OWA - Contacts and tasks

Using contacts (People) in Outlook on the web

In Outlook on the web, you use the People page to create, view, and edit contacts, contact lists, and groups.

Getting to the People page

To go to the People page, sign in to Outlook on the web and select the **People** icon at the bottom of the page

What you'll see on the People page

- Use the **Search** box to search for a person or a contact list.
- The toolbar provides menus and commands for creating and modifying your contacts, contact lists, and groups depending on the context
- **Favorites** shows everyone you've added to your favorites.
- **Your contacts** shows all saved contacts and contact lists in all folders.
- **Your contact lists** shows all contact lists in all folders.
- **Folders**: The default folder called **Contacts** contains contacts and contact lists. You can also create your own folders.
- **Groups**: **Member** shows groups you're a member of, and **Owner** shows groups where you're the owner.
- The middle pane shows favorites, contacts, contact lists, or groups depending on what you selected in the navigation pane. Use the filter menu to sort and to choose how contact names are displayed.
- The right pane shows details about the contact, contact list, or group that's selected in the middle pane.

Working with contact folders

By default, contacts and contact lists are stored in the **Contacts** folder under **Folders** in the navigation pane. You can also create your own contact folders to keep certain contacts or contact lists together and find them more easily.

- To create a new contact folder: Under **Folders**, select **New folder** and type a name. Then select the folder and add contacts to it.
- To rename or delete a contact folder that you created, right-click the folder and then select **Rename** or **Delete**.

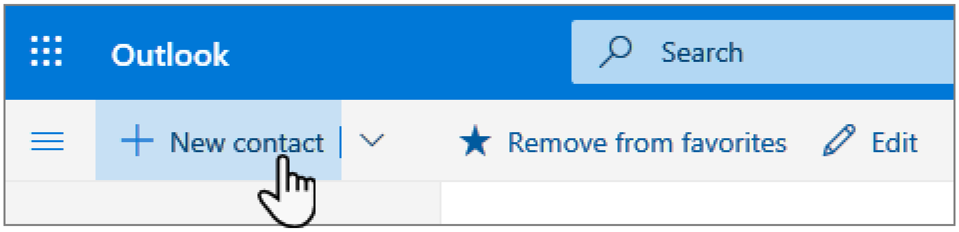
Create, view, and edit contacts

New contacts are saved in your default Contacts folder, and you will also see them under **Your contacts**. If you want to save the new contact in a different folder, select the folder before creating the contact.

Add a new contact from scratch

1. Sign in to Outlook on the web.

2. Select the **People** icon at the bottom of the navigation pane.
3. On the People page, on the toolbar, select **New contact**.



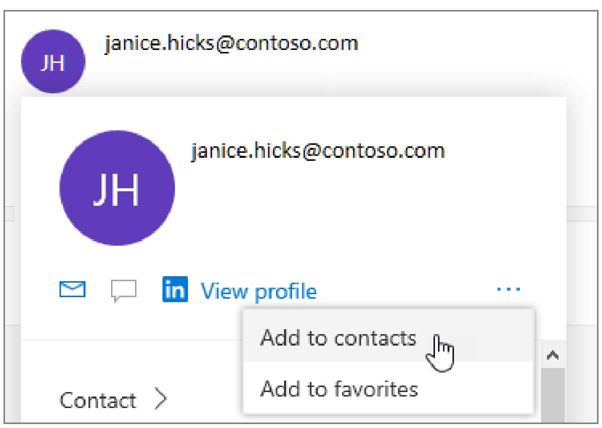
4. Enter details for the contact. Select **Add more** to add more information, such as the contact's address and birthday.
5. Select **Create**.

Add a contact from someone's profile card

When you click someone's name or picture in Outlook or other Office apps and services, you'll see their profile card with information about them. From their profile card, you can save them to your own contacts, for example if you want to add Notes or other information.

Here's how you can add a contact from an email message:

1. In Mail, open an email message in the reading pane, and then select the name of the sender or recipient you want to add to your contacts.
2. On the profile card that opens, select ••• > **Add to contacts.**



3. Add more information if you want. Select **Add more** to add more information, such as the contact's address and birthday.
4. Select **Create**.

   Note: The contact is saved in your default Contacts folder on the People page.

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Add people in your organization to your saved contacts

If your company has a directory set up, you'll be able to see information about your colleagues without saving them as contacts. You can search for them or select their name or picture from an email message. Their profile card will show information collected from other systems (directory). If you want to add other information, such as notes, you can save your colleagues to your own contacts. The new contact is auto-linked to the existing directory contact. Only you will see the information you add.

Add a contact to favorites

To add someone to your favorites, select the contact, and then select **Add to favorites** on the toolbar.

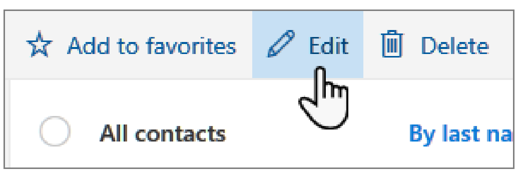
> **Tip:** Favorite contacts who have an email address will also show up in the navigation pane in Mail, so you can see all their email in one place.

View and edit contact information

On the People page, select a contact in the middle pane to see or edit information about them. What you see is a version of the profile card. What tabs and sections you see may vary.

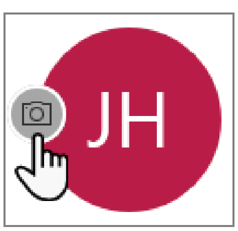
- **Files**: Recent files that the contact has shared with you.
- **Email**: Recent email messages and email attachments between you and the contact.
- **LinkedIn**: If the contact has a public LinkedIn profile with the same email that you've saved for that contact, you'll see LinkedIn information here.

To edit a contact, select **Edit contact** next to **Contact Information**, or select **Edit** on the toolbar.

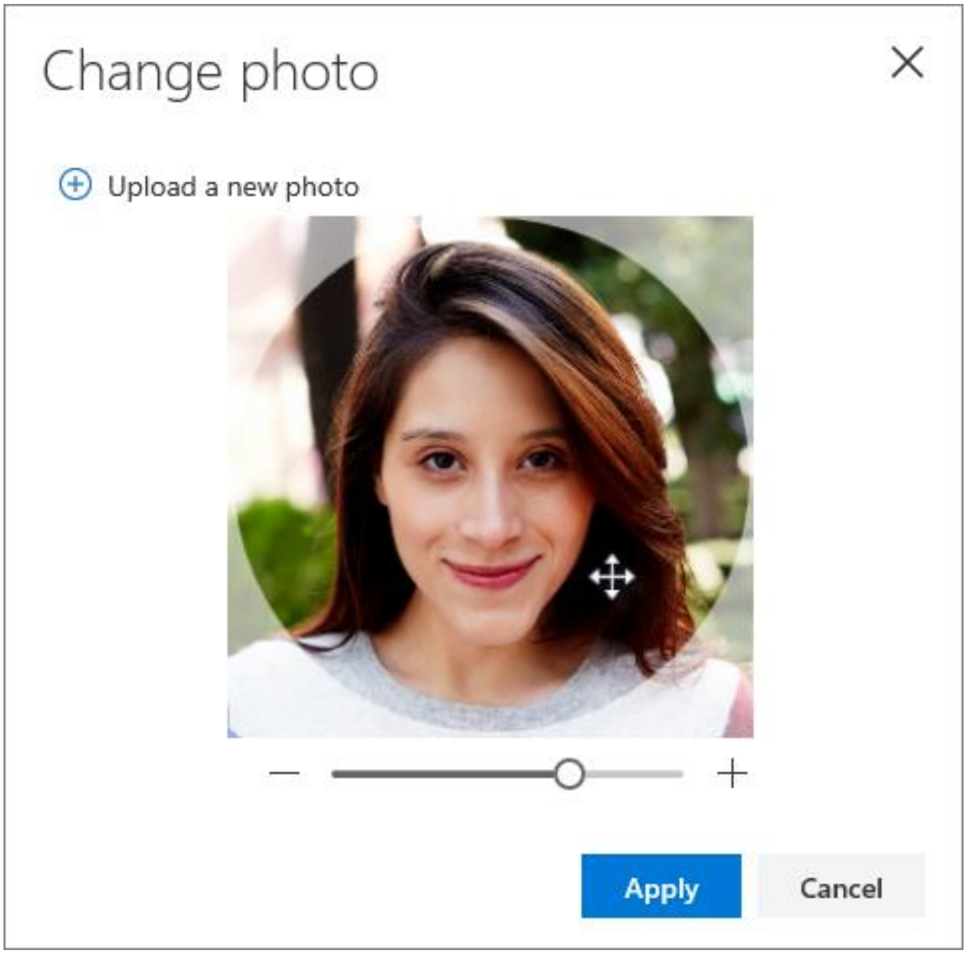


Add a photo to your contacts

1. On the People page, select a contact.
2. Select the camera icon.



3. Select **Upload a new photo**, choose the file you want to use, and then select **Open** to upload.
4. If you want to reposition the photo, click inside the circle and drag the pointer. To zoom in or out, use the slider below the photo.



5. Select **Apply**, and then select **Done**.

Change how contacts are displayed and sorted

To change how contact names are displayed, select **Settings** and then **Display contacts by** > **First name** or **Last name**. To select sorting, use the sort menu at the top of the list . For example, select **Sort by** > **Last name**.

Link contacts

You can link contacts to indicate that they're related, for example if you have several entries for the same person. Linked contacts appear as a single contact.

To link contacts:

- On the People page, select two or more contacts, and then select **Link contacts** in the panel that appears.

To unlink a linked contact:

- On the People page, select the contact, select **Linked contacts** on the toolbar, and then select **Unlink**.

Delete a contact

1. Select one or more contacts, and then select **Delete**.
2. Select **Delete** to confirm.

Create, view, and edit contact lists

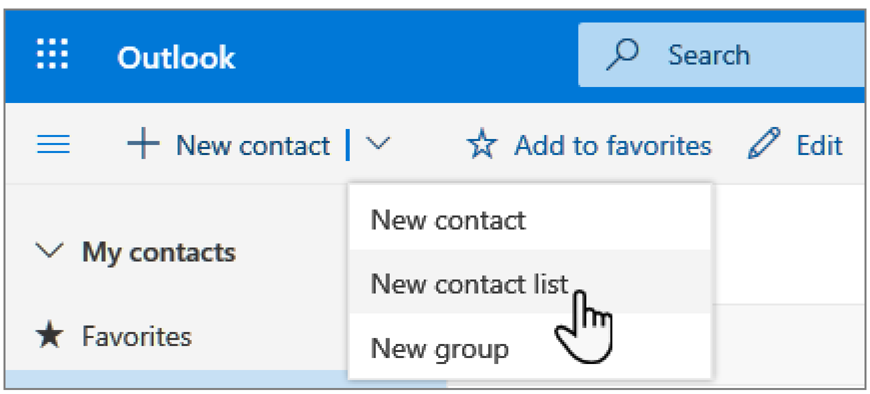
A contact list is a collection of email addresses, and is useful for sending email to a group of people. Contact lists are sometimes referred to as distribution lists.

For example, create a contact list named My Book Club and add all the members of your book club to it. When you want to send an email message to everyone in the club, just enter "My Book Club" in the **To** line of the email.

Create a contact list

Note: By default, contact lists are created in the default Contacts folder, and you can also see them under **Your contact lists**. If you want to save the contact list in a different folder, select the folder before you select **New contact list**. After you create a contact list in a folder, it isn't possible to move it to a different folder.

1. On the People page, on the toolbar, select the arrow next to **New contact**, and then select **New contact list**.



2. Enter a name for the list, and then add names or email addresses.
3. Select **Create**.

Tip: If you want to group contacts for other reasons than sending email, you can create a folder instead. Then add contacts to the folder.

Add more people to a contact list

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1. On the People page, select **Your contact lists** in the navigation pane, or search for the contact list name.
2. Select the contact list, and then select **Edit**.
3. Enter names or email addresses.
4. Select **Save**.

Remove people from a contact list

1. On the People page, select **Your contact lists** in the navigation pane, or search for the contact list name.
2. Select the contact list, and then select **Edit**.
3. Select the **x** for the name or email address you want to remove.
4. Select **Save**.

Delete a contact list

1. Select the contact list you want to delete, and select **Delete**.
2. Select **Delete** to confirm.

Use Tasks in Outlook on the web

A task is an item that you create that you want to track until it's completed. Tasks can be created from an email that you've flagged for follow-up as an actionable item, or they can be to-do list entries that you add manually. Use tasks in Outlook on the web to create, edit, categorize, and manage tasks.

Instructions for To Do in Outlook on the web

Microsoft To Do is now integrated with Outlook on the web. To Do is taking the place of Tasks and includes smart lists. Smart lists are filtered lists that make it easier to track tasks and organize your day. With To Do integration, you can quickly organize your tasks by adding them to My Day, marking them as important, or adding them to new lists that you create. There's even a list for tasks that you've assigned a date to. To get started, Sign in to Outlook on the web.

The To Do tool is a bit different from the classic Tasks in Outlook.comOutlook on the web. Some features are different, and others will be added as To Do is rolled out.

> **Note:** Shared mailboxes aren't supported in To Do, but you can share lists.

Manage your tasks

To view and manage your tasks, select **ToDo** at the bottom of the navigation pane.

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The To Do page includes four default tasks lists, plus optional tasks lists and any tasks lists that you create.

- **My Day** is a Smart List that can help you track the tasks that you want to get done today. It's empty at the start of each day by default, so that you can organize your day by adding tasks to it. You add existing tasks to My Day by right-clicking a task and choosing **Add to My Day**, or by dragging a task from any other tasks list to My Day. Tasks that appear in My Day are kept in their original list.
  Note: My Day is cleared at midnight every night. Tasks that appear in My Day are stored in other tasks lists, so they aren't deleted when My Day is cleared.
  - **Suggestions** are tasks that aren't completed that you might want to add to My Day. To see suggested tasks, go to **My Day**, then select **Suggestions** at the top of the page. Select the plus sign (+) next to a task to add it to My Day. Select **Done** to close Suggestions and return to My Day. Suggestions includes tasks that are due today or in the future, are overdue, were previously moved to My Day but not completed, or that might be relevant to start working on.
- **Important** is a Smart List that includes tasks that you've marked as important. You can mark a task as important by right-clicking it and selecting **Mark as important**, or by selecting the star icon next to it.
- **Planned** is a Smart List that includes tasks that have a reminder or due date and have not been marked as complete. Tasks that you create with a reminder or due date will automatically appear in this list. The only way to add tasks to this list is to assign a reminder or due date to an existing task.
- **Tasks** is the list where new tasks are stored by default.
- **Flagged Email** is an optional list. When on, messages that you've flagged in Mail are copied to the Flagged Email list as tasks. You can turn the Flagged Email list on or off by going to To Do, then selecting **Settings** > **To Do Settings** at the top of the page, going to **Connections** and using the slider to turn the **Flagged Email** list on or off.
- **Assigned to Me** is another optional list. When on, items that have been assigned to you in Microsoft Planner will appear in Assigned to Me. To turn Assigned to me on or off, go to To Do and select **Settings** > **To Do Settings** at the top of the page, go to **Connections** and use the slider to turn **Tasks from Planner** on or off.

You can add new tasks by selecting a tasks list, then choosing the plus sign next to **Add a task** and entering a description of your task. If you add a task to a Smart List, the task will be saved in Tasks and linked to the Smart List you were in when you created it.

Note: You can't create new tasks in Planned. To add a task to Planned, add a reminder or due date to an existing or new task.

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Select a task in any list to see all of the available options for that task. You can do things like add additional steps, add them to My Day, make them repeating, add a due date or reminder, and add a note.

Attach a file to a task

You can add one or more files to a task.

1. Select **To Do** at the bottom of the navigation pane.
2. Select the task you want to add a file to.
3. Choose **Add a file** from the task details pane.
4. Browse to and select the file you want to add.

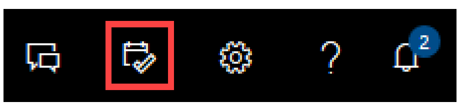
Note: You can attach more than one file to a task, but can add them only one at a time.

Drag a message to create a task

Use the My Day pane to create a task from a message.

Note: The My Day pane is a new feature that might not yet be available in your account.

1. Go to **Mail** in Outlook on the web.
2. Open the My Day pane by selecting **My Day** on the toolbar at the top of the page.



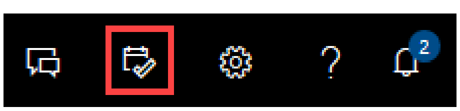
3. Find the message that you want to create a task from in the message list.
4. Select and drag the message to the To Do tab in the My Day pane.

Drag a task to add it to your calendar

Use the My Day pane to create an event in your calendar from a task.

Note: The My Day pane is a new feature that might not yet be available in your account.

1. Go to **Calendar** in Outlook on the web.
2. Open the My Day pane by selecting **My Day** on the toolbar at the top of the page.

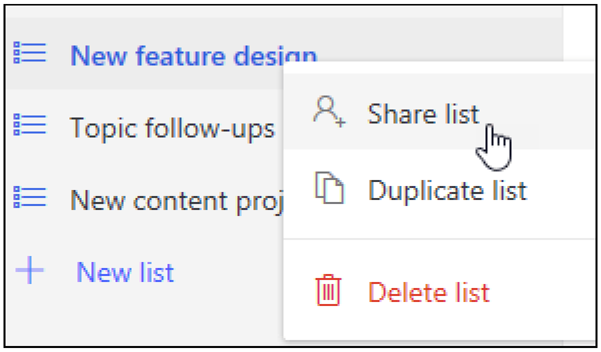


3. Find the task that you want to create a calendar event from.
4. Select and drag the task from My Day to when you want it on your calendar.

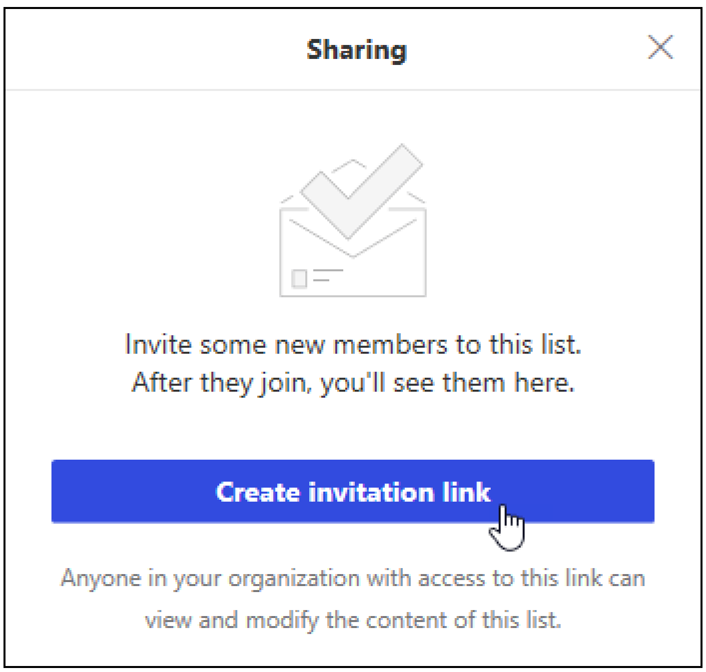
Share a tasks list

You can't share individual tasks, but you can share tasks lists that you create.

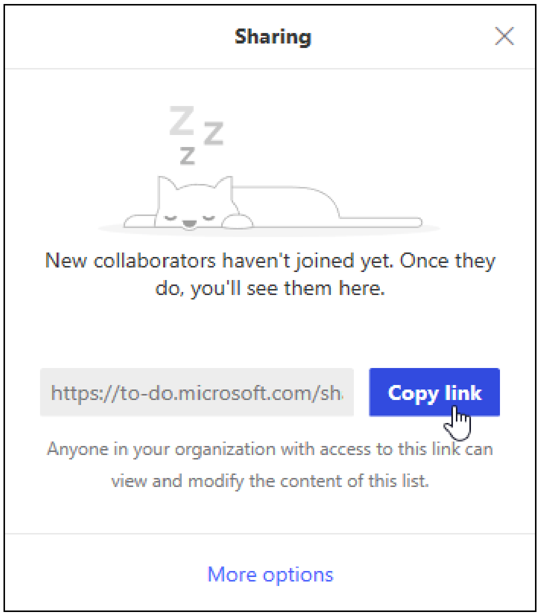
- Go to To Do.
- Right-click the tasks list you want to share and select **Share list**.



- Select **Create invitation link**.



- Select **Copy link**.



- Go to Mail and create a new message. Address it to the people you want to share the list with, paste the link in the body of the message and add any information you want, then send the message.

Note: You can send the link to anyone, but only people in your organization will be able to connect to the shared list.

After you've shared a tasks list, you can right-click it and select **Sharing options** to get the invitation link again. Select **Sharing options** then **More options** to stop sharing the list, or prevent people who haven't already joined the list from joining.

Tip: You can identify shared lists by the shared icon .

Creating and managing tasks lists

In addition to the default tasks lists, you can create and manage lists to organize your tasks into.

- Create a new tasks list.
    a. Select **New list** in the navigation pane.

    b. Enter a name for your new list.
    c. Press **Enter** to save your new list.
- Right-click a list in the navigation pane to **Share**, **Duplicate**, or **Delete** it.

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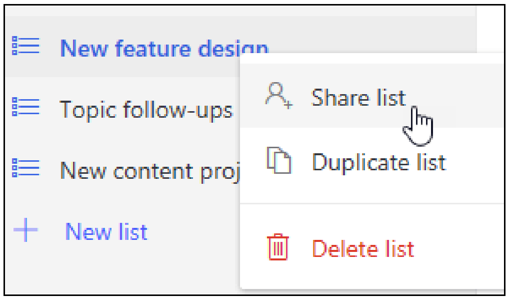
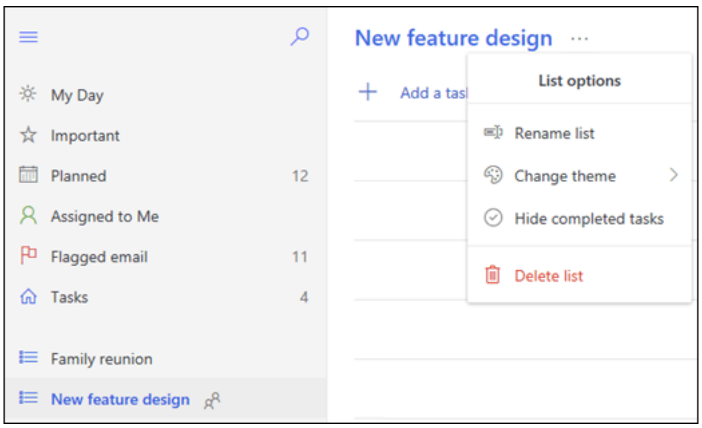


- Select a list, then select the more actions ··· icon in the task window to access list options such as **Rename list**, **Change theme**, or **Hide completed tasks**.



What else do I need to know about To Do?

Settings for To Do are on their own page. From the To Do page, select **Settings** > **To Do Settings** at the top of the page to see all options for To Do.

You can switch back to the classic Tasks by selecting **The new Outlook** toggle at the top of the To Do page.

If you've switched to classic Tasks, you can switch back by selecting the **Try the new Outlook** toggle at the top of the Mail page.

For more information, please refer to the Microsoft training resource page [HERE]