Quick Start Guide: Outlook Web App

How to access Outlook Web App:

- **From a BCHO workstation** click the Outlook icon on the desktop, in the Novell (NAL) Box, or in Windows Task Bar Shortcut

- **From any computer connected to the internet** in a web browser, navigate to email.ucsf.edu

  *Please Note* UCSF Dual authentication (DUO) is required for accessing email when remote. [UCSF DUO enrollment guide](#)

How to login to your email:

For login instructions, a separate email will go out shortly informing you of your UCSF MedCtr credentials and Outlook email address information. Follow the instructions to sign in.

First time login:

Select time zone “(UTC-08:00) Pacific Time (UC & Canada)” as shown below

[HIS recommends “The New Outlook” Interface, Click Try the new Outlook](#)
Getting started in Outlook Web App:

- When you open Outlook Web App, your Inbox is the first thing you see. Your inbox is where messages sent to you arrive, and where you will probably spend the most time reading and responding to messages.

1. Create a new message by selecting New message.

2. Folders. The folder list includes the folders in your mailbox and Favorites. It might include other folders, such as archive folders. You can collapse this pane by selecting the folder icon at the top. You can expand and collapse folders in this view by selecting the triangle icons next to the folder names.

3. Search window. Type what it is you want to search for here, such as the name of a person you want to find messages from, or text that you want to search for to find a particular message.

4. List of messages in the current folder. Each entry in the list view has additional information, such as how many messages there are in a conversation and how many are unread, or if there is an attachment, flag, or category associated with any messages in the conversation. A conversation can have one or more messages. When a conversation is selected, you can delete it, add a flag, or add a category by selecting the icons. At the top of the list view are filters that you can select to quickly find messages that are unread, that include your name in the To or the Cc line, or that have been flagged.

5. The reading pane, where the conversation that you’ve selected is displayed. You can respond to any message in the conversation by selecting the links on the right.
New Outlook inbox features!

- **Focused Inbox** - Focused Inbox separates your inbox into two tabs—Focused and Other. Your most important email messages are on the Focused tab while the rest remain easily accessible—but out of the way—on the Other tab.

- **Sweep, Archive, Move To** - Clean up your inbox and keep your email organized with automatic filtering and sorting, and by using tools on the command bar like Sweep, Archive, and Move to.

- **Conversation Threading** - By default, when you add most account types to Outlook, your messages are displayed in Conversations. A conversation includes all messages in the same thread with the same subject line.

- **Distribution List Management** – UCSF leverages a web interface ExHybrid to manage shared distribution lists.

For more information about messages in Outlook Web App, go to [Mail in Outlook Web App](#).

Cautionary notes

- UCSF.edu email is limited to 25MB for sending or receiving.

Navigating Application within Outlook Web App:

- Click on the menu button or bottom access bar as show below to access Calendar, Address Book (people), and other features of Outlook Web App (OWA)
Outlook Calendar:

- After your Inbox, the calendar is probably where you will spend the most time when using Outlook Web App.

1. Create a new event by selecting New event. An event can be an appointment, a meeting, or an all-day event.

2. Use the calendars to navigate from one date to another. Shading will show you what week you’re currently viewing, and darker shading marks the current date. You can use the calendar icon at the top to collapse or expand this side of the calendar view.

3. You can view more than one calendar at a time. This section lets you add other people’s calendars and select which to display.

4. This is another area that you can use to navigate from one day to another. Select any of the dates to jump to that date. Or select the arrows on either end to see the dates before or after what’s displayed.

5. The main window, where calendars will be displayed.

6. Select the view you want, and share, or print your calendar.

New Outlook calendar features!

- Schedule Assistant (create new appointment)
- Import Calendar (Access another’s calendar)

Cautionary notes

- Reoccurring meetings imported from GroupWise are now individual appointments and do not continue past 12/31/2019. All meetings in 2020 and beyond must be created in Outlook.

- Always set an end date when scheduling new re-occurring meetings.
Appointment alerts will display in your internet browser window and not as a separate window.

For more information about calendars in Outlook Web App, go to Calendar in Outlook Web App.

**People (Address Book Contacts):**

- This is where your contacts are stored. From here, you can find, create, and edit your contacts. Also, you can search for contacts in your organization’s directory.

  ➢ **Note:** Use BCHO Amcom Directory when searching for phone numbers

1. Create a new contact by selecting New.

2. All the places you can find contact information.

3. Search. Enter a person’s name here to search for them in your contacts and in your organization’s directory.

4. List of all contacts in the current folder.

5. The contact card for the selected person.

6. Actions you can take directly from the contact card. Select the icons to send a message or create a meeting request.

For more information about contacts in Outlook Web App, go to People overview - Outlook Web App.
Tasks:

- Tasks stores tasks that you create or that are sent to you, and also messages that you’ve flagged. When you view your tasks, the default view is **Flagged Items and Tasks**. You can change that by selecting **Tasks** in the folder list to the left.

1. Create a new task by selecting **New task**.
2. Use this column to view flagged items and tasks, or just tasks.
3. Filters. Select the filter depending on what items you want to see. Tasks and flagged items that don’t have a date associated with them and that aren’t completed will appear only when you select All.
4. List of items that meet the current filter criteria. Select any item to view it in the reading pane. You can use the controls in the list view to make changes to an item’s status. For example, you can mark a task as complete, or remove a flag from a message.
5. The reading pane, where the content of the items you’ve selected is displayed. You can use the controls in the upper corner to make changes to the item if it’s a task. If it’s a message, the controls will be the same as you would see while reading your mail.

For more information about tasks in Outlook Web App, go to **Tasks Overview**.
Mailbox Settings:

- Access mailbox settings from the Gear icon in the top right hand corner.
- Click View all Outlook settings to make additional modifications.
- Click here for a guide to Create Signature in Outlook Web App
- Click here for a guide to access a Shared Mailbox in Outlook Web App
- Click here for a guide to create Rules in Outlook Web App
- Click here for a guide to access a Shared Mailbox in Outlook Web App
- Click here for a guide to create Rules in Outlook Web App
- Outlook on the Web - Cheatsheet

Please Note:

- The following BCHO applications enrolled under your @mail.cho.org email address will continue to use the @mail.cho.org as your user ID for login until further notice:
  - BCHO Docusign (https://www.docusign.com/)
  - BCHO Zoom web meeting (https://ucsfoakland.zoom.us/)
  - ADP (payroll) (https://my.adp.com)
  - My Office Products (https://smart.myofficeproducts.com)
Get help with Outlook on the web:

- More information and FAQ's can be found on the BCHO GroupWise to Exchange Migration Project Page [https://tiny.ucsf.edu/groupwise](https://tiny.ucsf.edu/groupwise)
- Visit [Microsoft Help Portal](http://microsoft.com)
- Submit a ticket to the IT HelpDesk from the Employee Self Service portal [https://choprod.service-now.com/ess](https://choprod.service-now.com/ess)
- Contact the BCHO Helpdesk via Email at [HISHelpdesk@ucsf.edu](mailto:HISHelpdesk@ucsf.edu) or by calling 510-428-3885 x4357