

# Introduction to Microsoft Outlook

## HOW TO'S

*Microsoft offers excellent Helps, just use the "Type a question for help" window.*

### **Create a shortcut then double click on Microsoft icon on your desktop:**

You will not be prompted to enter your username and password. .

### **Default 3-part view:**

Folders are on far left. Inbox is in middle. Single click on inbox entry opens message on right of screen for viewing. Double click on entry to fully open message. Inbox can be arranged by date, size, etc.; and can be arranged with oldest or newest on top. To turn the preview pane off go to View, then Reading Pane. Choose off.

### **How to Create a New Mail Message:**

From mail folder, click once on New icon.

### **How to create a signature:**

1. Go to Tools, Options, Mail Format.
2. Choose the Signatures button.
3. Type in your signature as you want it. If you copy and paste from Lotus, you will run into formatting issues.
4. Indicate that you want the signature to appear with each message.

### **To populate the To field for email to Clarkson University addresses:**

1. Click on Address book icon (it defaults to the Global Address Book), type first name, select (click on) person from list, click OK. You can also search by last name by clicking on the Advanced button and choosing Find from the dropdown menu. Type in person's last name and click OK.
2. Once you have emailed an address, you will be able to select their name from a drop-down list which will automatically appear.
3. Choose a person from your personal contact list by changing from Global Address Book Contacts. See how to set up below.
4. Note that student addresses are made up of the first 6 letters of their last name plus first and middle initials if applicable. Faculty and staff email addresses are made up of the first initial plus the first 7 letters of the last name. Review these "aliases" if needed.

### **How to organize/manage your Outlook account:**

You can create folders in your Outlook account to store and organize e-mail messages by clicking on the drop down arrow next to New. To rearrange folders, just drag and drop. To add messages to folders from inbox, just drag and drop.

### **How to delete items in your Outlook account:**

Select the item you want to delete and either select the black X from the toolbar or just hit the Delete key on the keyboard. Use the Shift key to select multiple items. Keep in mind that this does not really delete items from your account. It puts them into your Deleted Item folder. To empty your Deleted Items folder select the folder and delete them directly from the folder **or** right click on the Deleted Items folder and select **Empty "Deleted Items" Folder** from the menu.

### **How to check the size of your Outlook account:**

1. Right click on Mailbox – Your Name on Navigation Pane. Go to Properties. Select the Folder Size button at the bottom left. Click on Server Data tab.
2. In the window that appears, you are looking for the number next to Total Size (including folders and subfolders):. This will tell you exactly how much of your 125MB you are currently using.
3. As you approach your quota, you will get messages telling you that you are about to run out of disk space. If you do not heed these messages, your account will become disabled. Remember to empty your Deleted Items folder. Remember to manage your Sent Items folder. Every time you send an e-mail, a copy of that email will get stored in the Sent Items folder. Go through your Sent Items folder periodically to clean these items up as they also count against your quota.  
**Note:** The HelpDesk will no longer run compactions. Once you empty your Deleted Items folder, the messages are gone and no longer count against your quota.

### **How do I create a New contact?**

1. From the drop down arrow next to the New button, select Contact. This will open a

window for you to enter the information about your new contact.

2. Enter your contact name and any other information that you require. Save & close.
3. To create a contact from mail in your inbox, double click on the message to open it. Right click on the name in the From field. Pick Add to Outlook Contacts. Save & close.

#### **If I cannot see my contact once I create one:**

1. Go to Tools and then Email Accounts.
2. Under Directory indicate Add new and then click Next.
3. Indicate Additional Address books, then click Next.
4. **Outlook Address book** should be indicated, then click Next.
5. Say OK to the pop-up and close out of Outlook.
6. Reopen Outlook to see your address book when you click on the To button.

#### **How to create a distribution list:**

1. From the down arrow to the right of the New button, select Distribution List.
2. Give your Distribution List a name.
3. Click Select Members to choose individuals from the CU Global Address Book, or you can add other people who are not employees of CU by clicking on Add New. When using Add New Member, do not change the E-mail type: or the Internet format:.
4. When you have entered the new member information, click once on the OK button.
5. When you have entered all the names for your Distribution List, click once on the Save and Close button in the top left corner.

#### **How to schedule appointments:**

1. By clicking on the down arrow next to the New button, select Appointment. Or just click once on New while in Calendar display.
2. Enter the Subject, Location of your appointment, Date, Beginning time and End time of your appointment.
3. You can set a reminder for your appointment.
4. You can show the time on your calendar as Busy, Out of Office, Tentative, or Free.
5. You can enter notes about the appointment in the space provided.
6. When you are finished, you can then click on Save & Close.

#### **How to schedule recurring appointments:**

1. Select the Recurrence... Button at on the toolbar or select Recurrence... from the

Actions menu. Your recurring appointment should have a start time and an end time. If you do not add an end time, your calendar may be too full for anything else. It could permanently disable your Outlook account if you do not identify a start date and an end date for these items.

2. When you are finished entering the details of the appointment, select the OK button.

#### **How to schedule a meeting:**

1. Open a new Appointment.
2. Enter the Subject, Location and Date.
3. Enter the start time and end time.
4. Click on the Scheduling tab to enter your invitees. You can type in usernames and Enter; Outlook will find them in directory. Click Send.

#### **How to delegate rights for others to see my calendar:**

1. From your calendar, click on the Share My Calendar link.
2. Click the Add button and choose the person from the Global Address Book. And click OK.
3. A new window will appear and you will be allowed to assign rights for that individual to have editorial rights, author rights or read rights. Select what is appropriate.
4. Read and check each of the check boxes to see if they apply to what you need that individual to do. Click OK and OK.

#### **How to see another person's calendar:**

From your calendar, click on the Open a Shared Calendar link. Type in the person's name.

#### **How to delegate rights for others to see my inbox and how to view another person's inbox that I have rights to (and how to send messages for them):**

Go to separate documentation available on the OIT web page.

#### **How do I access my mail via the web**

1. Open Internet Explorer.
2. Type in the following URL and press enter: mymail.clarkson.edu
3. This will open a window for you to log into your Outlook Web Access.
4. You will be prompted to enter your user name and password.

All information from your office workstation will be included in your OWA account.