Curtin University

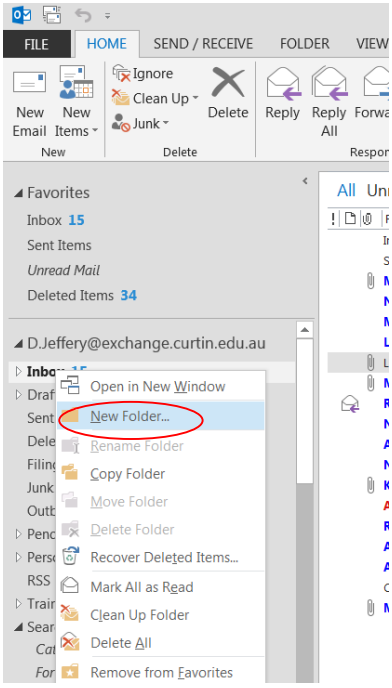
Using Microsoft Outlook - Tip Sheet

This Tip Sheet contains information on how to use or access some of the functionality within Microsoft Outlook. Please note that these examples are based on Outlook 2013.

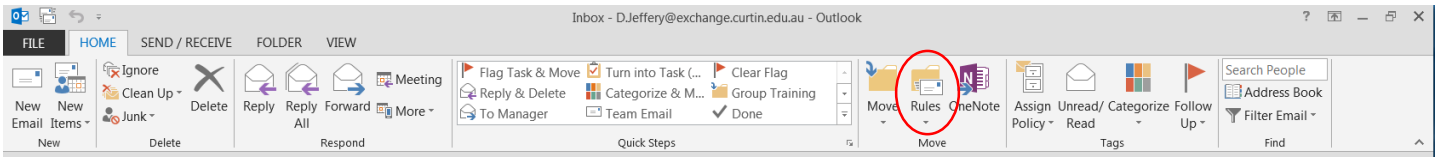
Setting up a rule

Rules can be an effective way of managing the inflow and prioritization of your emails. The basic principle is that when an email arrives in your inbox, it will be automatically re-directed to a specific folder in your mailbox or a specific action be taken based on instructions that you have set up. The example below demonstrates how to create a rule to automatically move all emails in which your name is in the cc field into a specific folder.

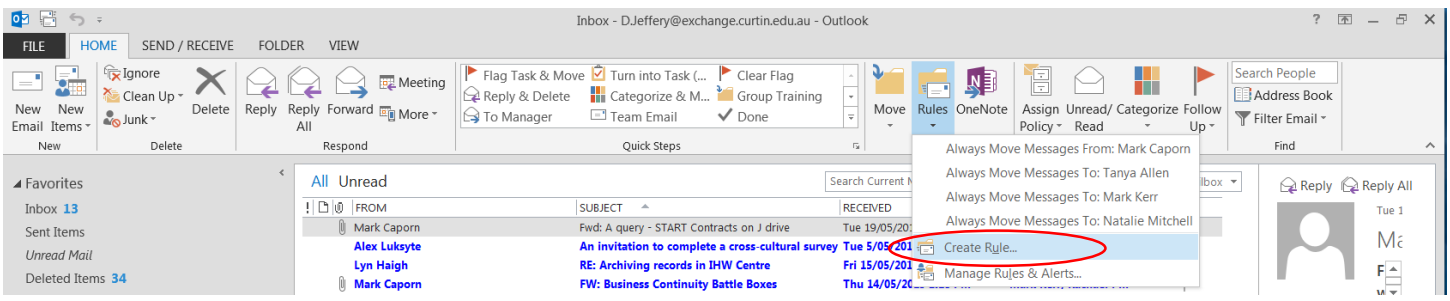
Step 1 – Create the folder that you want the emails to be automatically moved to. For example, if you wish to create a new folder called "CC emails" that will sit within the inbox, simply right click on the Inbox and select the option "New Folder". Name the new folder and click on OK. You will now have a new sub folder within your Inbox.



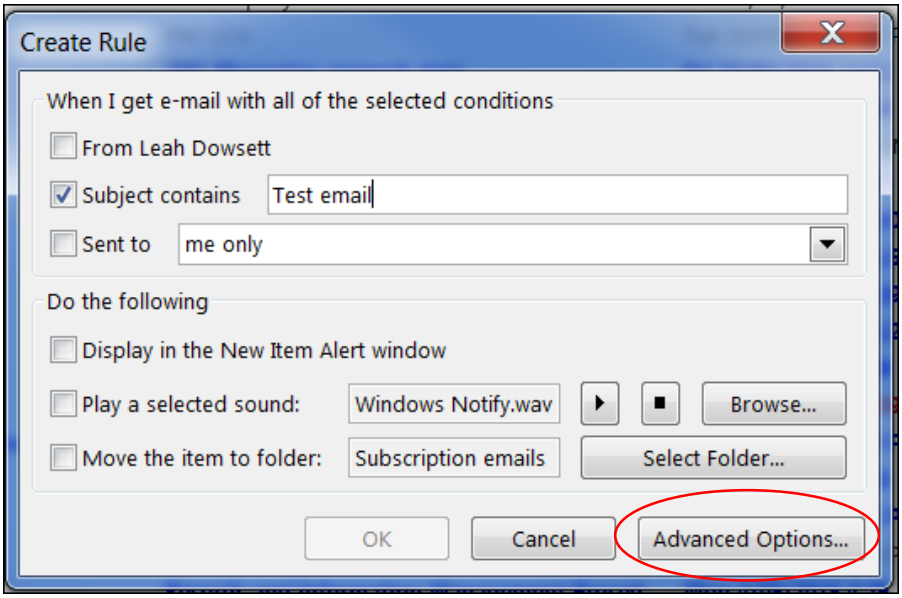
Step 2 – While in your mailbox, go to the "Rules" menu found on the ribbon at the top of the screen.



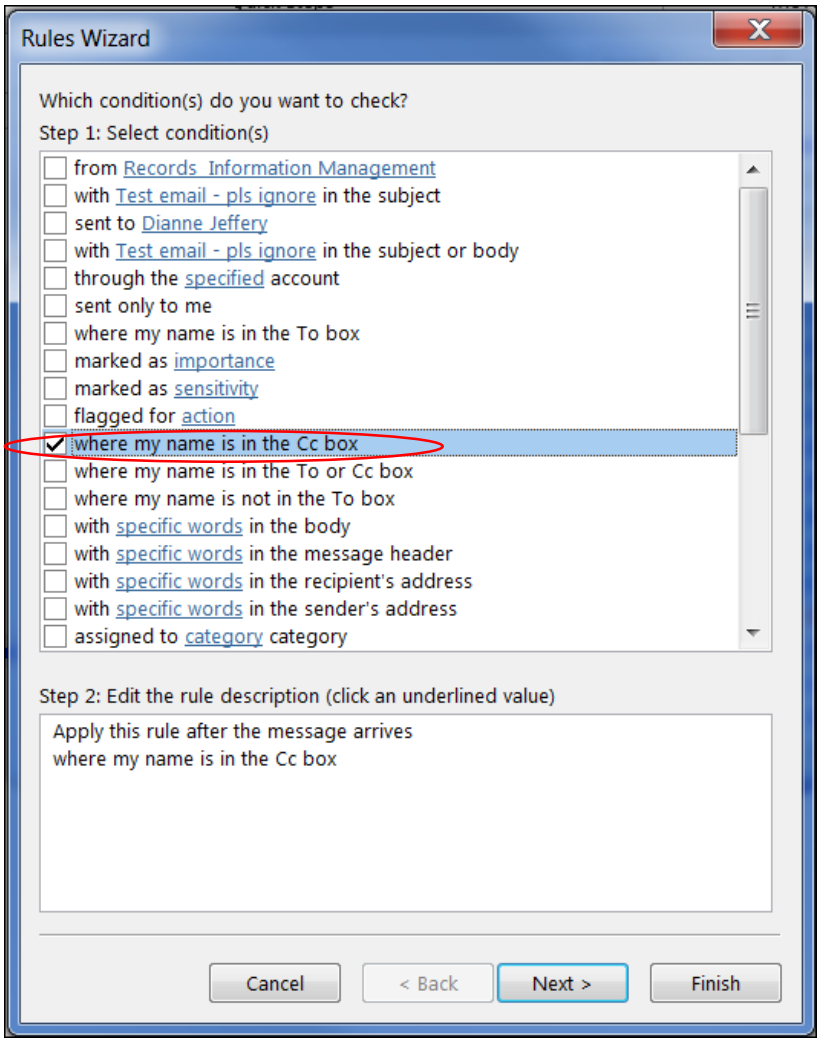
Step 3 – Next, select "create new rule" from the options available.



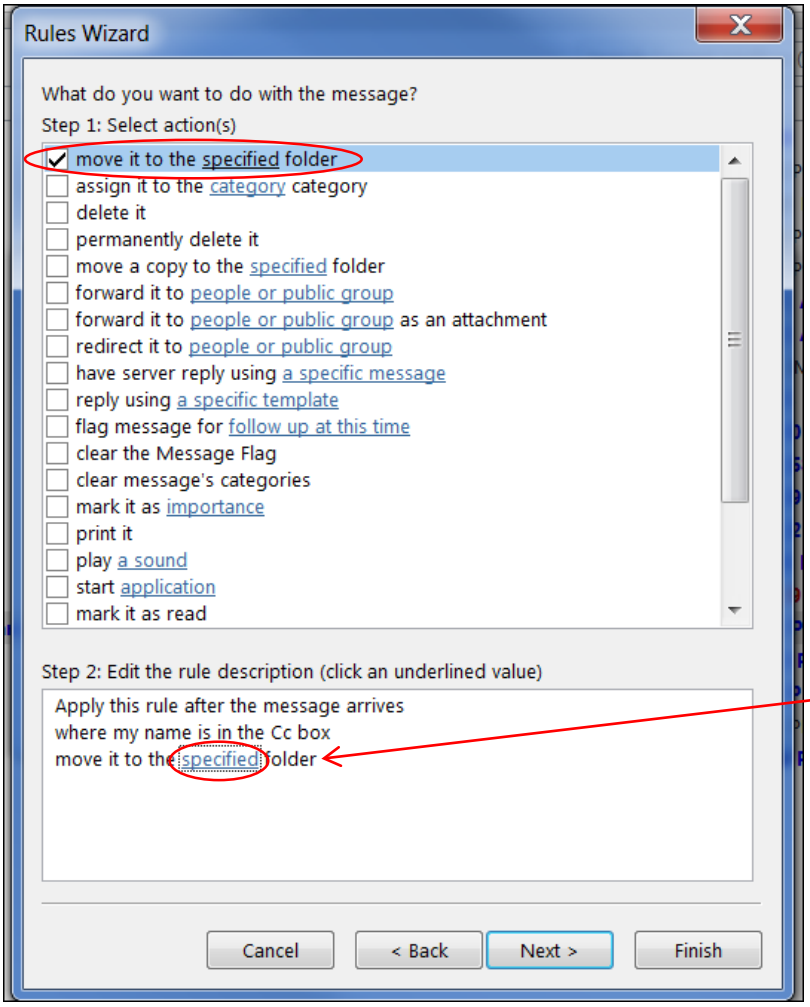
Step 4 - The Create Rule pop up box will appear. Click on “Advanced Options”.



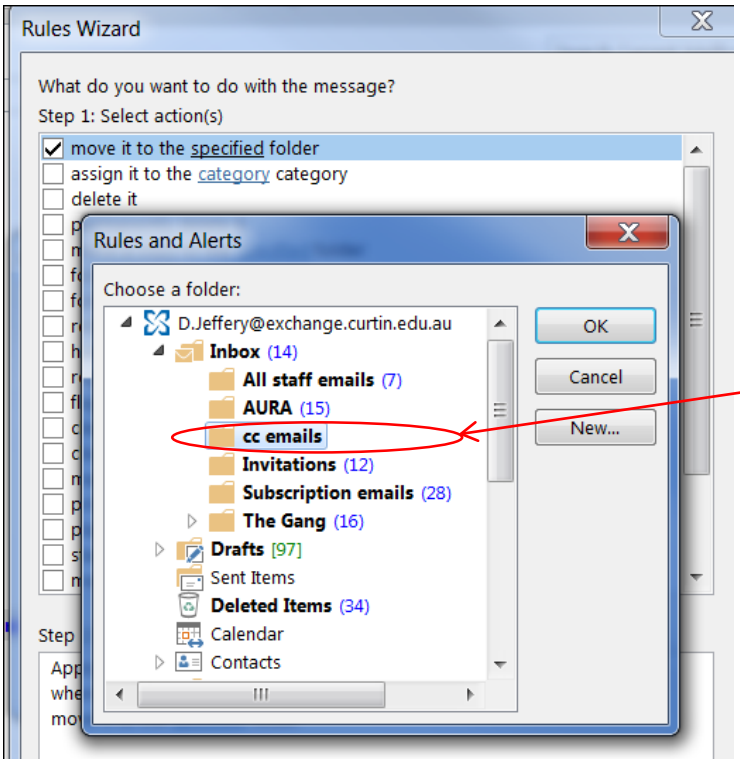
Step 5 – This will open the Rules Wizard. Now select the condition to be applied to your messages. In this case check the box “where my name is in the Cc box”.



Step 6 – Next, set the action that is to occur when the email arrives in the inbox – ie it is to be moved to a specified folder. Check the "Move it to the specified folder" box.

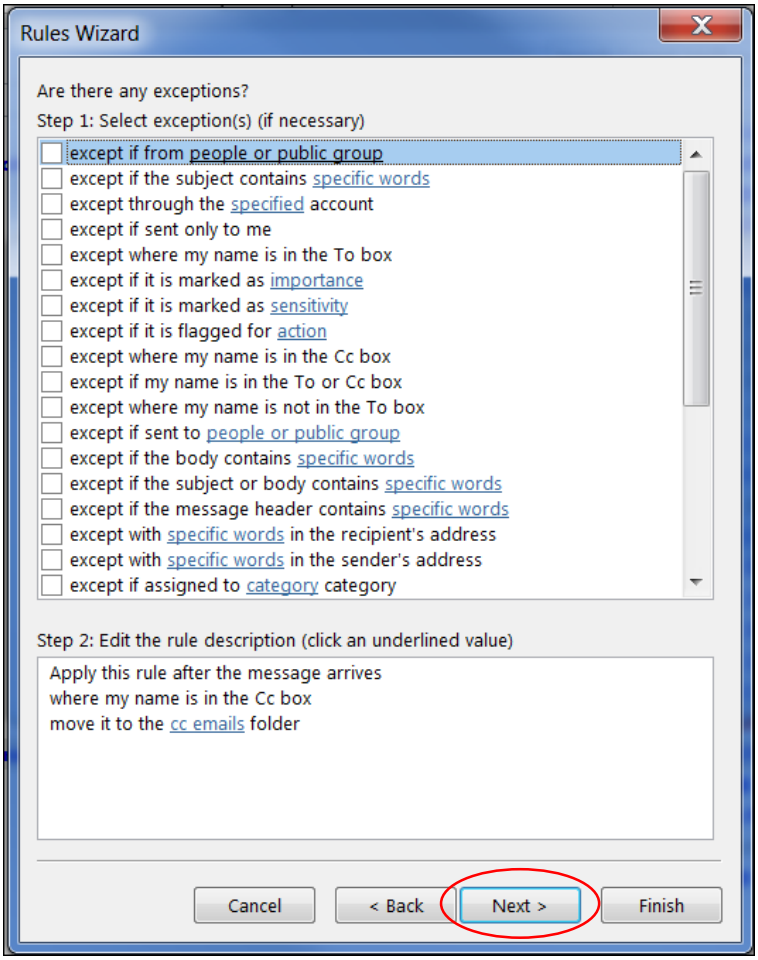


Step 7 – Next, click on the "Specified folder" link and select the folder the emails are to be moved to.

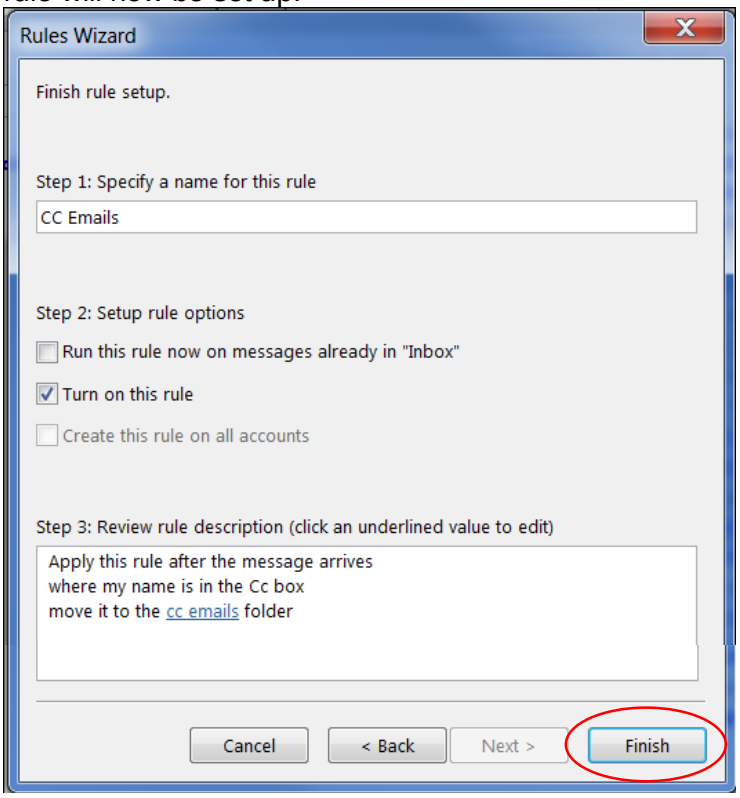


Step 8 - Select the appropriate folder from the pop up box and click on OK and then the Next button at the bottom of the Rules Wizard.

Step 9 – Next, set any exceptions, then click the Next button at the bottom of the Rules Wizard.



Step 10– Next, give the rule a name, check the "Turn on this rule" box and then click the finish button. The rule will now be set up.



Changing settings in Outlook – finding the right menu

There is usually a number of ways to change settings within Outlook. Below is a list of the settings that staff commonly want to change and one way of finding the relevant menus to access those settings are provided.

Action	Menus
Changing sharing permissions (to give someone else access to your mailbox and folders) or giving someone access to read your email and send email on your behalf.	File menu -> Account and Social Network Settings -> Delegate Access
To set up or edit a Rule or Alert	Select the Rules item on the Home ribbon
Changing the colour of read messages from certain people	View ribbon -> View Settings -> Conditional Formatting
To quickly check your mailbox size	File Menu -> Cleanup Tools -> Mailbox clean up
To change the notifications that appear or sound when an email arrives in your inbox	File menu -> Options -> Mail -> Message Arrival
To set up Outlook so that the “Deleted items” folder is emptied every time you exit Outlook	File Menu -> Options -> Advanced -> “Outlook start and exit”
To work offline	Send/Receive ribbon -> “Work Offline”

Need assistance?

Resources on using Microsoft Outlook can be found at - http://office.microsoft.com/en-au/outlook-help/

For more information please visit our website at ***rim.curtin.edu.au***

If you need assistance, please contact us by email at ***rim@curtin.edu.au***