Using Outlook at SMU

If you have any questions about using Outlook or would like any additional support using the software, please reach out to the Software & Application Support Centre via email at sas@smu.ca.

Technical Setup

Outlook is a part of the Microsoft 365 suite – this means that you can access the web version of the software by signing in with your @SMU.ca email address and password on office.com, or from the desktop application on your computer. If you are using a SMU-owned computer, Outlook should already be installed.

The most recent version of Outlook available to SMU users is **Outlook – Microsoft 365**. If you are running an older version of Outlook and would like to get the most recent version, you can request a new install by emailing helpdesk@smu.ca.

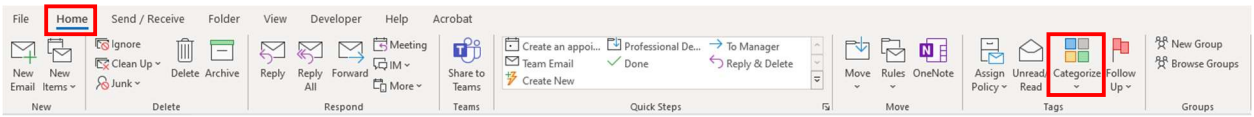
To check what version of Outlook you are using, open the app from your desktop and click on **File** along the top ribbon. Then, select **Office Account** in the bottom left corner. Your version information will be available under the **Product Information** section.

You can use either the desktop application or the web application – they both have similar features and functionalities; it is all about personal preference. The desktop application does offer a more robust suite of features, including the ability to be signed into multiple Outlook accounts at once. If you are responsible for managing multiple inboxes, the desktop application may be a better option for you. For checking your email on the go or from a device that isn't your own, the web application is a great option!

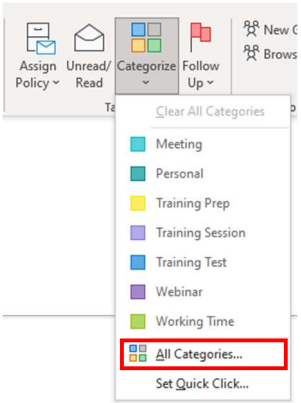
Mail

Categories

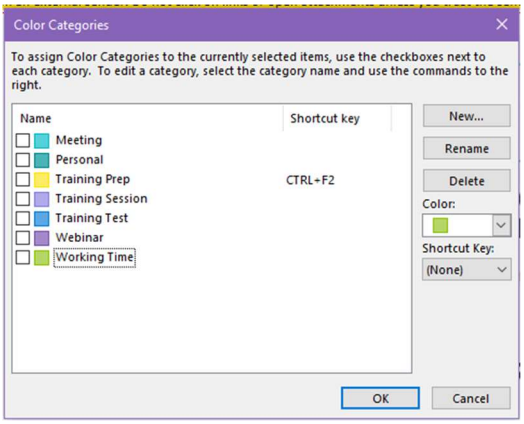
You can use categories to tag your mail and calendar events with a unique name and colour. Navigate to the **Home** tab on the **Ribbon** and click on **Categorize** to access the categories associated with your Outlook account.



To assign a category to an email, choose your desired category from the drop-down menu with the email selected. To manage your list of Categories:



1. Choose **All Categories ...** from the drop-down menu
2. A pop-up window with a full list of your Categories will appear



a. To change a category's name, select the checkbox next to the name of the category and click on **Rename**. Then, click on the name of the category again and type in the new name. Click **OK** to save the change.
b. To change a category's colour, select the checkbox next to the name of the category and click on the **Color** drop-down menu. Select a colour from the drop-down menu, or choose **None** if you do not wish for the category to have a colour. Click **OK** to save the change.
c. To delete a category, select the checkbox next to the name of the category and click on the **Delete** button. Click **Yes** in the pop-up box, then click **OK** to save the changes.
d. To add a keyboard shortcut to a category, select the checkbox next to the name of the category and choose an option from the **Shortcut Key** drop-down menu. You can now quickly assign any selected email or calendar event to a category by holding down the appropriate keys on your keyboard. Click **OK** to save the change.
e. To add a new category, select the checkbox next to the name of the category and click on the **New** button and type the name of your new category. Choose the category's colour from the **Color** drop-down menu, and a keyboard shortcut from the **Shortcut Key** dropdown menu if desired. Click **OK** in the pop-up box, then click **OK** to save the changes.

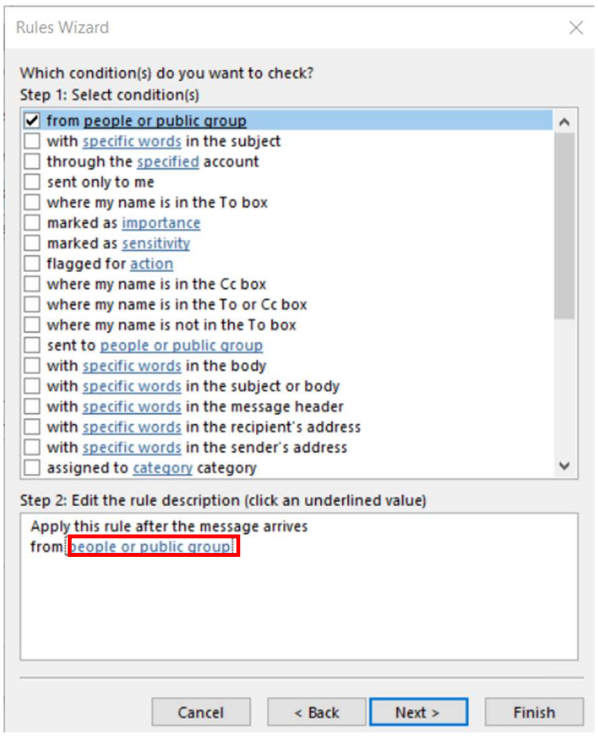
Creating Rules

Rules are a great way to proactively organize your inbox. Rules are actions that Outlook will automatically run when certain conditions are met.

1. Click on the **More commands** button in the top right corner
2. Select **Rules** from the drop-down menu
3. Choose **Manage Rules & Alerts**
4. Click on **New Rule**

5. Select the template that best describes the type of rule you'd like to create. You can make changes to the rule later, so just choose the closest fit. If none of the templates seem like a good fit, select one of the options under **Start from a blank rule**. Once you've made your selection, click **Next**.

6. Select the **condition(s)** that you want to be met for the rule to run. A condition is the circumstance that needs to have occurred for Outlook to recognize that the rule should be applied. Once you select a specific condition in **Step 1**, click on the corresponding underlined value in **Step 2** to edit the condition.



7. Once you've made the necessary changes, click **Next**
8. Select the **action(s)** you would like Outlook to take when the **condition(s)** of your rule are met. Once you select a specific action in **Step 1**, click on the corresponding underlined value in **Step 2** to edit the action.
9. Once you've made the necessary changes, click **Next**
10. If you don't want the rule to run in certain circumstances, you can set **exceptions** to your rule. Select the appropriate **exception(s)** you would like Outlook to make for your rule. Once you select a specific exception in **Step 1**, click on the corresponding underlined value in **Step 2** to edit the exception.
11. Once you've made the necessary changes, click **Next**

12. Type a name for your new rule in the **Step 1** text box
13. In **Step 2**, select whether or not you'd like to turn on the rule, run the rule on mail already in your inbox, and if you'd like the rule to apply to all Outlook accounts that you are signed into.
14. Click on **Finish** after you review your rule in **Step 3**.
15. Select **Apply**
16. Click **OK**

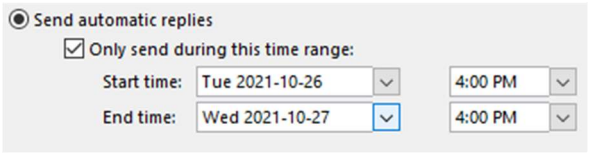
Automatic Replies

You can have Outlook send an automatic reply to incoming messages both inside and outside of SMU. To set up Automatic Replies:

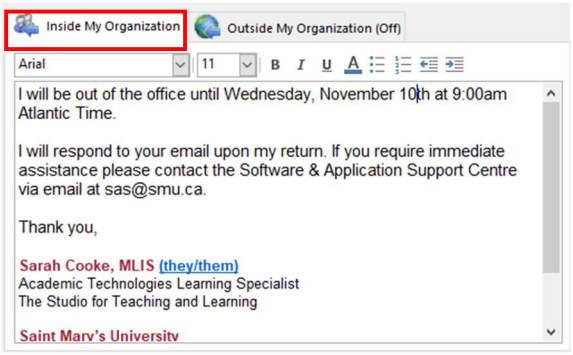
1. Click on the **File** tab along the Ribbon
2. Select **Info** from the left navigation bar
3. Click on the **Automatic Replies (Out of Office)** button

4. A pop-up window will appear. Select the **Send automatic replies** radio button

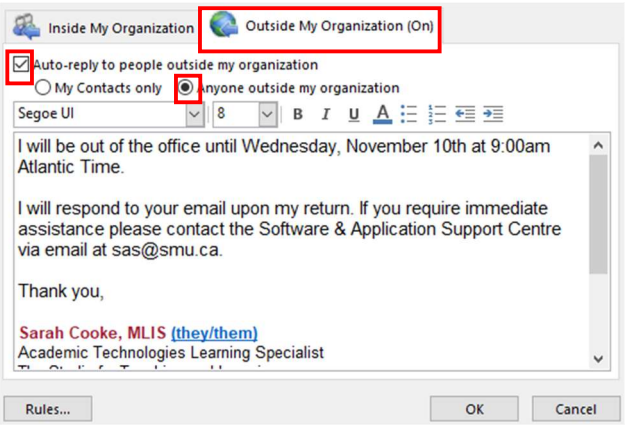
5. To set up automatic replies for a specific period, check the **Only send during this time range** checkbox and select the appropriate date and time range from the drop-down menus



6. To set your Automatic Reply for emails internal to SMU, select the **Inside My Organization** tab and type your desired Automatic Reply in the text box. Use the formatting options to select a specific font style, size, and colour.



7. To set your Automatic reply for emails external to SMU, choose the **Outside My Organization** tab and select the **Auto-reply to people outside my organization** checkbox. Select the **Anyone outside my organization** radio button to send your Automatic Reply back to any email you receive while your Automatic Reply is on. Use the formatting options to select a specific font style, size, and colour.



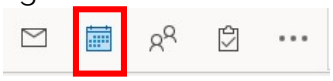
8. To set Rules to send during the period your Automatic Reply will be turned on, click on the **Rules…** button and click **Add Rule…** Set your desired conditions and actions, then click **OK**. Click **OK** again.

Calendar

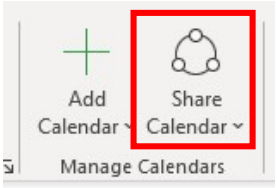
Calendar Permissions

Share your Outlook calendar with people inside your organization.

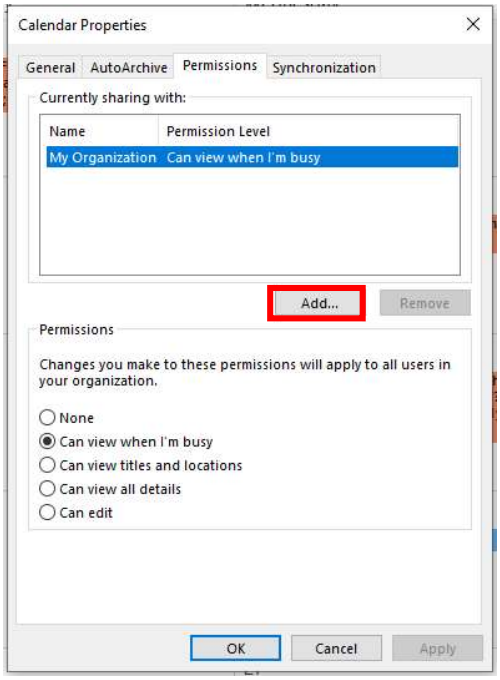
1. Go to your calendar by clicking the calendar option in the bottom right-hand corner



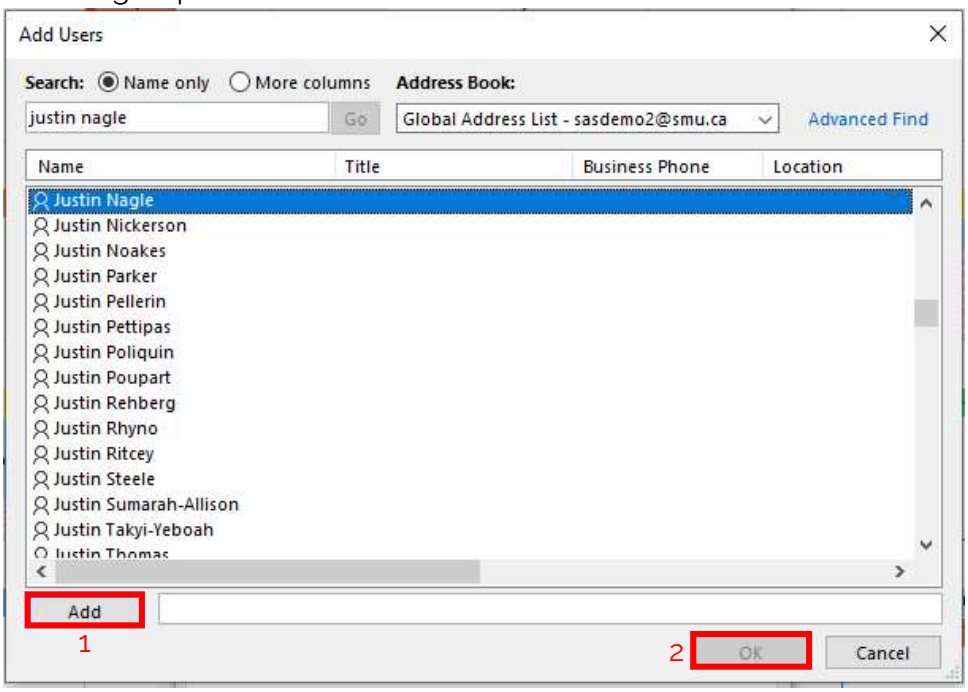
2. Click the **Share Calendar** drop-down button. Select which calendar you would like to share (this is only applicable if you have more than one email account in Outlook)



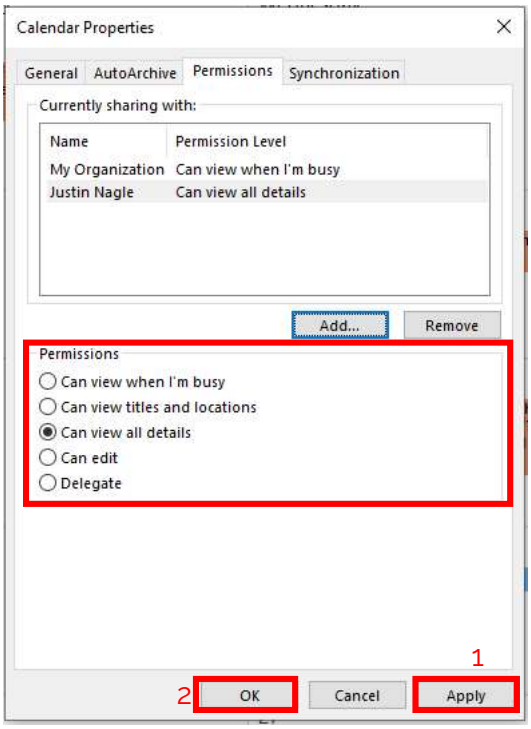
3. A new window will open allowing you to add the individual to your calendar



4. To share your calendar with someone, click **Add…** Under Adress Book select **Global Address Lis**t, you can either scroll through the list or in the search field type in the individuals name and select the person you want to give permission to and click **Add**. Then click **Ok**



5. Now you want to set the viewing permissions for the individual you just added

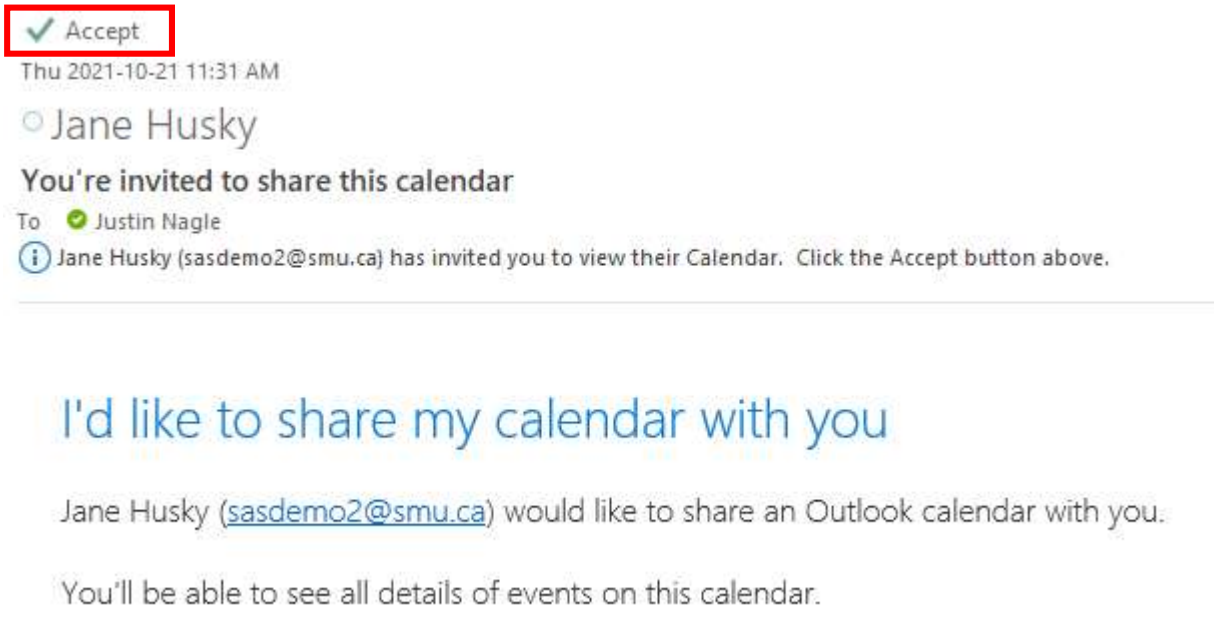


There are 5 different permission options you can chose from:

- **Can view when I'm busy** – this is the standard option available for SMU. It means that people can only see when you are busy. They cannot see any other details about your calendar
- **Can view titles and locations** – this means people can see where your calendar meetings/appointments location are as well as the title of the meeting/appointment
- **Can view all details** – means they can view all details about meetings/appointments in your calendar
- **Can edit** – means the individual can edit meetings/appointments in your calendar
- **Delegate** – means you are delegating someone to look after your calendar (this includes accepting/declining meetings on your behalf, editing meetings and appointments, etc.)

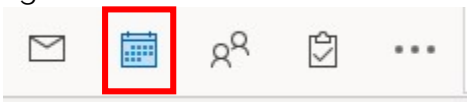
Click **Apply** then **Ok** once you have chosen a permissions option

The individual you select will receive an email informing them that your calendar was shared with them. They can click the accept button at the top of the email and it will add it to **Shared Calendars** on the outlook calendar

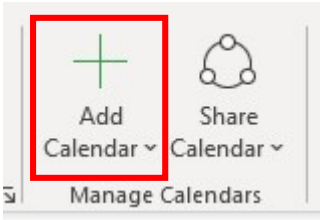


Add a shared Outlook calendar into your Outlook

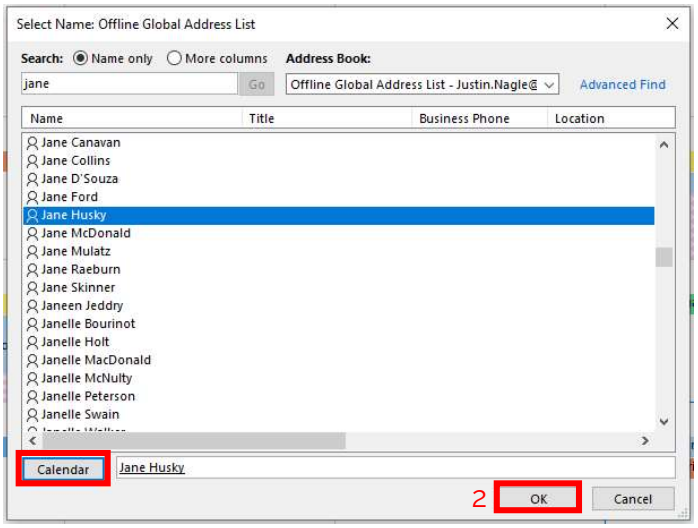
1. Go to your calendar by clicking the calendar option in the bottom right-hand corner



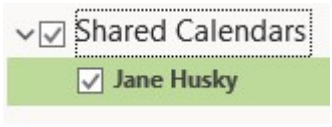
2. Click the **Add Calendar** drop-down button. Select **From Adress Book…**

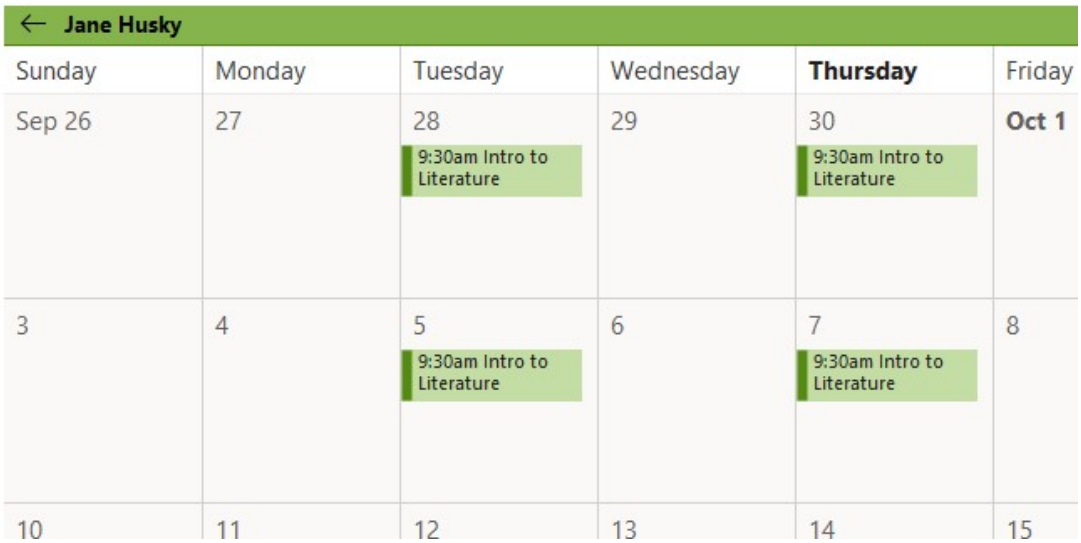


3. A new window will open, type in the individual's name that sent the shared calendar. Click calendar, then Ok



4. Now you will be able to see their calendar under the Shared Calendars header on the left-hand side of Outlook. Their calendar will load in the calendar field

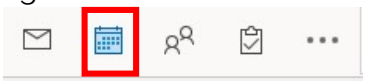




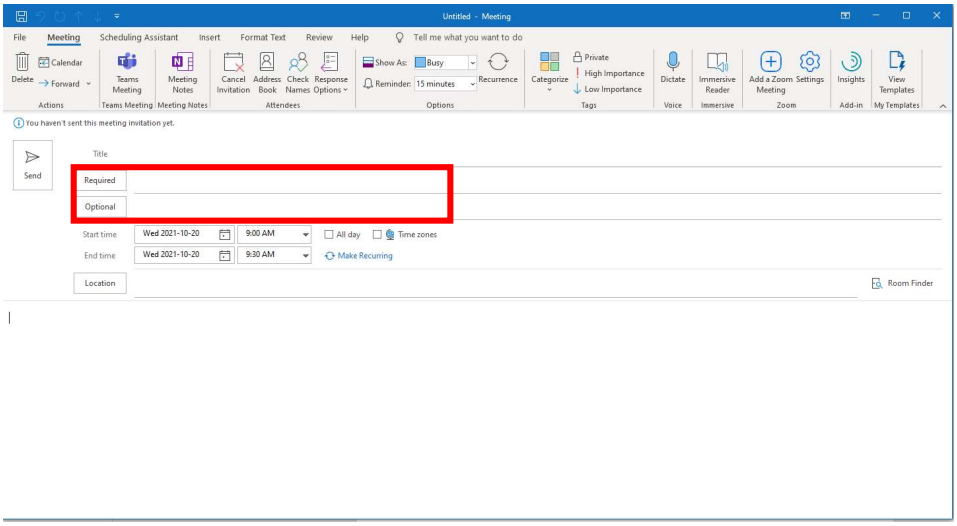
Scheduling Assistant

The Scheduling Assistant is a great way to check and see who is available for a meeting on the day you are scheduling it. It allows you to select a time when the most people are available. To open the Scheduling Assistant:

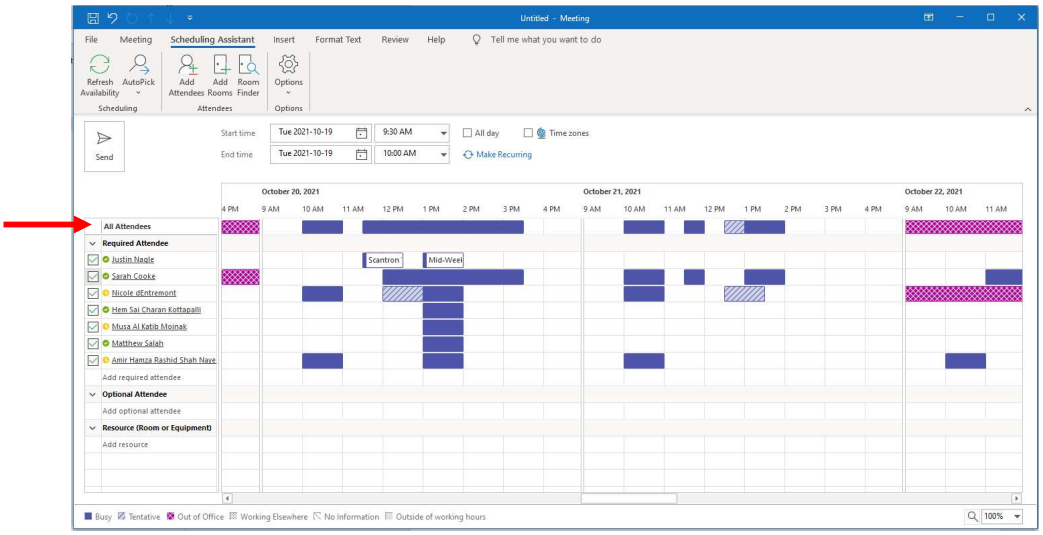
1. Go to your calendar by clicking the calendar option in the bottom right-hand corner



2. Click **New Meeting** from the Ribbon Bar. A new window will open
3. Add the **Required** and **Optional** attendees by typing in their name and selecting the appropriate email address or typing in their @smu.ca email address



4. To see attendees availability and to chose the best meeting time, click the **Scheduling Assistant** tab from the ribbon bar of the meeting window
5. As the image below indicates, the best time to schedule a meeting in which the all the attendees can attend is either from 11:00 am to 11:30 am or after 3:30 pm for Oct. 20th

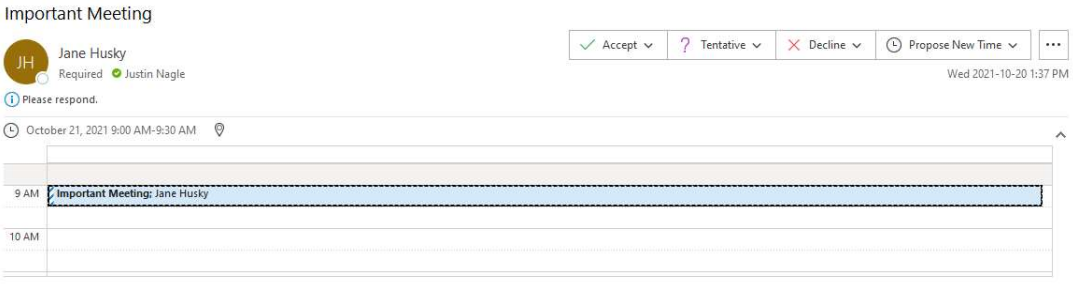


Purple indicates that attendees are busy during that time, and the pink cross-hatched indicates that the attendee is out-of-office. The best field to pay attention to on this screen is the **All Attendees** field at the top.

Now that you have a meeting time that works for all/most of your attendees, the last thing to do is go back to the meeting time, input the meeting time and any other meeting details, and send the meeting invitation.

Responding to Meeting Invitations

When a meeting invitation arrives in your inbox, you can accept, decline, reply as tentative, or propose a new meeting time.

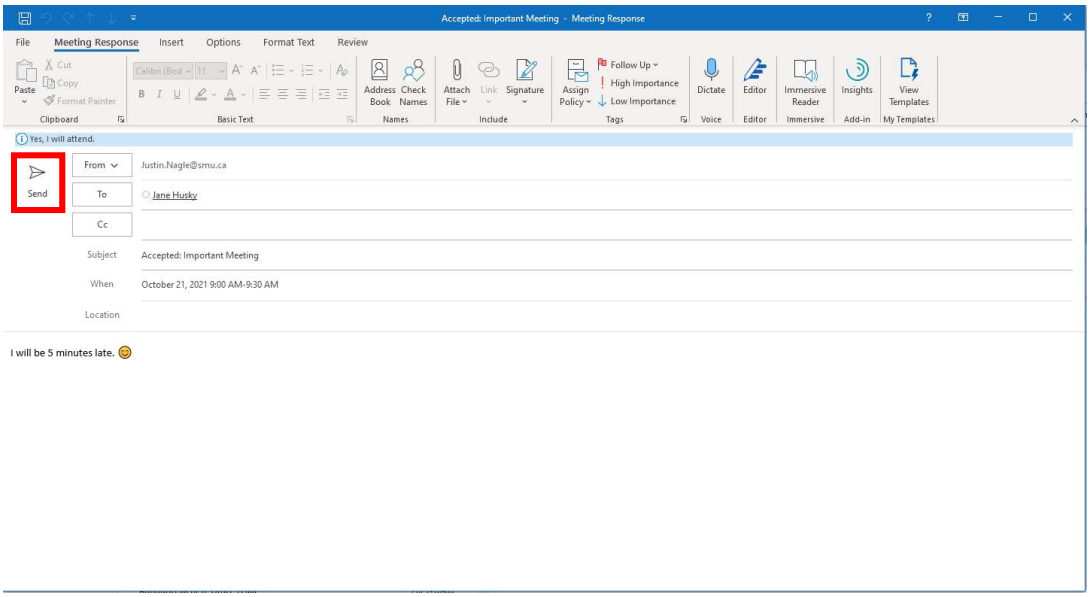


When choosing a response, a drop-down menu will load with three options:

- **Edit the Response before Sending**: this allows you to make a comment to the meeting organizer before sending your response. You can type your response in the body of the new window that opens. Once complete, you can click send.

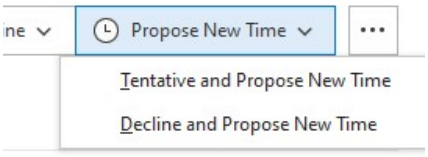
- **Send the Response Now**: this sends a response back the meeting organizer that you have accepted their invitation

- **Do Not Send a Response**: this option results in no response being sent to the meeting organizer, even though you accepted the meeting

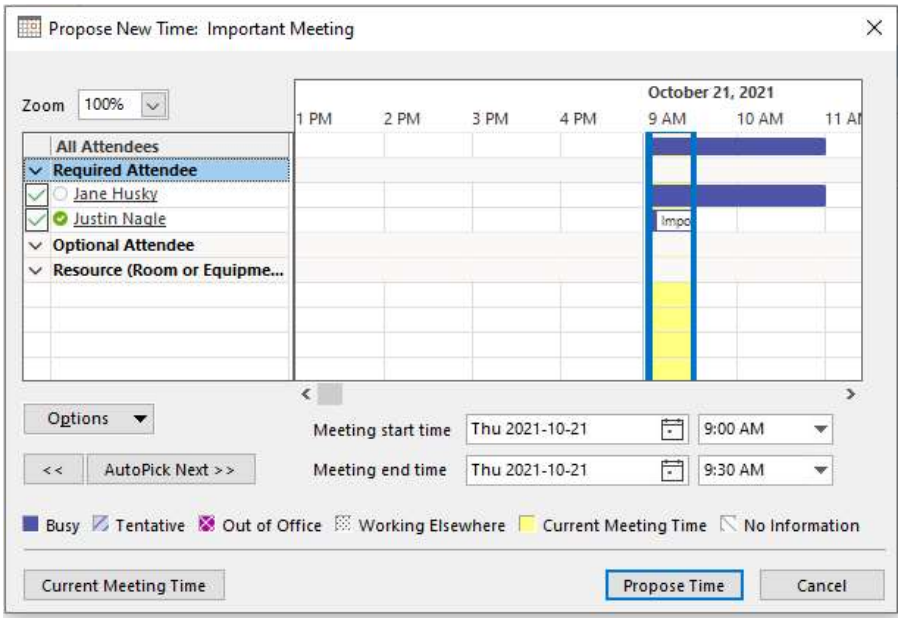


When choosing a meeting option, it is important to always **send the response** to the meeting organizer; that way they can plan accordingly on how many people will show up, etc.

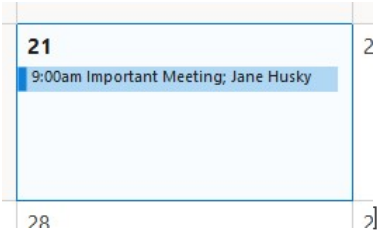
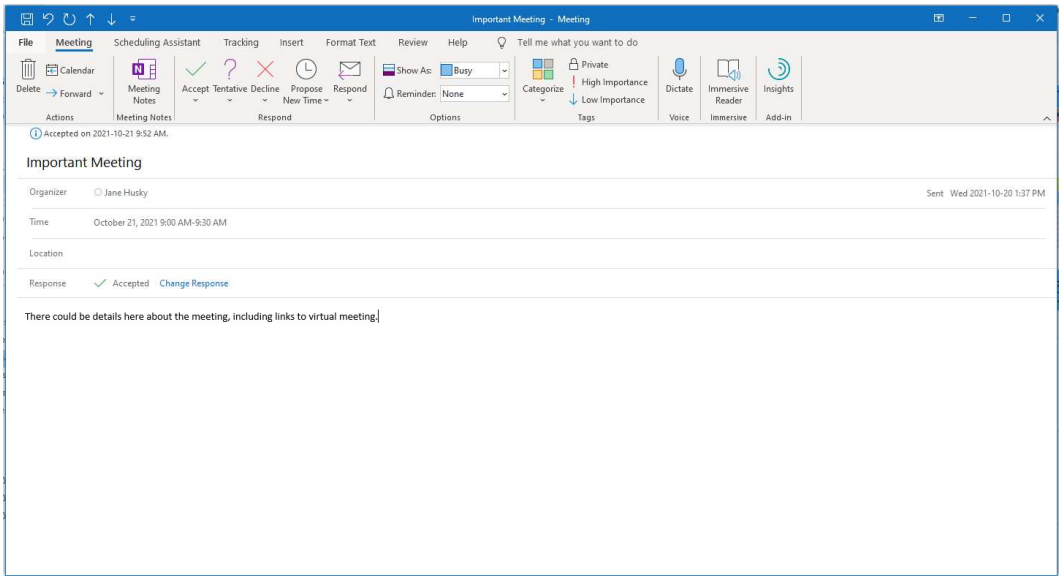
If you wanted to propose a new meeting time to the meeting organizer, select **Propose New Time**. A drop-down menu will open and show two options



A new window will open for either option that you chose. It is like a mini scheduling assistant. Here you can see which time everyone is available for the meeting and propose a new time/future date.



When you accept a meeting invitation, it will appear in your calendar as below:



You can double click the event in the calendar, to open more details about the event (to get the Zoom link, Teams link, and further information from the meeting invitation):