

Office 365 – (O365)

Outlook Web Access (OWA)



Tutorial # 7

People Tab – Create / Edit Contact

(Story board)

Introduction

The following is a story board of a tutorial depicting the steps and screen selections required to compose and send a message using the Office 365 Outlook Web Access (OWA) application.

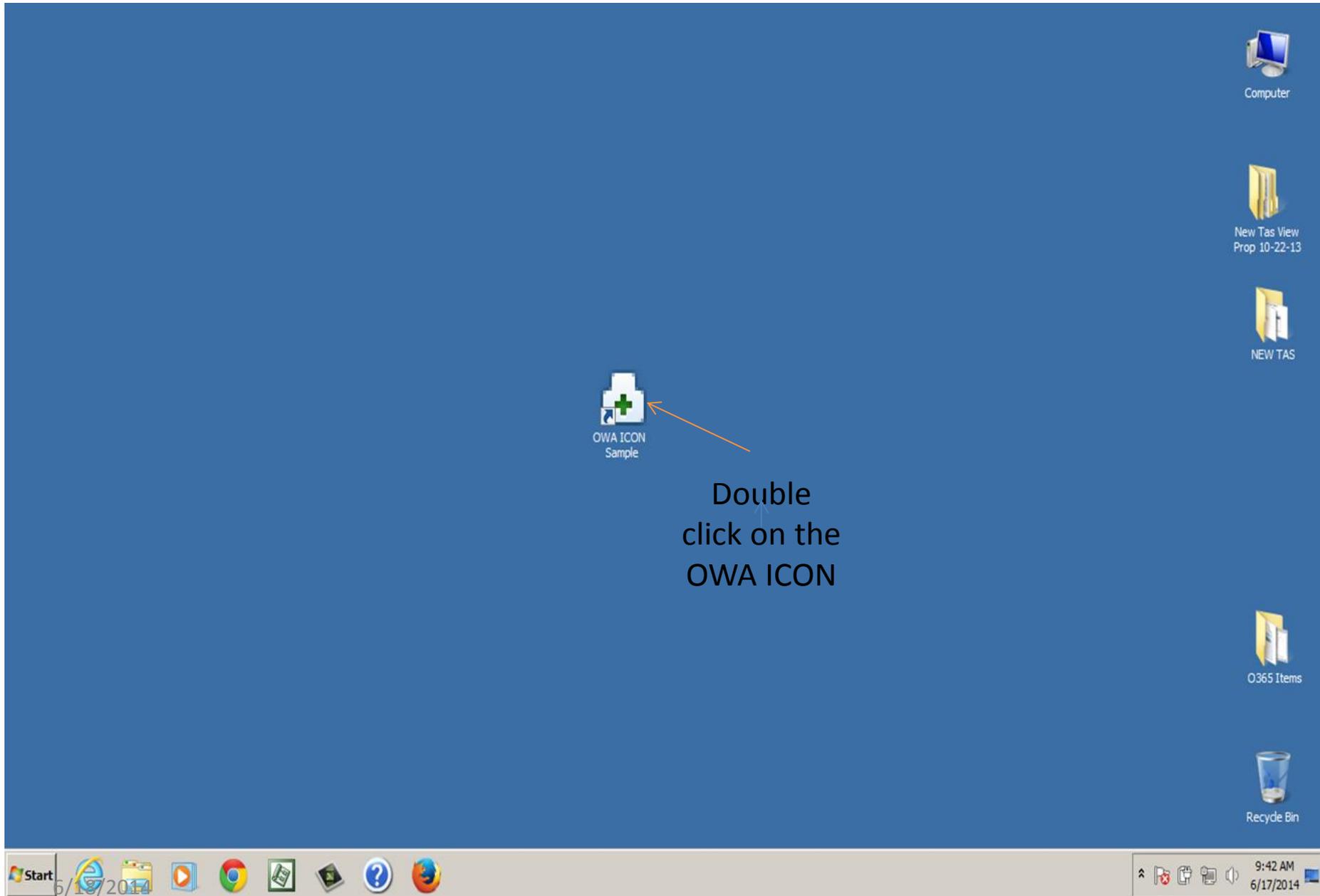
What is covered in 'People Tab – Create/Edit Contact' tutorial is a step by step review of:

- Sign on
- Creating new Contact
- Editing a Contact
- Deleting a contact
- Sign out

As the tutorials are designed to be viewed in a reasonable amount of time each one covers specific activities. Other commonly used capabilities will be the subjects of other tutorials.

Sign On

O365 – OWA Desktop - Sign in Screen



O365 – OWA Internet - Sign in Screen

Sign in to Office 365

Microsoft Corporation [US] https://login.microsoftonline.com/login.srf?wa=wsignin1.0&rpsnv=3&ct=1394633708&rver=6.1.6206.0&wp=MBI_SSL&wreply

Apps Welcome to the Montg... SiriusXM Internet Radi... CMS Content Manager Google Google Analytics Offici... ABCNews.com - Breaki... CBS News - Breaking ... Other bookmarks

Office 365

Sign in with your organizational account

someone@example.com

Password

Keep me signed in

Sign in

Can't access your account?

Enter County Network ID

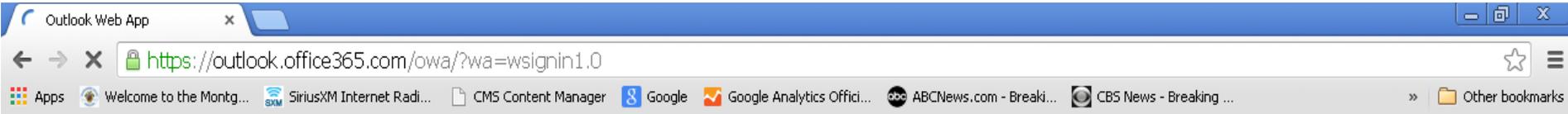
Enter County Network Password

Select to start Sign in process

Organizational accounts that work here can be used anywhere you see this icon. © 2014 Microsoft Legal Privacy Feedback

6/18/2014 9:45 AM

O365 – OWA Sign in progress screen

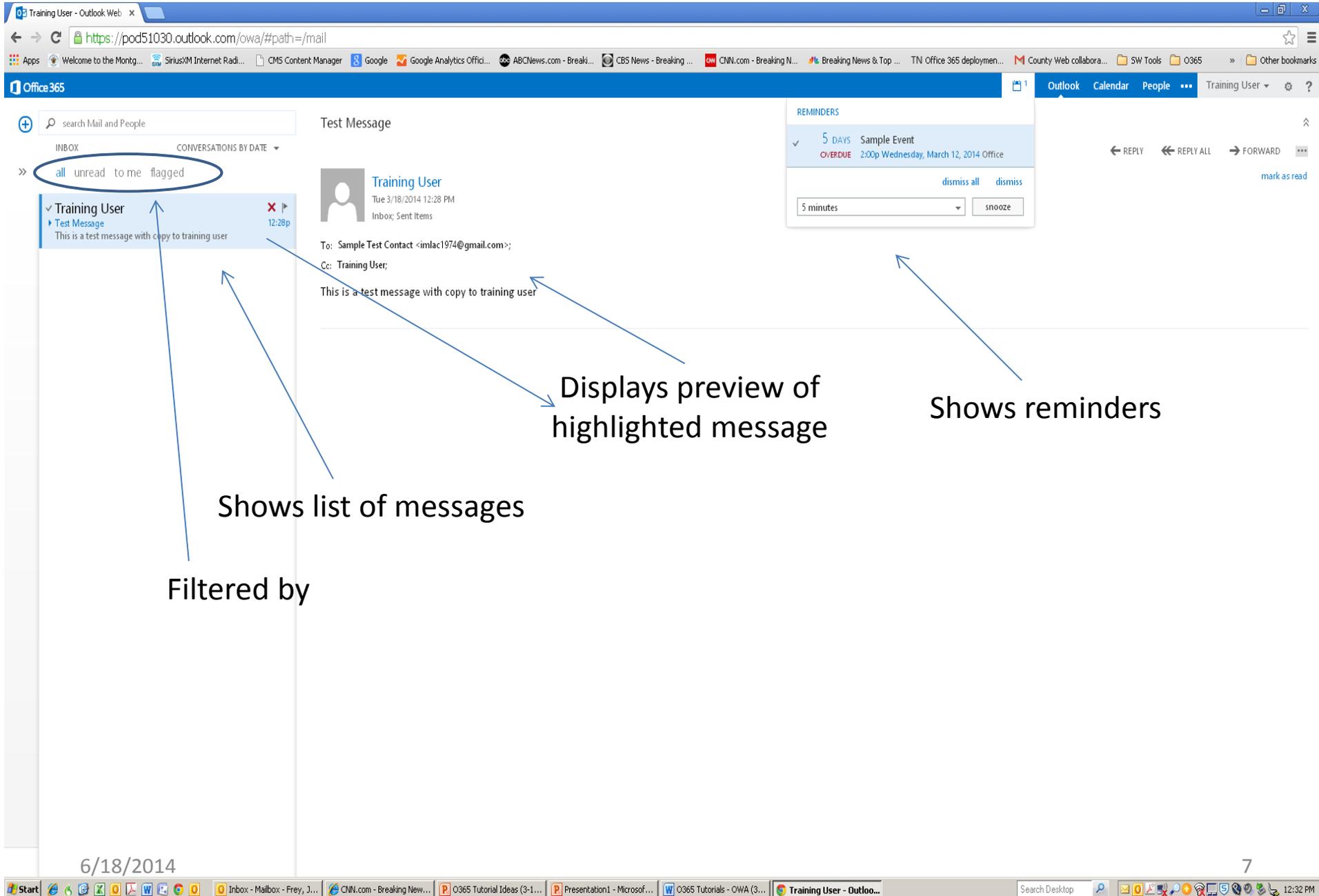


Outlook® Web App



When a staff person signs on they are presented the Outlook Tab.

Sign in start screen (Default Outlook Inbox)



search Mail and People

INBOX CONVERSATIONS BY DATE

all unread to me flagged

✓ Training User
▶ Test Message
This is a test message with copy to training user

Test Message

Training User
Tue 3/18/2014 12:28 PM
Inbox; Sent Items

To: Sample Test Contact <imlaci1974@gmail.com>;
Cc: Training User;
This is a test message with copy to training user

REMINDERS

✓ 5 DAYS Sample Event
OVERDUE 2:00p Wednesday, March 12, 2014 Office

dismiss all dismiss

5 minutes snooze

← REPLY ← REPLY ALL → FORWARD ...
mark as read

Filtered by

Shows list of messages

Displays preview of highlighted message

Shows reminders

6/18/2014

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People Tab

Create Contact

Create new Contact – Move to People Tab

The screenshot displays the Outlook Web App interface. The top navigation bar includes 'Outlook', 'Calendar', and 'People' tabs. A reminder pop-up is visible, showing a 'Sample Event' that is 'OVERDUE' and scheduled for '2:00p Wednesday, March 12, 2014 Office'. The reminder has a '5 minutes' duration and options to 'dismiss all' or 'dismiss'. A blue arrow points from the reminder pop-up to the 'People' tab in the navigation bar.

Test Message

Training User
Tue 3/18/2014 12:28 PM
Inbox; Sent Items

To: Sample Test Contact <imla1974@gmail.com>;
Cc: Training User;

This is a test message with copy to training user

6/18/2014

The starting point for creating a new Contact is the People Tab. Staff would select that to move to the correct screen

People Tab – High Level Overview

The screenshot shows the Outlook People tab interface. On the left, a navigation pane contains folders: My Contacts, Contacts, Directory, All Rooms, All Users, All Groups, All Contacts, and Offline Global Address List. Below this is a 'Connect to social networks' link. At the top left is a '+ new' button. A search window is open at the top with the text 'search People' and a dropdown menu showing 'all people groups'. Below the search is a 'MY CONTACTS' section with a 'BY LASTNAME' dropdown. A list of contacts is displayed, with 'Sample Test Contact' highlighted. To the right of the list is a detailed view for 'Sample Test Contact', including a profile picture, 'contact notes', and a 'send email' button with the address 'mlac1974@gmail.com'. At the top right of this view is an 'Edit' button with a three-dot menu. Annotations with blue arrows point to various elements: 'Contacts folders' points to the left navigation pane; 'Add a new contact selector' points to the '+ new' button; 'Contacts list' points to the list of contacts; 'View of Contacts list' points to the 'Sample Test Contact' entry; 'Order of view for Contacts list' points to the 'BY LASTNAME' dropdown; 'Search window' points to the search bar; 'Preview of highlighted contact' points to the detailed view of 'Sample Test Contact'; and '"Edit" contact selector' points to the 'Edit' button.

Create New Contact – Launch Contact creation process

The screenshot shows the Outlook web interface. In the top left, a blue arrow points to a '+' icon labeled 'new'. Below this, the 'MY CONTACTS' section is visible, listing contacts like 'Sample Test Contact', 'Jon Steven Frey', and 'Training Test User'. To the right, the details for 'Sample Test Contact' are shown, including a profile picture, contact notes, and various fields like 'send email', 'business address', and 'business' phone number.

Staff person selects
“+” to launch
Contact create
process

6/18/2014

Create Contact – Confirm creation process

The screenshot shows the Outlook Web App interface. On the left, a navigation pane includes a 'new' button with a plus sign. Below it is a search bar for 'People' and a list of 'MY CONTACTS'. The list contains 'Sample Test Contact', 'John Steven Frey', and 'Training Test User'. A blue arrow points from the 'new' button to the 'Sample Test Contact' entry. Another blue arrow points from the 'Sample Test Contact' entry to a modal dialog box. The dialog box has the title 'what would you like to do?' and three buttons: 'create contact', 'create group', and 'cancel'. The background shows the details for 'Sample Test Contact', including a profile picture, email address 'imiac1974@gmail.com', and business address '101 Monroe Street'. The Windows taskbar at the bottom shows the date '6/18/2014' and the time '1:18 PM'.

new

search People

all people groups

MY CONTACTS

BY LASTNAME

My Contacts

Contacts

Sample Test Contact

John Steven Frey

Training Test User

Connect to social networks

contact notes

send email
imiac1974@gmail.com

business address
101 Monroe Street

business
240-777-1212

linked contacts
Outlook - (Contacts)

what would you like to do?

create contact

create group

cancel

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Create Contact – Basic Items required

The screenshot shows the Outlook Web App interface for creating a new contact. The left sidebar contains navigation options like 'My Contacts', 'Directory', and 'Connect to social networks'. The main area displays the 'Create Contact' form with fields for 'First name', 'Middle name', and 'Last name'. Below these are sections for 'email', 'work', 'address', 'other', 'phone', 'IM', and 'notes', each with a plus sign icon to expand it. Blue arrows point from the text annotations to the 'Last name' field, the 'address' section, and the 'IM' section.

Basic name information is all that is required to establish the contact

Other information regarding the contact can be captured in these areas. The staff member opens a given area by selecting the '+'

Create Contact – Add contact information -

Training User - Outlook Web

https://outlook.office365.com/owa/?wa=wsignin1.0#path=/people

Office 365 Outlook Calendar People Training User

new search People

all people groups

MY CONTACTS BY LAST NAME

My Contacts

Contacts

Directory

All Rooms

All Users

All Groups

All Contacts

Offline Global Address List

Connect to social networks

Sample Test Contact

Jon Steven Frey

Training Test User

SAVE DISCARD

First name: Test Middle name:

Last name: Contact

Display as:

+ email

Email:

+ phone

+ IM

+ notes

+ work

Job title: Contact

Department: DTS

Company: Montgomery County

Office: 101 Monroe

Manager: My Manger

Assistant: My Assistant

+ address

+ other

A Staff person selects the '+' on the work category which opens a screen that enables them to fill in general work information

6/18/2014

Start BMC Remedyforce - Self ... Training User - Outloo... Inbox - Mailbox - Frey, J... Search Desktop 1:45 PM

Create Contact – Add contact information – telephone number - type

Office 365

Training User - Outlook Web

https://outlook.office365.com/owa/?wa=wsignin1.0#path=/people

Office 365

Outlook Calendar People

Training User

new

search People

all people groups

MY CONTACTS

BY LASTNAME

My Contacts

Contacts

Directory

All Rooms

All Users

All Groups

All Contacts

Offline Global Address List

Connect to social networks

SAVE DISCARD

First name: Test Middle name:

Last name: Contact

+ email

Email: imlac1974@gmail.com

Display as: Test Contact (imlac1974@gmail.com)

+ work

Job title: Contact

Department: DTS

Company: Montgomery County

Office: 101 Monroe

Manager: My Manger

Assistant: My Assistant

+ phone

business

+ home

mobile

other

+ address

+ other

+ notes

A Staff person can add telephone numbers by selecting the '+' on the phone area

A Staff person then selects the type of telephone number to record

6/18/2014

Start

BMC Remedforce - Self ...

Training User - Outloo...

Inbox - Mailbox - Frey, J...

OWA - Tutorial # 7 Story...

Search Desktop

2:00 PM

Create Contact – Add contact information – telephone number

Training User - Outlook Web X

https://outlook.office365.com/owa/?wa=wsignin1.0#path=/people

Office 365 Outlook Calendar People Training User

new search People

all people groups

MY CONTACTS BY LASTNAME

My Contacts

Contacts

Directory

All Rooms

All Users

All Groups

All Contacts

Offline Global Address List

Connect to social networks

SAVE DISCARD

First name: Test Middle name:

Last name: Contact

+ email Email: imlac1974@gmail.com Display as: Test Contact (imlac1974@gmail.com)

+ work Job title: Contact Department: DTS Company: Montgomery County Office: 101 Monroe Manager: My Manger Assistant: My Assistant

+ phone Business: 301-555-1212

+ IM

+ address

+ other

+ notes

A Staff person fills in the telephone information here

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Start BMC Remedyforce - Self ... Training User - Outloo... Inbox - Mailbox - Frey, J... OWA - Tutorial # 7 Story... Search Desktop 2:01 PM

Create Contact – Add contact information – address type

The screenshot displays the Outlook Web App interface for creating a contact. The left sidebar shows the navigation pane with 'My Contacts' selected. The main area contains a form for adding contact information. The form includes fields for First name (Test), Middle name, Last name (Contact), and various categories like email, work, phone, and IM. A dropdown menu for address type is open, showing options: business, home, and other. Two blue arrows point from text annotations to the '+' icon and the 'business' option in the address type menu.

Annotations:

- A Staff person can add additional address fields by selecting the '+' on the address area
- A Staff person then selects the type of address from the menu

Create Contact – Add contact information – address information

Training User - Outlook Web x
https://outlook.office365.com/owa/?wa=wsignin1.0#path=/people

Office 365 Outlook Calendar People Training User

new search People
all people groups

MY CONTACTS BY LAST NAME

- My Contacts
- Contacts
- Directory
- All Rooms
- All Users
- All Groups
- All Contacts
- Offline Global Address List

Connect to social networks

Sample Test Contact

Jon Steven Frey

Training Test User

SAVE DISCARD

First name: Test Middle name:

Last name: Contact

+ email
Email: imlac1974@gmail.com
Display as: Test Contact (imlac1974@gmail.com)

+ work
Job title: Contact
Department: DTS
Company: Montgomery County
Office: 101 Monroe
Manager: My Manger
Assistant: My Assistant

+ phone
Business: 301-555-1212

+ IM

+ address
business
Street: 101 First Street
City: My City
State/Province: My State
ZIP/Postal code: 99999-0000
Country/Region: USA

+ other

A Staff person then fills in the address information here

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Start BMC Remedyforce - Self ... Training User - Outloo... Inbox - Mailbox - Frey, J... OWA - Tutorial # 7 Story... Search Desktop

Create Contact – Save Information and Add contact to OWA

Once the Staff person has entered in all of the contact information desired they would save the contact in OWA by selecting the SAVE choice.

Create Contact – Add contact information – Results of adding Contact

The screenshot displays the Outlook Web App interface. On the left, a navigation pane shows 'My Contacts' with a list of contacts including 'Test Contact', 'Jon Steven Frey', and 'Training Test User'. The main area shows the details for 'Test Contact', including a profile picture, contact notes, and various fields such as 'send email', 'work', 'business', and 'business address'. Two blue arrows point from the text below to the 'send email' field and the 'business address' section.

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All of the contact information captured during the previous steps has been saved and is displayed here.

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People Tab

Edit Contact

Edit Contact – Select Contact Edit

The screenshot displays the Outlook Web App interface. On the left, a navigation pane shows 'My Contacts' with a list of contacts. The contact 'Test Contact' is highlighted. A blue arrow points from this contact to the 'Edit' button in the top right corner of the contact's detail view. The detail view shows contact information such as 'Test Contact', 'Contact, DTS', and various addresses and phone numbers. A second blue arrow points from the 'Edit' button to a text box on the right side of the screen.

6/18/2014

To edit a contact they are first highlighted in the contact list and then the Staff person selects the "EDIT" choice.

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Edit Contact – Edit Contact

The screenshot displays the Outlook Web App interface for editing a contact. The browser address bar shows the URL <https://outlook.office365.com/owa/?wa=wsignin1.0#path=/people>. The Office 365 navigation bar includes links for Outlook, Calendar, and People. The left sidebar shows navigation options like 'My Contacts' and 'Directory'. The main content area is titled 'Test Contact' and contains several sections for editing contact information:

- SAVE DISCARD** buttons at the top.
- Name fields:** First name (Sample), Middle name (Test), and Last name (Contact (Edited)). A blue arrow points from the text 'Staff person modifies the Contact Name' to the 'Last name' field.
- email section:** Email (imlac1974@gmail.com), Display as (Test Contact (imlac1974@gmail.com)).
- work section:** Job title (Contact), Department (DTS), Company (Montgomery County), Office (101 Monroe), Manager (My Manger), Assistant (My Assistant).
- phone section:** Business (240-777-1212, 301-555-1212).
- address section:** business, Street (101 Monroe Street), City, State/Province, ZIP/Postal code, Country/Region.

The Windows taskbar at the bottom shows the date 6/18/2014 and the time 2:28 PM. The system tray includes icons for network, volume, and other background applications.

Staff person
modifies the
Contact Name

Edit Contact – Save Changes

The screenshot shows the Outlook Web App interface for editing a contact. The contact is 'Test Contact' with email 'imlac1974@gmail.com'. The form is divided into several sections:

- Name:** First name: Sample, Middle name: Test, Last name: Contact (Edited)
- email:** Email: imlac1974@gmail.com, Display as: Test Contact (imlac1974@gmail.com)
- work:** Job title: Contact, Department: DTS, Company: Montgomery County, Office: 101 Monroe, Manager: My Manger, Assistant: My Assistant
- phone:** Business: 240-777-1212, Business: 301-555-1212
- address:** business, Street: 101 Monroe Street, City: , State/Province: , ZIP/Postal code: , Country/Region: , business, Street: 101 First Street

A blue arrow points from the 'SAVE' button at the top left of the form to the text on the right.

Once all the edits have been made the Staff person selects 'SAVE' to save the changes

Edit Contact – Edit Contact – Result of saved changes

The screenshot displays the Outlook Web App interface. On the left, a navigation pane shows 'My Contacts' with a list of contacts: 'Test Contact (Edited)', 'Jon Steven Frey', and 'Training Test User'. The main area shows the details for 'Test Contact (Edited)'. The contact's name is highlighted with a blue arrow pointing from the text 'Contact Name changed'. The contact details include:

- contact notes
- send email: imiac1974@gmail.com
- work:
 - Job title: Contact
 - Department: DTS
 - Company: Montgomery County
 - Office: 101 Monroe
 - Manager: My Manger
 - Assistant: My Assistant
- business:
 - 240-777-1212
 - Outlook - (Contacts)
- business address:
 - 301-555-1212
 - Outlook - (Contacts)
- business address:
 - 101 Monroe Street
 - Outlook - (Contacts)
- business address:
 - 101 First Street
 - My City My State 99999-0000
 - USA
 - Outlook - (Contacts)
- linked contacts:
 - Outlook - (Contacts)
 - Recently emailed
 - [Manage...](#)

The date '6/18/2014' is visible in the bottom left corner, and the system tray shows the time as 2:32 PM.

Contact Name
changed

People Tab

Delete Contact

Delete Contact – Select Delete Contact

The screenshot shows the Outlook Web App interface. On the left is a navigation pane with 'My Contacts' selected. The main area displays the details for 'Test Contact (Edited)'. A 'delete' button is visible in the top right corner of the contact's header area. Two blue arrows point from text annotations to this button.

Staff person selects
'...' menu and
'delete' appears.

Staff then selects
'delete' to trigger
the deletion
process

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Delete Contact – Confirm Delete Contact

The screenshot shows the Outlook Web App interface. On the left is a navigation pane with 'My Contacts' selected. The main area displays a contact named 'Test Contact (Edited)'. A modal dialog box is open in the center, titled 'delete contact?'. The dialog contains the text 'Test Contact (Edited) will be deleted from your contacts.' and two buttons: 'delete' and 'cancel'. A blue arrow points from the text 'confirm the delete' in the overlay to the 'delete' button. The background shows contact details such as 'send email', 'business', and 'work' information.

Staff member would either confirm the delete or cancel the process

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Delete Contact – Results of Delete Contact

The screenshot shows the Outlook Web App interface. On the left, the 'MY CONTACTS' list is visible, containing 'Jon Steven Frey' and 'Training Test User'. A blue arrow points from the text 'Test Contact' has been eliminated from the contacts' to the 'Training Test User' entry in the list. The main pane displays the details for 'Jon Steven Frey', including his job title 'Senior Business Consultant, DTS/HHS', email address 'Jon.Frey@montgomerycountymd.gov', and phone numbers for business and mobile. The 'contact notes' section is empty. The system tray at the bottom shows the date '6/18/2014' and the time '2:43 PM'.

6/18/2014

‘Test Contact’ has been eliminated from the contacts

2:43 PM

Sign off

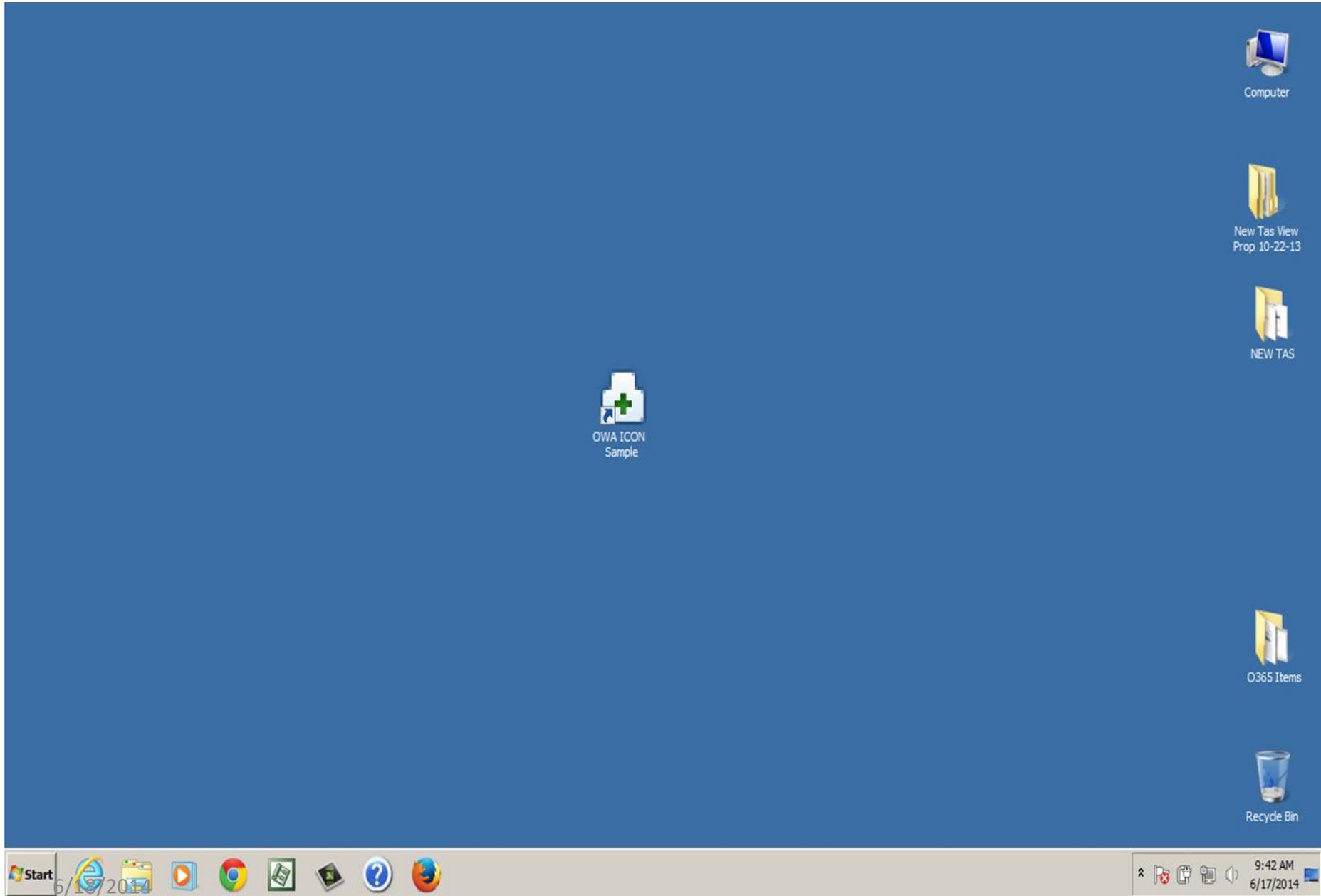
OWA Overview – Sign off

The screenshot shows the Outlook Web App (OWA) interface. The top navigation bar includes 'Outlook', 'Calendar', 'People', and 'Training User'. The 'Training User' dropdown menu is open, displaying a profile picture, the name 'Training User', the email address 'training@teachoffice365.com', and options for 'change', 'Open another mailbox...', and 'Sign out'. The 'Sign out' option is highlighted. The main content area shows an empty inbox with a message: 'There are no items to show in this view.' The taskbar at the bottom shows the date '6/18/2014' and the time '9:13 AM'.

The 'User' tab is accessible from anywhere in OWA. When selected, the menu of choices appears.

Staff member selects 'Sign out' to exit OWA.

O365 – OWA Sign Off - Desktop



O365 – OWA Sign Off - Internet

Sign in to Office 365

Microsoft Corporation [US] https://login.microsoftonline.com/login.srf?wa=wsignin1.0&rpsnv=3&ct=1394633708&rver=6.1.6206.0&wp=MBI_SSL&wreply

Apps Welcome to the Montg... SiriusXM Internet Radi... CMS Content Manager Google Google Analytics Offici... ABCNews.com - Breaki... CBS News - Breaking ... Other bookmarks

Łączyć Connecte 连接 Ligue Connect تواصل Verbinden つなぐ Yhdistä povezati להתחבר

Office 365

Sign in with your organizational account

someone@example.com

Password

Keep me signed in

Sign in

[Can't access your account?](#)

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6/18/2014

Start Sign in to Office 365 - ... Presentation1 - Microsof... Search Desktop 9:45 AM

End of

People Tab – Create / Edit Contact