Charles Sturt University

Microsoft Outlook

Advanced

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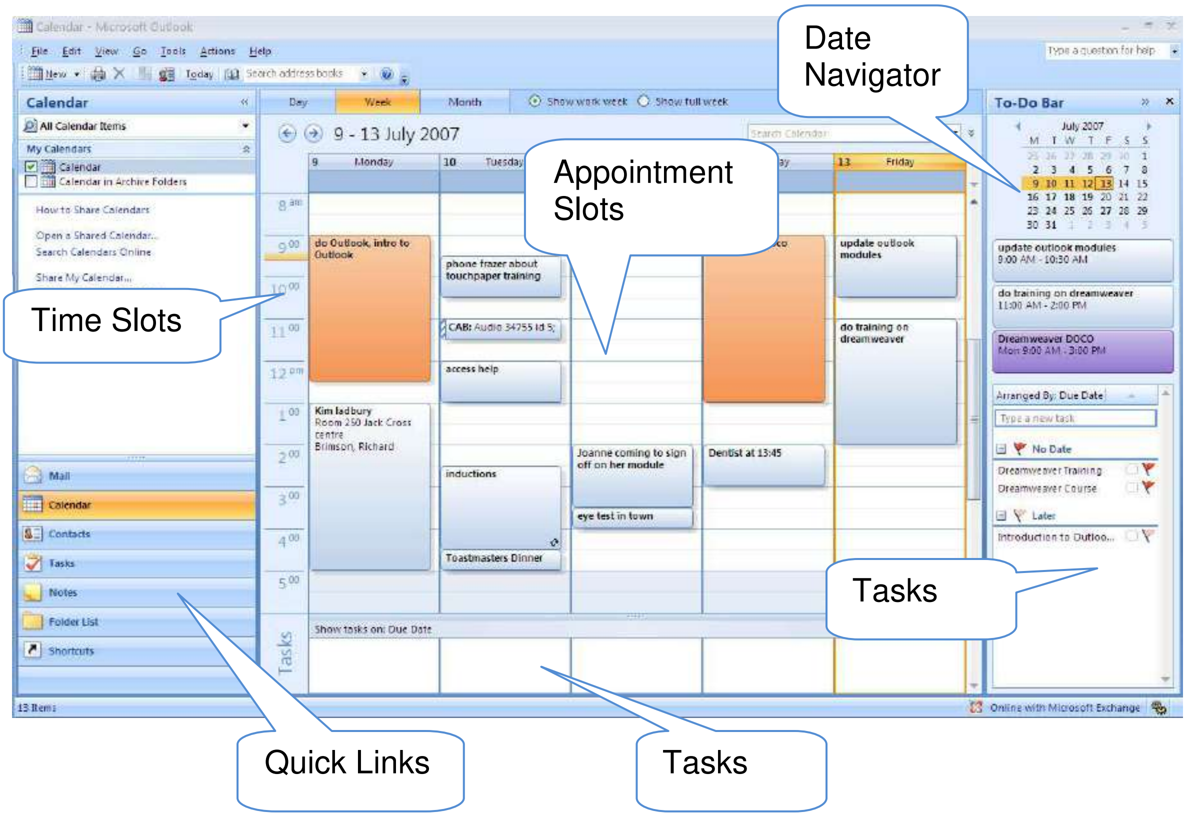
Version 2

THE CALENDAR

The Basics

The Calendar feature of Outlook allows the user to schedule appointments, meetings and events. It is therefore a handy tool, assisting with time management and general work practices. Your calendar can be shared with a colleague or colleagues which means that they will be able to see your availability for meetings etc. if you are absent. The calendar is listed in Outlook's folder list. Once you have selected calendar from the Folder List, a screen something like the following will appear (the Calendar may look slightly different due to individual setups):

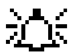


Time Slots

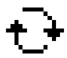
Time Slots show the hours of the day, with each full hour numbered. The default Time Slots for working hours are bright yellow, and non-work hours are shaded a darker yellow.

Appointment Slots

Appointment Slots on the Calendar show your appointments and meetings. A Calendar item indicates whether the item refers to an appointment or a meeting, whether the appointment or meeting is recurring, whether it is private and whether you've set a reminder. The Calendar item also gives you information about the subject, the location and the duration of the appointment or meeting.



This symbol indicates that a reminder for the appointment or meeting has been set.



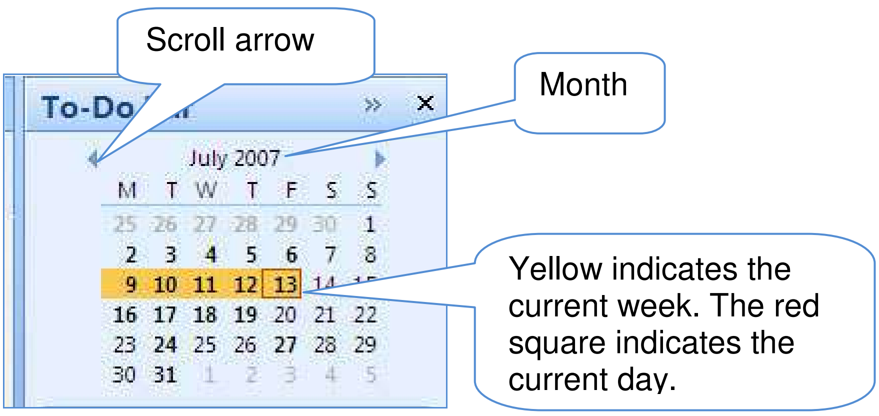
A recurring appointment or meeting.

A meeting (an appointment has no symbol)

Using the Date Navigator

The Date Navigator is used to view from one to several months at a glance. Dates that are bold indicate that an appointment or meeting has been made on that particular date. Navigate to a date by clicking on the desired month and date in the navigator. Use the scroll arrows to jump months ahead or back. Outlook places a square around the date currently being viewed in the Calendar.

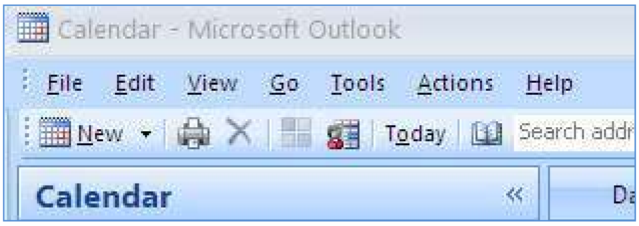
The diagram below shows the Date Navigator displaying two months at a time. The amount of months showing depends on how wide you have allowed the pane to be – drag on the border between the pane showing the months and the pane showing the calendar slots to alter.



Hints

- Click on the month title to reveal a list of months from which you can navigate quickly to by selecting them with the mouse.

- To return to today's date use the TODAY icon on the toolbar.



Viewing the Calendar

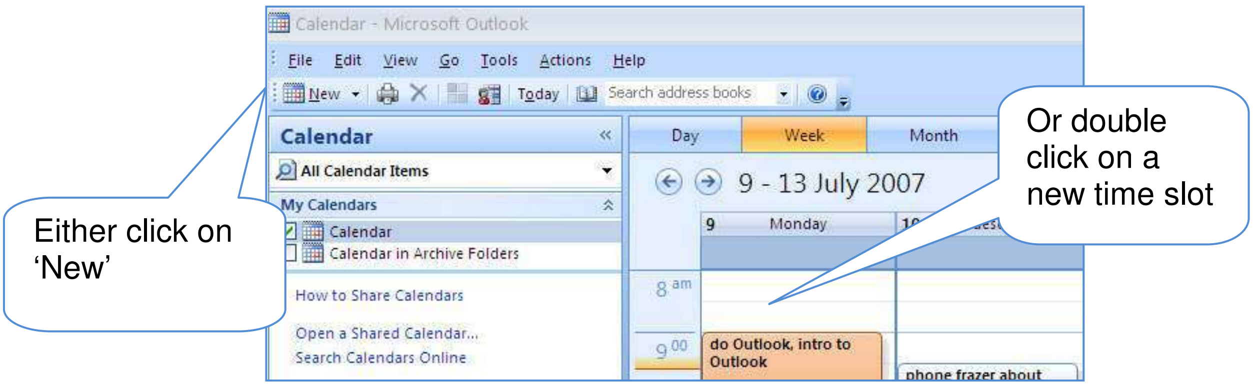
The default Calendar view is the Day/Week/Month view. This can be changed by using the buttons shown below. You can choose between four time spans: Day, Work Week (5 day week), Week (7 day week) or Month. Select the time span shown by clicking on the appropriate icon on the toolbar. (The TODAY icon will return to a view which includes the current date)

Creating a New Appointment

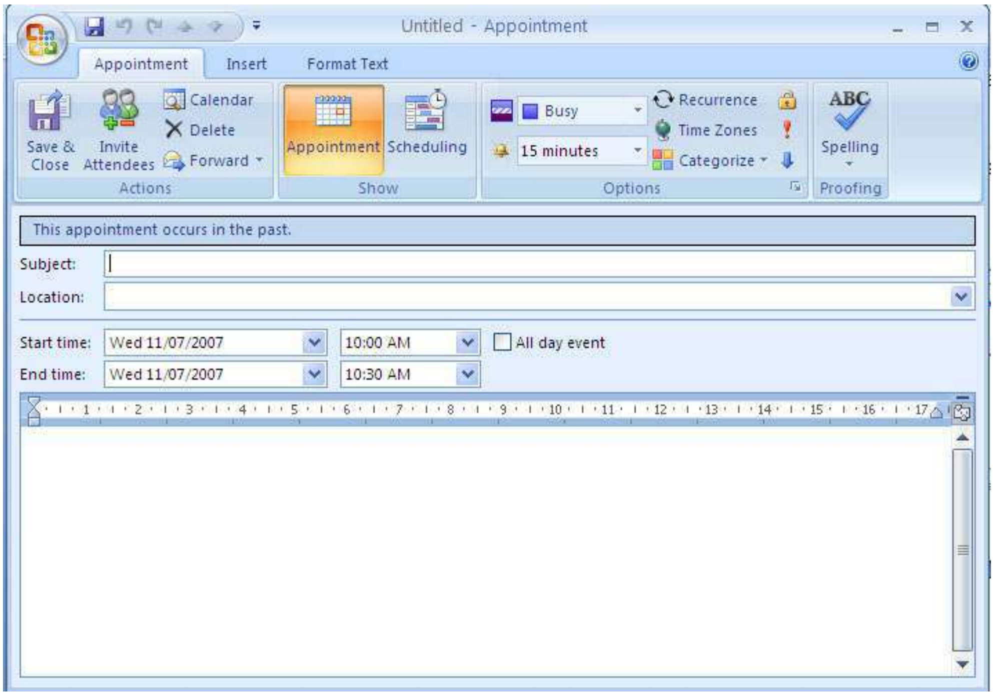
Create a new appointment by one of the following methods:

1. Click on the **CALENDAR** button on the Outlook **QUICK LINKS,** then select the NEW icon from the toolbar; or

2. While you are in Calendar view, double click on the desired time slot or the appointment slot, a new appointment window will open (the times can be adjusted once you are in the appointment window.



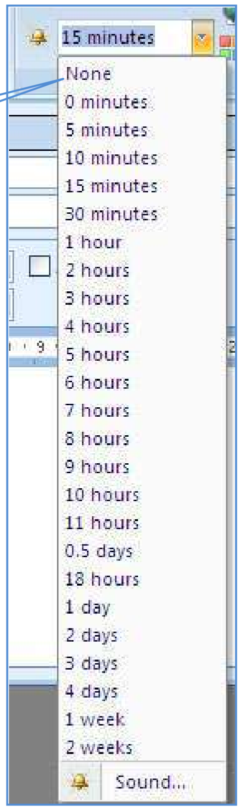
The following window appears:



Fill in the appropriate areas of the window, setting the starting and ending times and dates as you go. Make sure the text in the subject dialog box is descriptive as this is what shows in your calendar.

The reminder time is set by clicking on the drop down box and selecting a time.

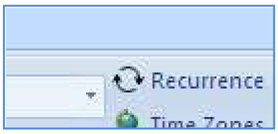
Reminder Times



After all settings have been made, click on the ‘SAVE AND CLOSE’ icon on the Standard toolbar.

Recurring Appointments

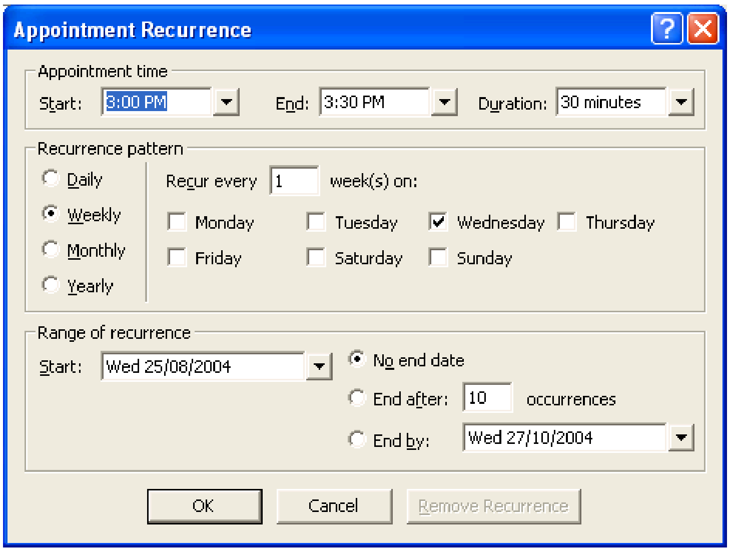
To create a recurring appointment, click on the RECURRENCE icon.



The APPOINTMENT RECURRENCE dialog box appears.

In this window you can choose the time for your meeting as well as how often you want it to happen, and when you want the recurrence to end.

Make the necessary changes and click on OK when you finish.



Hint: If you are setting a recurring appointment for a long period of time and one occurrence needs to be cancelled (for example, if you have a Monday appointment for the next 12 weeks, and a public holiday falls due in this time), it is quicker to set the whole range of dates and then delete the one you don't require when you are back in Calendar view, than it is to set two ranges of dates, avoiding the unwanted day. You will be asked do you want to delete the whole series, or just the one. Make sure you select the correct option.

Meeting Requests

Outlook gives you all the tools required to investigate the availability of staff who you would like to invite to a meeting. You can send an email invitation to a meeting upon which Outlook will add an entry to both yours and their calendar. This entry will be marked as TENTATIVE in the staff member's calendar until they either accept or decline the meeting.

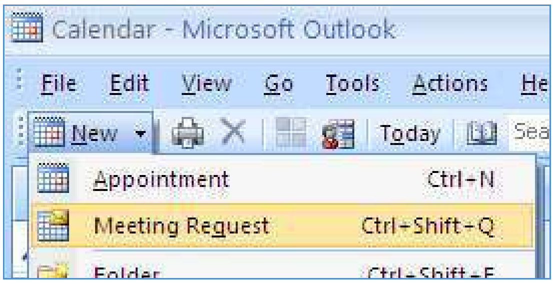
If you are the organiser of the meeting (the originator of the meeting), you will be able to track acceptances and non-acceptances by looking at your meeting appointment.

You can add further attendees at a later date and inform them of the meeting without having to send an email to everyone.

Creating a basic meeting request

There are a few ways to create a new meeting request.

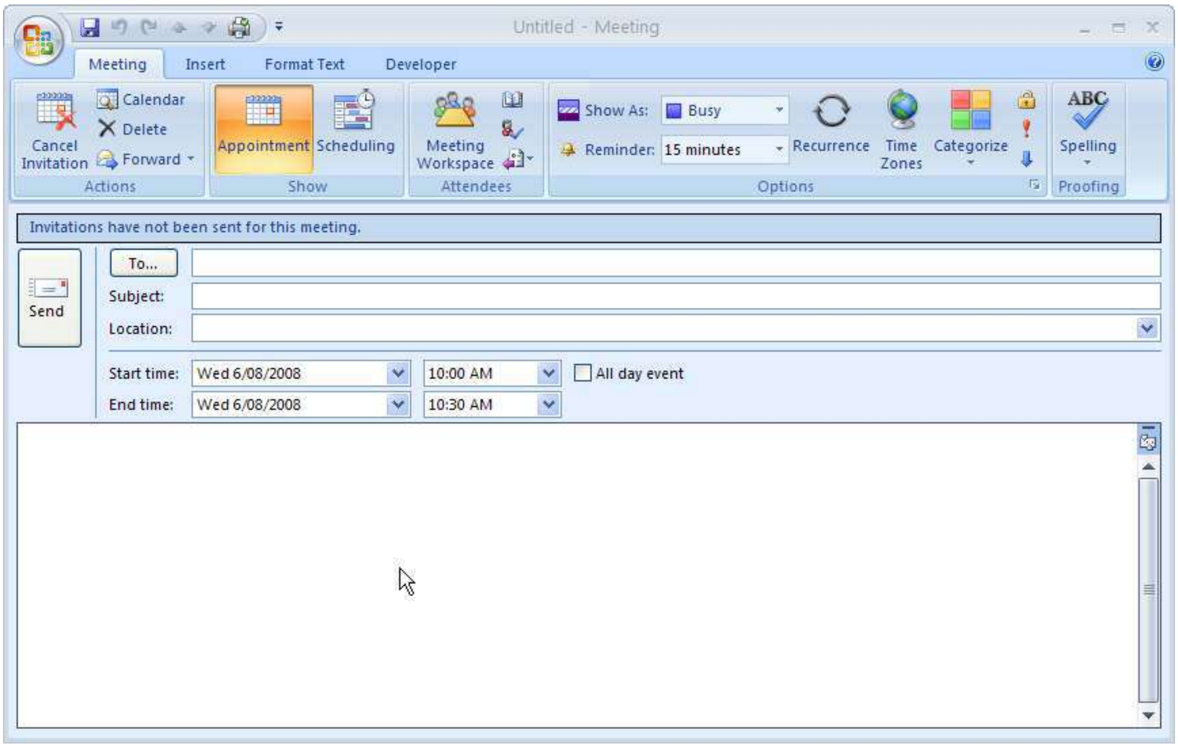
1. Select CALENDAR from the Outlook QUICK LINKS, ensure you are in the correct day. Select the desired appointment slot and then click on the drop down arrow next to the NEW icon and select MEETING REQUEST from the list; or



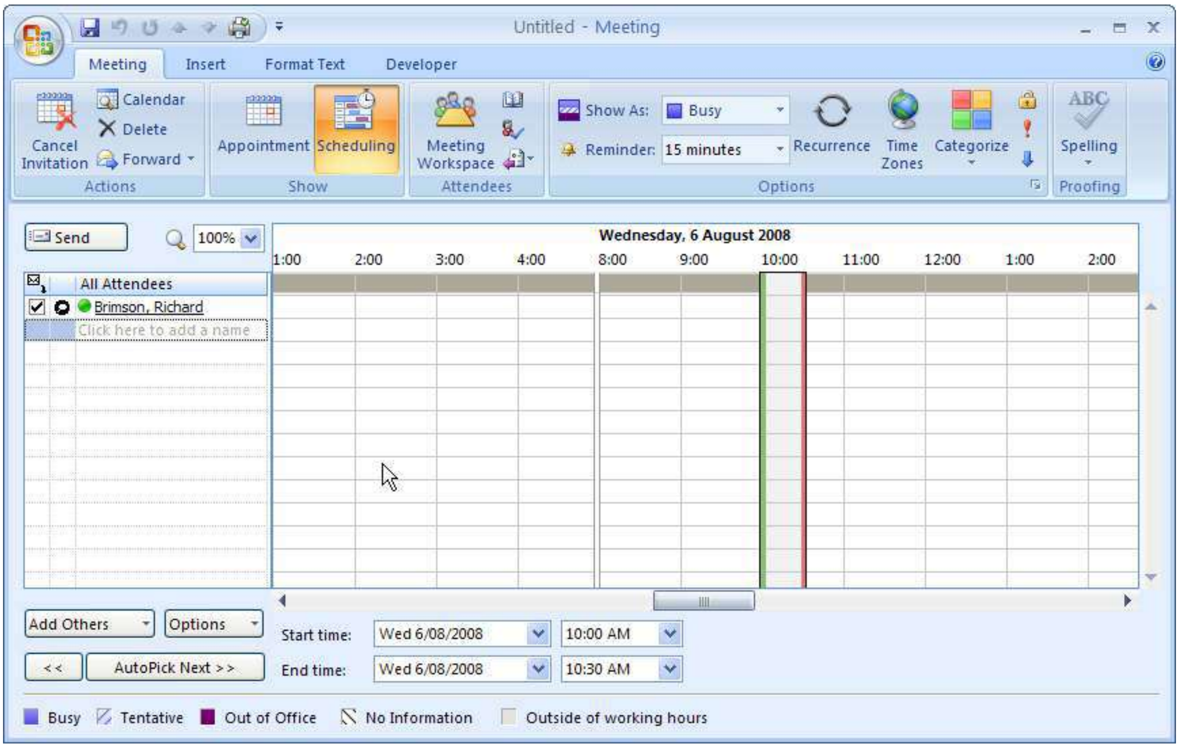
2. Use the keyboard shortcut – CTRL+SHIFT+Q; or

3. Select CALENDAR from the Outlook FOLDER LIST, ensure you are in the correct day. Select the desired appointment slot and then click on the NEW icon.

Filling out the meeting details is very much the same as making an appointment for yourself except that you have an extra dialog box where you enter the email addresses of the invitees. There is also an extra tab called SCHEDULING which is used to ascertain the availability of the attendees.



To invite people to your meeting choose the Scheduling option and then you will have the screen shown below and by clicking on 'Add Others" you can invite whoever you would like to attend by selecting their email addresses from the Global Address Book. See below:



Each person who has been invited will receive an invitation. Once they have received the invitation they will have a few options. These are:

Accept – which will notify you that they can attend and put an entry into both your diary and their diary?

Decline – This will send a message back to you to tell you that they cannot attend the meeting

Tentative – Which will send a message to you informing you that they are not yet sure they can attend but will tentatively accept your invitation

Propose new time – Will tell you that the invitee cannot attend at the time specified but would like to suggest an alternative time

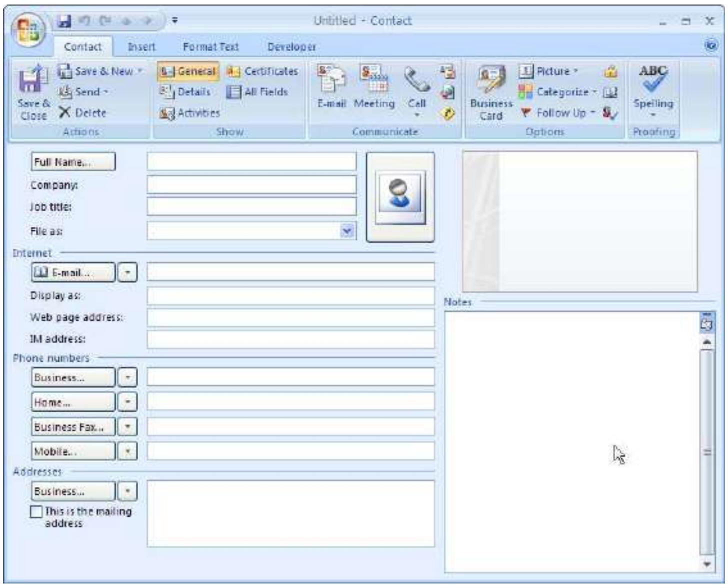
Creating New Contacts

You will notice on your folder list an entry titled **'Contacts'**. This is set up for you to easily add email addresses of people outside the University who you may need to contact on a regular basis or whose email address and details you would like to keep for future reference.

If you have received an email from someone and would like to add a new contact entry for them you will just need to **drag and drop** their email into the contact folder, alternatively you can just open the **'New Contact'** window and add them manually.

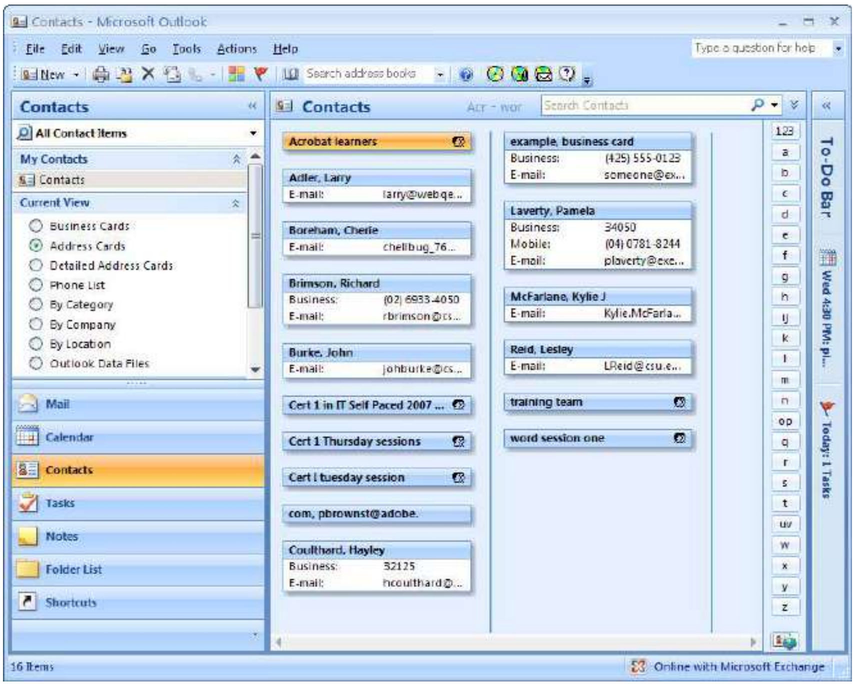
To add a new contact manually

Go to **'New'**, Click on **'Contact'** and you will see this screen

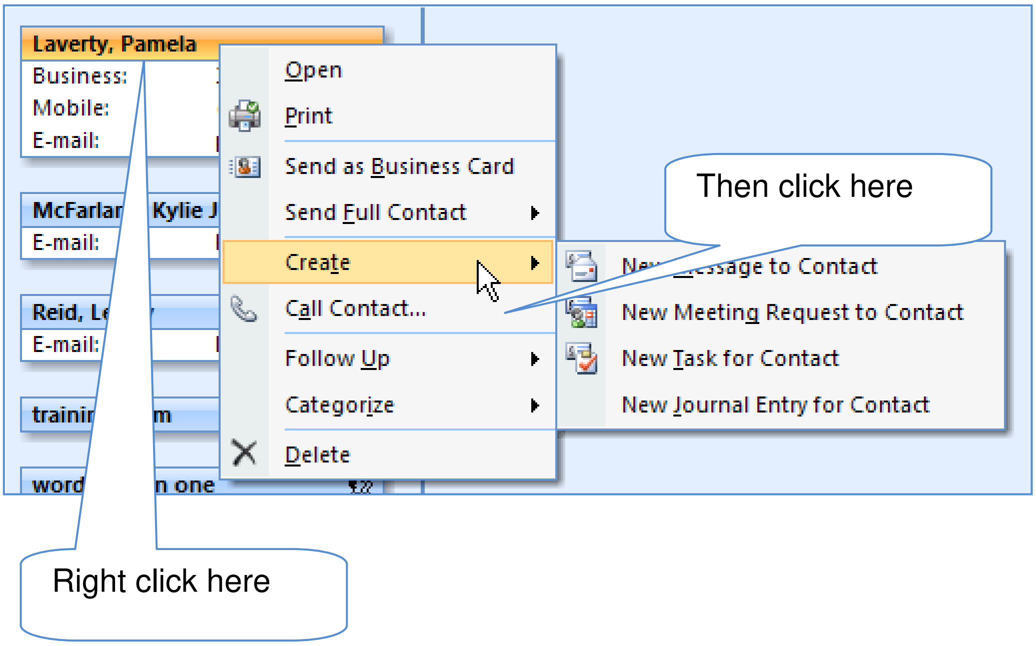


Fill in all the information required and you will have made yourself a new ‘**contact**’.

To see your contacts click on ‘Contacts’ in your folder list and the following screen will open.



To send a new message to one of your contacts from this list you need to ‘**right click**’ on the contact and you will get the following options. You can send a new message from this list of options.



Drag and Drop

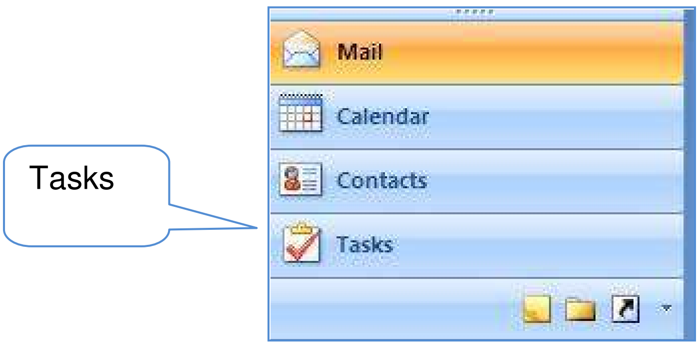
If you receive an email from someone whom you would like to add to your **'Contacts'** list then you have the option to add them by using the **'drag and drop'** function. What this means is that you can just drag the email entry into your contacts folder and Outlook will automatically add an entry for them, including the original email for future reference. The original email will still remain in your **'inbox'** for you to deal with.

Tasks

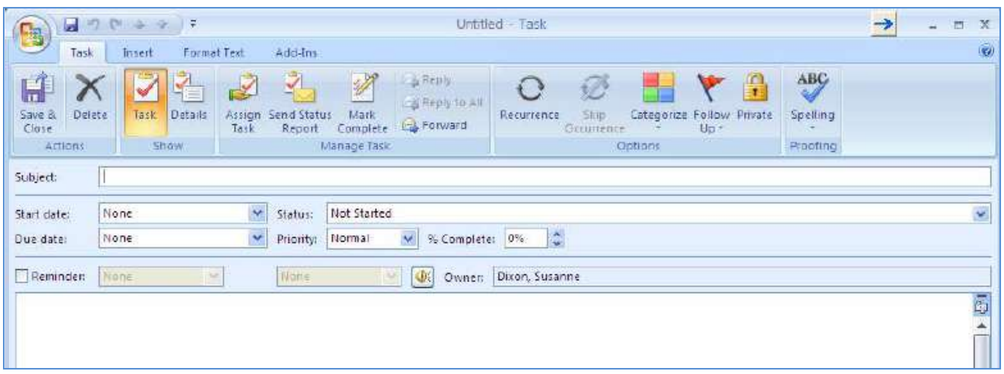
The task feature in Outlook allows you to enter individual activities or items of work which you are required to undertake, similar to a 'To do' list. Tasks allows you to keep track of the important things you need to do or follow up which may not require a full calendar entry. You can also assign tasks to other people by sending them a task.

Creating New Tasks

Creating a new task is very similar to creating a new meeting request or calendar item. You need to click on **'Tasks'** in your folder list. See below:

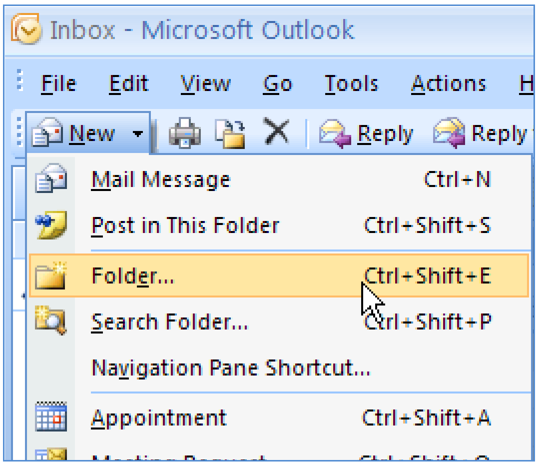


A blank 'Task' window will now open and you can fill in the details of your task. See below:

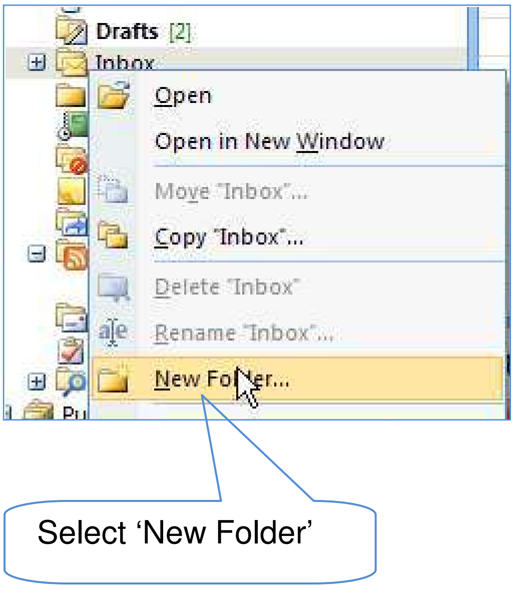


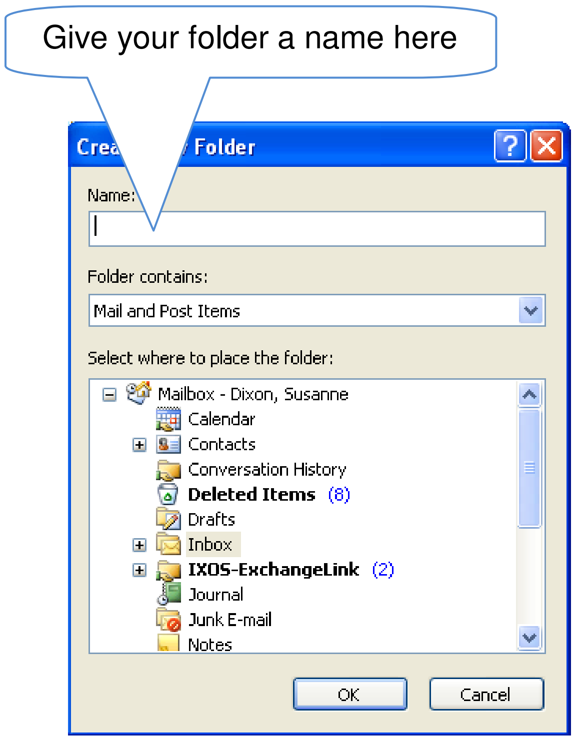
Creating Folders

To create new folders Click on ‘New’, then choose ‘Folder’.



To create a new sub folder in your inbox, right click on your inbox and select ‘New Folder’. You can give your folder a name in the resulting ‘Create New Folder’ window. Then select ‘OK’ and your new folder will file alphabetically under the ‘Inbox’ folder.





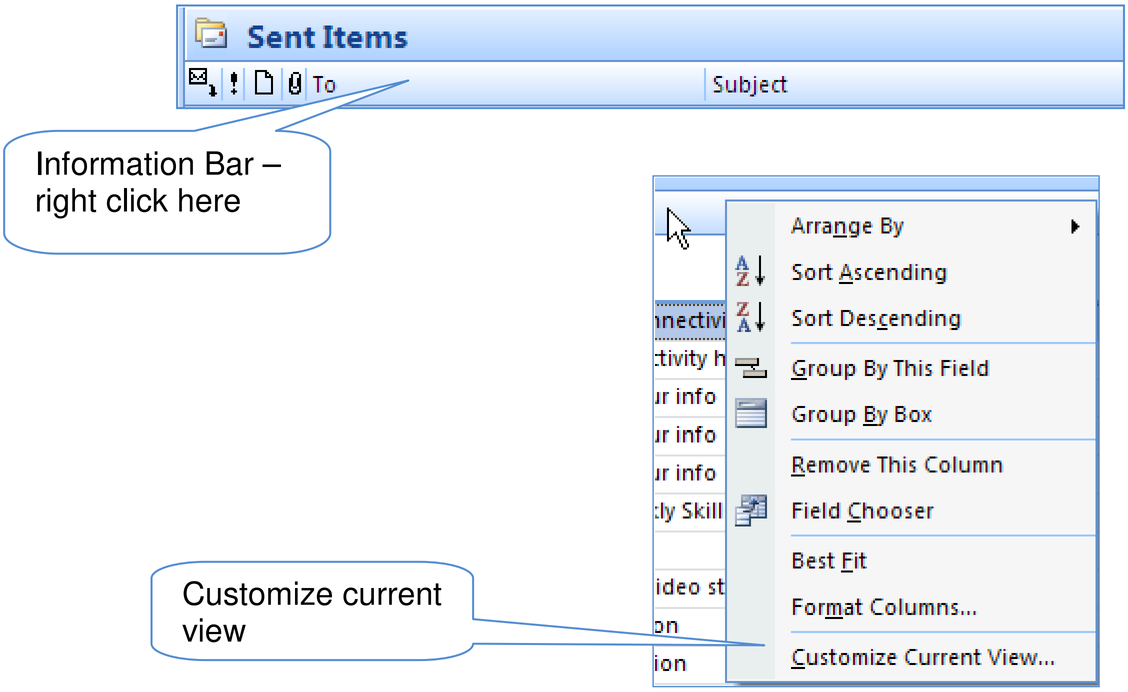
Mail Format

In mail format you will find information to alter your Message Format, change your stationery and fonts and add a signature to your emails.

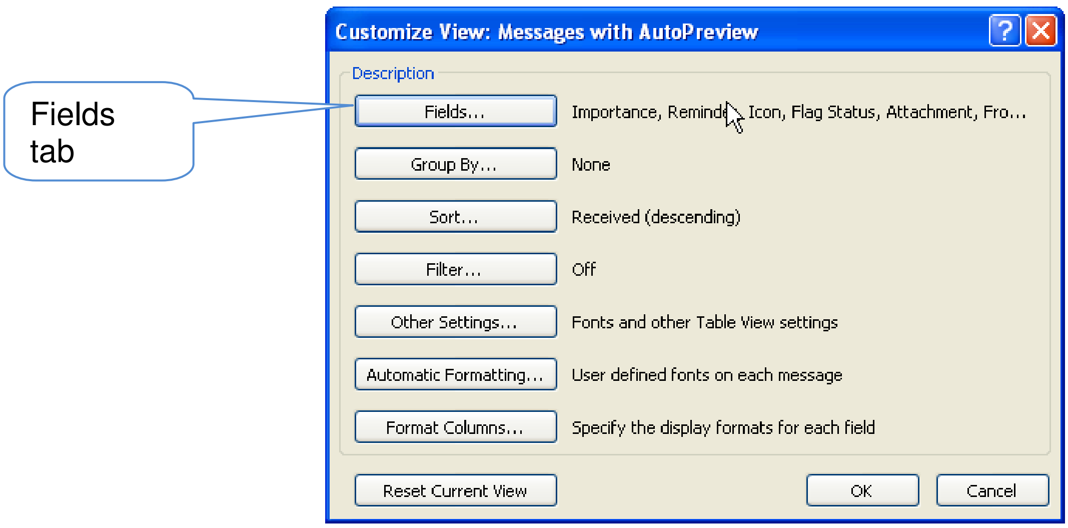
You just need to go into tools/options/mail format and access the area you need and either create what you require or make the necessary changes.

Field Chooser

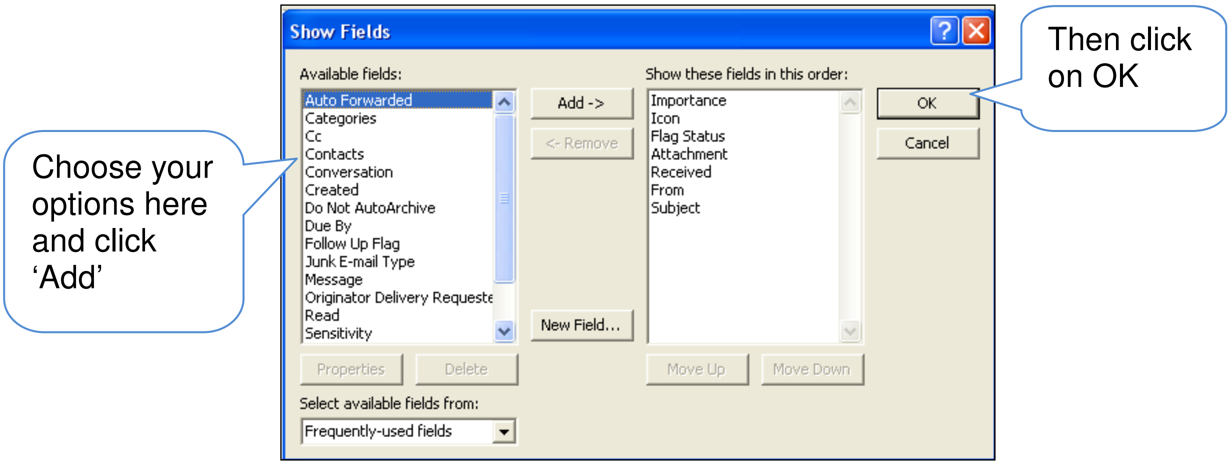
You can choose the way you would like your incoming mail to look. The usual format is **'From, subject, and date received'**. The grey area above the Information Viewer area is known as the **'Folder Banner'**. This displays the name of the currently open folder. By using your right mouse button in the information bar directly below this you will get a menu which looks like this:



From this menu you will need to choose the **'Customize Current View'** option and you will see this screen:



If you choose the ‘Fields’ tab you will see the following list of options and you can choose which fields you would like to see in your incoming mail folder:

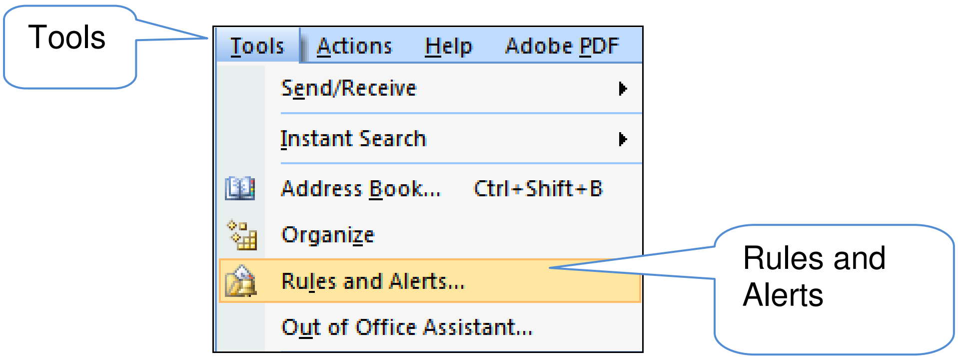


You need to choose the available fields from the left column and add them to the right column. You can choose the order you would like to see them by **dragging and dropping** within the list.

RULES

Adding a rule in Outlook

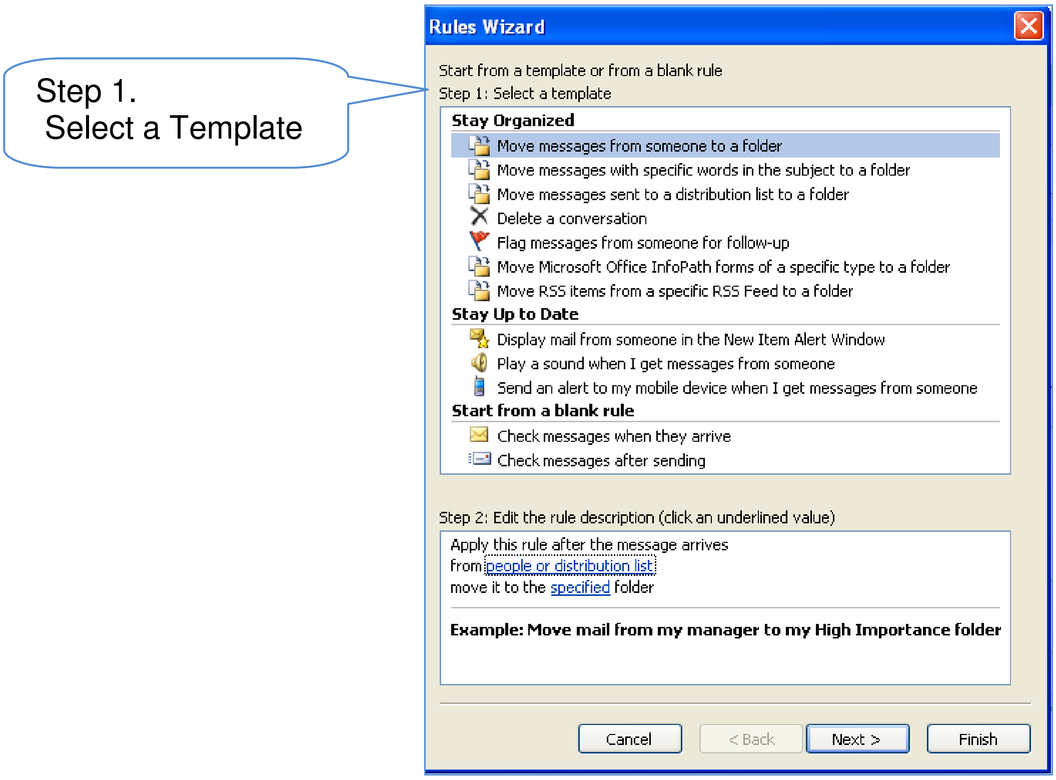
You can set up ‘Rules’ in your Microsoft outlook program to organise the way messages are handled once they are delivered to your mailbox. To do this you will need to use the ‘Rules Wizard’. You will find the rules wizard by selecting ‘tools’ from the ribbon and then selecting ‘Rules and Alerts’ from the resulting drop down list.



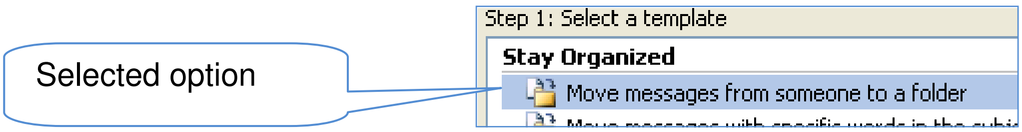
The next step is to select 'New Rule' 

from the top of the resulting window. The 'Rules Wizard' window will then open and this is where you start to select the conditions for your new rule.

The first section of your 'Rules Wizard' window has a list of some rules which you may wish to activate for your own use. This section is Step 1. Select a template. There is also a section where you can make your own rule.

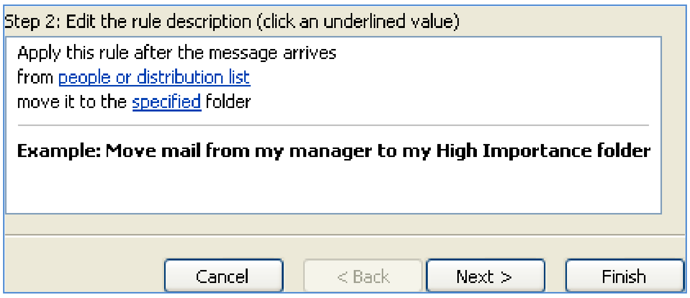


The next step is to choose an option from this list. Once you have chosen an option you can move on to Step 2 from the bottom of the window. This step gives you the ability of when and how you apply the rule. In the following example I have chosen the first option from Step 1. This option is – 'Move messages from someone to a folder'.



Step 2 is at the bottom of the window. The options in Step 2 change according to the selection you have made in Step 1. This example shows the options for the selection above. You will see that some of the text is 'hyperlinked', this means that you can click on it and it will open another window from where you can choose your options.

Options showing hyperlinks

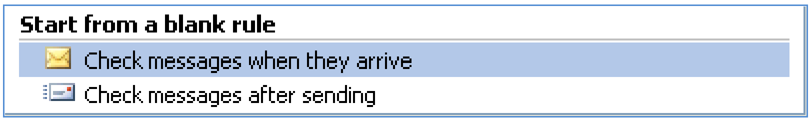


If you choose the 'people or distribution list' hyperlink the Outlook address book will open and you can choose either a person or distribution list from your options. If you choose the 'specified' hyperlink your folder list will display and you can choose which folder you would like your messages delivered to.

Once you have made your selections from these options click on 'Next' at the bottom of the window. You will then have the option to put specific conditions and exceptions on your rule. Click on 'Next' and you will be able to give your rule a name, run the rule, and Turn it on or off.
Click on 'Finish' and your rule will be in effect.

If you choose the 'Start from a blank rule' option you can make your own rule from the options presented.

Create your rule here



Make your selections from the menu and keep choosing 'Next' until you have set all the conditions for your rule.

SHARING

Sharing Mail and Calendars

These instructions are for sharing your mailbox, email folders and other MS Outlook items such as calendars and tasks.

Sharing Outlook items with other users involves three steps:

1. Setting up permission for a user to access your Outlook Today which is the top level of your mailbox. This step includes making sure that this top level is visible to the other user.

2. Setting up permission for the actual folders or tasks in your mailbox that you wish others to access. This includes specifying the level of access they are allowed to have.

3. Finally, after granting permissions, making sure that the user you are setting up accepts the permission you have granted, and that they decide whether to:

a) access your information on an ‘as needs basis’; or

b) have your folder(s) on view all the time, in the same way as they view their own information.

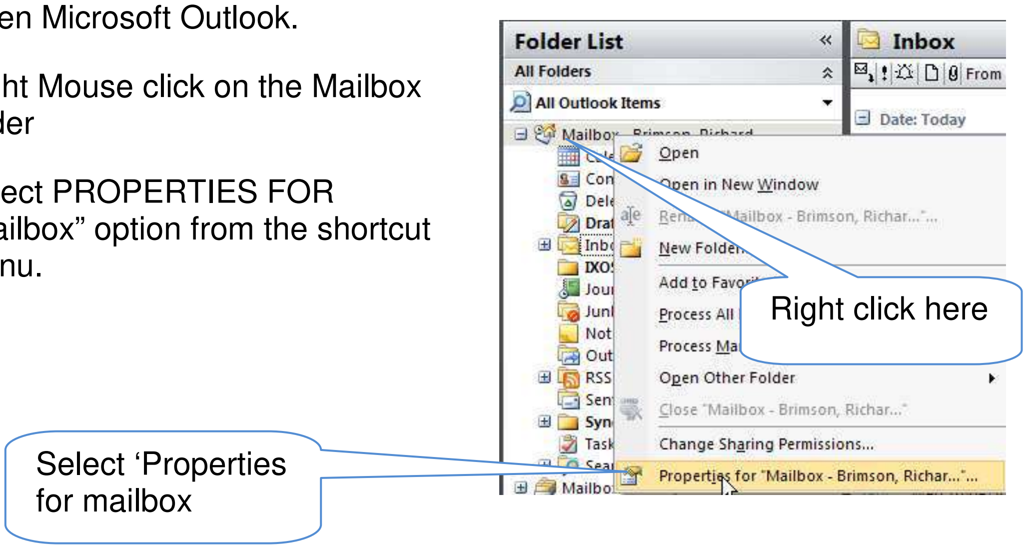
Note: If you are being set up to view someone else’s folder(s), it is a good idea to have the FOLDER LIST showing. To turn this on, when you have opened MS Outlook, click on the VIEW menu and select FOLDER LIST.

Setting up permission for a user to access Outlook on your behalf:

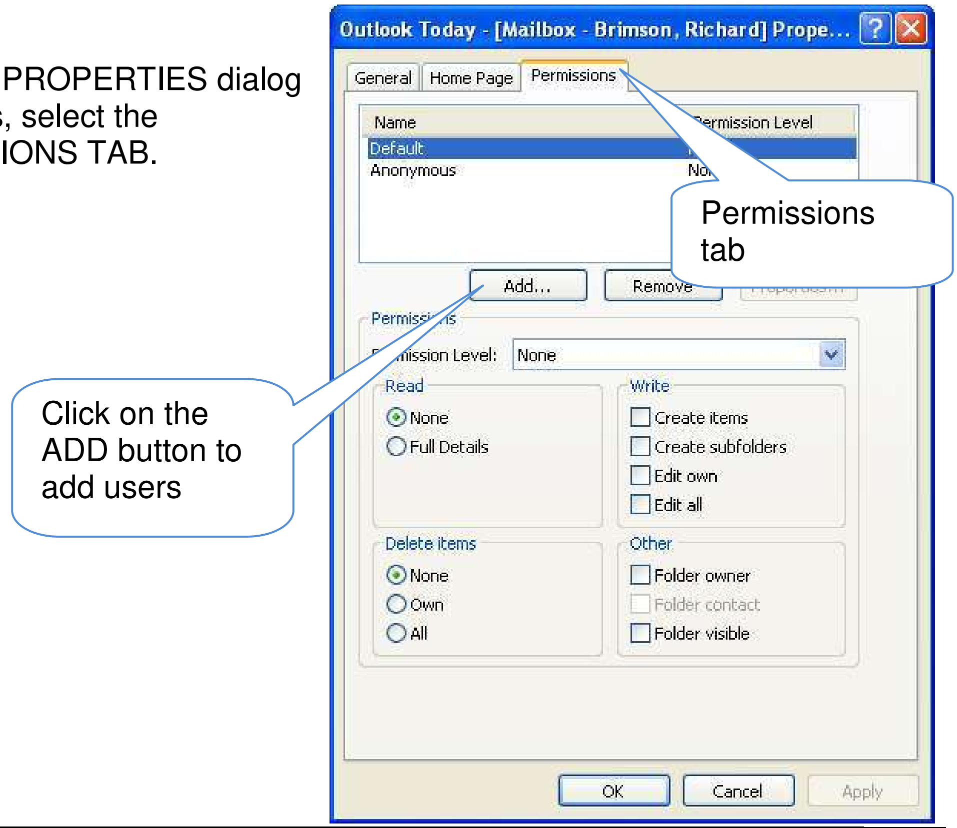
1 Open Microsoft Outlook.

2. Right Mouse click on the Mailbox folder

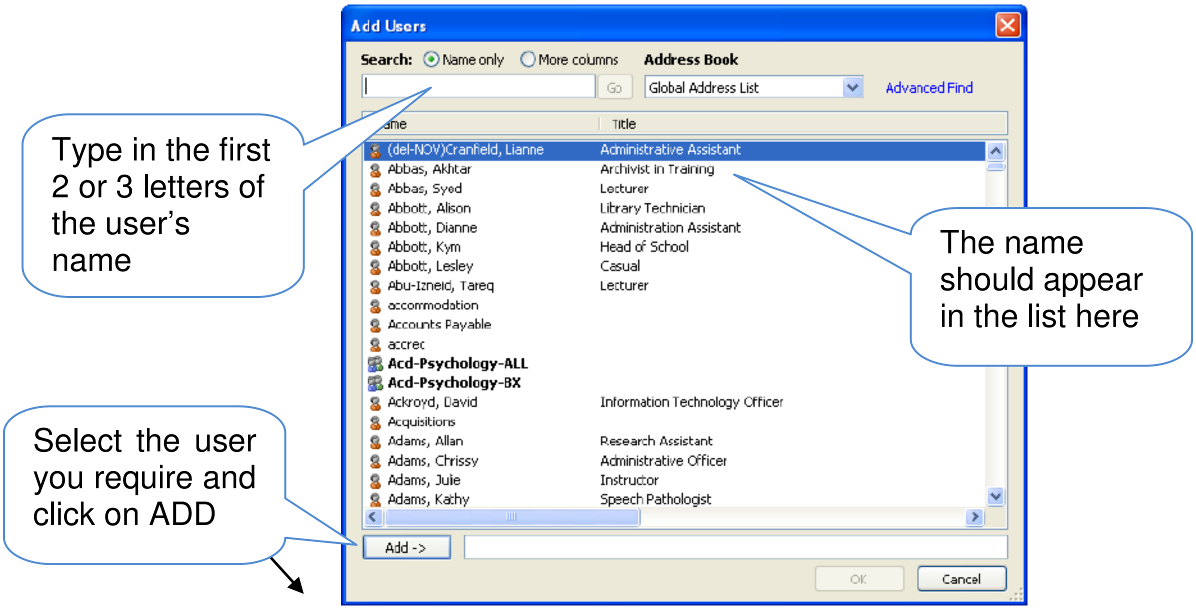
3. Select PROPERTIES FOR “Mailbox” option from the shortcut menu.



4. When the PROPERTIES dialog box opens, select the PERMISSIONS TAB.

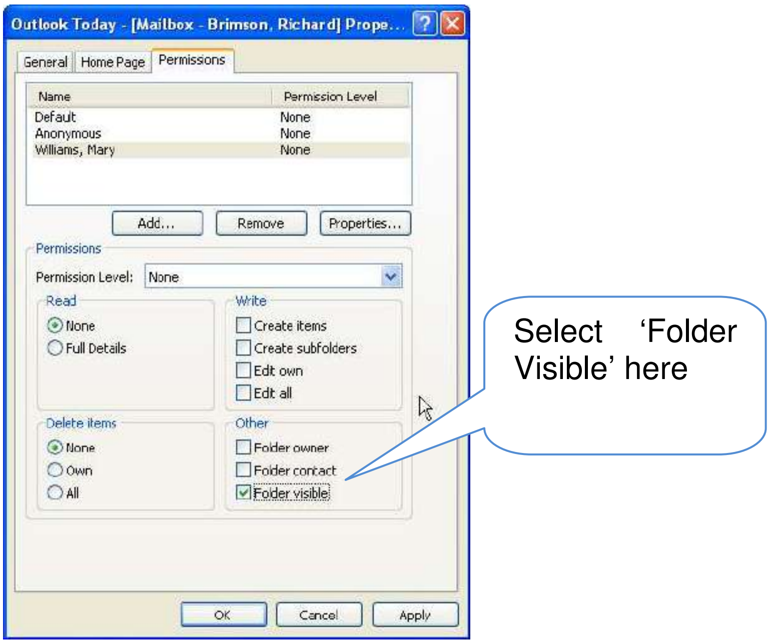


5. Click on the ADD button to add the logon ID of the person you wish to share your MS Outlook folders with. The ADD USERS dialog box will open.



6. In the 'TYPE NAME OR SELECT FROM LIST' text box, type the first two or three letters of the person you wish to add. When you see their name in the NAME list, either double click on it or click on the ADD button. The name should then appear in the ADD USERS list on the right hand side of the dialog box. Click on OK to finalise this step.

7. You will be returned to the PROPERTIES dialog box. You should be able to see the person's name in the NAME box. To make sure that the user will be able to see your Outlook Today, click on the FOLDER VISIBLE option. Change the Permission level to NONE.



8. Click on OK – the PROPERTIES dialog box will close.

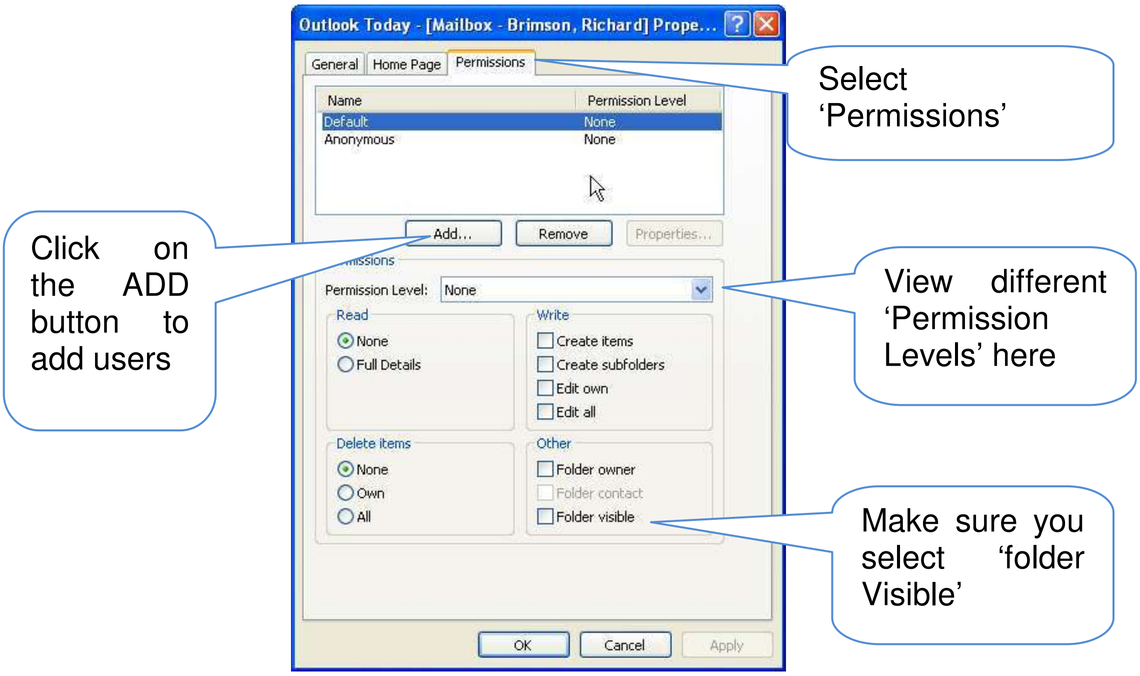
Setting up permission for specific folders or features in Outlook

1. If setting up your Inbox for another user to access, right mouse click on your Inbox and select PROPERTIES. The INBOX PROPERTIES dialog box will open.

2. Click on the PERMISSIONS tab.

3. Click on the ADD button to add a user, in the same way you added a user in steps 5 and 6 of the previous section. Their name will appear in the NAME text box.

4. Make sure the FOLDER VISIBLE option is enabled. This will let people see your Inbox in their Folder List.



5. Select the different options required, to see what the options are, click on the drop down menu next to **'Permission Level'**. The different Permission Levels are described below:

With this permission level (or role)	You can
Owner	Create, read, modify, and delete all items and files, and create subfolders. As the folder owner, you can change the permission levels others have for the folder. (Does not apply to delegates.)
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders. (Does not apply to delegates.)
Editor	Create, read, modify, and delete all items and files.
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create. (Does not apply to delegates.)
Author	Create and read items and files, and modify and delete items and files you create.
Contributor	Create items and files only. The contents of the folder do not appear. (Does not apply to delegates.)

Reviewer	Read items and files only.
Custom	Perform activities defined by the folder owner. (Does not apply to delegates.)
None	You have no permission. You can't open the folder.

Excerpt from MS Outlook Help

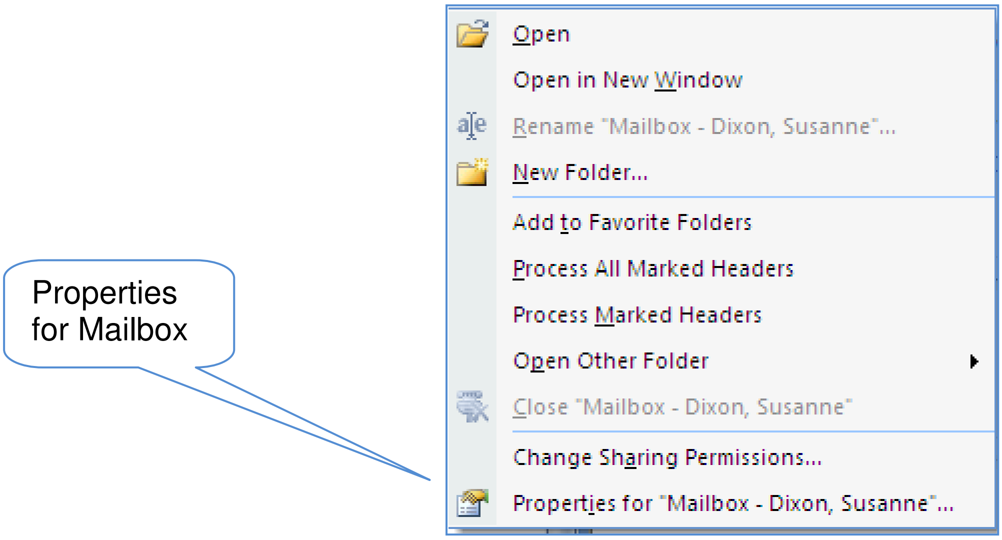
6. After setting up the Inbox, right mouse click on any subfolders that you wish to grant access to and repeat steps 2-5. You can only do one folder at a time.

Viewing folders and tasks which have had permissions granted on them

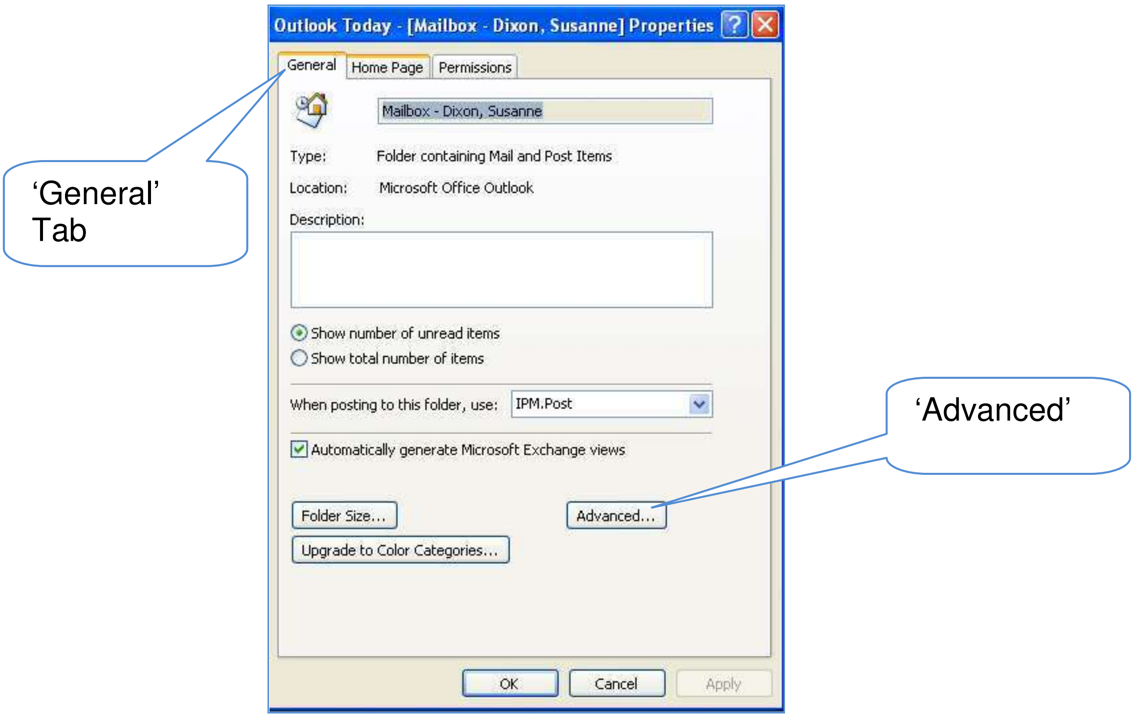
This step accepts the permissions that have been set up for a user.

1. Have the person you have set up permission for, go to their computer and in MS Outlook, right mouse click on Mailbox. If you have been set up by someone else, you will do these steps on your own computer to be able to view their information.

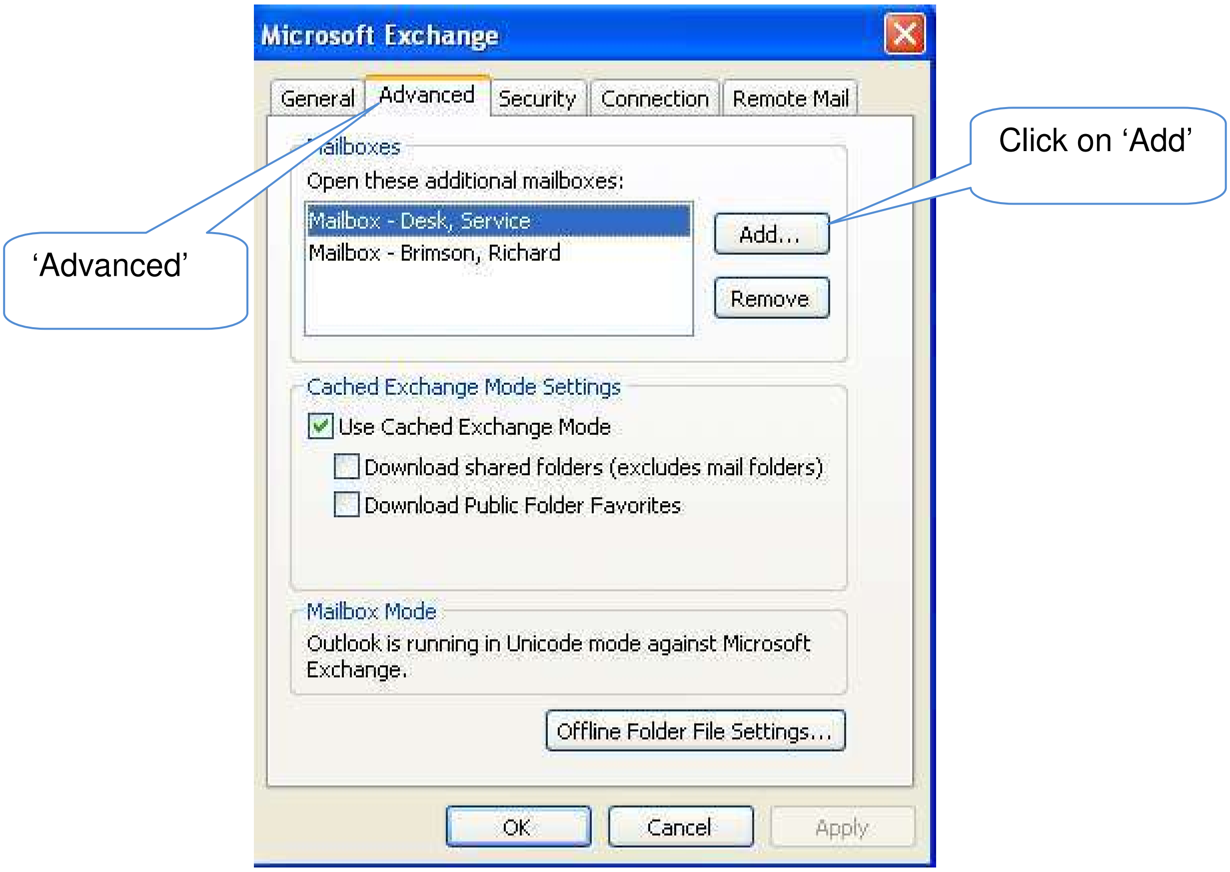
2. Select the 'Properties for Mailbox' option from the shortcut menu. The PROPERTIES dialog box will open.



3. On the GENERAL tab, locate and click on the ADVANCED button.



4. The MICROSOFT EXCHANGE SERVER dialog box will open. Locate and click on the ADVANCED tab, then click on the ADD button.



5. The ADD MAILBOX dialog box opens. Type in the logon ID of the person who's mailbox you are trying to add and click on OK.

6. You will be returned to the MICROSOFT EXCHANGE SERVER dialog box. The user's name should now appear in the MAILBOXES list.

7. Click on OK twice to close this and the PROPERTIES dialog box.

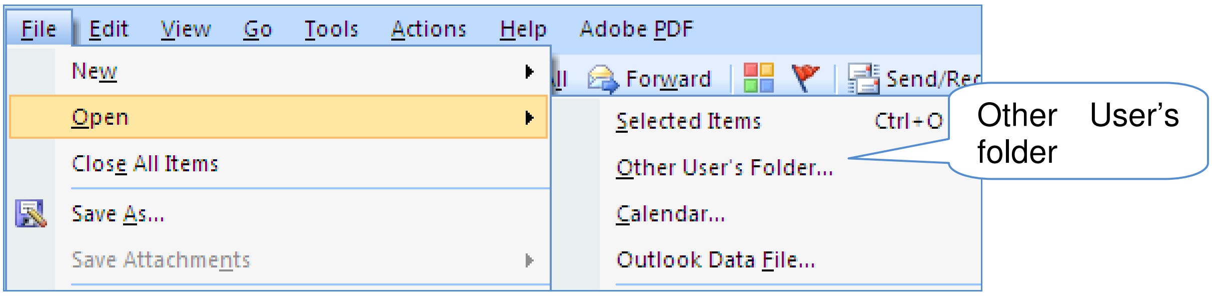
8. The user should now be able to see the folders, in their folder list, that they have been given permission to access,.

NOTE: You can set up other MS Outlook folders, for example, a Calendar, in the same way.

Viewing a folder or calendar on an 'as needs basis'

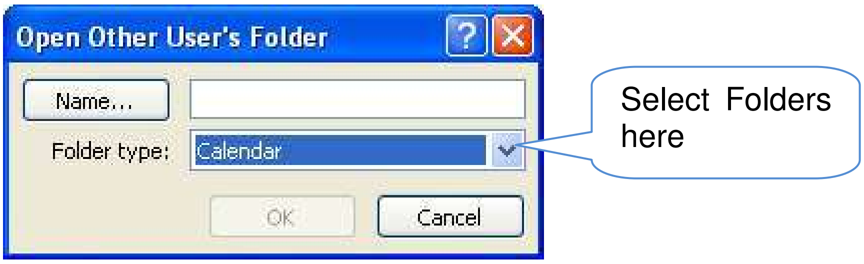
Should you only wish to view a folder or calendar once in a while, i.e. you do not wish to have it on permanent view, follow these steps:

1. Click on File, Open, Other Users Folder.



2. In the 'Open Other User's Folder' dialog box, type in the logon ID of the person.

3. In the FOLDER drop down list, select the folder or task you wish to open.



4. After clicking on OK, the calendar, folder etc you specified should open.

NOTE: You cannot view subfolders in this way, only the main folders. And you need to have been given permission to access these folders before you can open then

Removing Users

To remove a user's access that you have previously given, go back into each folder or object's PROPERTIES dialog box, click on the PERMISSIONS tab and then use the REMOVE button to remove the user's access. If removing from the Inbox, remember that each subfolder the user had access to must also have its permissions removed. For example:

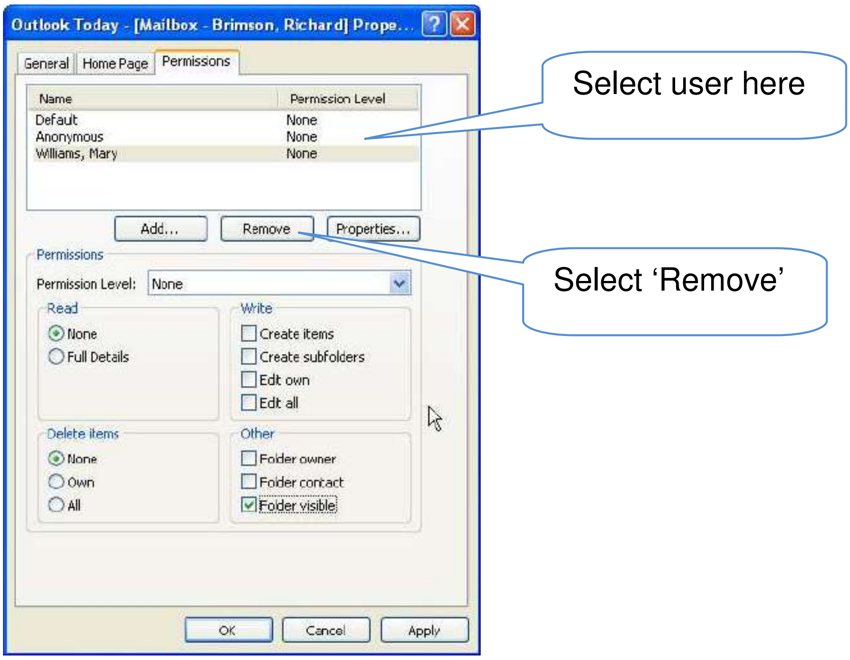
A user has been given access to a subfolder called "Correspondence" under the Inbox:

1. Right mouse click on the Correspondence subfolder;

2. Select PROPERTIES from the Shortcut menu.

3. Click on the PERMISSIONS tab

4. Highlight the user's name



5. Click on the REMOVE button

6. Click on OK to finalise the steps.

7. Remove the user's access from the Inbox by right mouse clicking on the Inbox folder and repeating steps 2-6 above;

8. Remove the user's access from OUTLOOK TODAY by right mouse clicking on OUTLOOK TODAY in the mailbox, selecting PROPERTIES FOR "OUTLOOK TODAY" from the shortcut menu then following steps 3-6 above.

Removing someone's folder from your mailbox

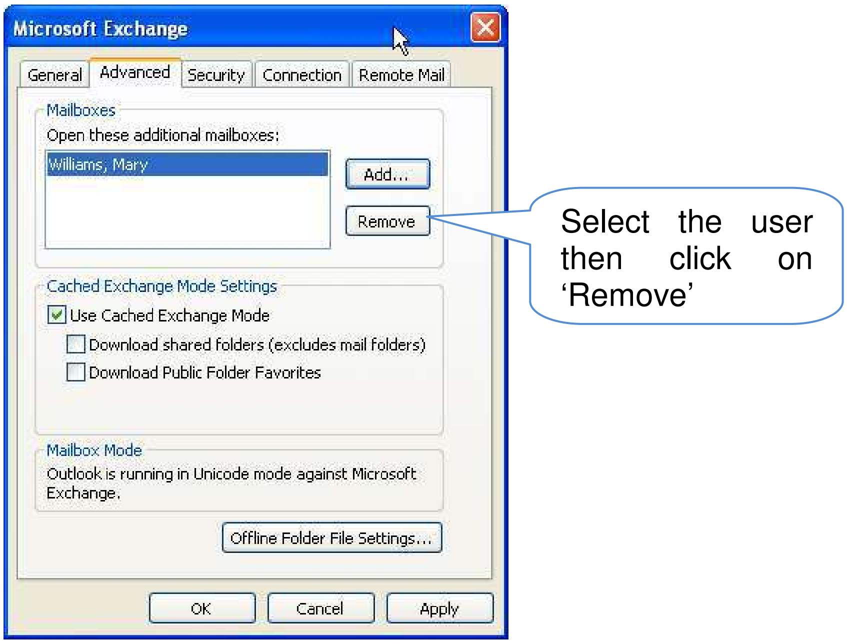
If your access to someone else's folder is removed, you will have to follow these steps to remove the instructions that were setup to allow you to see their folder:

1. Right mouse click on OUTLOOK TODAY;

2. Select PROPERTIES FOR "OUTLOOK TODAY" from the shortcut menu;

3. On the GENERAL tab, select the ADVANCED button.

4. In the MICROSOFT EXCHANGE SERVER dialog box, select the ADVANCED tab.



5. Select the user's name from the 'Mailboxes' text box, then click on the 'Remove' button.

6. Confirm that you want to remove the user (click on the YES button)

7. Click on OK twice to finalise the procedure.

JUNK MAIL

What is 'Junk Mail'?

'Junk email is unwanted marketing material, advertisements, sales pitches, and product descriptions; junk email often advertises questionable products and/or services and uses nonsensical filler to try to get past firewalls and virus checking software'.

Most junk email at CSU is stopped by the Sophos scanning software before it is delivered to your mailbox. Some messages which are not 'Junk' are delivered to your junk email folder from time to time. This happens with 'Scanned' documents.

Scanned documents in ‘Junk’

If you scan a document and send it to yourself if will often deliver directly to the Junk folder. Always check your junk email folders when you should have received a message and it has not arrived.

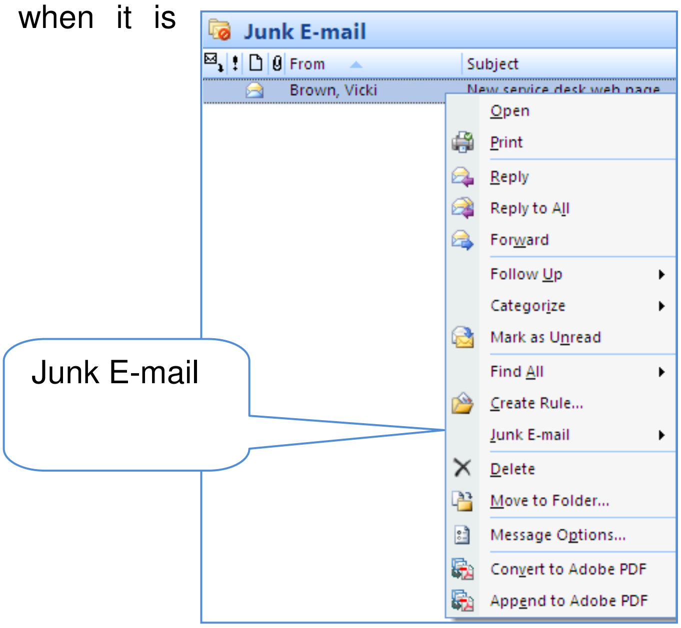
You cannot open an attachment or hyperlink from a message in your junk folder. To open any attachments from these messages you should move the message back to the inbox by clicking and dragging it.

‘Safe Senders List’

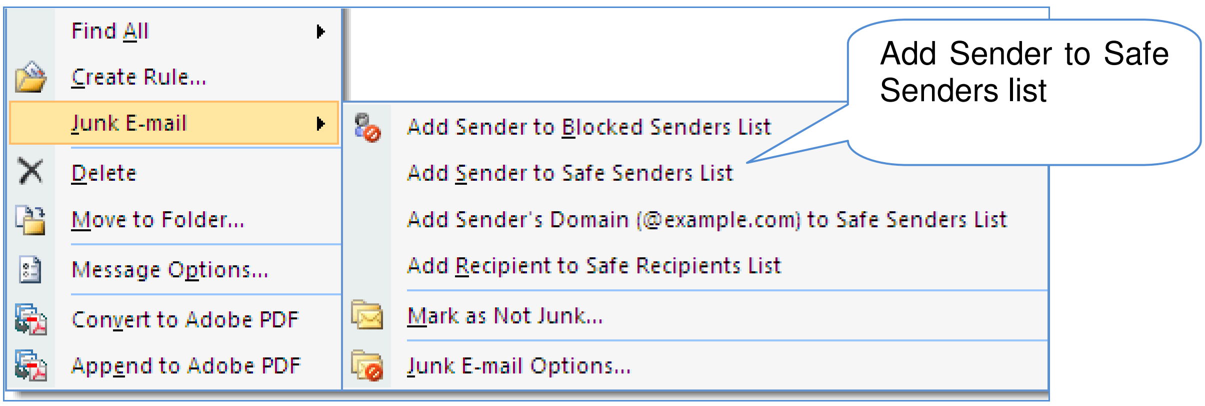
If you have a problem with messages from certain senders going to the Junk Email folder then you can add them to the ‘Safe Senders List’. Any message from that sender in the future will automatically go directly to the Inbox without being filtered out. To add a user to the ‘Safe Senders List’ follow these steps:

Right click on the message when it is showing in the folder

Select ‘Junk E-mail’



From the resulting menu select ‘Add Sender to Safe Senders List’



This will ensure that any future messages from that sender will go to the Inbox.

Blocked Senders List

You will also see that from this menu you can add people to a 'Blocked Senders List' by following the same steps and selecting 'Add Sender to Blocked Senders List' from the options available on this window.

Other Options for Junk Mail

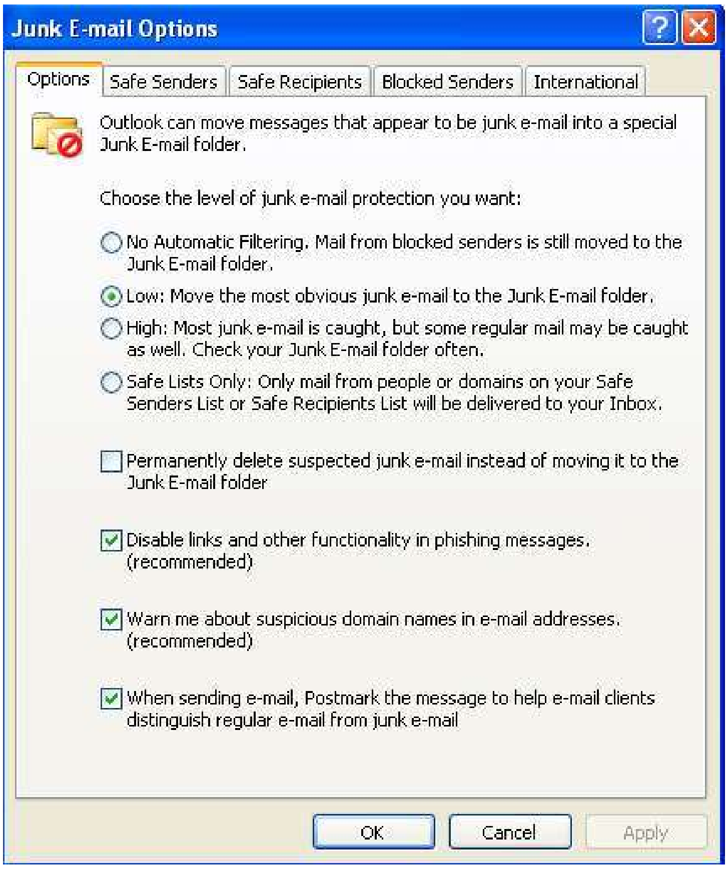
Other options include:

- Add sender's domain to Safe Senders List – what this means is that by adding the domain any future emails coming from anyone within that domain will automatically go to your inbox, eg.@csu.edu.au

- Add recipient to Safe Recipients List – if you are a member of a 'Listserve' and a message is sent to that listserve the message sent to the 'Listserve' will not be treated as 'Junk' email and will be delivered to your email account. If you have received a message at any time from a listserve and it has been delivered to your Junk folder you should right click on the message and add the listserve as a 'Safe Recipient'. A 'Listserve' is like a distribution list.

- Mark as 'Not Junk' – sometimes messages come repeatedly and go into your Junk Email folder. If you right click on it and mark it as 'Not Junk' you will get a popup appearing informing you that the message is being moved back to your Inbox

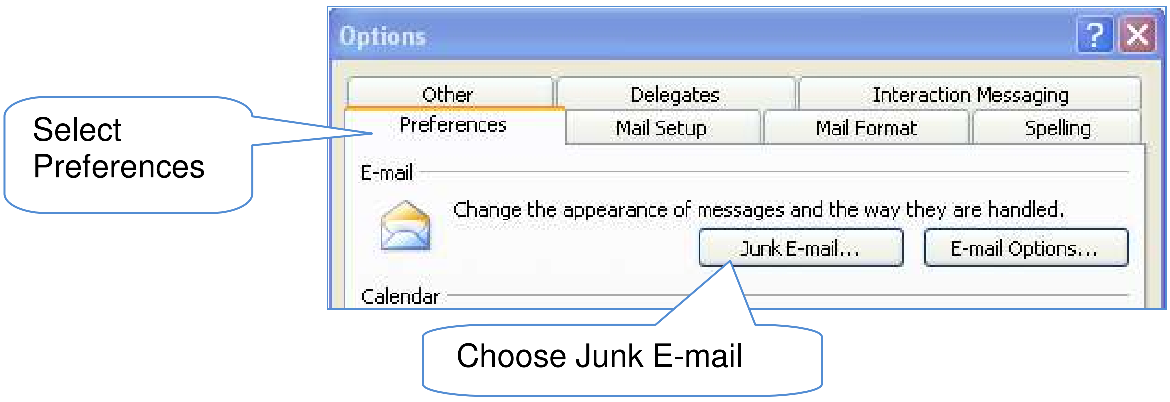
- Junk E-mail options – when you select this option a window will open with lots of options for you to select to deal with your Junk email. It looks like this:



More about Safe Senders

Email addresses that are listed in your 'Contacts' folder are considered safe by the Junk Email filter if the '**Also trust e-mail from my Contacts'** check box is selected (the default setting). However, you might also sometimes send e-mail to recipients who are not listed in your Contacts. Such recipient addresses are not considered safe by default. If you want these addresses to be considered safe, do the following:

Right click on your message or select 'Tools', 'Options', 'Preferences', 'Junk E-mail':



From the 'Junk E-mail Options window select the 'Safe Senders' tab and then select 'Also trust e-mail from my Contacts'. Then click on OK.