Creating an OCFO Distribution List from Excel Data

This document will show you how to take email addresses from an Excel spreadsheet and use them to create a distribution list in the Oracle Connector for Outlook.

The procedure described below may be applied to other data sources. For example, you may create a distribution list using data from Microsoft Word.

Check Your Data

1) Make sure Outlook is open.

2) Open an Excel spreadsheet. The Excel spreadsheet should contain email addresses.
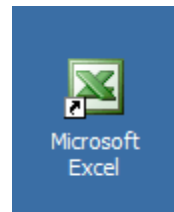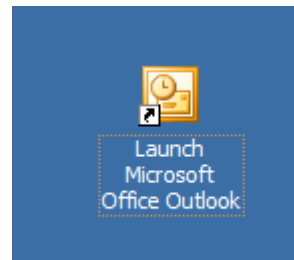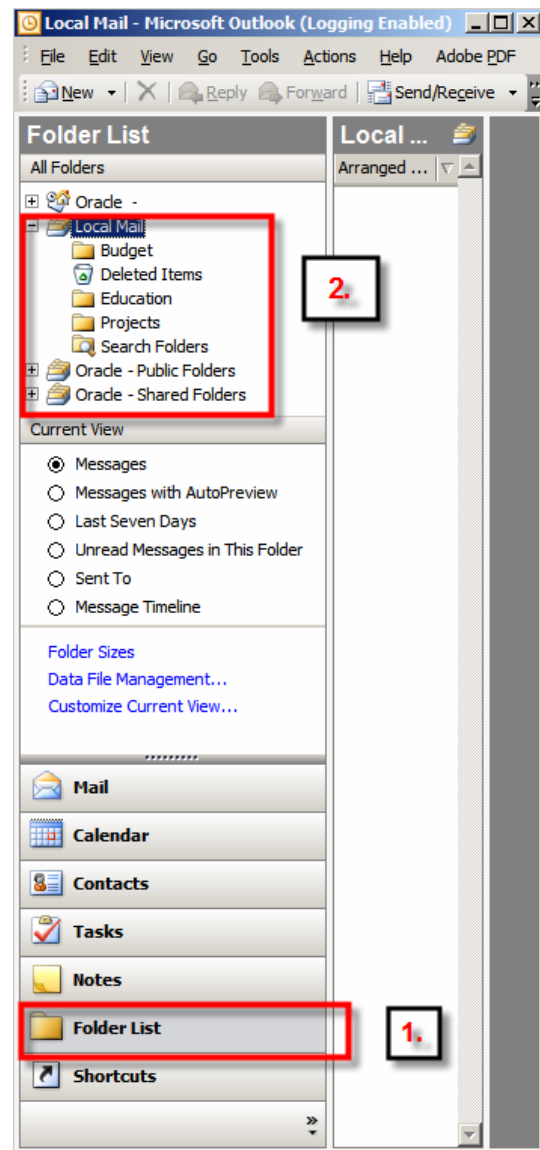
Create a Local Contacts Folder

If the distribution list in OCFO will be a large list, you should store it locally. This requires the creation of a Contacts folder in your Local Mail pst.

Why create a local Contacts folder? Because the Contacts folder provided within OCFO is located on the Oracle server. This server is in a separate area of the network and requires distribution lists to be transferred across the network. Transferring a large list may result in a lengthy delay.

To create a local Contacts folder, follow the below steps.

First, find out if you have already have a local Contacts folder:

1) In the left pane, on the toolbar, click on **Folder List**.

2) Under the **Local Mail** icon, check for a **Contacts** folder.

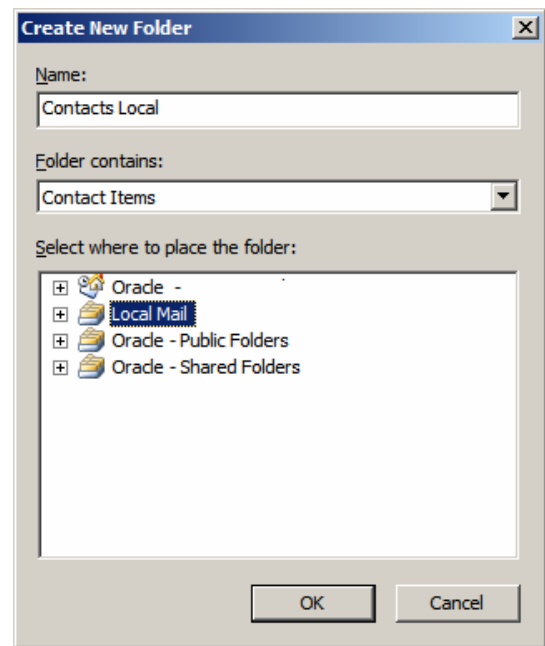3) In this example there is no **Contacts** folder in the **Local Mail** pst.

Create a **Contacts Local** folder in the **Local Mail** pst:

4) On the main menu, go to **File** > **New** > **Folder**.
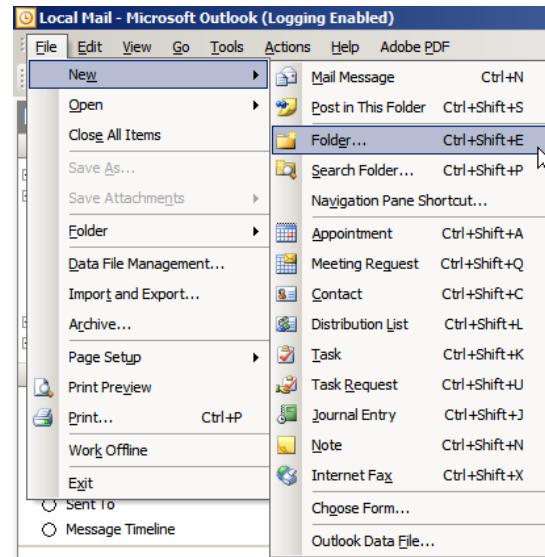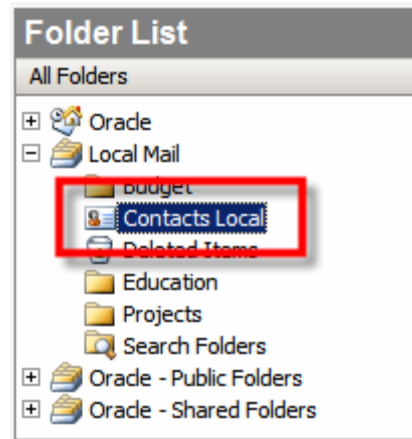

The **Create New Folder** dialog box appears.

5) In the **Name** field, enter **Contacts Local** (or any name you choose).

6) In the **Folder contains** field, enter **Contact Items**.
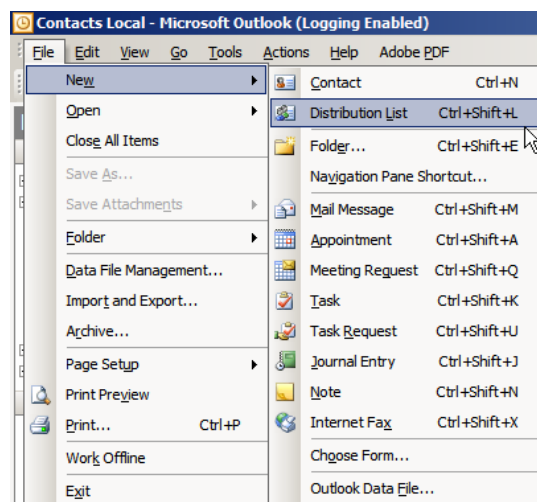
7) Highlight the **Local Mail** pst.

8) Click OK .

9) Confirm that the **Contacts Local** folder is created.

Create a Distribution List

1) Click on the **Contacts Local** folder

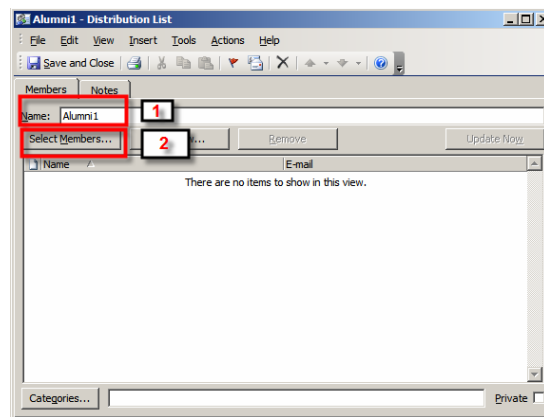2) On the main menu, go to **File** > **New** > **Distribution List**.

The **Distribution List** dialog box appears.

3) Give the distribution list a name. In our example we are calling the list Alumni1. In the **Name** field enter **Alumni1**.

4) Click the button **Select Members**.

The **Select Members** dialog box appears.

5) Go to your Excel spreadsheet.

6) Go to the column with the email addresses in it. Hold down the shift key and click on the first cell with an email address.

7) Continue to hold down the shift key. Scroll down to the last email address of the email column. Click on that last email address. This will select the entire list of email addresses.
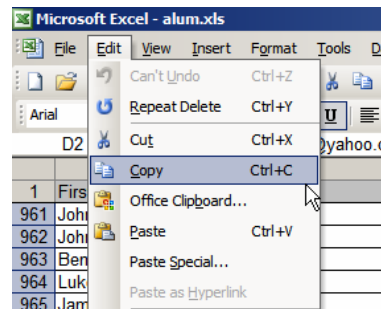
8) Copy the addresses:

   a) Click on the copy icon in the main menu.

      OR

   b) Go to **Edit** > **Copy**.

      OR

   c) Use the shortcut key combination of **Ctrl + c**.

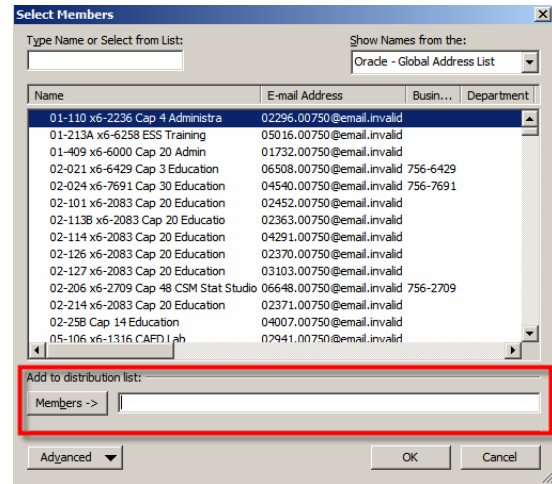9) Go back to Outlook and the **Select Members** dialog box.

10) Click in the **Members** field near the bottom of the dialog box.

The cursor appears in the **Members** field.

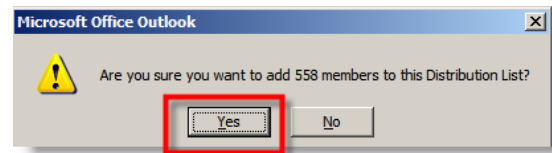11) Press **Ctrl** + **p** (the key combination to paste).

The list from the Excel spreadsheet appears in the **Members** field. If you are pasting a large list into this field it may take a few seconds.

12) Click OK.

A **Microsoft Office Outlook** warning appears.

13) Read then click Yes.

The **Alumni1 Distribution List** appears.

14) Make sure all of the email addresses in the **E-mail** column have the right format. There must be an @ symbol in every address or there will be problems using this list.

15) If an address is incorrect it will cause the delivery failure to the entire group.

16) It does not matter if the Name is the same as the email address.

17) After checking all of the email addresses, click **Save and Close** on the menu bar.
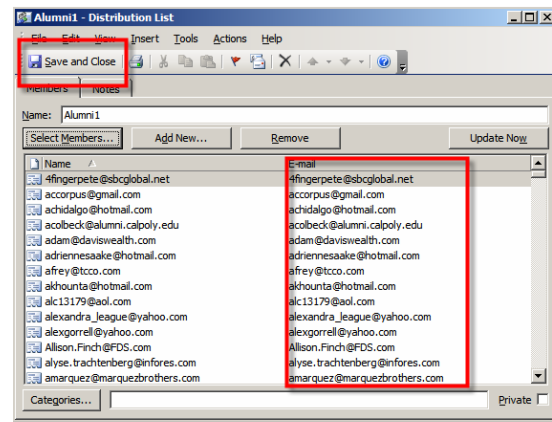
Use the New Distribution List.

1) Open a new email message.

2) Enter the text for the message.

3) It is recommended that you put your list in the **Bcc** field as this will hide the list from the recipients and help stop a potential spammer from getting the list.

4) Click the **Check Name** icon in the tool bar.
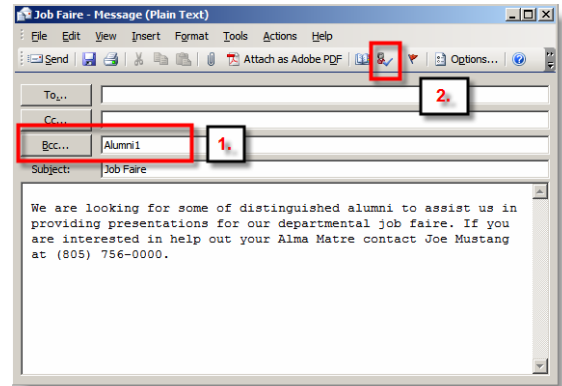
5) If the addresses in your list are accepted by Outlook, the name of the list will be bolded and underlined with a plus sign. If you click the plus sign in front of the list you will be able to see all of the email addresses contained in the list.

6) When you are done composing your message, click the **Send** button.
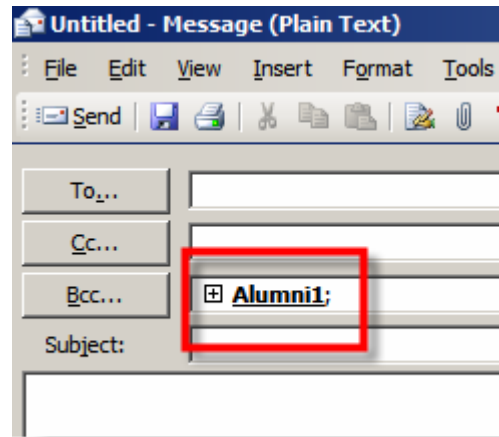
7) After sending an email to a large group you may receive returned messages indicating that some of the addresses you are using are not valid. This is an opportunity for you to update your list.

You may want to add your name to the distribution list. If you receive the message, you will know that the message was sent properly.

For additional information contact the Service Desk at 756-6059 or servicedesk@calpoly.edu