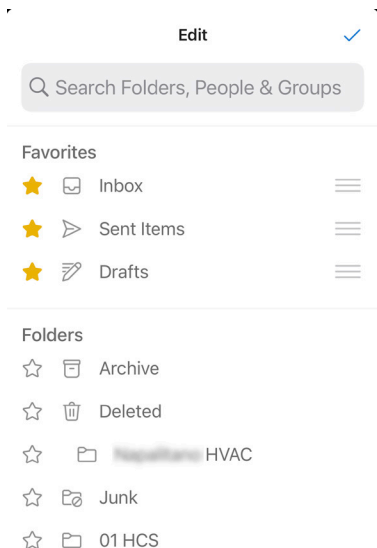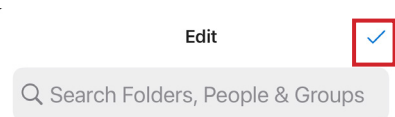NOTE: Turn your device to landscape mode for 7-day view.

New Event
Creates an event on your calendar.

Tips

Send Availability
While composing a new email, or replying to an existing email conversation, tap Calendar (⊡) above the keyboard. From the menu that appears, select Send Availability. In the Calendar view that appears, tap the time blocks where you would like to share your availability; you can select multiple times across multiple days.

Open Shared Calendar
Navigate to the Calendar. Tap on the Menu button in the top left-hand corner of the app. From the menu that appears, tap Add (+) in the top left-hand corner. Tap on Add Shared Calendar. Search for a person, room, or other mailbox in your organization. Tap the Add (+) next to the person, room, or other mailbox to add that shared calendar. The newly added shared calendar will appear in the list of calendars under your Microsoft 365 account.

Calendar Category colors
Category colors you've set on calendar events in your Microsoft 365 account in Outlook Desktop, Outlook Mac, or Outlook Web now show on Outlook for iOS in all your calendar views.

Dictation
Create an event using dictation.

Save

Discard

Edit Event
Calendar

Title of Event

● Rich to finish outlook guide

Attendee Options

Request Responses ✓
Allow New Time Proposals ✓
Allow Forwarding

People

Required   Optional

joan

JW Joan Work
    jwork@hcsonline.com

John Filardo ›

Attendee Options ›

Event Invite
Required: Invite required people to the event.
Optional: Give Invitees the option to join the event.

All Day ⏺

Date   Time (EDT) 🌿
Sat, Mar 26   3:30 PM → 4:00 PM
Next Saturday Duration: 30 minutes

Eastern Daylight Time   EDT ›

Attendee Options
Select response options for the event.

Location
80 Orville Dr ⊗

◎ 80 Orville Dr

◎ 80 Orville Dr
  Bohemia New York 11716, United States

◎ 80 Orville Dr N
  Ronkonkoma New York 11779, United States

◎ All County Great Bay
  Property Management
  9.6 mi • 80 Orville Dr Ste 100, Bohemia NY...

◎ Herbal Destination
  9.6 mi • 80 Orville Dr Ste 100, Bohemia NY...

Online Meeting Provider

🖥 Teams Meeting ✓
📹 Zoom

◎ 80 Orville Dr ›
  Bohemia New York 11716, Unite...

Teams Meeting ⏺

Online Meeting Provider
Choose which meeting Provider to use for the event.

Location
Add a location for the event.

☰ Description _____... ›

🔁 Repeat   None ›

Alert

None
At time of event
5 minutes before
15 minutes before ✓
30 minutes before
1 hour before

🔔 Remind Me 15 minutes bef... ›

👁 Show As   Busy ›

🔒 Private ⏺

Show As

Busy ✓
Free
Tentative
Out of Office
Working Elsewhere

Show as
Allows people to view your calendar staus for this event.

Alert
Choose when to be alertedfor the event

13

People

People shows recent contacts that you have communicated with. It also reads from your contacts of your Exchange account and from the Contacts app.

To access People:
1. Tap Search.
2. Tap People.
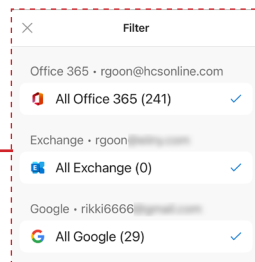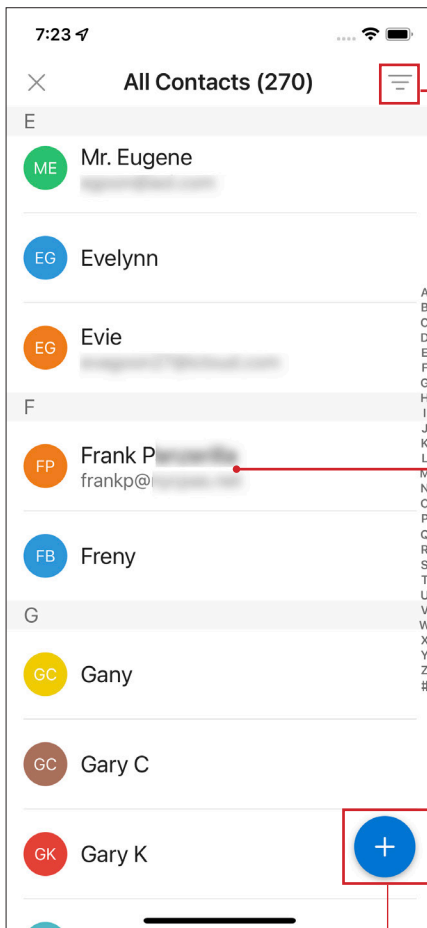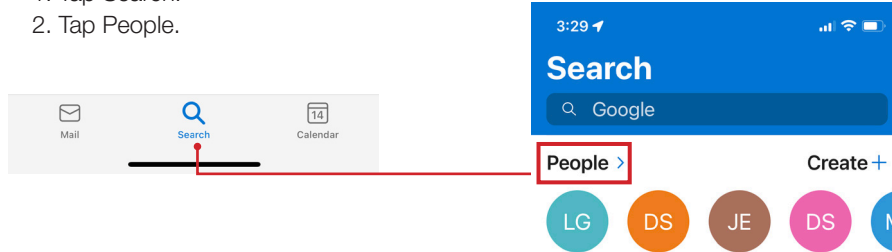
Filter
Use filter to view contacts from different accounts.
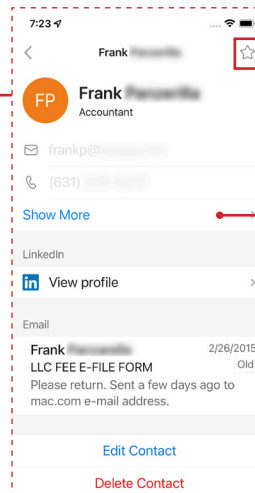
Favorites
Tap the star to add the contact to your favorites.

New Contact
Create a new contact. You can choose which account to save the contact.
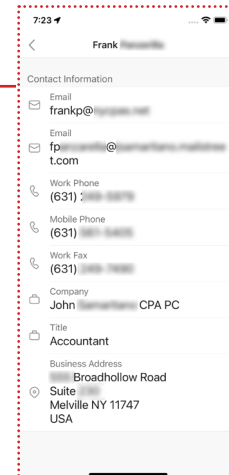
Contact Card
Shows the contacts main information such as email, phone number, and title. It also shows the most recent email conversations.
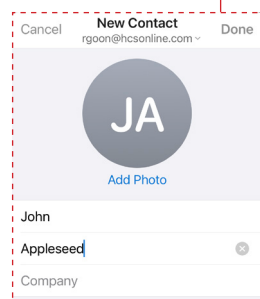
Show More
Shows more information about the contact such as secondary phone number, address, or alternative email addresses.

Search

Use the search feature to find emails, people or events or tap one of the suggestions to see the results.

Recent
The row of names are people that have recently interacted with You. Tap a name to search items pertaining to the person
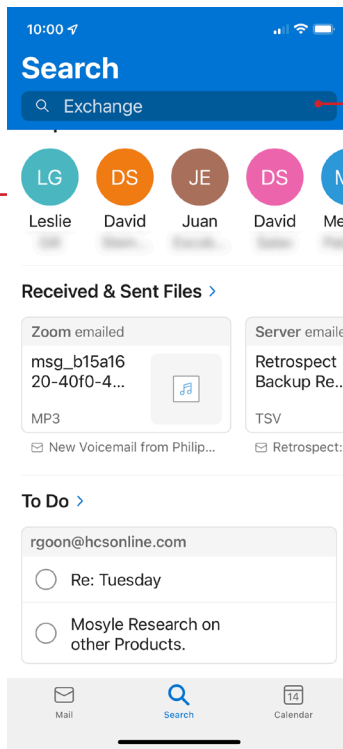
Received & Sent Files
Tap the items to view what you have sent or received.

To Do
This will launch Microsoft To Do to view your tasks.

NOTE: Microsoft To Do must be installed on your device.
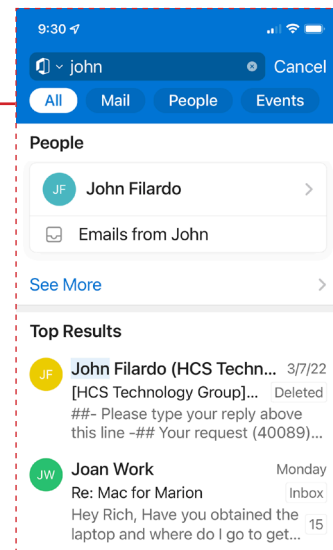
Search by Name
This will gather your results from a search for a person. You can filter it by Mail, People or Events. You can view the results at The bottom . Tap See More for more results.

Shortcut Button

From Mail, Calendar or Search, Tap the Add/New (+) to use shortcuts.
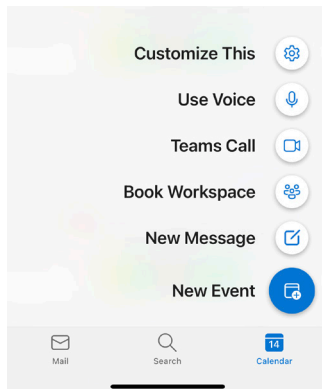
Customize This
Use this to customixe the shortcuts, you can remove items or add items.

Use Voice
Use voice commands to do tasks on Outlook for iOS. For Example, tap the microphone and say, "What's John's Email address?"

Teams Call
Tap this to launch Microsoft Teams for meetings or collaborations.
NOTE: you must have Microsoft Teams on your device.

Book Workspace
Book a Workspace to work with other team members.

New Message
Create a new email.

New Event
Create a new event.

Settings

Navigate to Settings

1. Tap the Account Selector.

2. On the bottom-left, Tap Settings (⚙).
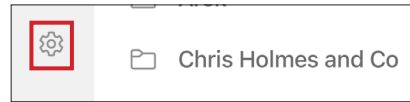
Mail Accounts

Set your preferences for your email accounts. You can set up another email account and set the display order of email accounts.

Set Order

You can drag to set the order of accounts by tapping & holding the handle (≡) then dragging and dropping.
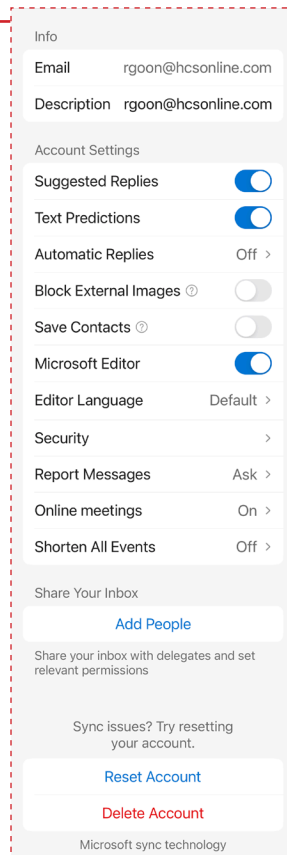
Email Account Settings

NOTE: Accounts setting differ upon what kind of account that you have setup on Outlook for iOS. For example, you may have more options for Microsoft 365 compare to an IMAP account. The common settings for the accounts are listed below.

- Set auto replies for incoming messages.
- Block external images from loading in your Mail.
  NOTE: This will not block images that are embedded in the email as an attachment.
- Save contacts allows new calls and text Messages to be linked with your existing contacts.
- Reset Account will delete any cached files and re-download the current data from your mail server.
- Delete the account from Outlook for iOS

Add Mail Account

- Add email account to Outlook for iOS. You can add email from services such as Gmail, iCloud, Outlook.com, Yahoo!, or Exchange.
- Add a shared or delegated mailbox to Outlookfor iOS
- Create a new Outlook. com or Hotmail email and calendar account.

Mail

You can set up your notifications, signatures and swipe options. Additionally, you can turn on/off Conversations, Focused Inbox and Contact Photos.

G rikki6666@gmail.com

rgoon@hcsonline.com ✓

rgoon@eiiny.com
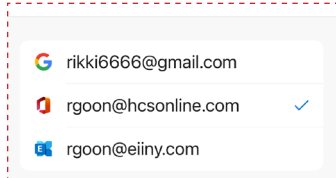
Default Email
Set which email account is the default account.

Per Account Signature ⬤

OFFICE 365 - rgoon@hcsonline.com

Richard Goon
Senior Systems Engineer
HCS Technology Group

Signature
You can create a general signature for all your email accounts or you can create signatures for each email account by toggling Per Account Signature.

Mail

Notifications ⟩

Default   rgoon@hcsonline.com ⟩

Signature   Per Account ⟩

Swipe Options   Delete / Move ⟩

Focused Inbox �ⓘ   ⬤

Badge Count   Focused Inbox ⟩

Organize By Thread   ⬤

Show Contact Photos ⓘ   ⬤

Dictation   ⟩

Play My Emails   ⟩

Sound for Sent Mail   Default ⟩

Office 365 - rgoon@hcsonline.c...

Focused and Other Inboxes

Focused Inbox   ✓

Favorite People

None

Sound for New Mail   Default ⟩

Notifications
Focused and Other Inboxes - Notifies you when any email comes in.

Focused Inbox - Notifies you when email only comes in the Focused Tab.

Favorite People - Notifies you when an email from a contact that you marked in your favorites

None - Turns off all mail notifications.

Sound for New Mail - choose a different alert sound when email comes in.

‹   Swipe Options

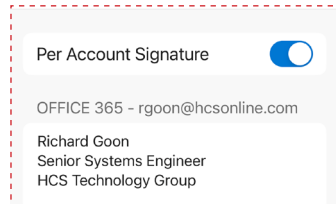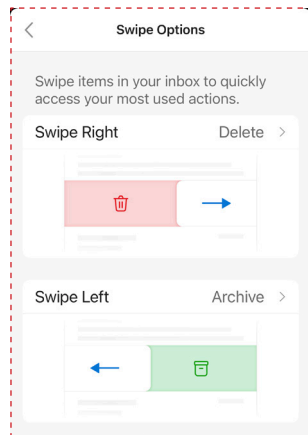Swipe items in your inbox to quickly access your most used actions.

Swipe Right   Delete ⟩

🗑   →

Swipe Left   Archive ⟩

←   🗑

Swipe Options (covered on page 10)
Outlook lets you personalize swipe gestures to match your unique email habits.
Options include:
- Delete
- Move
- Archive
- Snooze
- Flag/Unflag
- Read & Archive
- Mark Read/Unread
- None

Focused Inbox
Turns on/off Focused Inbox.

Badge Count
Change how Outlook calculates the number to display on your Outlook icon (the number of emails in your Focused Inbox, or your total number of emails).

Organize Mail By Thread
Allows you view your Inbox in conversation threads or by list view.

Show Contact Photos
Turns on/off to show photos in your People cards.

Dictation
Choose a spoken language, turn on/off Auto Punctuation, Profanity Filter and Voice Commands

Play My Emails
When headphones are connected to your device, you can play your emails.
NOTE: Only available for specific accounts such as Outlook.com will work

Calendar

Set your preferences for your Calendar. You can set your default calendar or notifications for different accounts. You can also add calendar apps for Outlook for iOS and subscribe to other calendars.

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- Calendar ✓
- HCS - NY
- HCS-Test

Default Calendar
Specifies the default calendar to use when you save events.

Saturday
Sunday ✓
Monday

This week start preference will be used in the different calendar views across the app.

Week Start
Sets a day to start your week.

Record custom Siri Shortcuts to access quick actions without opening

Next Meeting >
What's my next meeting

Running Late >
I'm running late

Play My Emails >
Play My Emails

Siri Shortcuts
Use Siri commands to access actions without opening Outlook for iOS

Settings

Calendar

Notifications >

Default   Calendar >

Weather   On >

Week Start   Sunday >

Week Numbers   Off >

Workspace Booking ⓘ   ⬤

Integrations And Add-Ins

Siri Shortcuts >
Setup quick actions via Siri Shortcuts

Interesting Calendars
Subscribe to your favorite events

Add-ins
Connect your favorite apps and services

Add-ins
rgoon@hcsonline.com ⌄

Add-ins may access personal information. By turning on an add-in, you agree to its License Terms and Privacy & Cookies Policy.

App4Legal for Outlook +
App4Legal

Avaya Cloud Office Sche... +
RingCentral Inc.

Box +
Box

Add-Ins
Tap Add (+) to connect the selected Add-Ins to Outlook for iOS. For Example, on an email, tap more options and then send it to OneNote (see fig 5)

Zoom   Mar 24
To zoom   ...

Fig 5

Translate Message | Save to Evernote | Send to OneNote | Send to Slack | M Ad

---

Remind Me

Events   15 minutes before >

All day   1 day before (9:00 AM) >

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Allow Notifications   ⬤

Sound   Default >

Notifications
Events - Sets a notification time before the event happens

All day - Sets a notification time for all day events.

Enable Notifications - Turns notifications on/off.

Sound - Sets a notification sound for your different accounts.

All Calendars | My Calendars

Bing calendars
Subscribe to sports events, more coming soon.

Sports >
TV >
MLB >
NBA >
NFL >
NHL >

Data from Microsoft Sports

Interesting Calendars
Subscribes to different kinds of calendars such as Sports, other country calendars or holidays.
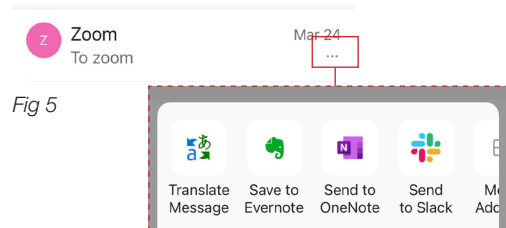
Storage Accounts

In addition to files from your device, Outlook for iOS lets you attach files from third-party storage accounts like Box or Dropbox to your messages. Outlook for iOS makes it simple to share files stored in the cloud. With just a few taps in your email message, you can insert a link to any file from OneDrive, Dropbox and other cloud storage apps.
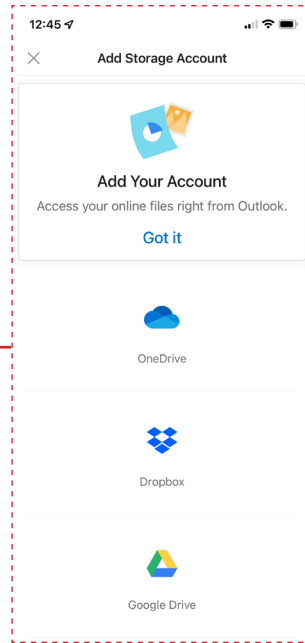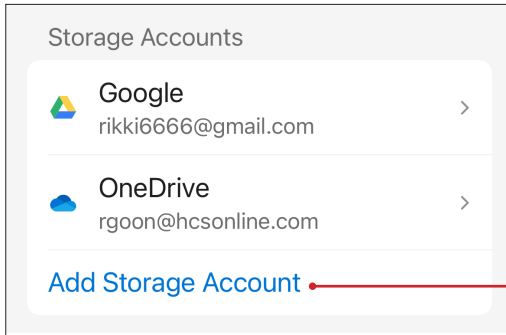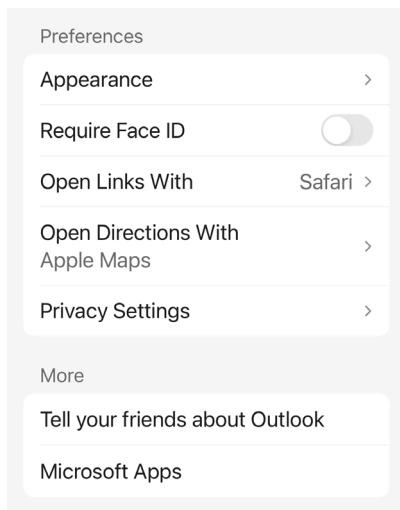
Add Storage Account

You can add the following Storage Accounts:

• OneDrive

• Dropbox

• Google Drive

• Box

NOTE: When you're signed into your iCloud account on your iOS device, iCloud drive is automatically added to Outlook for iOS

Other Settings

Appearance

Lets you choose Light mode, Dark mode or whatever appearance mode the system is set at.

Show Your Pride

Sets certain icons and areas to use Rainbow accent colors.

Require Face ID

Requires you to use FaceID to use Outlook whenever you open Outlook for iOS.

Open Links With

Sets a default web browser to use to open links from email.

Open Directions With

Sets a default navigation app.

Privacy Settings

Enables or disables data such as diagnostics to be collected and analyzed.
NOTE: the data collected will not contain your email address or your name.

Microsoft Apps

Shows you what Microsoft apps you have installed on your device. Tapping on an app that isn't installed opens the app store and displays the entry for that app.