

Using Microsoft Office 2007 Intermediate Outlook Handout

INFORMATION TECHNOLOGY SERVICES
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Intermediate Microsoft Outlook 2007

Microsoft Outlook 2007 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 2007** handout. Features that are covered in this handout include Tasks, Notes, Calendar Pane, Auto Archive, Tracking messages, vCards, and managing junk e-mail.

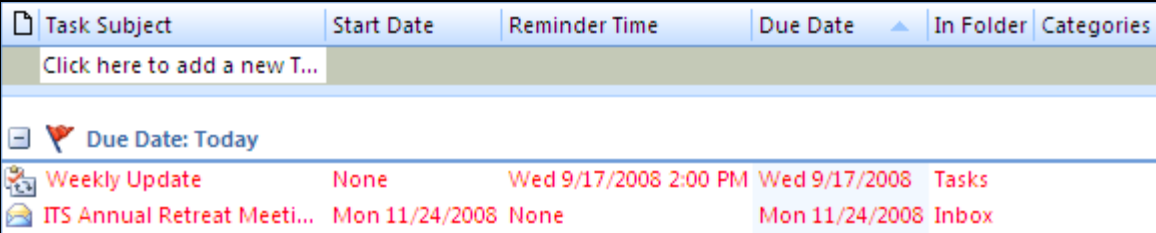
More information about Outlook can be found at <http://www.calstatela.edu/outlook>.

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.



Task Subject	Start Date	Reminder Time	Due Date	In Folder	Categories
Click here to add a new T...					
Due Date: Today					
Weekly Update	None	Wed 9/17/2008 2:00 PM	Wed 9/17/2008	Tasks	
ITS Annual Retreat Meeti...	Mon 11/24/2008	None	Mon 11/24/2008	Inbox	

Figure 1 - Example of Tasks

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

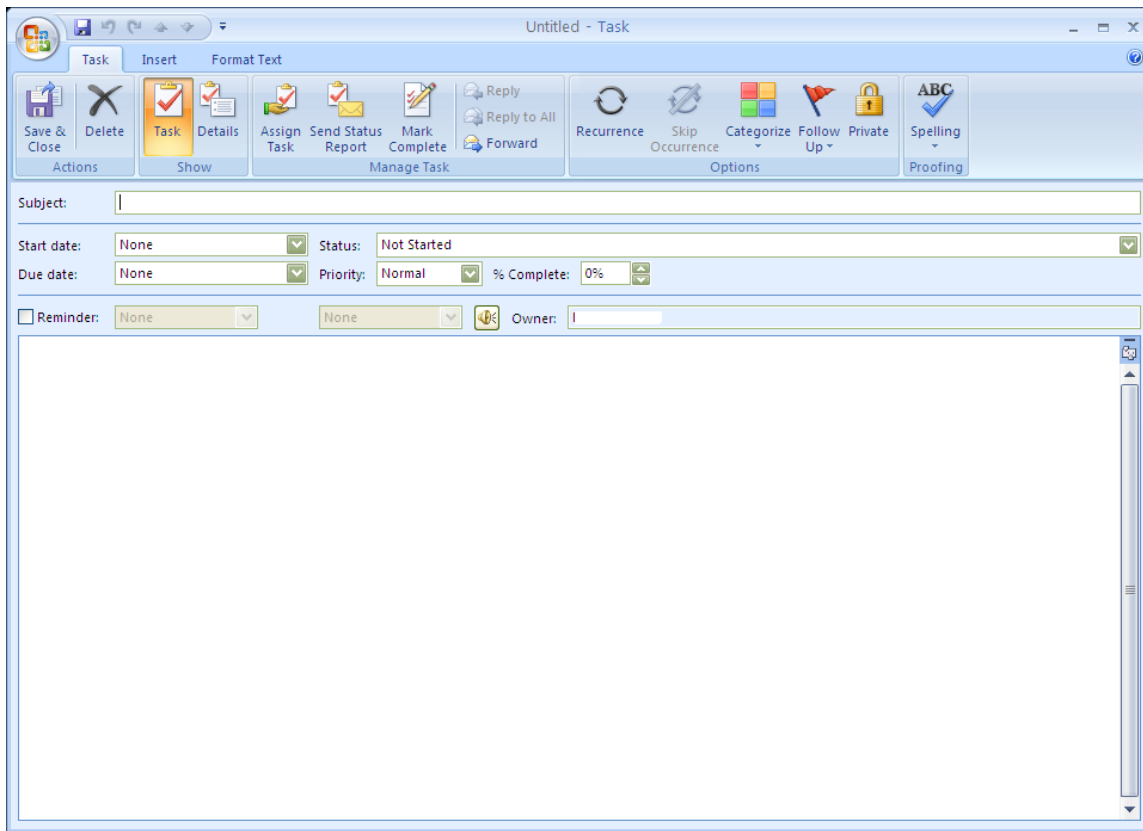


Figure 2 - Setting a Task Dialog Box

Outlook also provides a recurrence attribute that can be set once and 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. Click the **Recurrence** button in the *Options* group on the *Task* tab on the **Ribbon**. The *Task Recurrence* dialog box opens (see Figure 3).

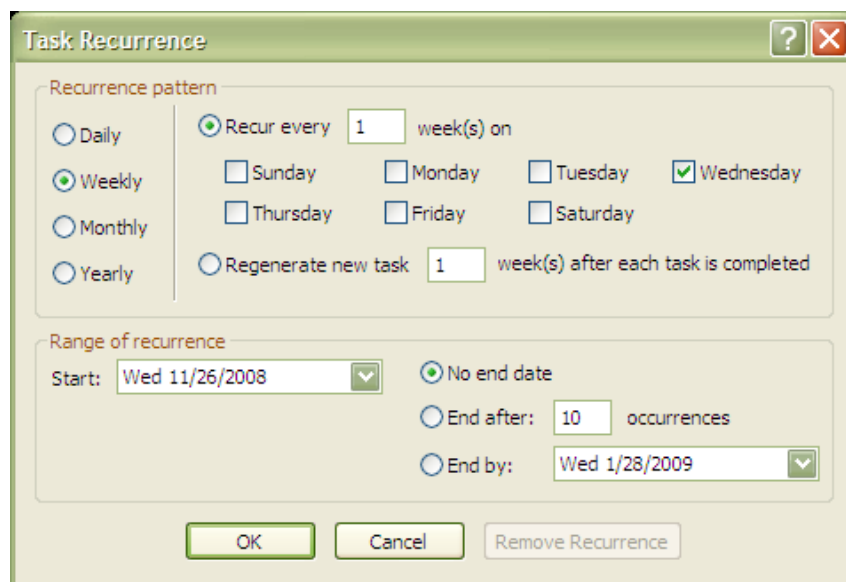


Figure 3 - Task Recurrence Dialog Box

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

To mark a task as completed:

1. Open **Tasks**.
2. Right-click the task and select the **Mark Complete** option.

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 the **Assign Task** button in the **Manage Tasks** group on the **Task** tab of the **Ribbon**.
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 areas to save information. Notes can be assigned different categories and color-codes, 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 by using different colors.

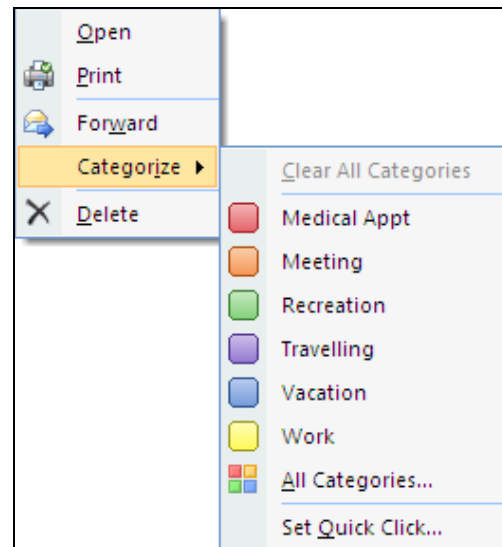


Figure 4 - Color Categories for Notes

To color-code the notes:

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

Or:

- Click the note icon  on an open note ► **Categorize** ► 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 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.

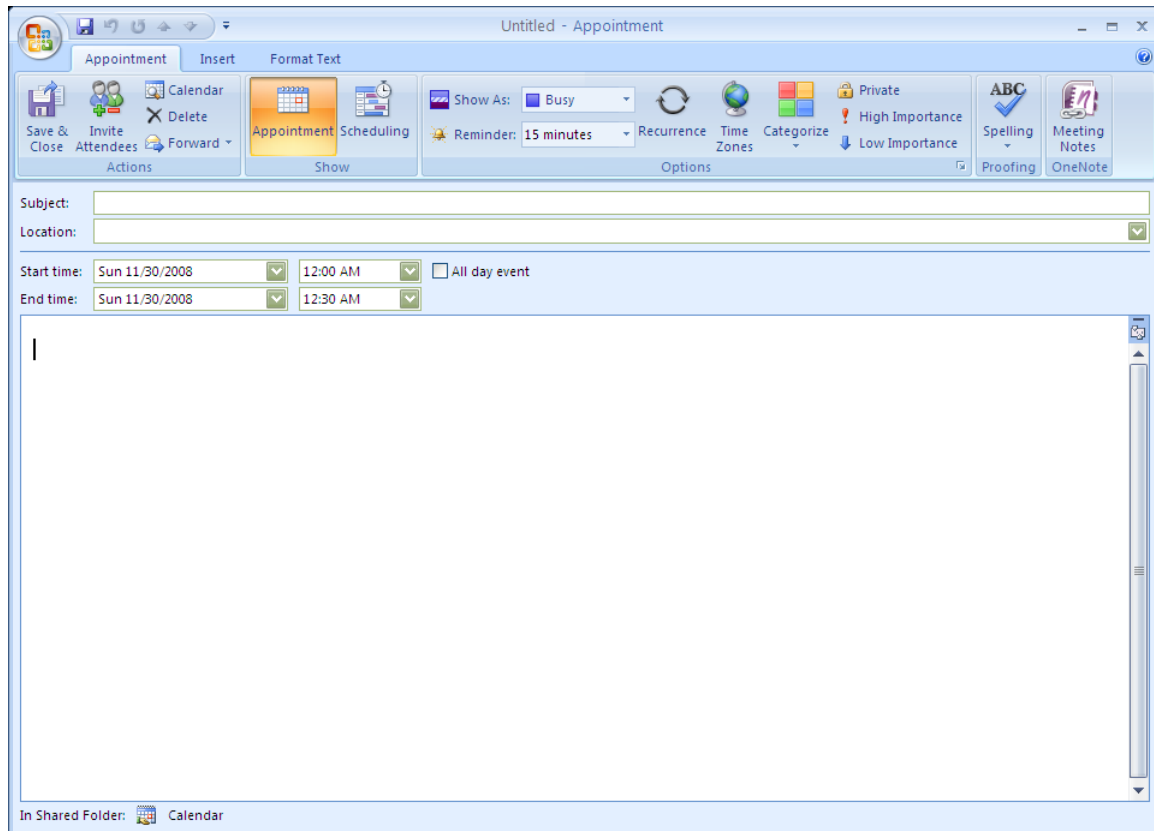


Figure 5 - The Appointment Window

To create a new appointment:

1. Click the **Calendar** button on the **Navigation Pane**.
2. Click the **New** button. The *Appointment* window appears (see Figure 5).
3. Type a subject and the location for the appointment.
4. Adjust the **Start time:** and **End time:** using the drop-down list as desired.
5. Click the **Reminder:** drop-down arrow and choose a reminder sound.
6. Select the **Show As:** drop-down arrow to see availability (e.g. Free/Tentative/Busy/Out of Office).
7. Type the details about the appointment.
8. Click the **Save & Close** button.

ORGANIZING MEETINGS

Outlook can set a meeting time on the *Calendar*, create an appointment, and 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 (see Figure 6).

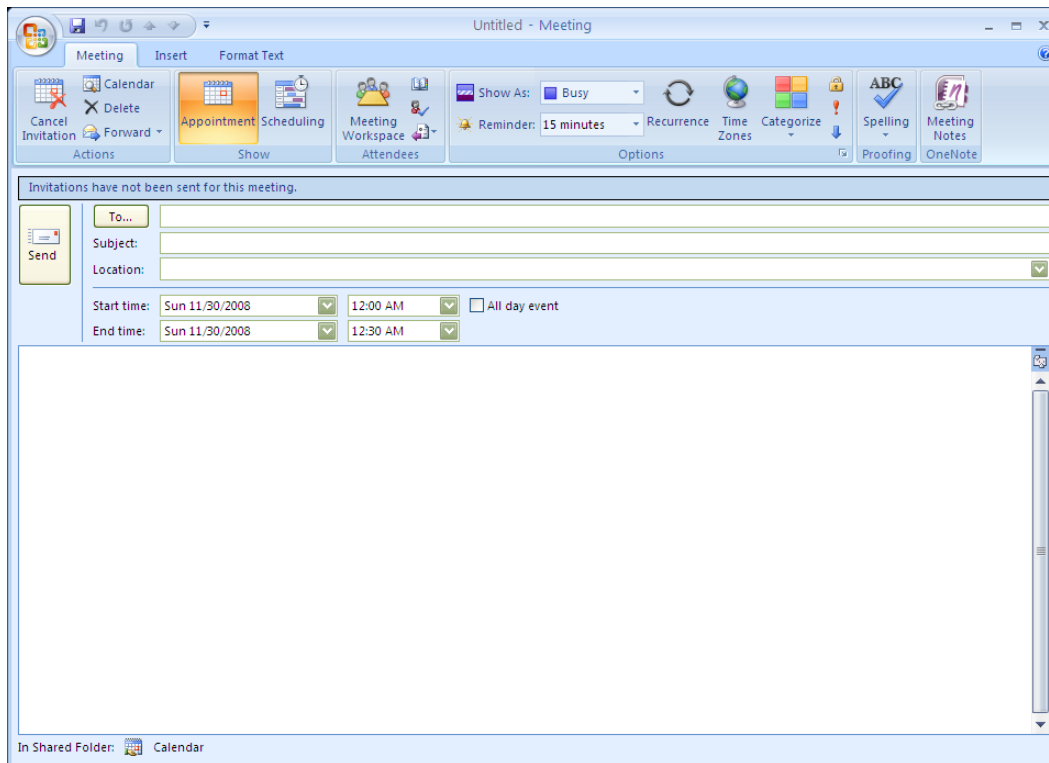


Figure 6 - Meeting Request Window

2. Click the **Required** or **Optional** button to add attendees indicated in the obligation box (see Figure 7).

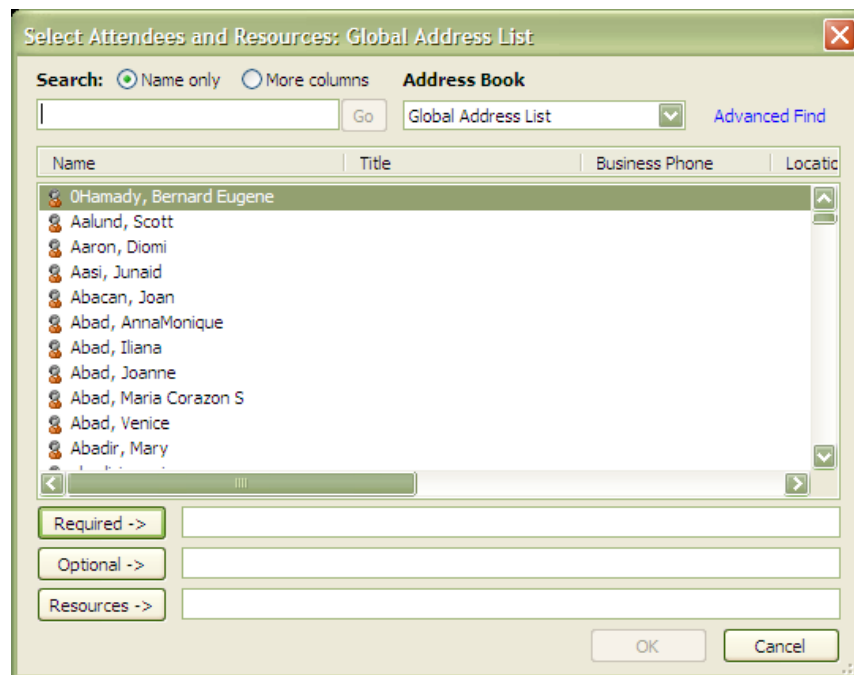


Figure 7 - Select Attendees and Resources Window

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).

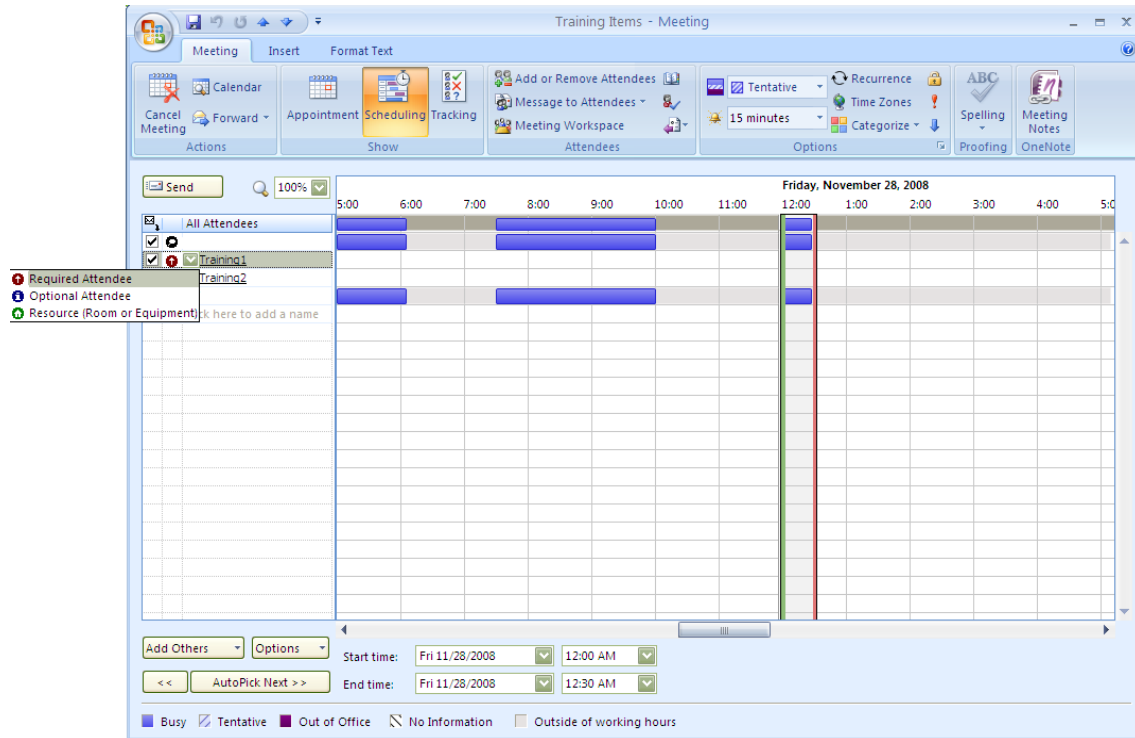


Figure 8 - Scheduling Tab

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 the appropriate options under the *Recurrence pattern* and *Range of recurrence* sections (see Figure 9).
8. Click the **OK** button to go back.

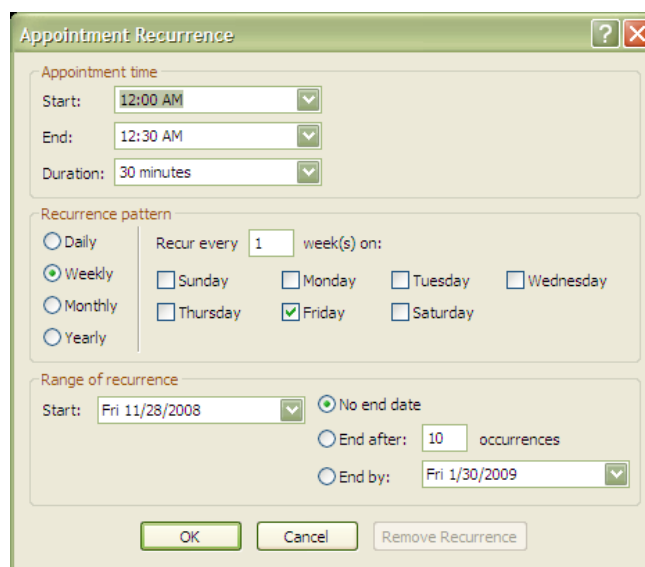


Figure 9 - Appointment Recurrence Dialog Box

9. Click the **Send** button. All the attendees will receive a meeting invitation which can be responded to using the commands in the **Respond** group on the *Meeting* tab of the **Ribbon** (see Figure 10).

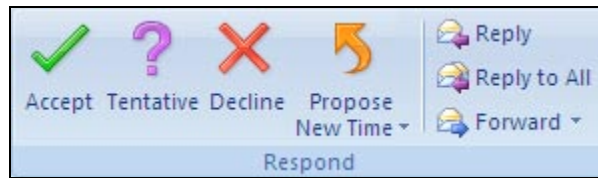


Figure 10 – Respond Group

COLOR-CODING THE CALENDAR

Appointments and meetings can be color coded to indicate use. Labels can be defined by color or via pre-defined labels 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. Select the **Categorize** option.
4. Select a color-coded label from the list (see Figure 11).

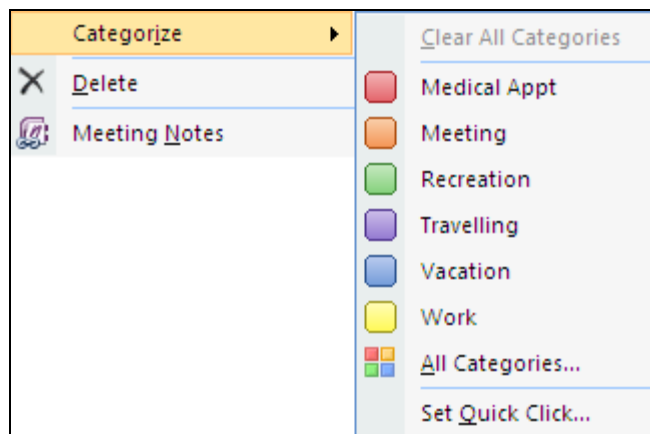



Figure 11 - Calendar Color Labels

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 **Categorize** button  on the **Standard** toolbar ► **All Categories...**. The *Color Categories* dialog box opens (see Figure 12).
3. Select the color to rename ► **Rename** button ► type in the new name ► **OK** button.

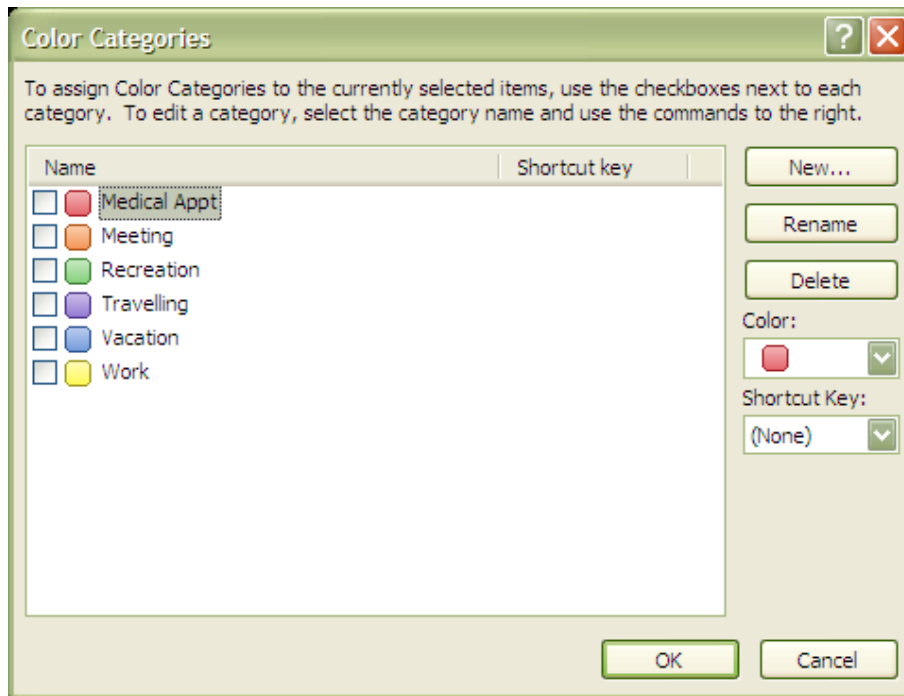


Figure 12 - Edit Calendar Labels Window

CONFIGURING CALENDAR

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

To configure the calendar:

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

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 **T**ools menu ► **O**ptions. 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 **Add ->** to add to delegate list.
5. Click the **OK** button.
6. The *Add Users* dialog box appears (see Figure 16).
7. Set up desired standard.
8. Click **OK** ► **A**pply.

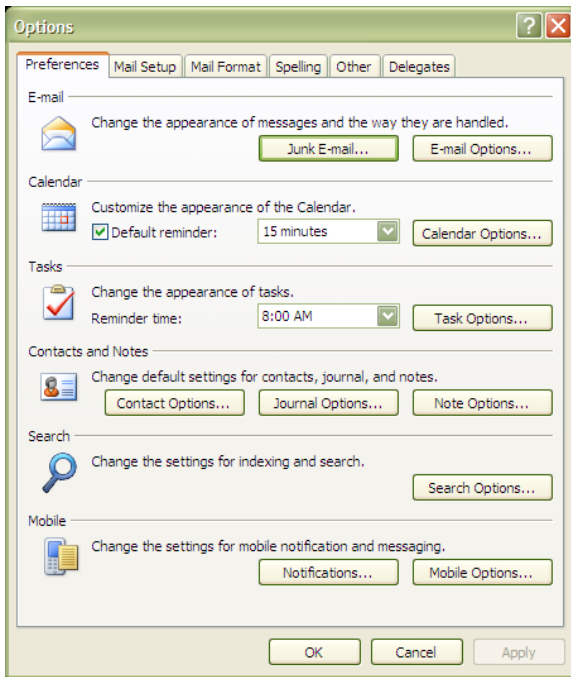


Figure 13 - Options Dialog Box

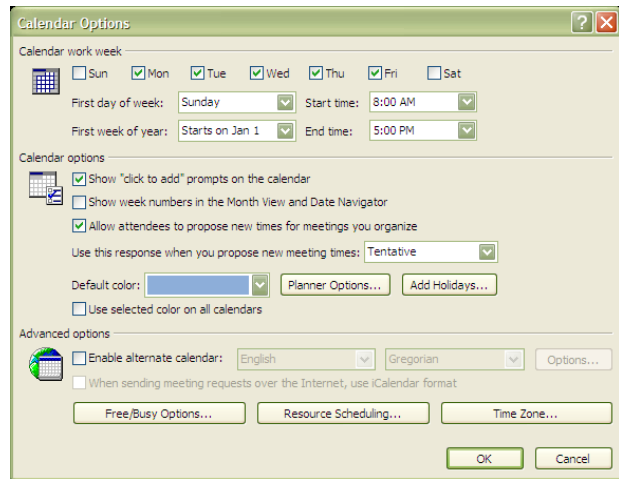


Figure 14 - Calendar Options Dialog Box

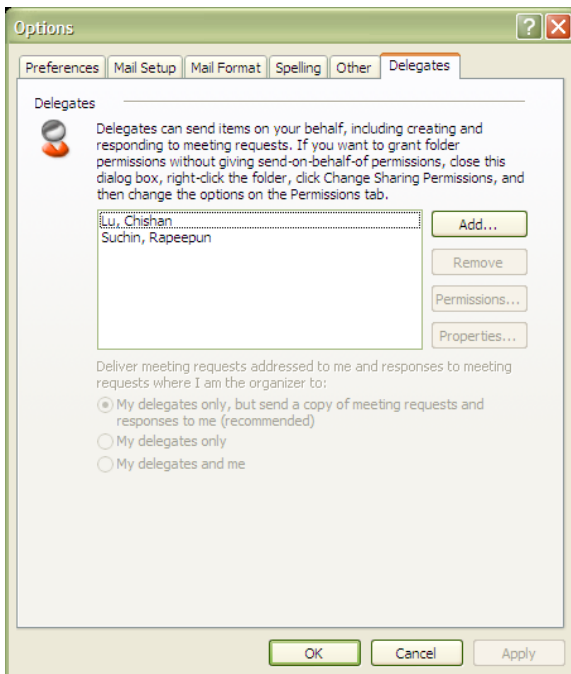


Figure 15 - Delegates

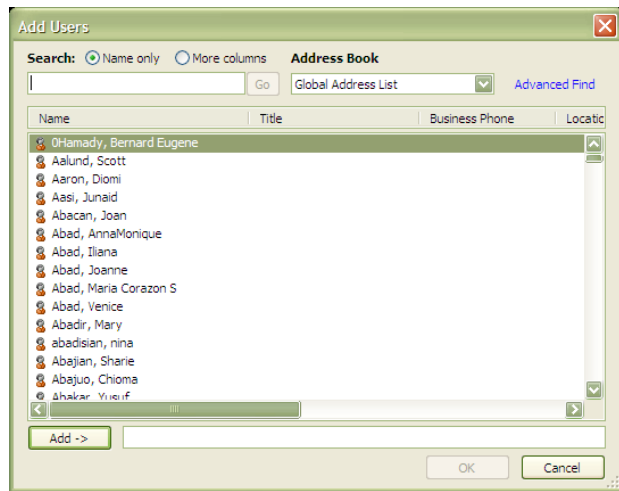



Figure 16 - Delegate Permissions Dialog Box

VIEW GROUP SCHEDULES

It is helpful to view a co-worker's schedule before designating 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* in the **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**.

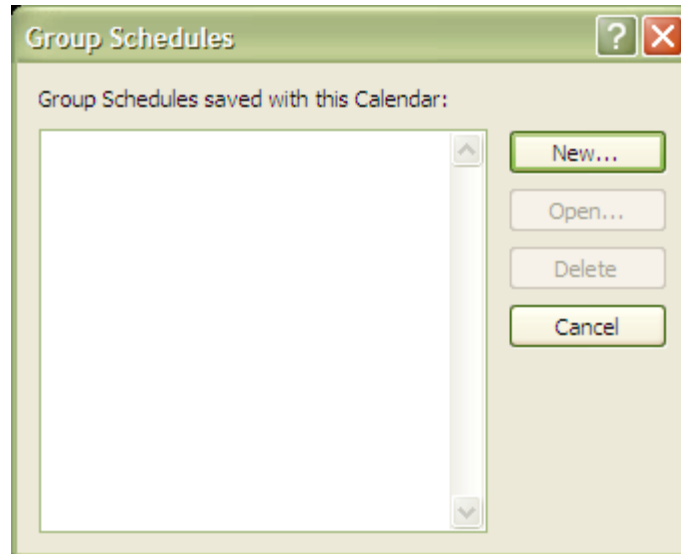


Figure 17 - Group Schedules

4. In the new group dialogue box (see Figure 18), click **Add Others** 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.
6. Click the **Save and Close** button to save any changes and close the dialog box.

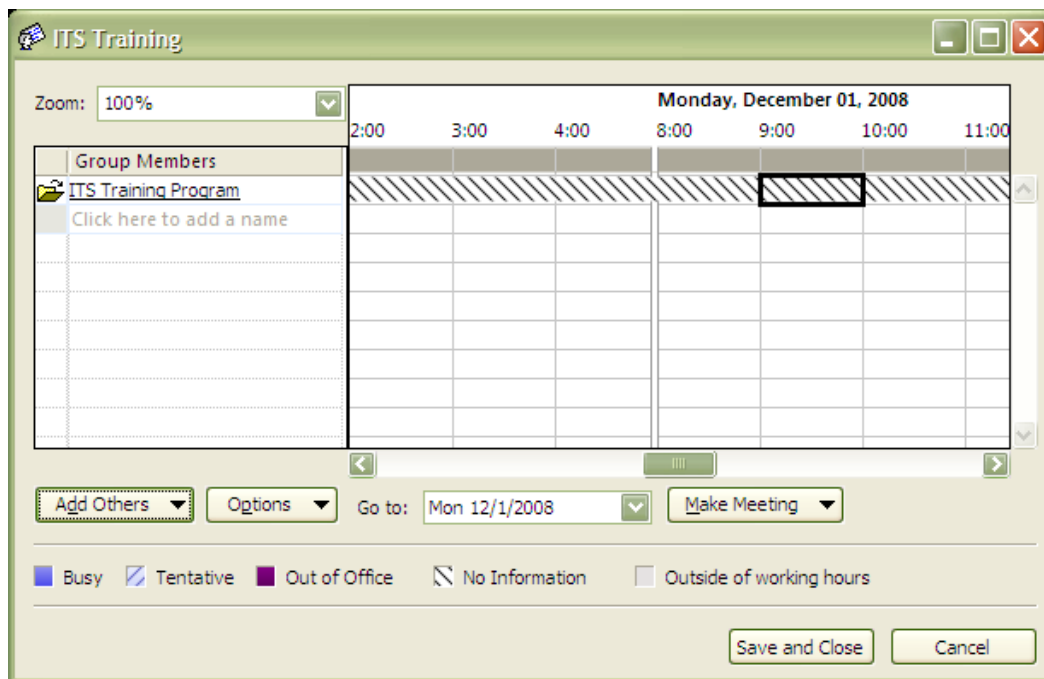


Figure 18 - The New Group

Using Rules and Alerts

Rules help make work more efficient by automating actions.

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

To use the rules and alerts:

1. In the *Mail* option, select the **T**ools menu ► **R**ules and Alerts... The *Rules and Alerts* dialog box opens (see Figure 19).

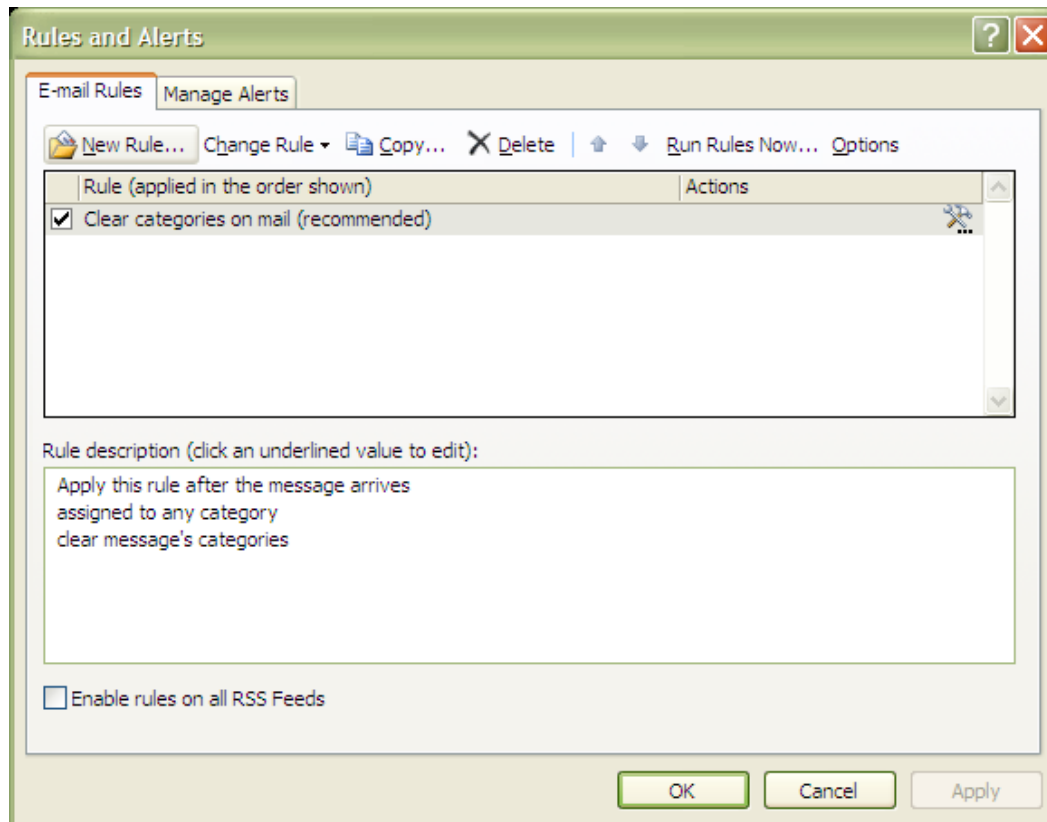


Figure 19 - Rules and Alerts

2. Click the **N**ew Rule... button. The *Rules Wizard* dialog box opens (see Figure 20).
3. Select the template or blank rule ► **N**ext button.
4. Select the conditions for the rule in the *Step 1: Select condition(s)* section of the dialog box (Figure 21).
5. Depending on the rule, values may have to be set in the *Step 2: Edit the rule description (click an underlined value)* section ► **N**ext button.

NOTE: Clicking on any of the underlined text links allows the user to designate specific words, names, or degrees of importance to make the criteria more specific.

6. Check or uncheck any exceptions to the rule (see Figure 22) ► **N**ext button.
7. Specify a name for the rule and click the check boxes as appropriate to set up rule options (see Figure 23) ► **F**inish button.
8. Click the **O**K button to close the *Rules and Alerts* dialog box.

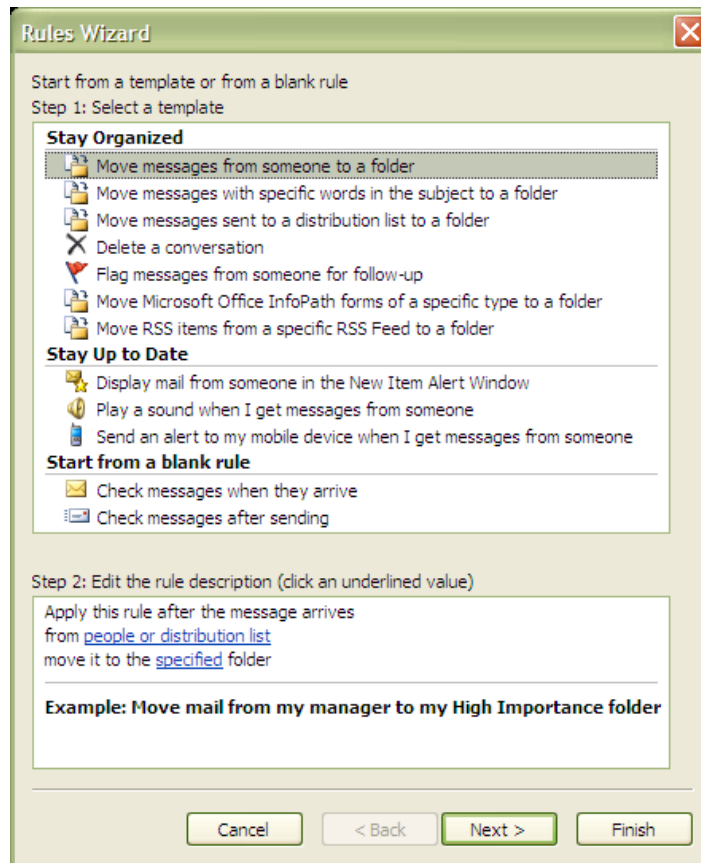


Figure 20 - Start a New Rule

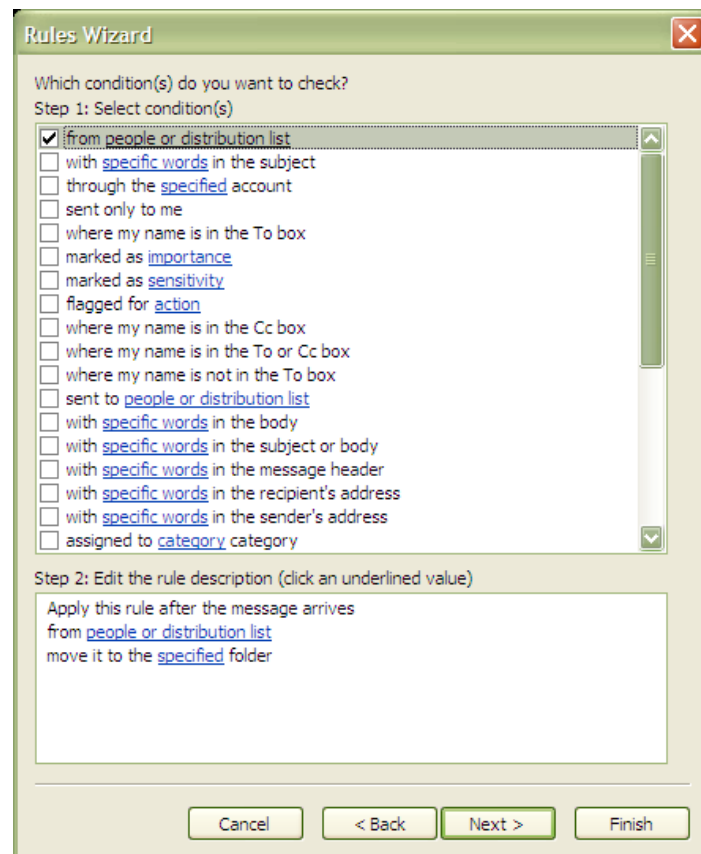


Figure 21 – Select Condition(s)

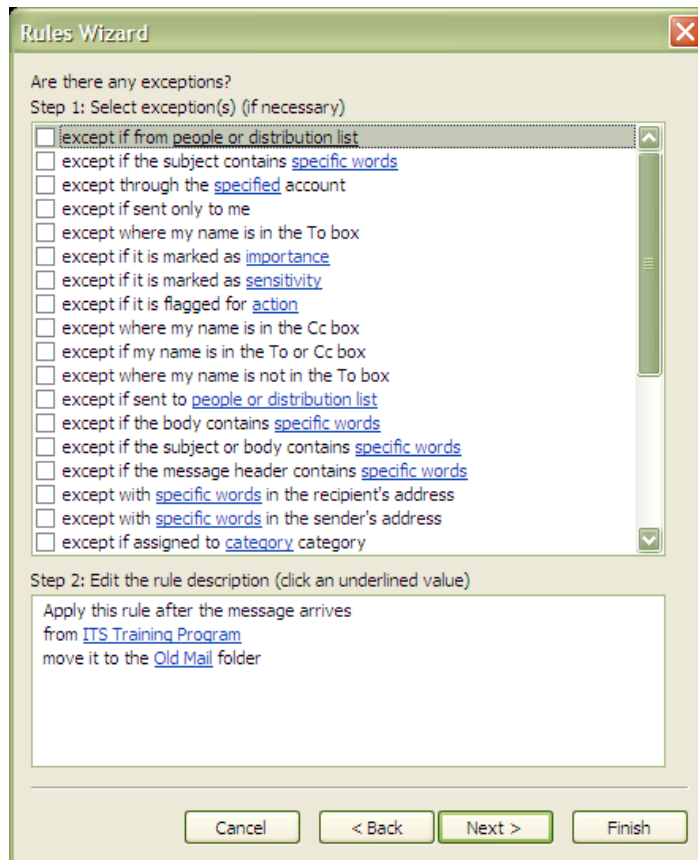


Figure 22 - Setting Rule Exceptions

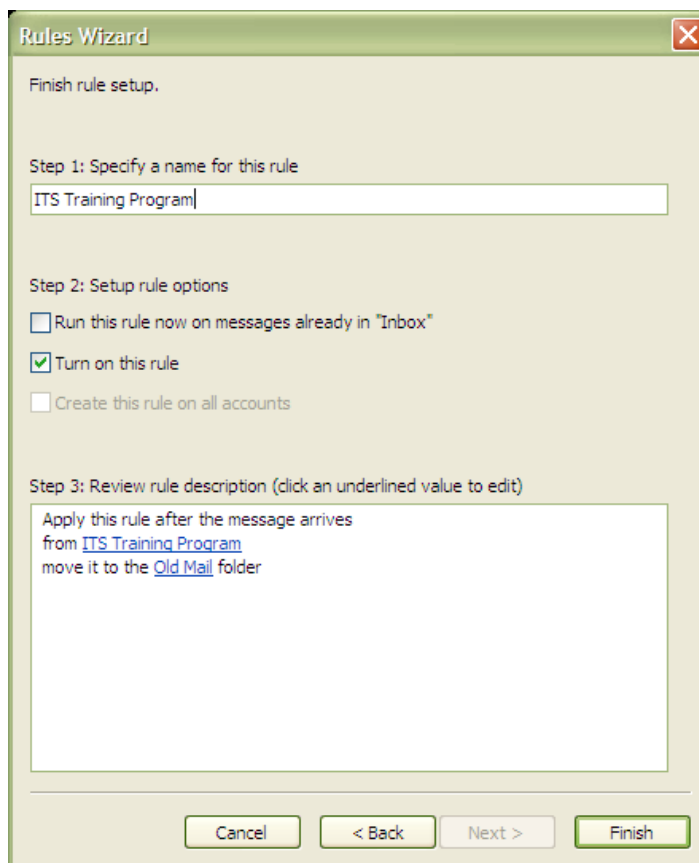


Figure 23 - Finish Setup Rules

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 **T**ools menu ► **O**ptions... 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 Email Options* dialog box opens (see Figure 24).
4. Click the *AutoSave unsent items in:* drop-down arrow to select a different folder such as “*Drafts*,” “*Inbox*,” “*Sent Mail*,” or “*Outbox*.”
5. Click the **O**K button on each dialog box to apply the changes and close all open dialog boxes.

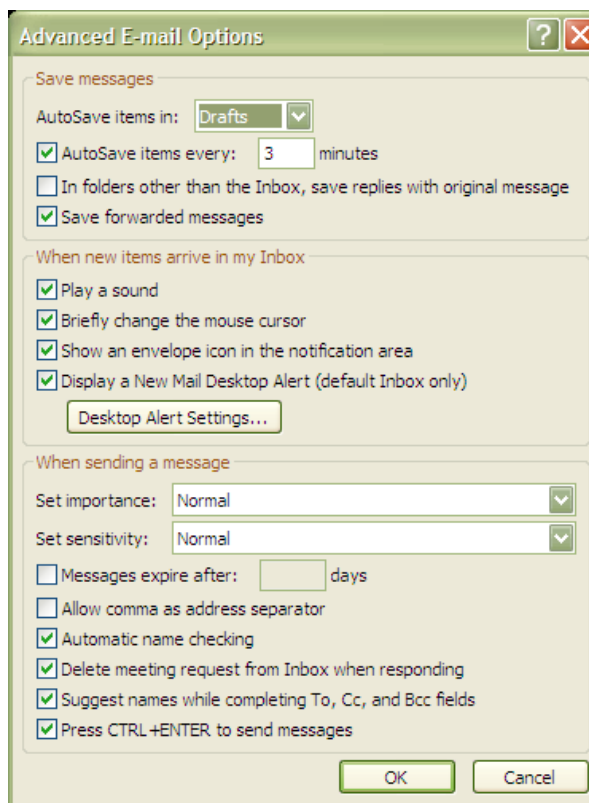


Figure 24 - Advanced E-mail Options

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 **T**ools ► **O**ptions... The *Options* dialog box opens.
2. Click the **O**ther tab ► **A**utoArchive... 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 **O**K 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 criteria 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 **T**ools menu ► **M**ailbox Cleanup... The *Mailbox Cleanup* dialog box opens (see Figure 25).
2. Click the **V**iew Mailbox Size... button. The *Folder Size* dialog box opens (see Figure 26).
3. The account size can be seen in the **T**otal size (including subfolders): field. The example in Figure 26 has an account size of “147303 KB,” or approximately 147 megabytes (well below the 2 GB size limitation).
4. Close all open dialog boxes.

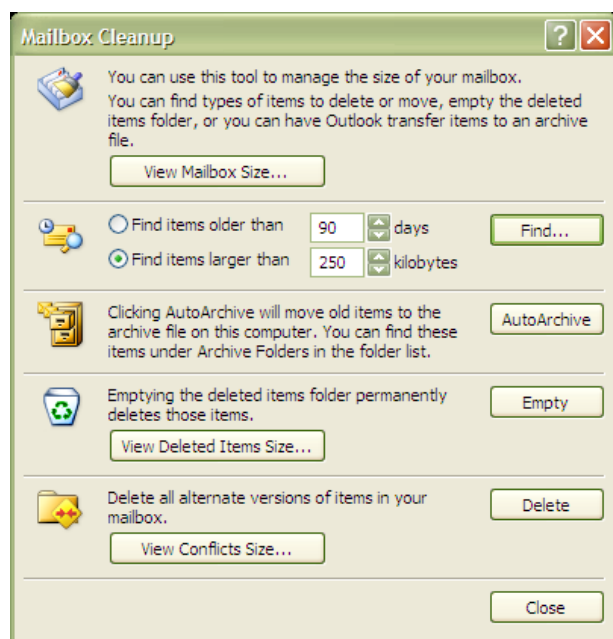


Figure 25 - Mailbox Cleanup Dialog Box

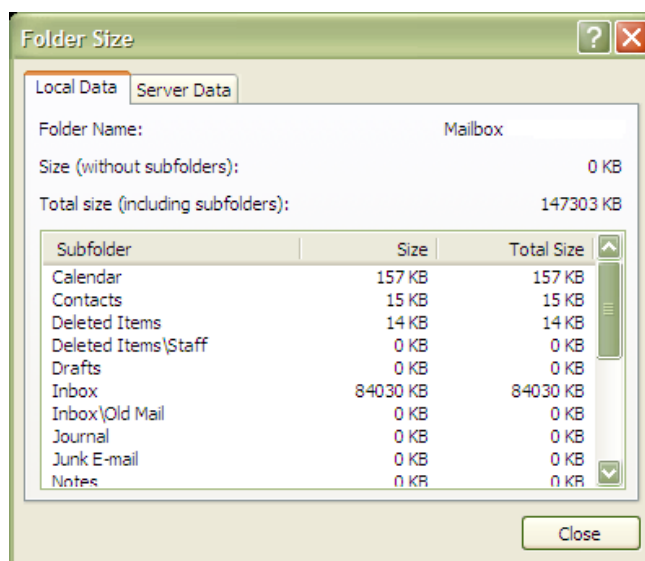


Figure 26 - Folder Size Dialog Box

Tracking Features

Outlook has tracking features to determine how Outlook handles delivery and message 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 the folders where message receipts are stored (e.g., the *Deleted Items* folder).

To set tracking options:

1. Select the **T**ools menu ► **O**ptions... 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 27).

3. Click the **Tracking Options...** button under the *Message handling* section. The *Tracking Options* dialog box opens (see Figure 28).
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.

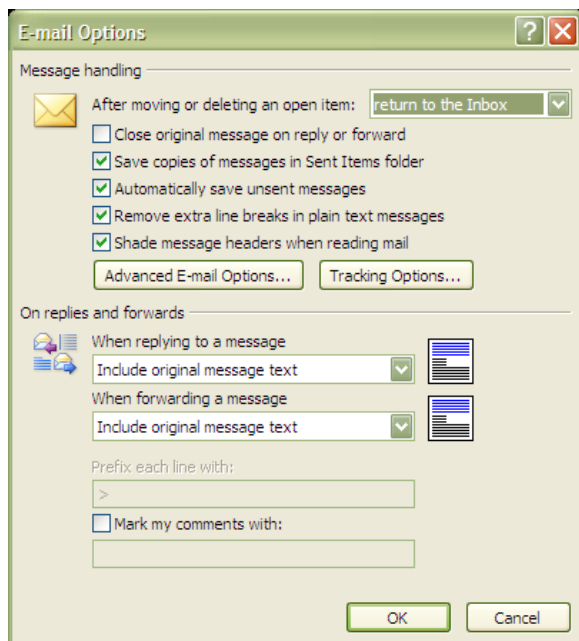


Figure 27 - E-mail Options Dialog Box

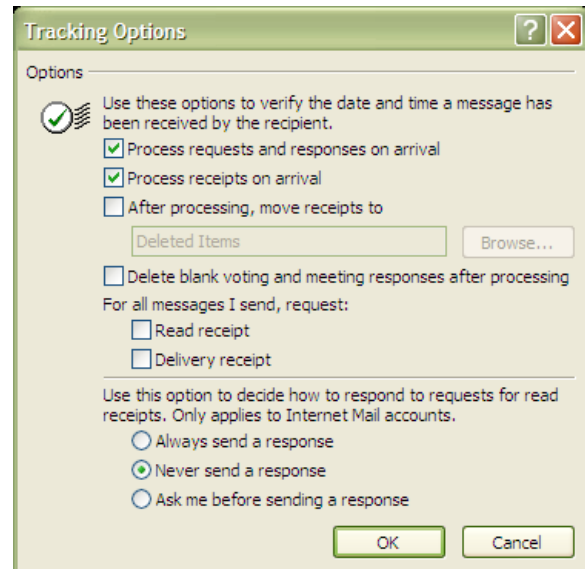





Figure 28 - Tracking Options

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 28).

VIEWING MESSAGE TRACKING INFORMATION

Messages that contain tracking information will appear with an icon of an envelope with a tracking information symbol  in the **Sort by:** column. Tracking information can be accessed via the *Sent Items* folder. When a message has been delivered, a delivery confirmation message will appear in the user inbox with the  tracking information symbol in the **Sort by:** column.

To view the message delivery status:

1. Open the *Sent Items* folder.
2. Double-click a message that contains the tracking information symbol . The message opens in the **Message** window.
3. Click the **Tracking** button in the *Show* group on the *Message* tab of the **Ribbon**. The tracking information will be displayed (see Figure 29).

This message was sent on 12/1/2008 11:11 AM. Status Totals: delivered to 1 recipient	
Recipient	Delivery
	Delivered: 12/1/2008 11:11 AM

Figure 29 - Tracking Information

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 30).

You attempted to recall this message on Monday, December 01, 2008 11:27 AM.

Figure 30 - Message Recall

Messages can be recalled 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. Click the *Other Actions* drop-down arrow on the **Ribbon** (see Figure 31).
4. Click the **Recall This Message** option. The *Recall This Message* dialog box opens (see Figure 32).
5. Choose the recall options as desired ► **OK** button.

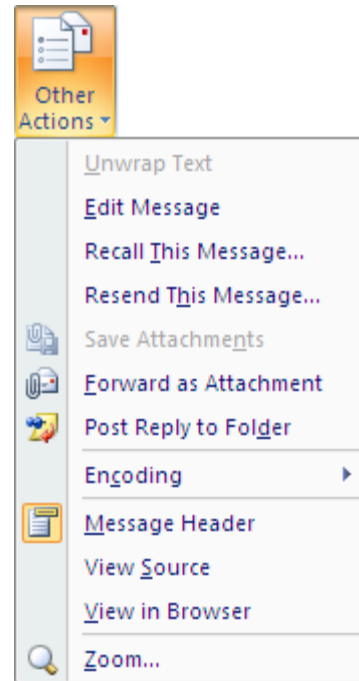


Figure 31 – Recall This Message Option

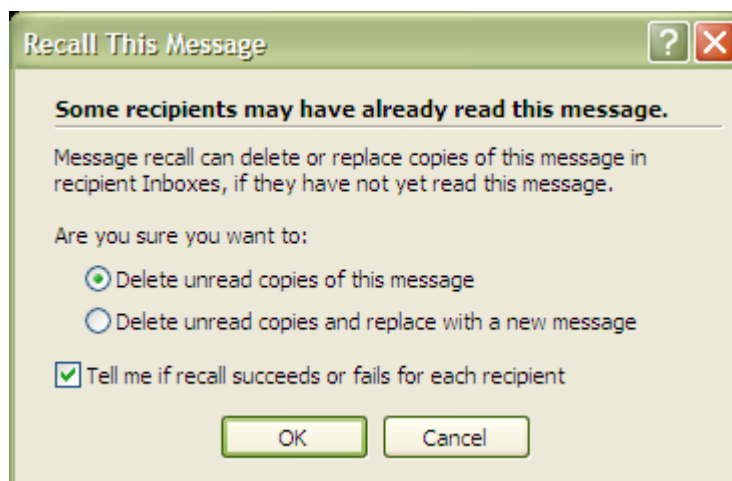


Figure 32 - Recall This Message Dialog Box

NOTE: If the *Tell me if recall succeeds or fails for each recipient* check box in the *Recall This Message* dialog box is checked, 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*”.

Working with Junk E-mail

Junk e-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*. More information about the Quarantine Manager can be found at <http://www.calstatela.edu/qmtraining>. Outlook provides several tools for managing junk e-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 **T**ools menu ► **O**ptions... The *Options* dialog box opens.
2. Click the **J**unk E-mail... button in the *E-mail* section. The *Junk E-mail Options* dialog box opens (see Figure 33).
3. Select the level of e-mail protection ► **O**K button.
4. Click the **O**K button to close the *Options* dialog box.

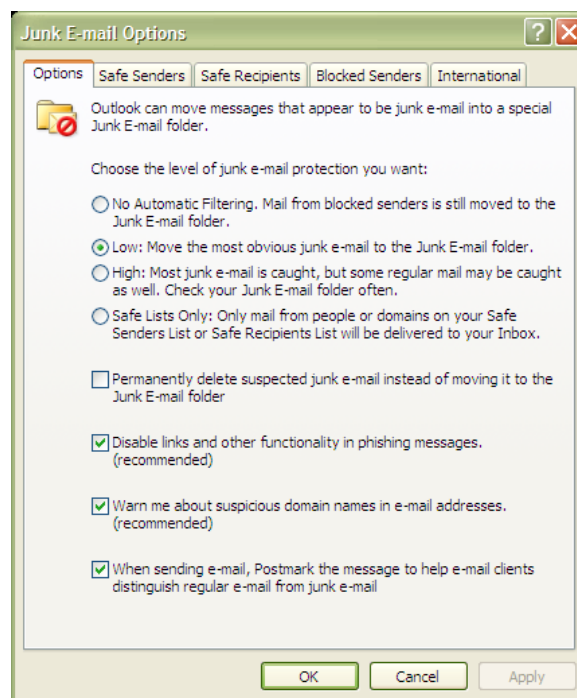


Figure 33 – Junk E-mail Options Dialog Box

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 **A**ctions menu ► **J**unk E-mail ► **A**dd Sender to **B**locked Senders List (see Figure 34).

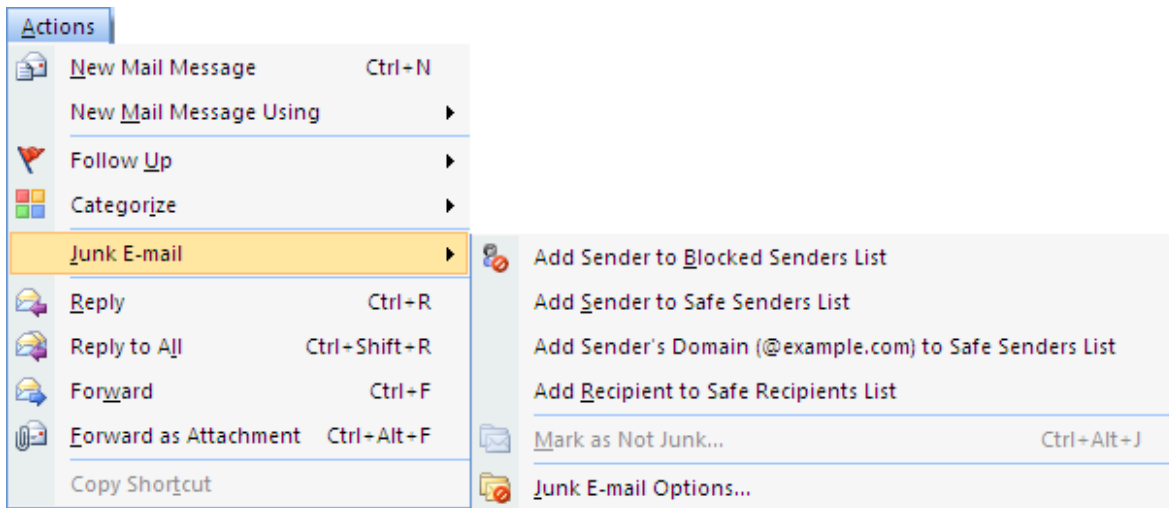


Figure 34 - Junk E-mail Menu Options

3. A warning prompt will appear. Click the **OK** button (see Figure 35).

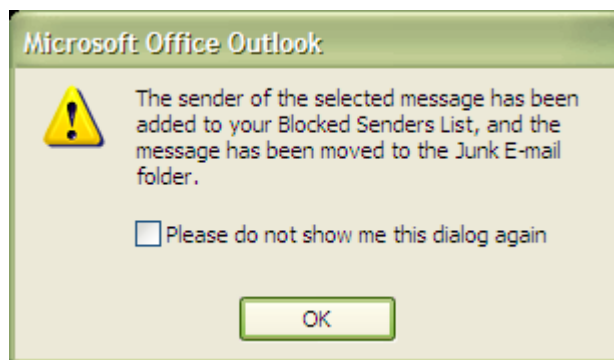


Figure 35 - Block Senders List Warning Prompt

NOTE: Right-clicking the message will activate a shortcut menu and the *Junk E-mail* dialog box can be opened. Users can manage safe recipient and blocked sender lists by selecting the appropriate tab on the dialog box and adding or removing senders from the lists.

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 users in that domain will be classified as part of the list.

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

1. Select the **T**ools menu ► **O**ptions... The *Options* dialog box opens.
2. Click the **J**unk E-mail button. The *Junk E-mail Options* dialog box opens (see Figure 33).
3. Select the appropriate tab for the list to add names to (e.g., the *Block Senders* tab).
4. Click the **A**dd... button. The *Add address or domain* dialog box opens (see Figure 36).

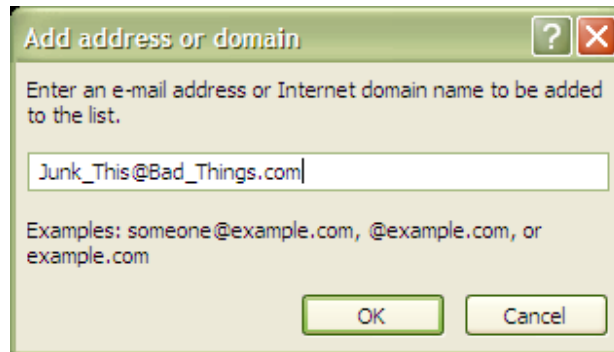


Figure 36 – Add Address or Domain Dialog Box

5. Type the e-mail address or domain name ► **O**K 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 steps 4 and 5.
7. When finished adding senders, click the **O**K button to close the *Junk E-mail Options* dialog box.
8. Click the **O**K 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 for a contact. It can be shared with the corresponding parties and integrated into the *Contacts* list 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 **N**avigation Pane click *Contacts*.
2. Open the contact, update any necessary information, save, then close the contact
3. Select the contact in the **V**iew pane, but do not open it.
4. Select the **F**ile menu ► **S**ave As... The *Save As* dialog box opens.
5. Select the location where the file will be stored
6. Assign an appropriate name to the file.
7. Select “*vCard Files*” in the **S**ave as type: drop-down menu ► **S**ave 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* list, click any of the contacts to be sent as a vCard.

2. Select the **A**ctions menu ► **S**end Full Contact ► **I**n Internet Format (vCard) (see Figure 37). A new e-mail form will open with the vCard file as an attachment (see Figure 38).
3. Select the recipients to receive the vCard, complete the message and send the file.

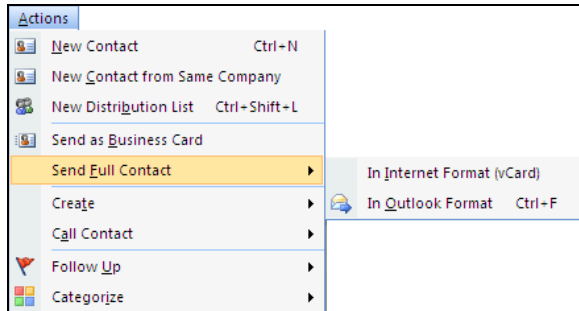


Figure 37 - Sending a Contact as a vCard File

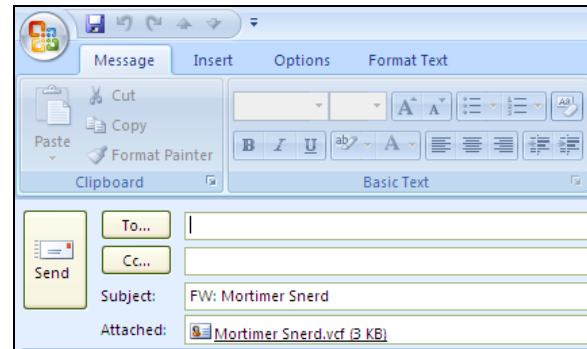


Figure 38 - vCard as an Attachment

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 **C**ontact window (see Figure 39) with the information e-mailed.
3. Make any adjustments to the data and click the **S**ave and **C**lose button in the **A**ctions group of the **C**ontact tab on the **R**ibbon. The contact information will now appear in the **C**ontact list.

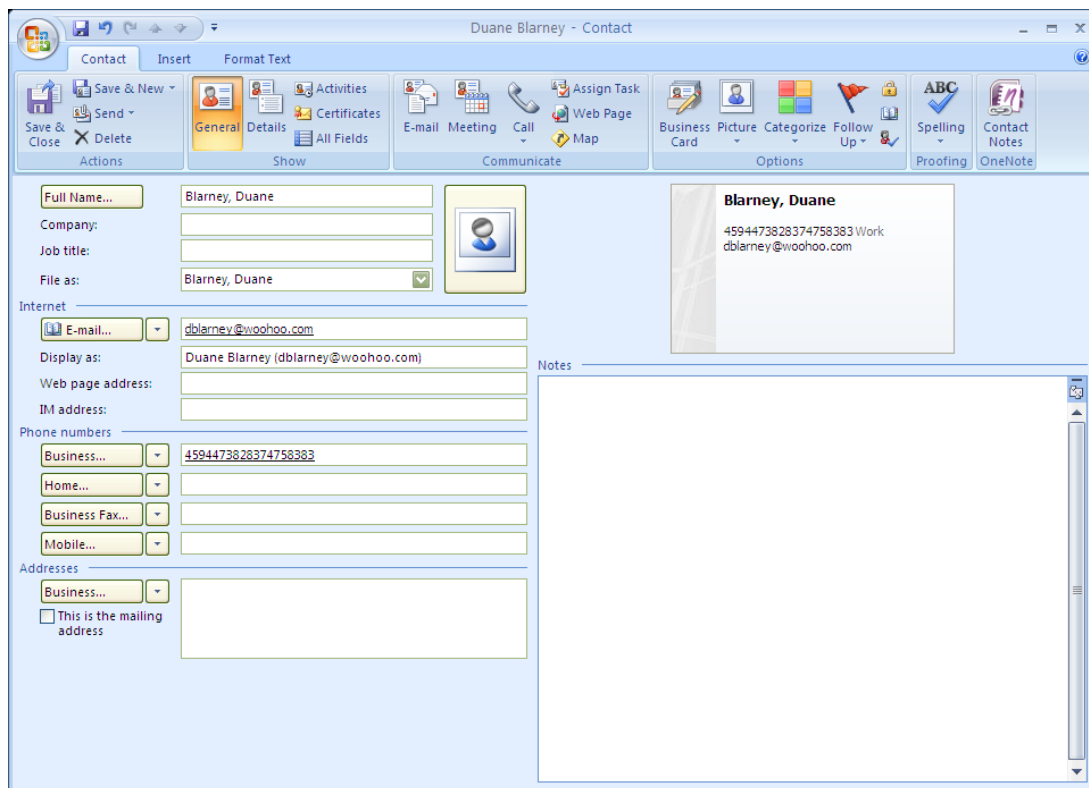


Figure 39 – Contact Window

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>