Using Microsoft Office 2003
Intermediate Outlook Handout

Information Technology Services
California State University, Los Angeles

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Contents

Introduction

Microsoft Outlook 2003 is a comprehensive desktop information management program that is designed to organize tasks and electronic communication. The purpose of this handout is to provide instructions on additional features not previously discussed in the **Introduction to Microsoft Outlook 2003** handout. Features that are covered in this handout include Tasks, Notes, Calendar Pane, Auto Archive, Tracking messages, vCards, and managing Junk E-mails.

More information about Outlook can be found at http://www.calstatela.edu/outlook.

Working with Tasks and Notes

Although Outlook is used primarily for e-mail, it performs other functions as well. ***Tasks*** and ***Notes*** are additional features that can be accessed from the **Navigation Pane**.

TASKS

A ***Task*** is a personal or work-related errand whose progression can be tracked (see Figure 1). A task can occur once or can be recurring.

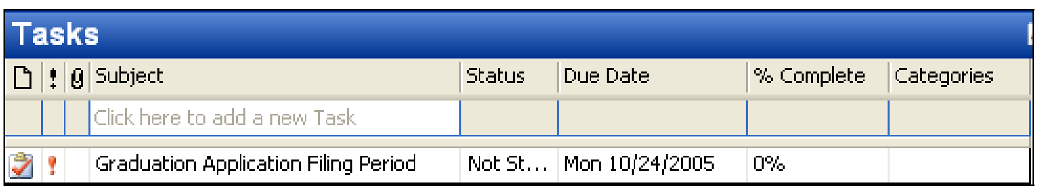


Figure 1 - Example of a Task

To use this feature click the **Tasks** button Tasks on the **Navigation Pane**. New tasks can be created, or progress of current tasks can be monitored by entering or changing information in the appropriate text box (for example; ***Start date:***, ***Due date:***, ***Status:***, or ***% Complete:***).

To create a new task:

1. In the *Task* tab, select the **File** menu ► **New** ► **Task**.

   NOTE: The symbol "►" is used throughout this handout as a notation to indicate sequences of steps to execute the described actions.

Or:

1. From within the ***Tasks*** function, click the **New** button New on the **Standard** toolbar. The *Task* dialog box opens (see Figure 2).
2. Enter the name of the task in the ***Subject:*** text box.
3. Select the start date and deadline for the task from the ***Start date:*** and ***Due date:*** drop-down boxes.
4. Enter any additional information.
5. Click the **Save and Close** button Save and Close.

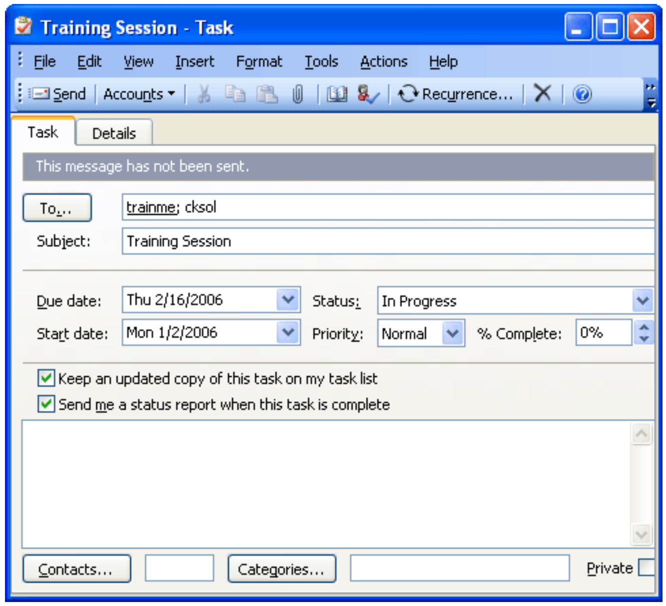


Figure 2 - Setting a Task Dialog Box

Outlook also provides a recurrence attribute that can be set once which will recreate the ***Task*** according to the pattern specified.

To set a recurring task:

1. Open ***Tasks***.
2. Double-click the specific task to open its dialog box.
3. Select the **Actions** menu ► **Recurrence…** Or click the **Recurrence…** button Recurrence… on the *Task* dialog box **Standard** toolbar. The *Task Recurrence* dialog box opens (see Figure 3).

Figure 3 - Task Recurrence Dialog Box

4. Click appropriate options in the *Recurrence pattern* and *Range of recurrence* sections.
5. Click the **OK** button.

To mark a completed task:

1. Open ***Tasks***.
2. Click the check box to the left of the task subject.
3. To return the task to its original incomplete status, click the check box again to deselect it.

To assign a task to another Outlook user:

1. Open ***Tasks***.
2. Double-click the task to open it in a **Tasks** window.
3. Click at the end of the subject line and add a colon (:) and initials.
4. Click **Assign Task** button .
5. Enter the recipient's e-mail address in the ***To…*** box.
6. Select options and adjust settings as desired.
7. Click the **Send** button .

NOTES

Notes are simple text area to save information. Notes can be assigned different categories, can be color-coded, and are viewable in different modes. To include the **Notes** button on the **Navigation Pane**, follow the same steps that were used to show the **Task** button above.

To create a note:

1. Select the **Notes** button on the **Navigation Pane**. Existing notes will be displayed in the **View Pane**.
2. Click the **New** button to create a new note. Enter the text and close the note. Outlook will save the note automatically and assign the yellow color to its background. The title of the note comes from the first few words on the note.

   NOTE: Notes can be organized more easily with different colors.

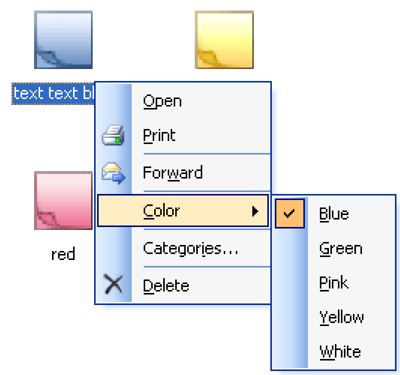


Figure 4 - A Sample Note

To color-code the notes:

- Right-click the closed note in the **View Pane** and select **Color** ► select a color (see Figure 4).

Or:

- Click the note icon on an open note ► **Color** ► select a color.

Using the Calendar Pane

Outlook *Calendar* is a powerful feature that allows tracking and managing of appointments, events, meetings, and schedules. Outlook *Calendar* is fully integrated with e-mail, contacts, and all of the other Outlook features.

VIEWING THE CALENDAR

Click the Calendar button Calendar on the **Navigation Pane**. The *Calendar* can be viewed by day, week, or month.

CREATING APPOINTMENTS

Appointments can be set for any of the time slots. A sound or a message reminder is available for appointments, meetings, and events. Each appointment can be color-coded for easier identification.

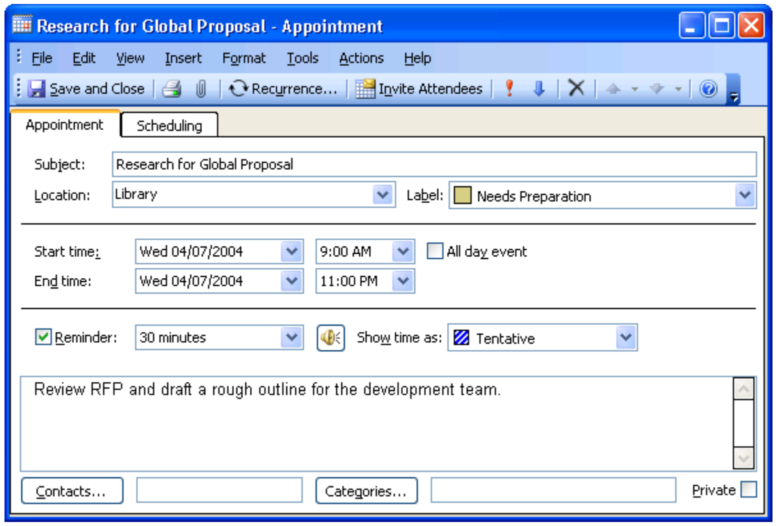


Figure 5 - The Appointment Window

To create a new appointment:

1. Select the **File** menu ► **New** ► **Appointment.** The *Appointment* window appears (see Figure 5).
2. Type a subject and the location for the appointment.
3. Adjust the **Start time** and **End time** using the drop down list as desired.
4. Check the **Reminder** option and choose a reminder sound.
5. Select the **Show time as** options to easily see availability (e.g. Free/Tentative/Busy/Out of Office) in Navigation Pane.
6. Type the details about the appointment.
7. Click the **Save and Close** button .

ORGANIZING MEETINGS

Outlook can set a meeting time on the *Calendar*, create an appointment, and to invite people to the meeting. Outlook will help find the earliest time when all potential attendees are available.

To organize a meeting:

1. Click the ***New*** drop-down arrow on the **Standard** toolbar ► **Meeting Request**. The Meeting dialog box opens.

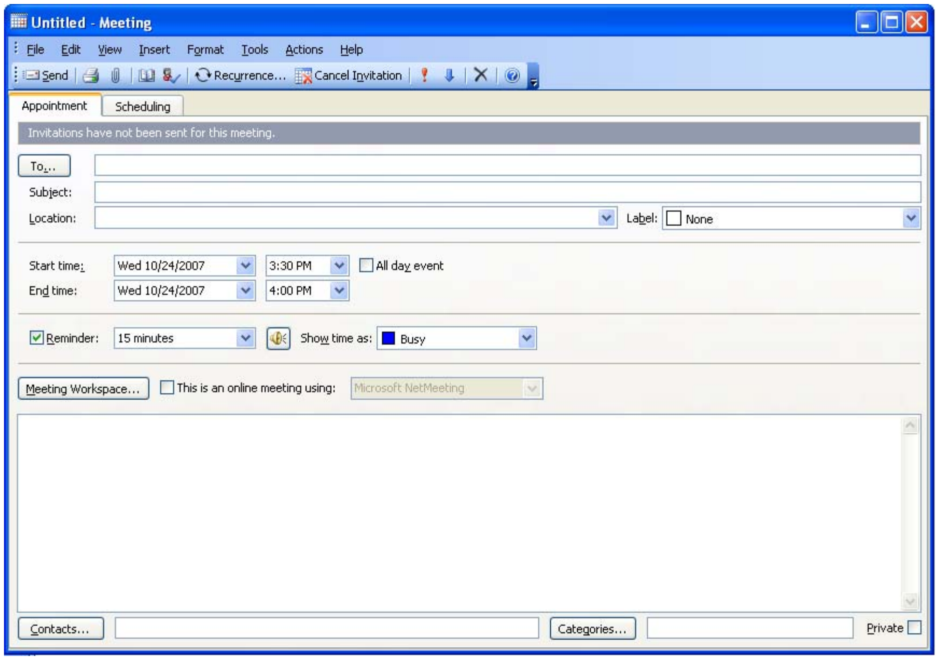


Figure 6 - Meeting Request Window

2. Click the **To…** button  to add attendees indicated in obligation box (e.g., Required, Optional). See Figure 7.

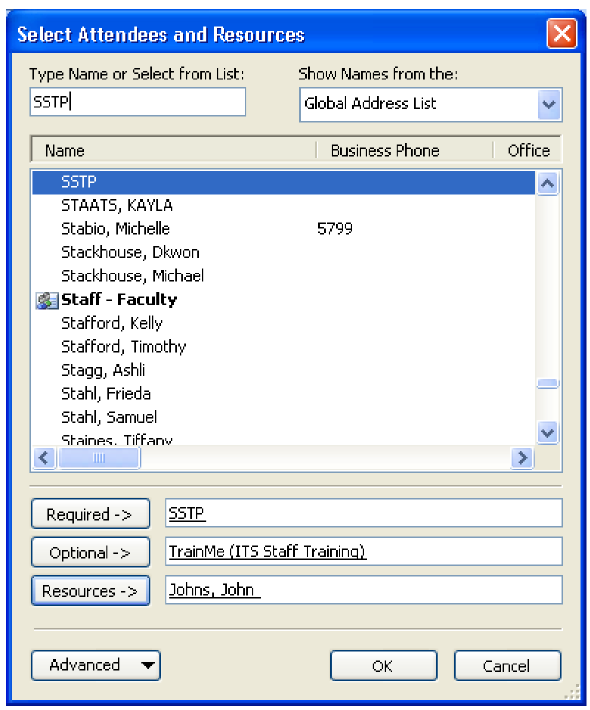


Figure 7 - Select Attendees and Resources Window

3. Click the **OK** button to go back to the Meeting dialog box.
4. If attendee's status is needed to be changed, click on the *Scheduling* tab (see Figure 8).

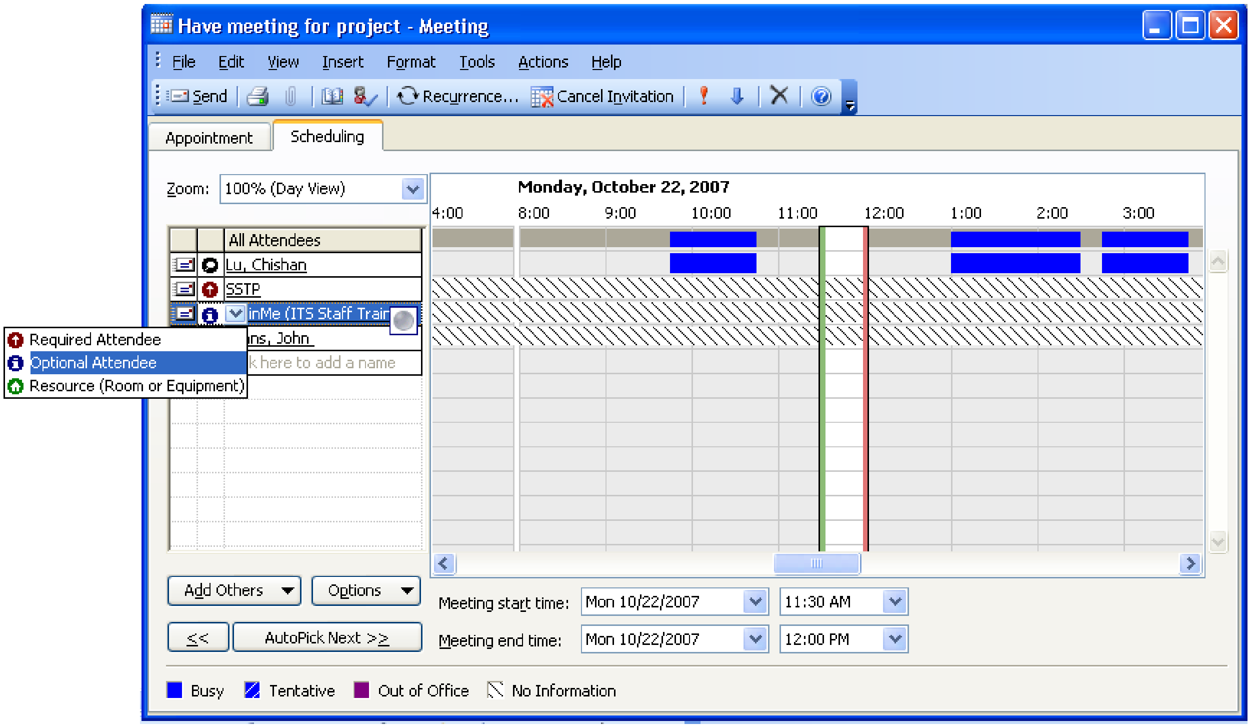


Figure 8 - Scheduling Tab

5. Click the status icon to change desired status.
6. Click the *Appointment* tab. Fill in the appropriate fields for time and details of the meeting.
7. If the meeting will occur on a regular basis, click the **Recurrence…** button  on the *Calendar* dialog box. Select appropriate options under the ***Recurrence pattern*** and ***Range of recurrence*** sections (see Figure 9).
8. Click **OK** button to go back.

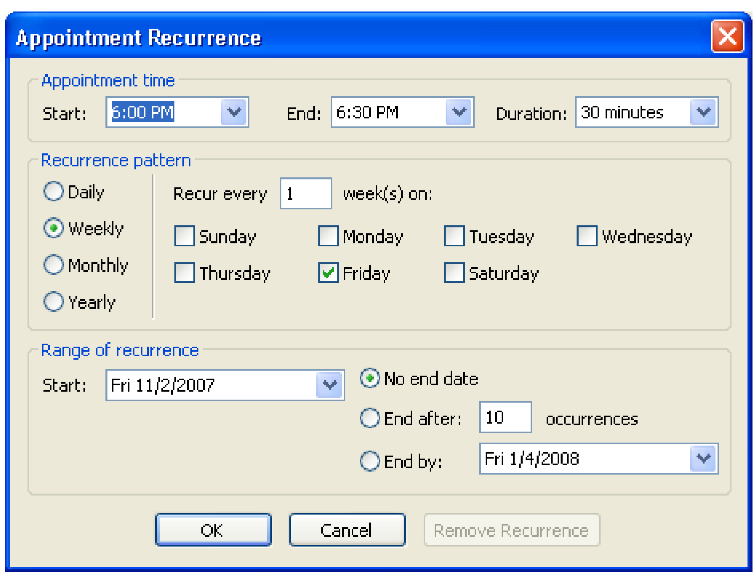


Figure 9 - Appointment Recurrence Dialog Box

9. Click the **Send** button. All the attendees will receive a meeting invitation which can be responded with an accepted, tentative or decline message.

Figure 10 - Meeting Options

COLOR-CODING THE CALENDAR

Appointments and meetings can be color coded to indicate use. Labels can be defined by color or via pre-defined label that Outlook assigned.

To color an appointment or meeting with a predefined label:

1. Click the Calendar button on the **Navigation Pane**.
2. Right-click an appointment or meeting.
3. Click the Label: drop-down arrow.
4. Select a color-coded label from the list (see Figure 11).

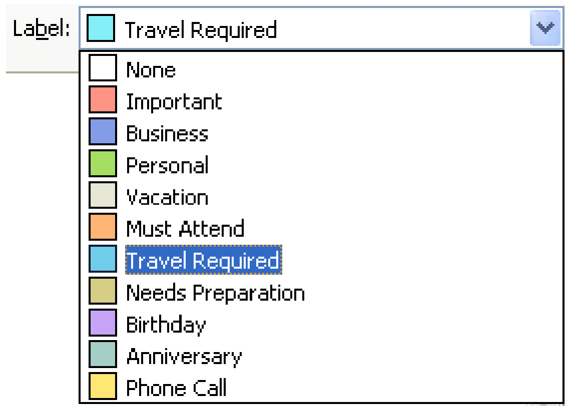


Figure 11 - Calendar Color Labels

NOTE: To remove the color from the appointment or meeting repeat steps 1 and 2 and select **None**.

To create a colored label:

1. Open the *Calendar*.
2. Click the **Calendar Coloring** button on the **Standard** toolbar ► **Edit Labels…**. The *Edit Calendar Labels* dialog box opens. See Figure 12.

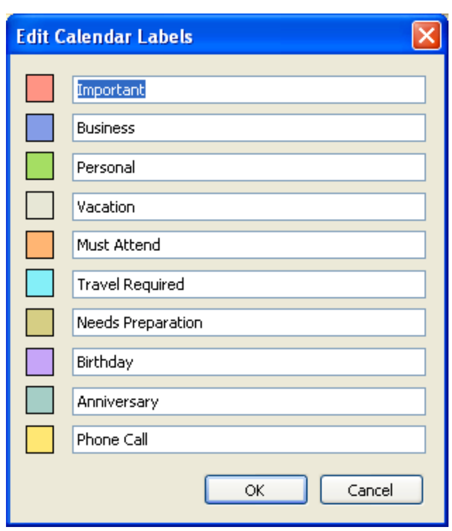


Figure 12 - Edit Calendar Labels Window

3. Select the color(s) to rename by typing in the new label name(s) ► **OK** button.

Configuring Calendar

In order to better representation time, working hours should be configured to reflect actual working days and hours.

To configure the calendar:

1. Click the **Tools** menu ► **Options**. The *Options* dialog box opens.
2. At the *Calendar* section of *Preferences* tab, check ***Default Reminder:*** check box and set up the desired time to be notified in advance for a calendar item (see Figure 13).

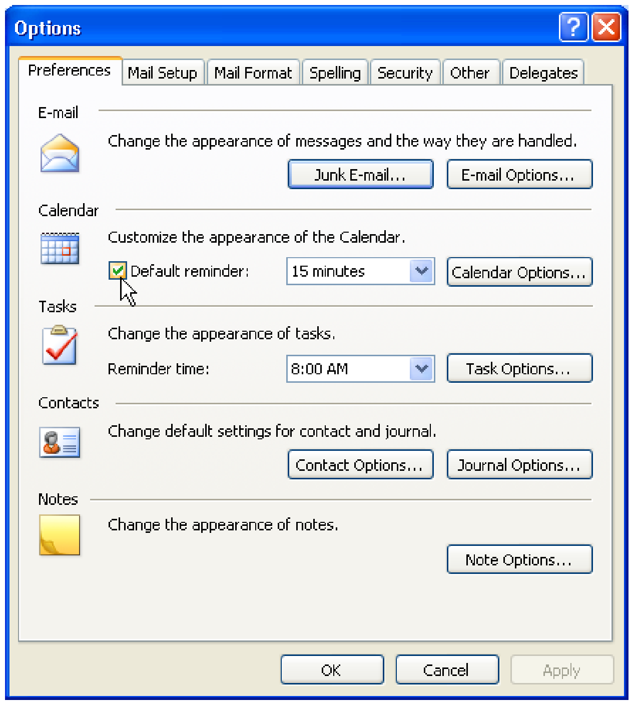


Figure 13 - Options Dialog Box

3. Click the **Calendar Options…** button. The *Calendar Options* dialog box opens (see Figure 14).
4. In the *Calendar work week* section, select the working days by clicking the appropriate check boxes, and enter desired time in the appropriate text boxes.

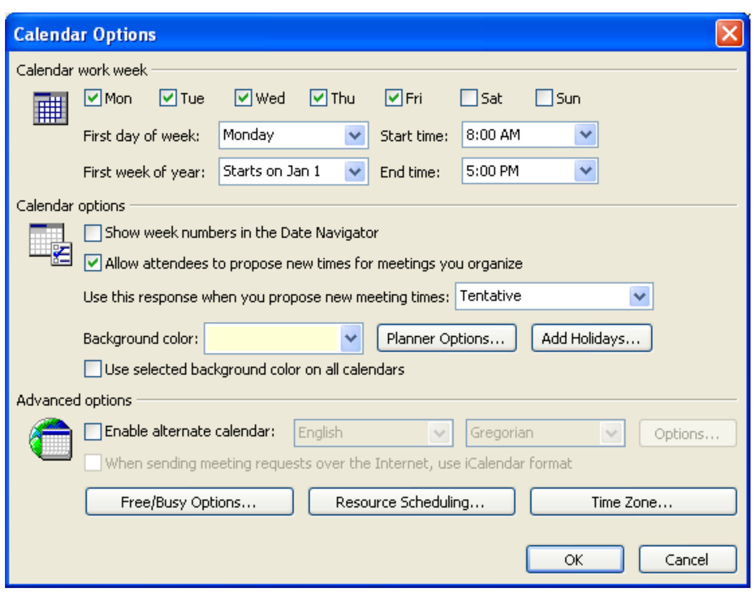


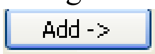
Figure 14 - Calendar Options Dialog Box

DELEGATION

The process of granting someone permission to open the folders, read and create items, and respond to requests is called Delegate Access Permissions.

NOTE: This feature requires using a Microsoft Exchange Server e-mail account.

To add delegates:

1. Click the **Tools** menu ► **Options**. The *Options* dialog box opens (see Figure 15).
2. Click **Delegates** tab and click the **Add…** button .
3. Select delegates from the global address book or type them in manually.
4. Click  to add to delegate list
5. Click the **OK** button.

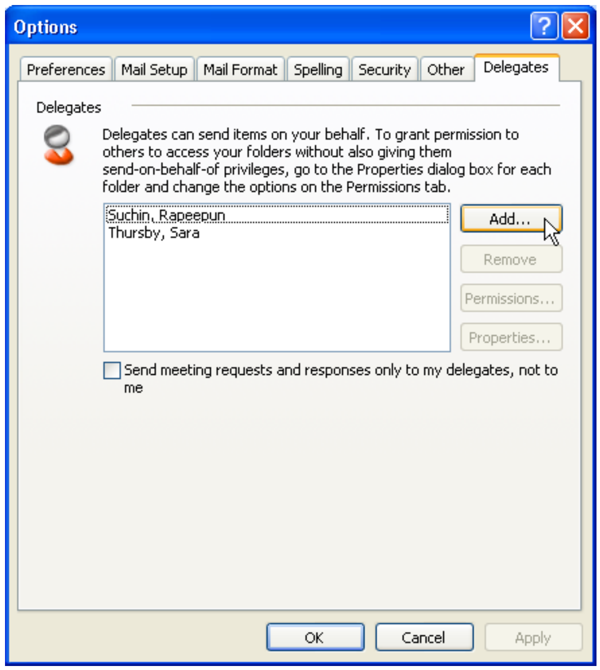


Figure 15 - Delegates

6. The Delegate Permissions: dialog box appears (see Figure 16).
7. Set up desired standard.
8. Click **OK**.
9. Click **Apply**.

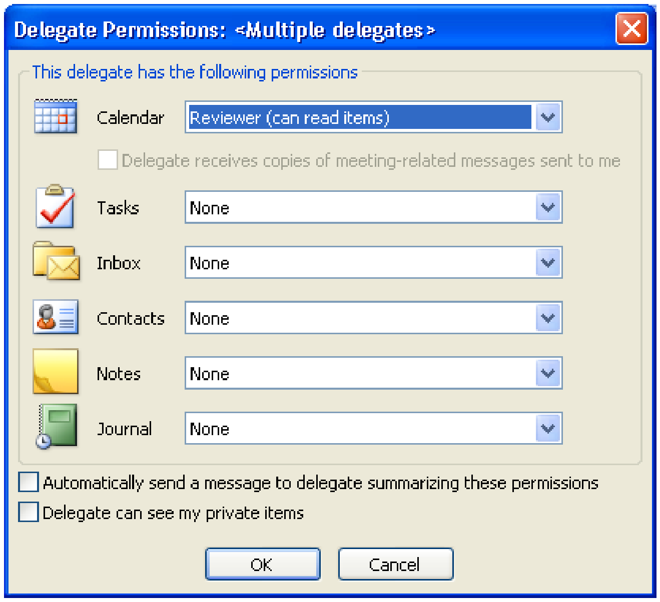


Figure 16 - Delegate Permissions Dialog Box

View Group Schedules

It is helpful to view co-worker's schedule before designate a time for a meeting. In order to do this, groups need to be created in the *Calendar* **Navigation Pane**.

To create a group in Calendar:

1. Go to *Calendar* **Navigation Pane**.
2. Click **View Group Schedules** button  and the *Group Schedules* dialogue box opens (see Figure 17).
3. Click the **New…** button 

to show *Create New Group Schedule* dialog box. Type a name for the new group schedule and click **OK**.

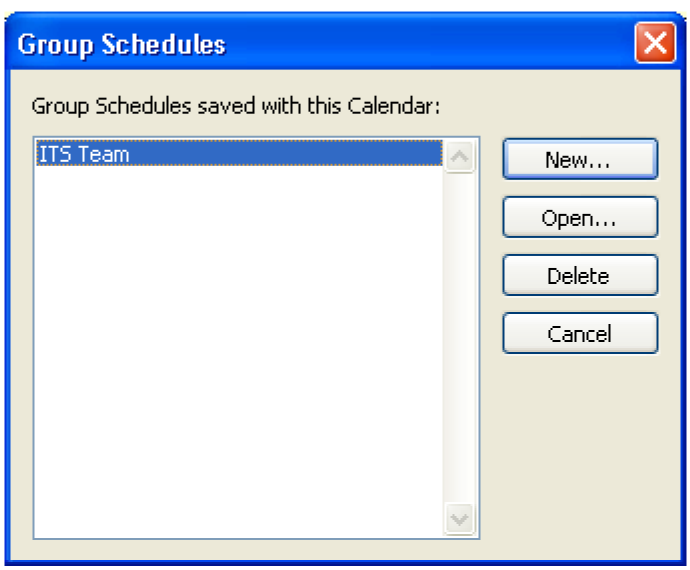


Figure 17 - Group Schedules

4. In the new group dialogue box (see Figure 18), click 

and add group members from the address book.
5. The schedules of the various members will display in the right window of the new group.

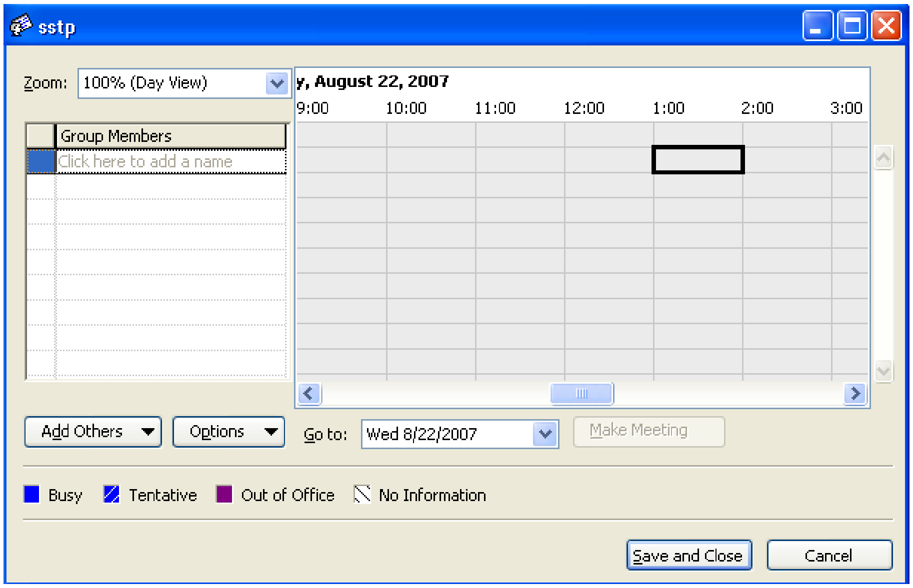


Figure 18 - The New Group

Using Rules and Alerts Option

Rules help make work more efficient by automating actions.

NOTE: It is necessary to be connected to the Microsoft Exchange server to create rules.

To use the rules and alerts:

1. In the **Mail** option, select the **Tools** menu ► **Rules and Alerts…**. The *Rules and Alerts* dialog box opens (see Figure 19).

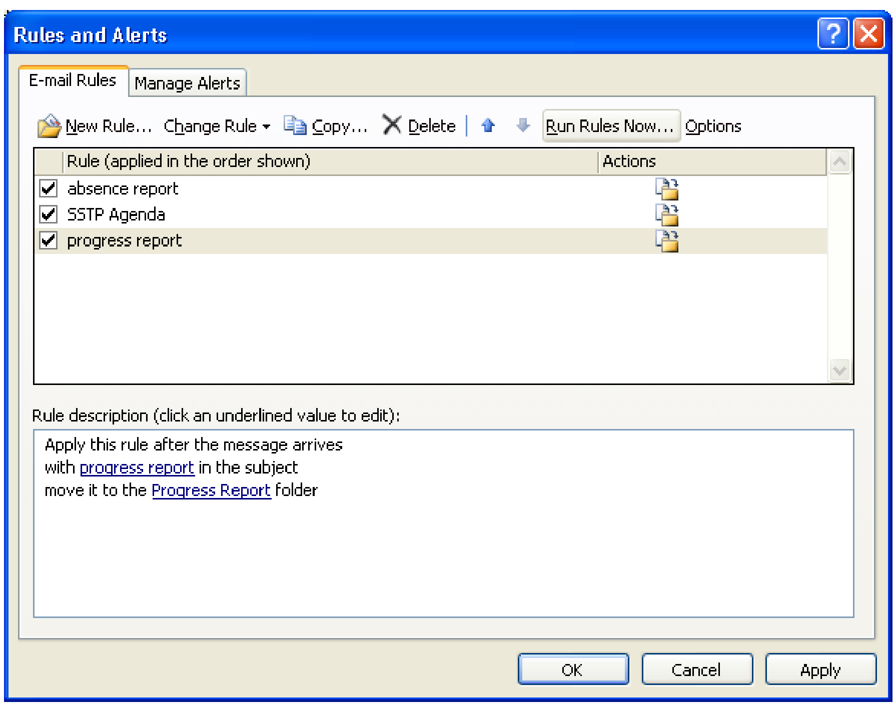


Figure 19 - Rules and Alerts

2. Click the **New Rule…** button. The *Rules Wizard* dialog box opens (see Figure 20).

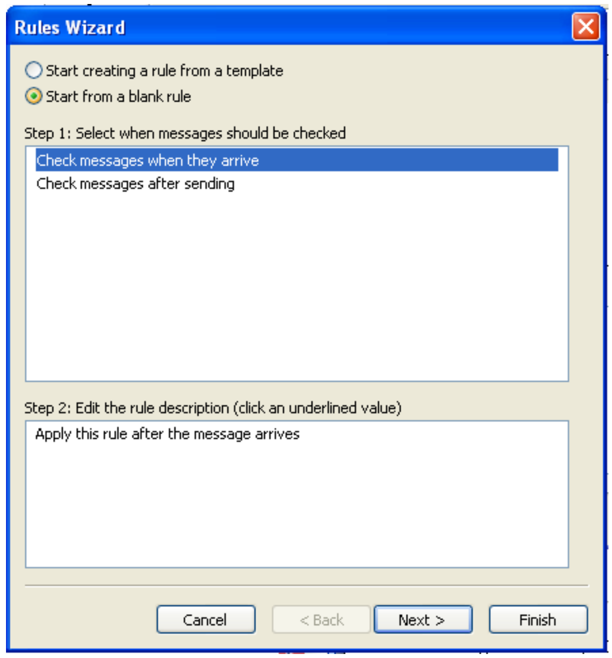


Figure 20 - Start a New Rule

3. Select **Start from a blank rule**.
4. In the ***Step 1*** text box, select when the messages should be checked ► **Next** button.
5. Check or uncheck *condition* check boxes as appropriate. In the ***Step 2*** text box, click on any of the underlined text links to designate specific words, names, or degrees of importance to make the criteria more specific ► **Next** button (see Figure 21).

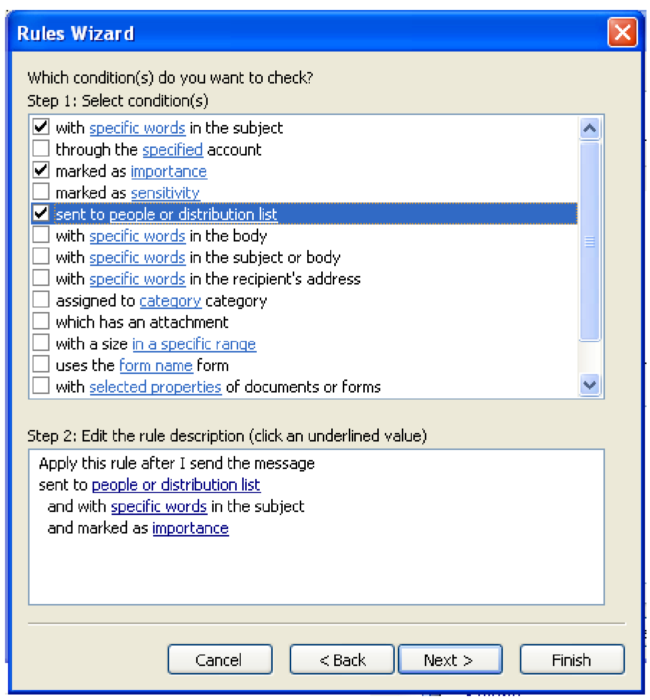


Figure 21 - Edit Rule

6. Check or uncheck *action* check boxes as appropriate. In the ***Step 2*** text box, click on any of the underlined text links to designate specific words, names, or degrees of importance to make the criterion more specific ► **Next** button.

7. Check or uncheck *exception* check boxes as appropriate. In the ***Step 2*** text box, click on any of the underlined text links to designate specific words, names, or degrees of importance to make the criterion more specific ► **Next** button.
8. Specify a name for the rule and click the check boxes as appropriate to setup rule options ► **Finish** button (see Figure 22).

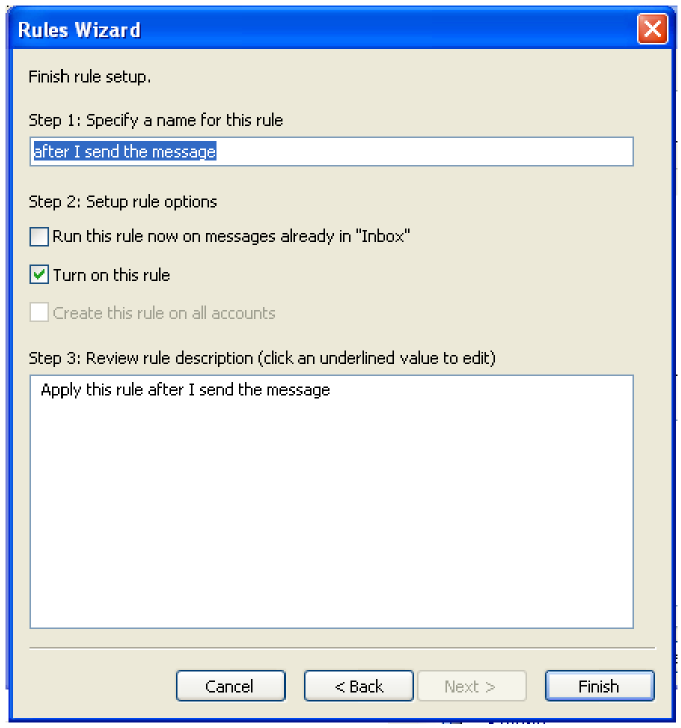


Figure 22 - Finish Setup Rules

9. Click the **OK** button to close the dialog box.

Managing and Monitoring E-mail Messages

Outlook has messaging features such as tracking, delivery status, flagging, and message recall.

MANAGING DRAFT MESSAGES

Outlook will automatically save all incomplete messages. By default, incomplete messages are saved to the **Drafts** folder every three minutes. The time interval and location where draft messages will be saved can be adjusted.

To change the saving time interval or location:

1. Select the **Tools** menu ► **Options…**. The *Options* dialog box opens.
2. In the *Preferences* tab, click the **E-mail Options…** button. The *E-mail* dialog box opens.
3. Click the **Advanced E-mail Options…** button. The *Advanced E-mail Options* dialog box opens (see Figure 23).
4. Click the ***Save unsent items in:*** drop-down arrow to select a different folder such as "***Drafts***," "***Inbox***," "***Sent Mail***," or "***Outbox***."
5. Click the **OK** button on each dialog box to apply the changes and close all the dialog boxes.

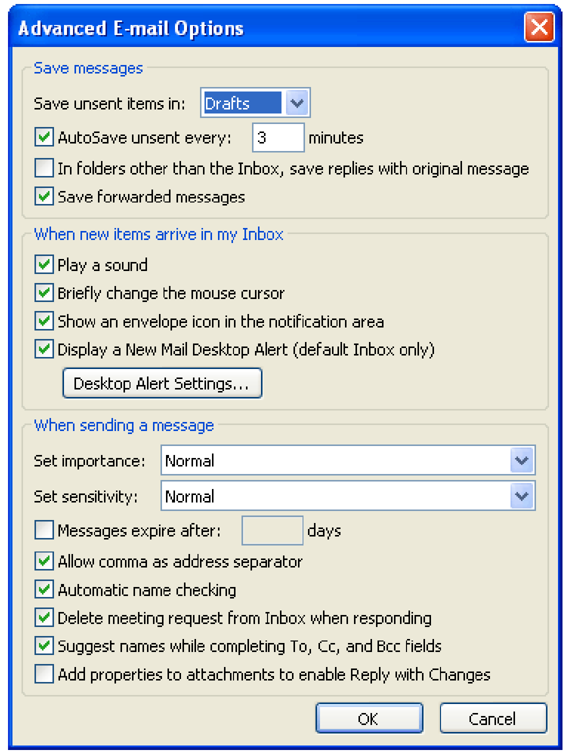


Figure 23 - Advanced E-mail Options

Auto Archive

Automatic archive will set policies on keeping the disk and inbox clean by moving old items from the specified folder to an archive folder.

To change auto archive options:

1. Click **Tools** ► **Options…**. The *Options* dialog box opens.
2. Click the **Other** tab ► **AutoArchive…** button. The *AutoArchive* dialog box opens.
3. Select the frequency of Auto Archive activation, where archived messages will be saved, and what happens to messages older than a specified period of time.
4. Click the **OK** button twice to close all dialog boxes and apply the changes or updates.

Once the auto archive rules have been set, messages that meet the specified criterion will automatically be moved from the server to the specified folder. This folder is usually located on the local machine.

NOTE: Archive folders are a type of personal storage folder with a file extension of "***.pst***". More information on how to manage the .pst files is provided in the **Managing E-mail Disk Quotas** handout (http://www.calstatela.edu/its/docs/pdf/outlookquota.pdf).

Monitoring E-mail Account Size

Storage space on all campus e-mail accounts and Public Folders is limited to two gigabytes (2 GB) – the equivalent of approximately 82,000 average-size messages (25 KB each). Using the Microsoft Outlook client, it is possible to monitor the e-mail account size and determine how close an individual account is to the size limit.

To check e-mail account size from Microsoft Outlook:

1. Select the **Tools** menu ► **Mailbox cleanup…**. The *Mailbox Cleanup* dialog box opens (see Figure 24).
2. Click the **View Mailbox Size…** button. The *Folder Size* dialog box opens (see Figure 25).
3. The account size can be seen in the ***Total size (including subfolders):*** field. The example in has an account size of "***97895 KB***," or approximately 98 megabytes (well below the 2 GB size limitation).
4. Close all open dialog boxes.

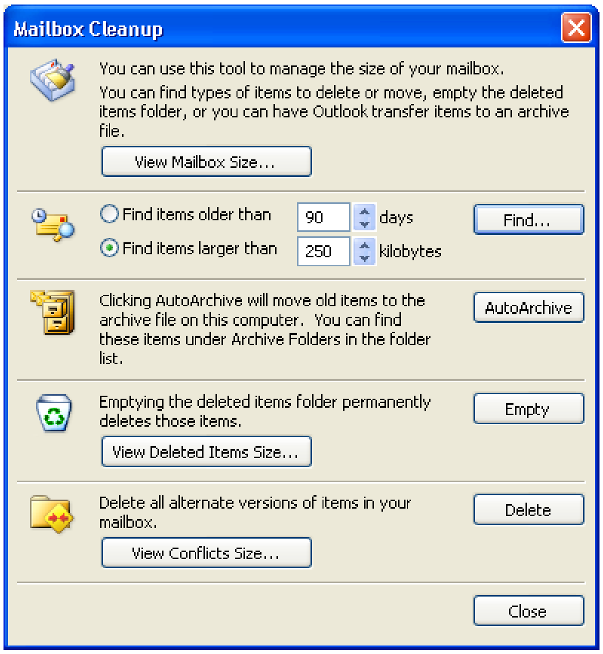


Figure 24 - Mailbox Cleanup Dialog Box

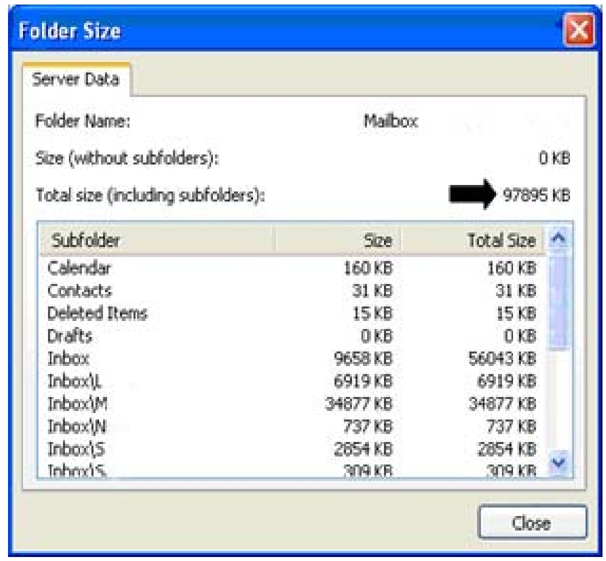


Figure 25 - Folder Size Dialog Box

Tracking Features

Outlook has tracking features to determine how Outlook handles delivery and read receipts. When the tracking options are enabled, different notification icons will appear in the "***From***" column of the ***Inbox***.

Setting Message Tracking Options

The *Tracking Options* dialog box is used to track all messages automatically, track a specific message using the *Message Option* dialog box within the message, or to specify which folders to move the receipts to (e.g., the ***Deleted Items*** folder).

To set tracking options:

1. Select the **Tools** menu ► **Options…** command. The *Options* dialog box opens.
2. In the *Preference* tab, click the **E-mail Options…** button. The *E-mail Options* dialog box opens (see Figure 26).
3. Click the **Tracking Options…** button under the *Message handling* section. The *Tracking Options* dialog box opens (see Figure 27).
4. Click the appropriate check boxes to specify the tracking options to use. For example, click the ***Read Receipt*** and/or the ***Delivery Receipt*** check boxes.
5. Click the **OK** buttons on all open dialog boxes to confirm the changes.

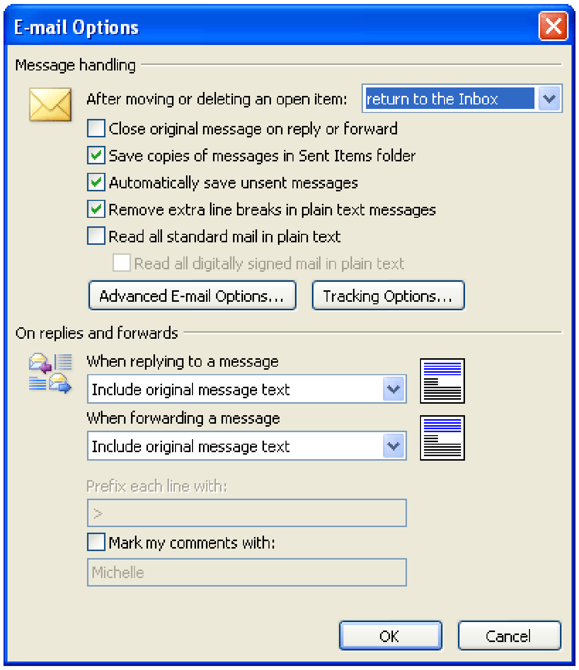


Figure 26 - E-mail Options Dialog Box

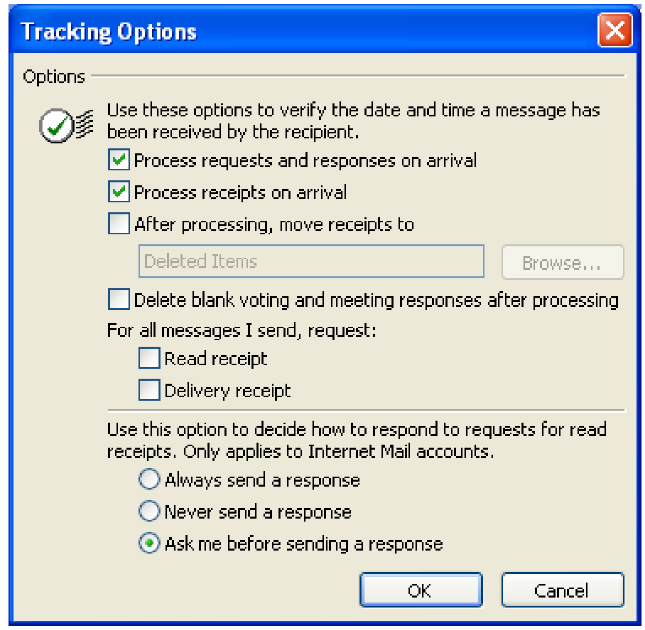


Figure 27 - Tracking Options

NOTE: ***Read Receipt*** and ***Tracking Information*** will only be generated when the recipient is using an Internet Mail-based system. Also, the read response sent by an Internet Mail recipient will depend on the option buttons chosen: ***Always send a response***, ***Never send a response,*** and ***Ask me before sending a response*** (see Figure 27).

VIEWING THE MESSAGE DELIVERY STATUS

Messages that contain tracking information will appear with an icon (e.g., the envelope with an information symbol). The ***Sent Items*** folder displays a table containing the delivery information for each receipt (see Figure 28).

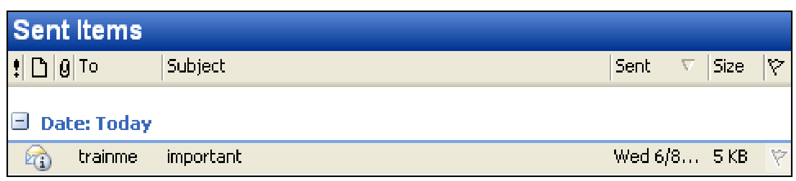


Figure 28 - Information Symbol

When message tracking options have been enabled, the "***Delivered***" status of a message will appear (see Figure 29).

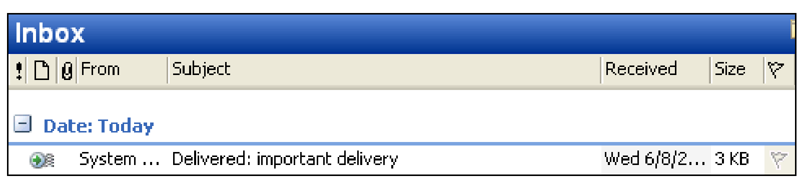


Figure 29 - Delivered Message

If the message has been read the "***Read***" status of the message will be displayed (see Figure 30).

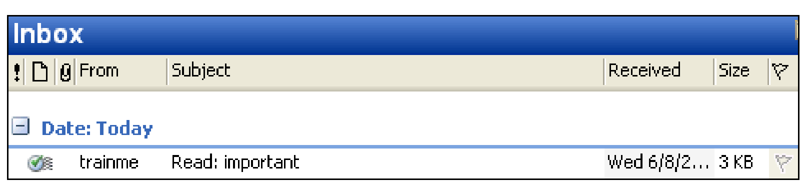


Figure 30 - Read Message

To view the message delivery status:

1. Open the ***Sent Items*** folder.
2. Double-click a message that contains the information symbol . The message opens in the **Message** window.
3. Select the *Tracking* tab. The delivery status of the message and other relevant information appears (see Figure 31).

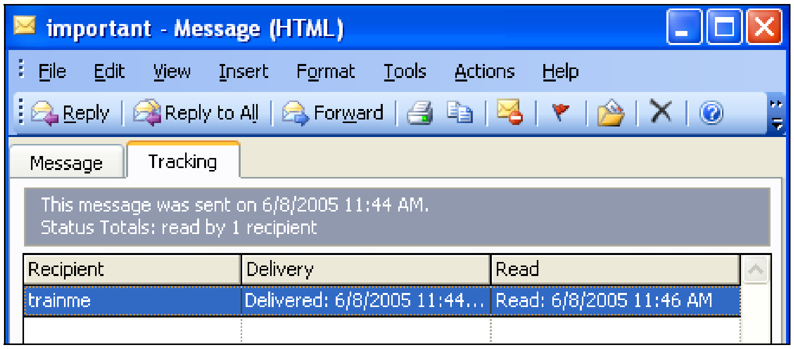


Figure 31 - Tracking Tab

Recalling a Message

Outlook supports the recalling of sent messages before being read. When a message is recalled, details or information about it will appear in the Sent Items folder (see Figure 32).

Figure 32 - Message Recall

Messages can be as long as the recipients have not read them or if the message is still in the same Exchange server.

NOTE: Messages sent to recipients who use other mail servers cannot be recalled.

To recall a message:

1. Open the ***Sent Items*** folder.
2. Double-click the message to recall.
3. Select the **Actions** menu ► **Recall This Message…** (see Figure 33).
4. The *Recall This Message* dialog box opens (see Figure 34).
5. Choose the recall options as desired ► **OK** button.

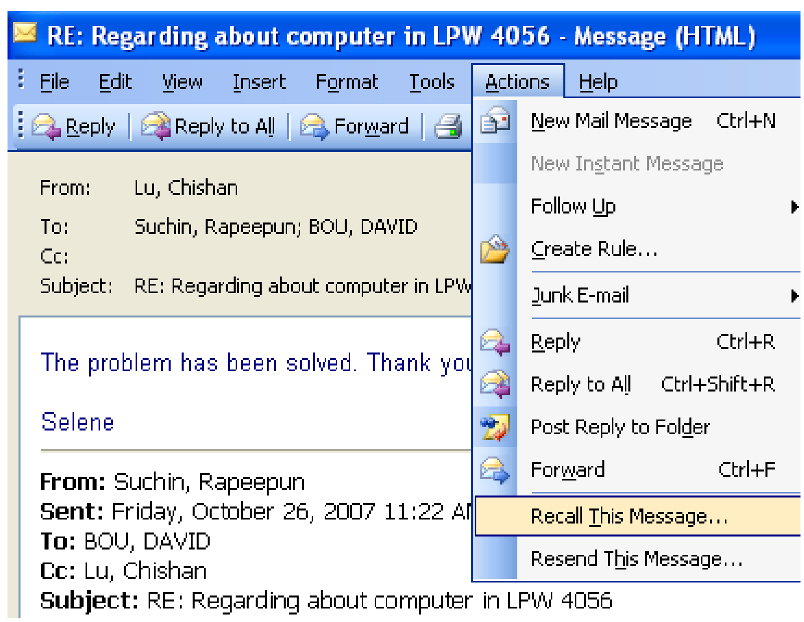


Figure 33 - Recall This Message Option

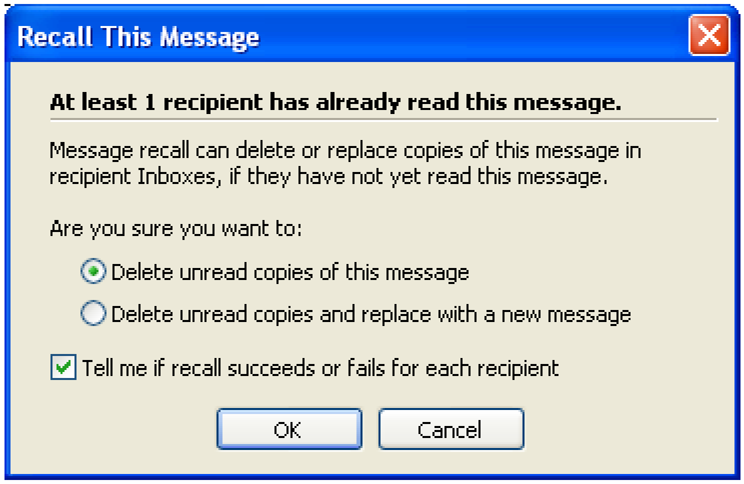


Figure 34 - Recall This Message Dialog Box

NOTE: Clicks the ***Tell me if recall succeeds or fails for each recipient*** check box in the *Recall This Message* dialog box, a notification reporting the success or failure of each recall attempt will be displayed. The notification will appear in the **Inbox** folder as a message with the subject of "***Message Recall Success***" or "***Message Recall Failure***".

After recalling a message, the recipient of the message will see the message with the recall icon in the mailbox (see Figure 35).

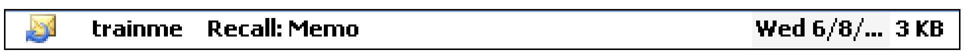


Figure 35 - Recall Notice

If the recipient attempts to open a recalled message, a *Message Recall* dialog box will display on the screen (see Figure 36).

Figure 36 - Message Recall Information

Click the **OK** button to acknowledge the recall. The unavailable message symbol will be displayed and the text of the message will appear as in Figure 37.

Figure 37 - Unread Message Due to Recall

The overall effect was to delete the message from the recipient's system before it was read.

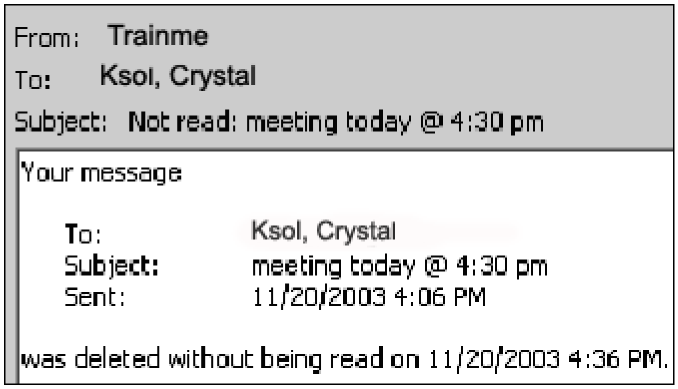


Figure 38 - Confirmed Deletion of Message After Recall

If the recall was successful the sender will receive a notification as seen in Figure 39.

Figure 39 - Message Recall Success

Working with Junk Mails

Junk mail is unsolicited e-mail that is delivered to the e-mail account. The University offers an anti-spam service to give control over their personal spam quarantine through a web interface called *Quarantine Manager*. Outlook provides several additional tools for dealing with the problem of junk mail.

SETTING JUNK MAIL OPTIONS

By default, the junk e-mail option is set to the "***Low***" level of protection, but can be changed. There are four levels of junk mail protection provided in this program (see Table 1).

Table 1 - Junk E-mail Protection Level

Protection Level	Description
No Protection	Turns off Junk E-mail filtering.
Low	This is the default setting. Only the most obvious junk e-mail is moved to the Junk E-mail folder.
High	Catches most of the junk e-mail, but may also mistakenly include some regular mail. When this level is selected, the Junk Mail folder should be checked regularly.
Safe Lists Only	The highest level of protection. Only messages from those senders on the Safe Senders or Safe Recipients list are delivered to the Inbox. All other mail is delivered to the junk Mail folder.

To set the junk e-mail protection level:

1. Select the **Tools** menu ► **Options**. The *Options* dialog box opens.
2. Click the **Junk E-mail…** button in the *E-mail* section. The *Junk E-mail Options* dialog box opens (see Figure 40).
3. Select the level of e-mail protection ► **OK** button.
4. Click the **OK** button to close the *Options* dialog box.

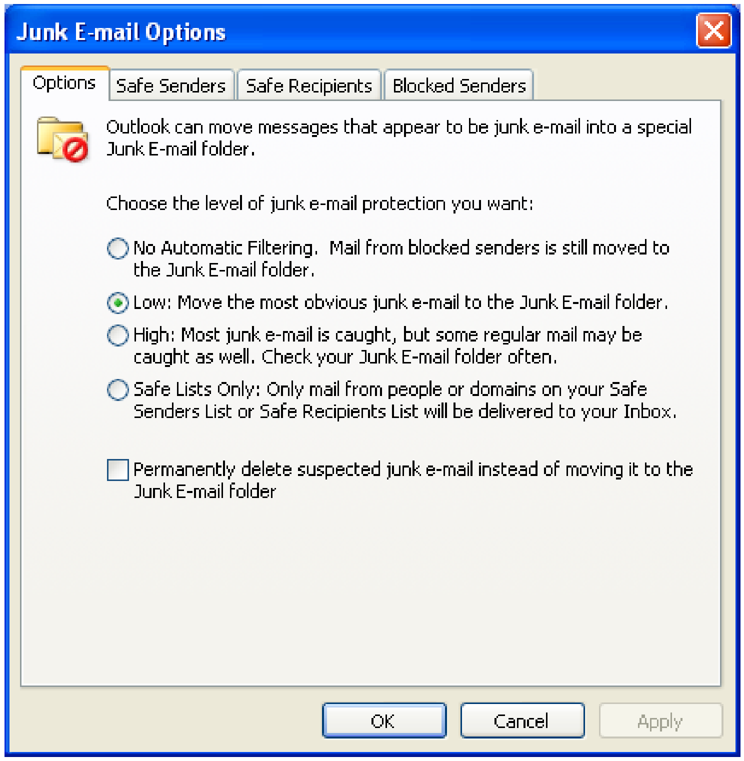


Figure 40 - Junk E-mail Options Dialog Box

ADDING SENDERS TO THE JUNK SENDERS LIST

Outlook can organize and move selected messages to a specific folder simply by dragging and dropping messages from one folder to another. It is also possible to color code the messages for easy identification. The ***Organize*** feature also helps filter unwanted junk mail from bulk marketing or unsolicited senders.

To add senders to the Junk Senders list:

1. From the ***Inbox*** select a message from the sender whose messages Outlook should automatically delete.
2. Select the **Actions** menu ► **Junk E-mail** ► **Add Sender to Blocked Senders list**.
3. A warning prompt will appear. Click the **OK** button (see Figure 41).

Figure 41 - Block Senders List Warning Prompt

NOTE: Right-clicking the message will bring up a shortcut menu, select the **Junk E-mail** menu option. The ***Blocked Senders list*** displayed blocker senders and can be used to add or remove e-mail addresses from it.

Adding to the Junk Filter Lists

Outlook provides three different lists that can be used to add names to for filtering junk e-mail. The lists are the ***Safe Senders List***, the ***Safe Recipients List***, and the ***Blocked Senders List***. Names on these lists can include individual e-mail addresses or domains. If a domain is added to a list, all e-mail from people in that domain will be classified as part of the list.

To add names to a Junk E-mail filter list:

1. Select the **Tools** menu ► **Options**. The *Options* dialog box opens.
2. Click the **Junk E-mail…** button. The *Junk E-mail Options* dialog box opens (see Figure 40).
3. Select the appropriate tab for the list to add names to (e.g., the *Block Senders* tab).
4. Click the **Add…** button. The *Add address or domain* dialog box opens (see Figure 42).

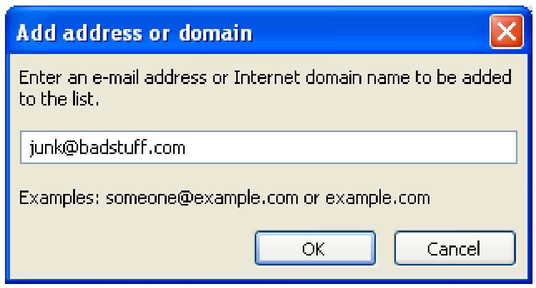


Figure 42 - Add Address or Domain Dialog Box

5. Type the e-mail address or domain name ► **OK** button. The *Add address or domain* dialog box closes and the name appears in the ***Blocked Senders*** list.
6. If there are additional e-mail addresses or domain names to add, repeat the steps 4 and 5.
7. When finished adding senders, click the **OK** button to close the *Junk E-mail Options* dialog box.
8. Click the **OK** button to close the *Options* dialog box.

VCard

A vCard is an electronic equivalent of a visit card. It is a simple small file encapsulating all of the information of a contact. It can be shared with the corresponding parties and integrated into the Address Book with only a few clicks.

Creating a vCard

Any contact in the address book can be converted into a vCard.

To create a vCard:

1. In the **Navigation** Pane click **Contacts**.
2. Open the contact to save as a vCard.
3. Fill in the desired information and select the **File** menu ► **Export to vCard file…**. The *VCARD File* dialog box opens.
4. Name the file and save it by clicking the **OK** button

   NOTE: Pay attention to the location of the saved file.

Sending a vCard

The personal vCard can be attached to e-mails sent to newly established acquaintances that might need the contact information.

To send a contact as a vCard to others:

1. In the **Contacts** Pane, click any of the contacts to be sent as a vCard, go to the **Actions** menu ► **Forward as vCard**.
2. Select the recipients to receive the vCard (see Figure 43). The vCard is in the attachment.

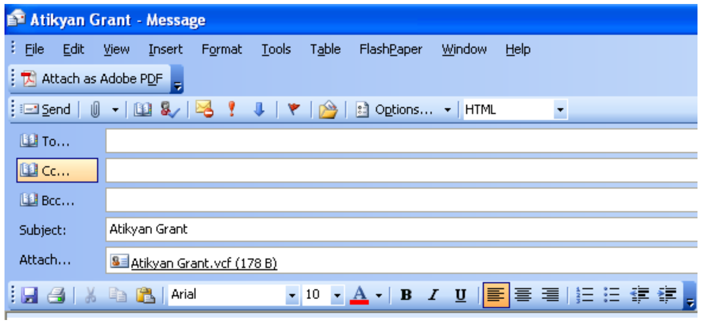


Figure 43 - Send a vCard

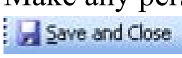
To include a ***".vcf"*** file as an attachment:

1. Refer to the *Creating a vCard* section above to create a vCard file.
2. Start a new e-mail message. Click the **Insert** menu ► **File…**. The *Insert File* dialog box opens.
3. Navigate to the "***.vcf***" file and click the **Insert** button. The vCard is now attached to the e-mail message.

IMPORTING A VCARD

When a vCard is received as an attachment to an incoming e-mail, it can be integrated into the list of contacts.

To import a vCard:

1. Open the e-mail that has the vCard file attached to it.
2. Double-click the ***".vcf"*** attachment. Outlook opens the **Contact** window (see Figure 44) with the information e-mailed.
3. Make any personal adjustments to the data and click the **Save and Close** button  on the **Standard** toolbar. The contact information will now appear in the ***Contact*** list.

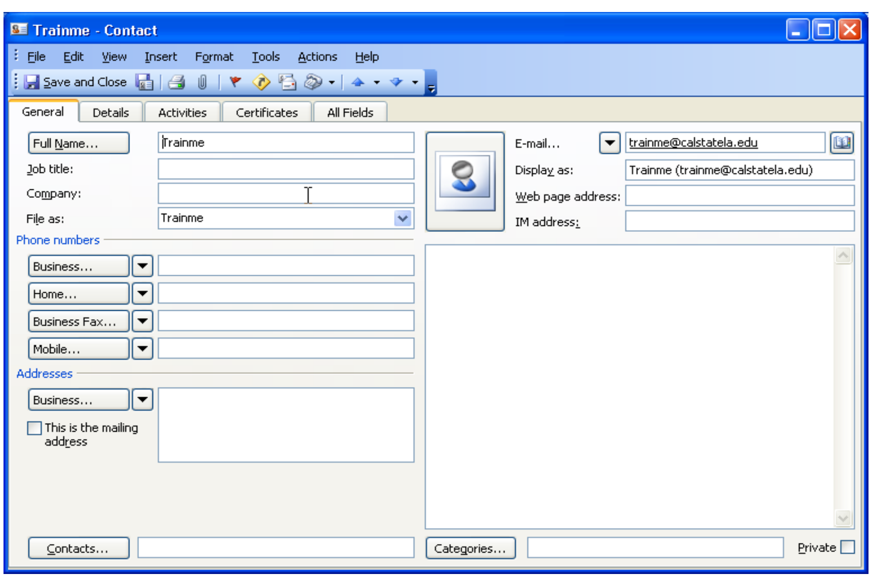


Figure 44 - Contact Window

Information Security Tips

For more on Information Security, visit:

- User Guidelines for E-mail Communications: http://www.calstatela.edu/its/policies/ITS-1000-G_EmailCommunications.pdf
- Information Security Tips: http://www.calstatela.edu/its/itsecurity/tips