INFORMATION TECHNOLOGY

Enterprise Application Systems

Microsoft Outlook User Guide

Desktop App

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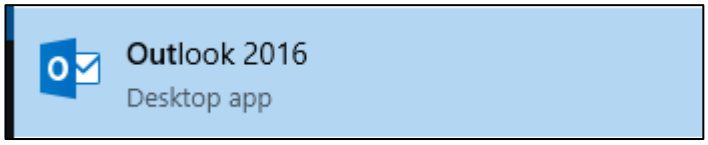
Accessing Outlook

Outlook is part of the Microsoft Office Suite and offers two versions of this application: a desktop application and a web application. This user guide will focus on the desktop application. For Outlook Web Application help, please visit the Mt. SAC Office 365 website.

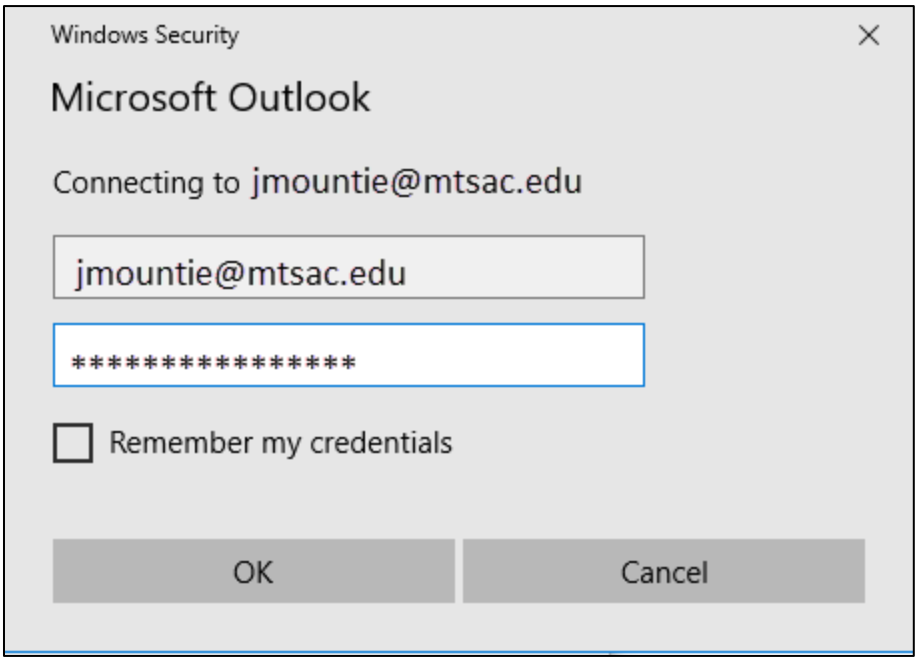
1. To access Outlook, find the **Outlook** icon on your computer desktop and double- click the icon.
   You can also search for Outlook on your windows search bar.



Logging in to Outlook

1. On the login screen, your **My Portal username** will be auto-filled followed by '@mtsac.edu'. DO NOT CHANGE THIS.

2. Enter your **My Portal** password in the password field and click **OK.**



Navigating through Outlook

Ribbon- group of actionable items available for your current selection on the screen

Status Bar- provides number of items on the folder you have selected and status of internet connection

Zoom In/Out Slider- found to the right of the slider, allows users to increase/decrease text size of the preview pane

Navigation Bar- allows users to switch between tasks such as mail, calendar, and people

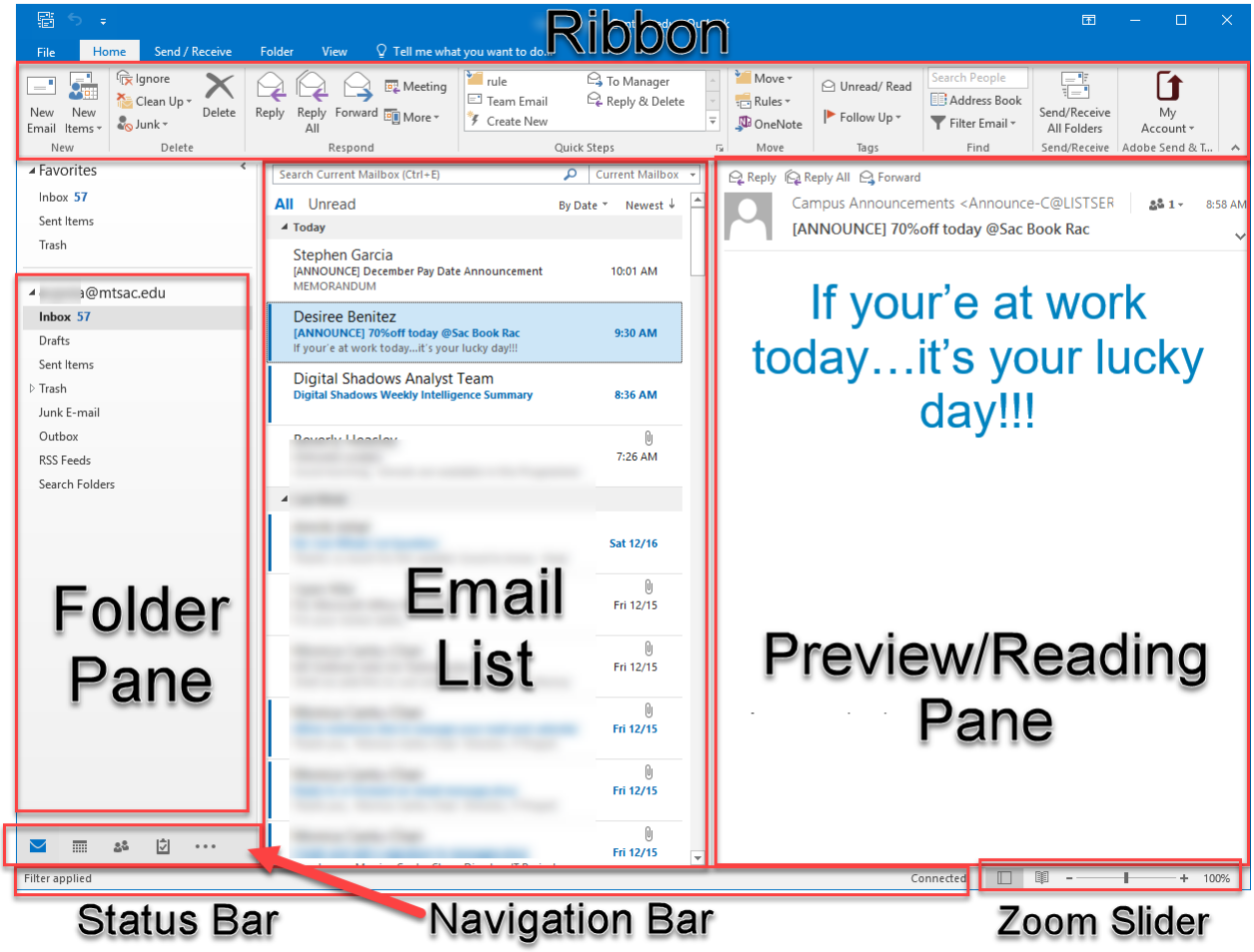
Arrows/Carets- these can be found throughout the interface for expanding or collapsing details. For ribbon views use the Ribbon Display Options on the upper right-hand corner of your window

Folder Pane- consists of your favorites, inbox (s), and folders

Email List (mid screen) – view list of read and unread

Preview (Reading) Pane- area where you can read and view email text and details

**Note: All panes can be sized differently by clicking and dragging the vertical pane line.*



Working with Email

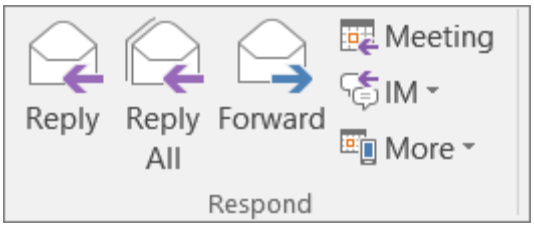
Reading email- click on the email desired in the email list.

Creating a new message- click on the **New Mail** option in the ribbon.

Replying and Forwarding Email

1. In the Reading Pane, click **Reply**, **Reply All**, or **Forward**.

*Mountie Tip #1: If the Reading Pane is off or if you've opened the message in its own window, on the **Home** or **Message** tab, click **Reply**, **Reply All**, or **Forward**.*



2. Write your message.

3. Click **Send**.

*Mountie Tip #2: If you want all replies to automatically open in a new window, from the **File** menu, click **Options** > **Mail**. Under **Replies and forwards**, check the **Open replies and forwards in a new window** box.*

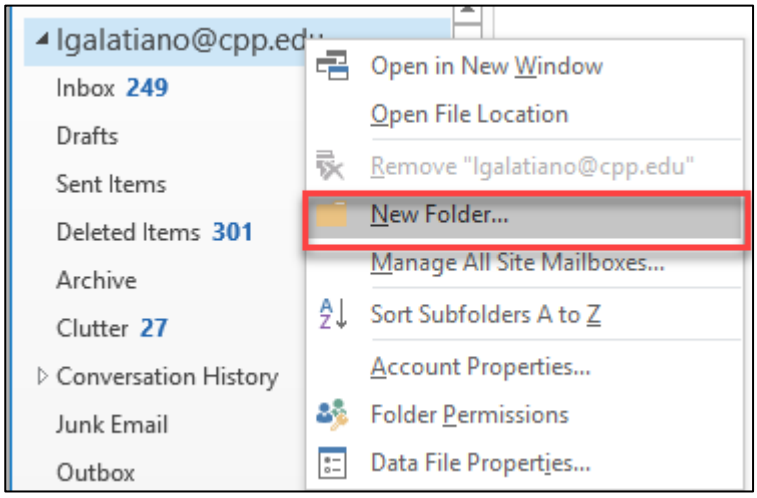
*Mountie Tip #3: If you want to forward two or more messages to the same recipients in one message, in the message list, press and hold Ctrl as you click each message. Then, click **Home** > **Forward**. Each message is forwarded as attachments in one new message.*

Organizing Email

Creating folders:

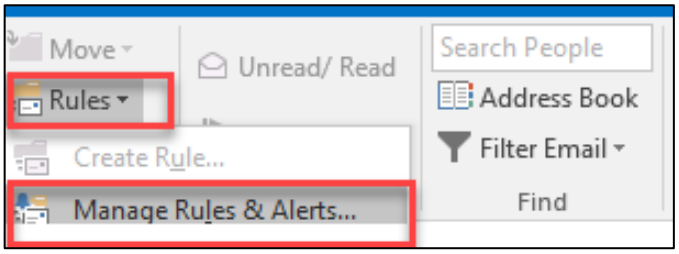
1. On the folder (left) pane, right-click where you want to add the folder, and click **New Folder.**

2. In the **Name** box, enter a name for the folder and press **Enter**.

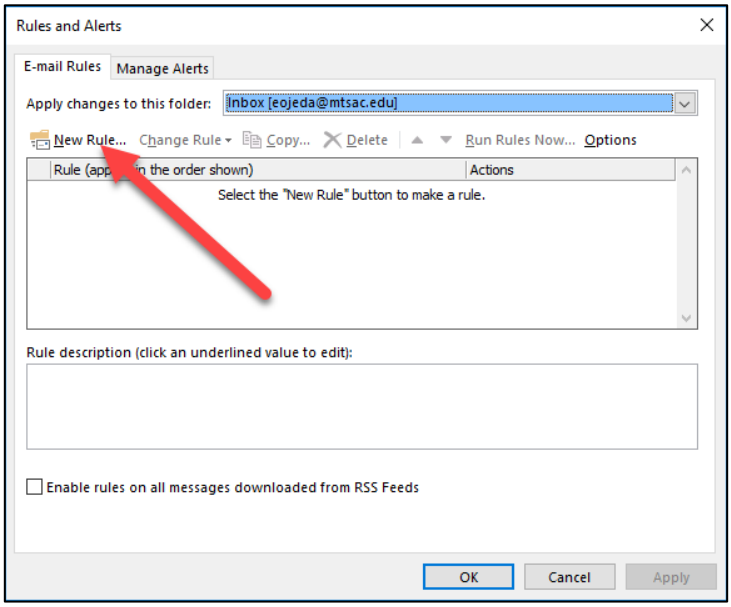


Creating rules:

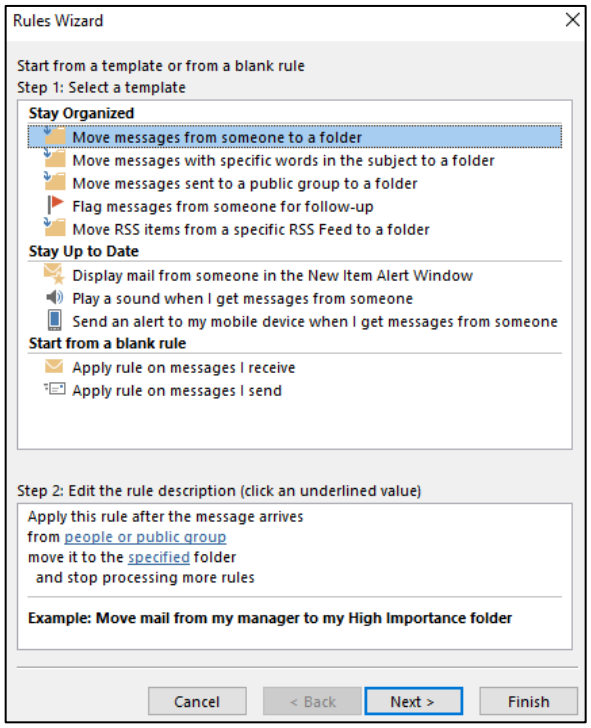
3. Choose **Rules** > **Manage Rules & Alerts** from the ribbon or choose the **File** tab and then choose **Manage Rules & Alerts.**



4. In the **Rules and Alerts** dialog box, on the **E-mail Rules** tab, choose **New Rule.**



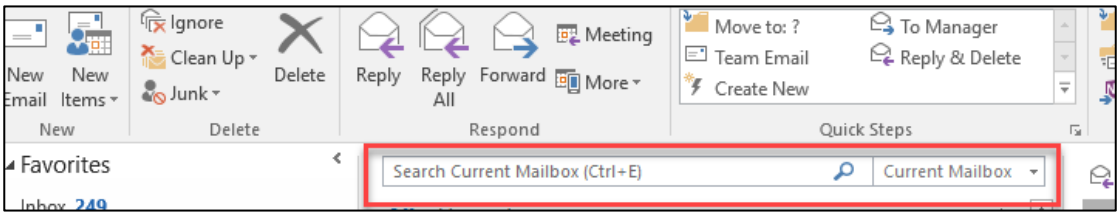
5. In the **Rules Wizard**, under **Step 1: Select a template**, pick one of the default templates under **Stay Organized**, **Stay Up to Date**, or, **Start from a blank rule.**



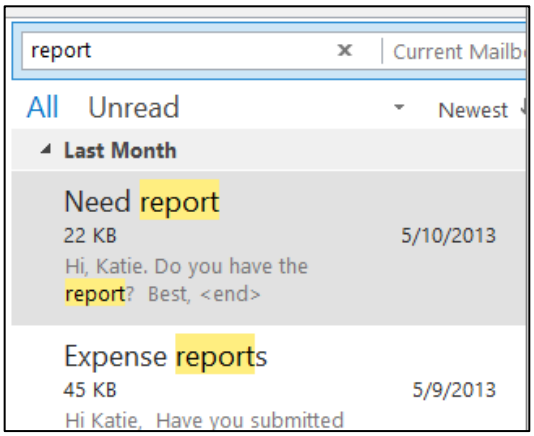
6. Edit the rule description to your needs. Click **Finish** when done.

Searching Messages

1. Find the search box above the list of your emails.



2. To find a word that you know is in a message, or a message from a particular person, type the word or person's name (you can use first, last, and partial names) in the search box. Messages that contain the word or name you specified appear with the search text highlighted in the results.

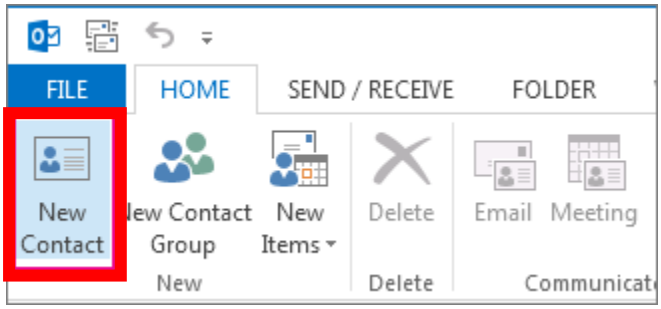


Creating Contacts/Contact Groups

Creating Contacts:

1. Click **People** at the bottom of the screen.

2. In the **New** group, choose **New Contact**.



3. Enter a name and any other information that you want to include for the contact.

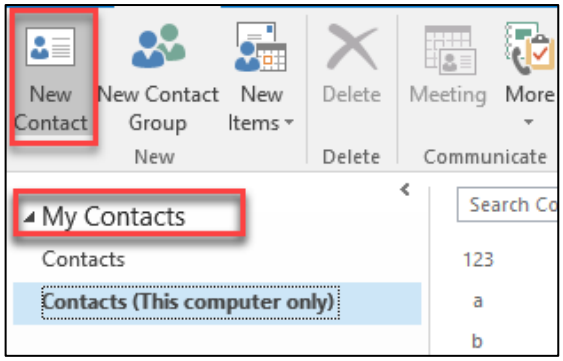
4. If you want to immediately create another contact, choose **Save & New** (this way, you don't have to start over for each contact).

Creating Contact Groups (Distribution Lists):

1. On the Navigation Bar, click **People.**

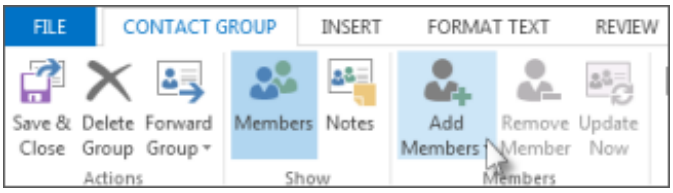
2. Under **My Contacts**, pick where you want to add the contact group. For this example, click **Contacts**.

3. Click **Home** > **New Contact Group**.



4. On the **Contact Group** tab, in the **Name** box, type a name for the group.

5. Click **Add Members**, and then add people from your address book or contacts list. (*Note: To add someone who is not in your **address book** or **contacts**, create or add a person as a contact.)



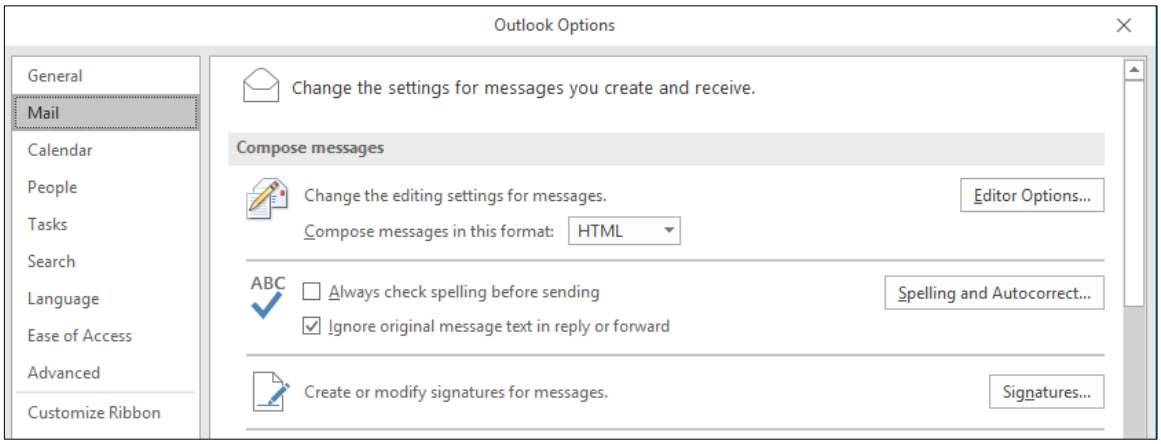
6. Click **Save and Close**.

*Mountie Tip #4: A **contact group** is a list of email addresses collected under one name, where a message sent to a contact group will go to all recipients in the list. A contact group is not global; therefore the contact group will only be available for selection by the user who created the list. An **address list** under the Mt. SAC Global Address Book is created and managed by the system administrator (e.g. IT Helpdesk).*

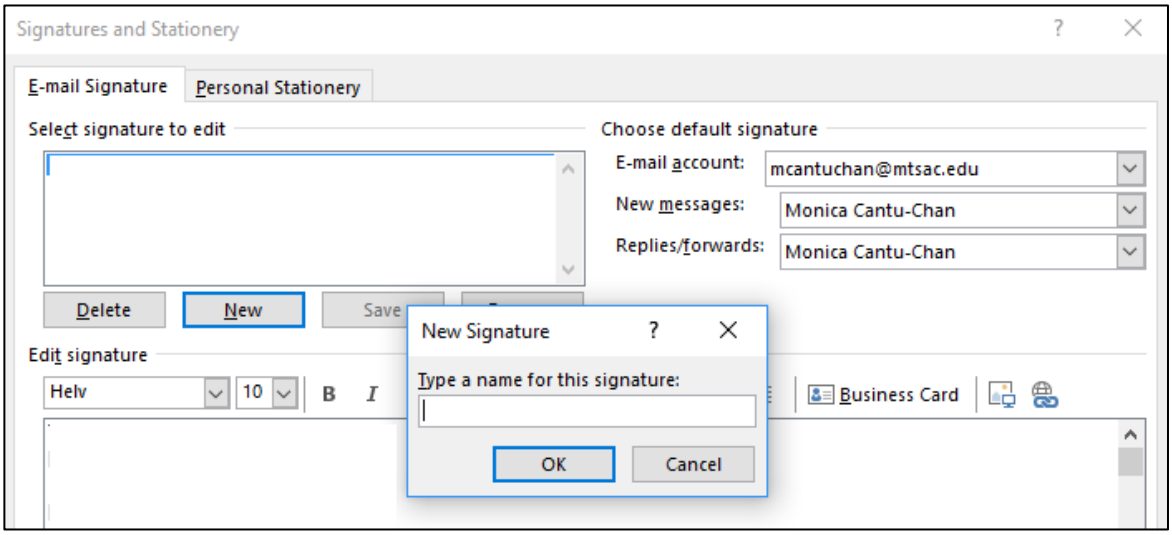
***Listserv** email lists (e.g. Announce-C) are not part of Lotus Notes and will not be affected by the migration.*

Adding Email Signature

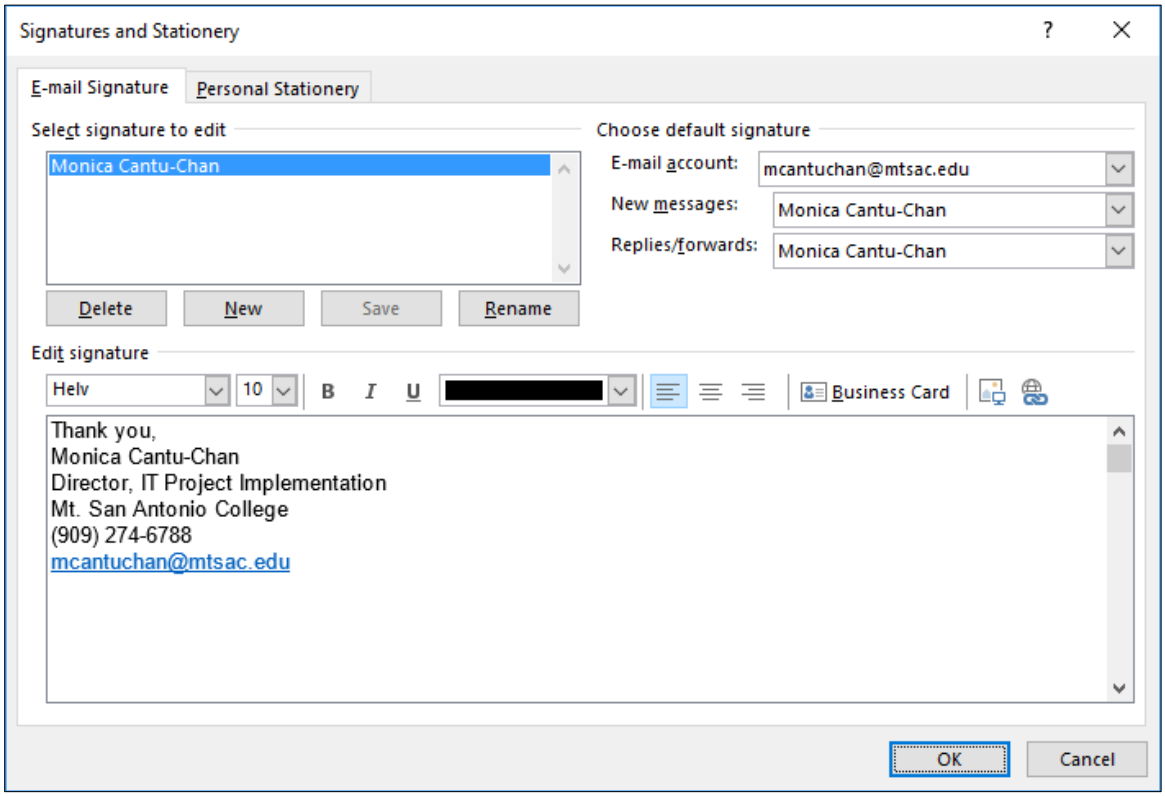
1. Select **File > Options > Mail**. Under **Compose messages**, select **Signatures**.



2. Under **Select signature to edit**, choose **New**, and in the **New Signature** dialog box, type a *name* for the signature.



3. Under **Edit signature**, type the *signature*, chose **OK.**



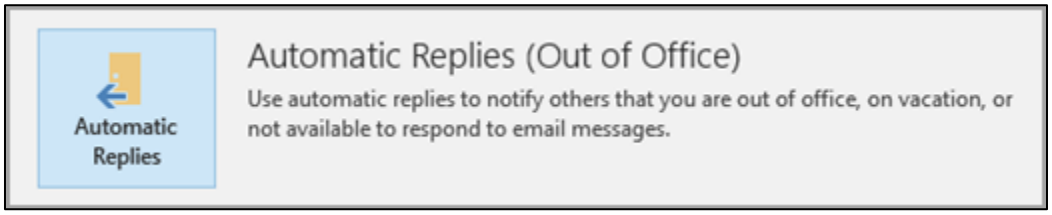
4. Under **Choose default signature**, set the following options for your signature:

*Option 1: In the **New messages** list, choose the signature that you want to be added automatically to all new email messages. If you don't want to automatically add a signature to new messages, choose (none).*

*Option 2: In the **Replies/forwards** list, choose the signature that you want to be added automatically (auto sign) when you reply to or forward messages. Otherwise, accept the default option of (none).*

Setting Out-of-Office Replies

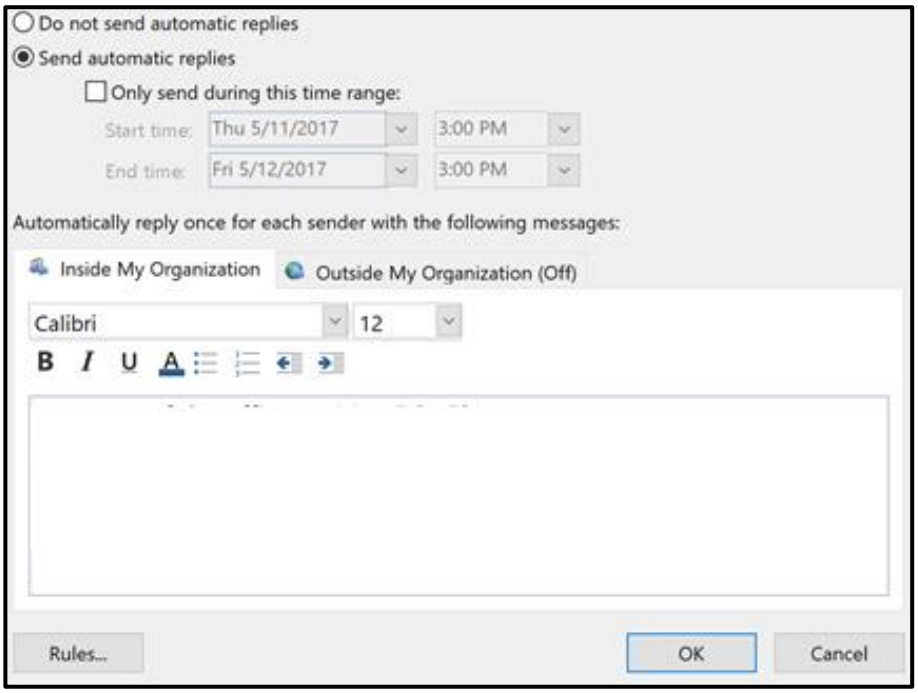
1. Select **File** > **Automatic Replies**.



2. In the **Automatic Replies** box, select **Send automatic replies**.

Optionally, set a date range for your automatic replies. This will turn off automatic replies at the date and time you enter for the end time. Otherwise, you'll need to turn off automatic replies manually.

3. On the **Inside My Organization** tab, type the response that you want to send while you are out of the office.



4. Select **OK** to save your settings.

Turn off automatic out-of-office replies

When Outlook is setup to send automatic replies, you'll see a message under the ribbon with this information. Select **Turn off** to disable automatic out-of-office replies. If you want to modify the dates for your automatic reply or the message sent, use the steps above to modify your settings.