Office of Information Technology Training

Customer Technology Support

FUTURE

Outlook 2007 – Power Users
E-Mail, Calendar, and Tasks

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Objectives

Learn how to use advanced functions in Outlook e-mail, calendar, and use public folders.

E-mail options

Setting delegates and permissions
View another person's e-mail
Set the importance and sensitivity of an e-mail message
Specify Rules for processing e-mail
Flag messages
Recall a sent message
Voting Options
Send replies to another email address
Send a message from someone else

Calendar

Create an appointment and invite others
Tracking
Sharing
View multiple calendars
Create a desktop shortcut
Printing the calendar (formats)

Tasks

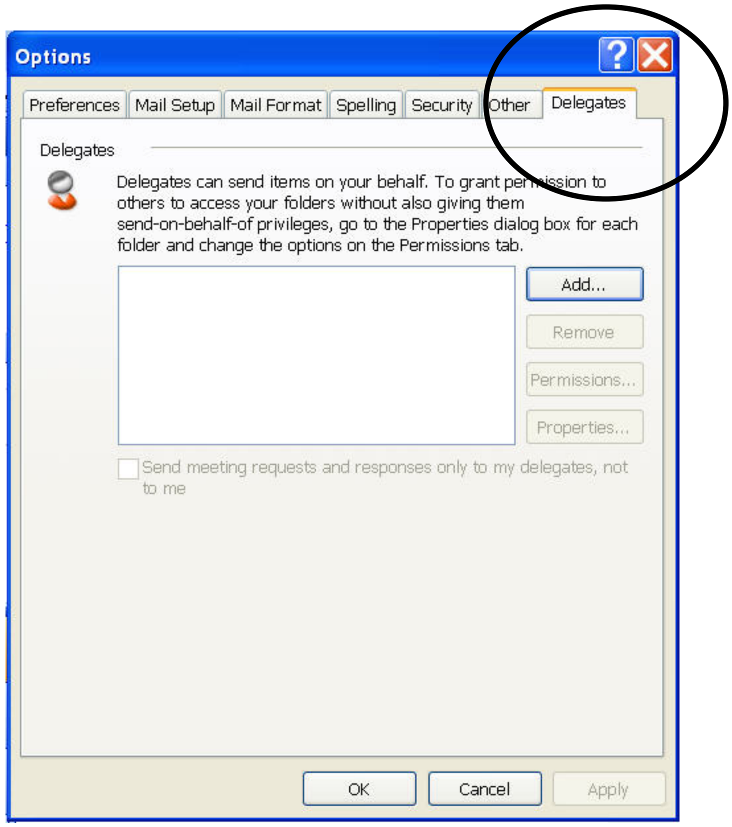
Organize Tasks
Share Tasks

E-Mail Options

Set Delegates and Permissions

You can give another person access to your Inbox (and any other Outlook folder) by granting the person delegate access. There are several levels of access you may use that determines if your delegate will have read, create, modify, and delete permission to your folder.

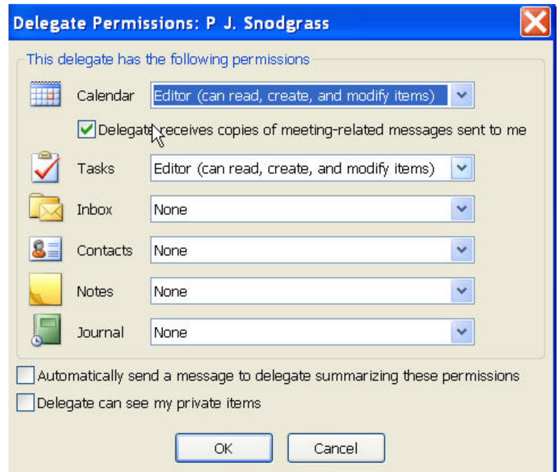
You can set delegates for any Outlook folder you own. Access this screen by clicking on **Tools>Options** and clicking on the Delegates tab.



Exercise 1: Set a Delegate on the Inbox

1. Click **Tools>Options**.
2. Click the **Delegates** tab in the Options dialogue box.
3. Click **Add...** to select a person as a delegate.
4. Select a **name** from the Add Users dialogue box and click **Add** (or double click on a name).
5. Click **OK**.

You can set delegate permissions on any Outlook folder from this screen. Be sure to carefully read what each permission level allows. **Editor** level allows read, create, and modify, **Author** can read and create items, **Reviewer** can only read items in the area you specify.



Exercise 2 : Complete the Permission

1. Click the selection arrow for the **Inbox**.
2. Select the **permission level** you need.
3. Click **OK**. (*You will see the person's name listed in the Delegate box.*)
4. Click **Apply** then **OK** to complete the action.

(To remove the action, click the person's name then the Remove button.)

View another person's e-mail

If you are a delegate to another person's Inbox, you may add their mailbox to your account for quick and easy access. You must have at least reviewer permission to open their mailbox.

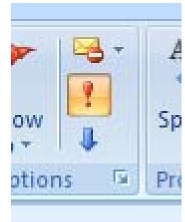
Exercise 3: Add another Inbox to your View.

1. Click **Tools>E-mail Accounts**
2. Click **View** or change existing e-mail accounts then **Next**
3. Select the **account type**
4. Click **Change**
5. Click **More Settings**
6. Click the **Advanced** tab
7. Click **Add** and **type the mailbox name** of the person you want to add to your profile.

Set Importance/Sensitiviy Level for an E-mail

This option lets your e-mail recipients see the level of importance and/or sensitivity you set on your message from their own inbox.

Exercise 4: Set Importance and Sensitivity



1. Start a **message** to someone in the class.
2. Click either the **Importance High** or **Importance Low** button on the toolbar
3. **Send** the message
4. Check your **Inbox** for the e-mail

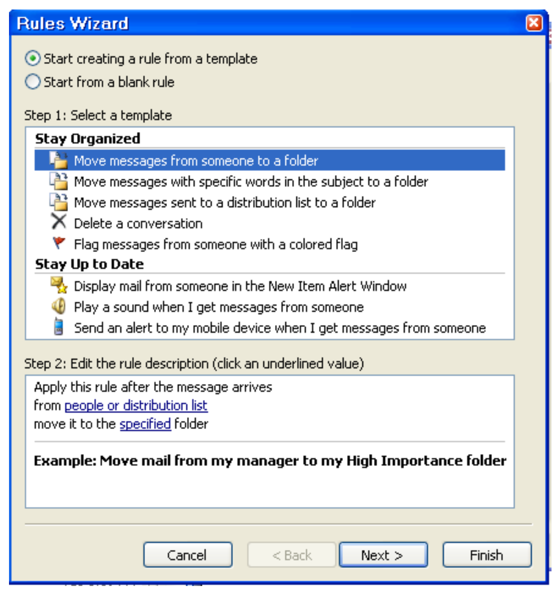
Specify Rules for processing e-mail messages

Exercise 5: Create a Rule for Your Inbox

1. In the Navigation Pane, click **Mail**.
2. On the Tools menu, click **Rules and Alerts**.
3. If you have more than one e-mail account, in the Apply changes to this folder list, click the **Inbox** you want.
4. Click New **Rule**.

Do one of the following:

- Use a template with pre-specified actions and condition and select the template you want.
- Create the rule by specifying your own conditions actions, and exceptions (this option is not available when you create a Rule for a public folder).



5. Click **Start from a blank rule**, **Check messages when they arrive**
6. Click **Next**.
7. Follow the rest of the instructions in the **Rules Wizard**.

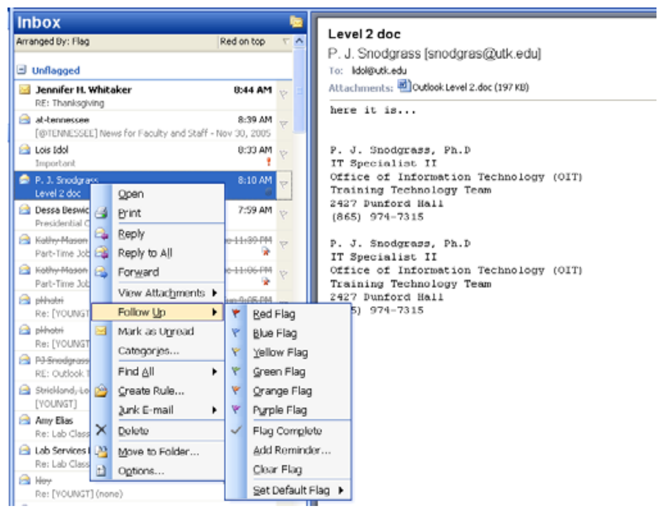
If you want to run this rule on messages already in one of your folders, select the **Run this rule now on messages already in "folder"** check box on the last page of the Rules Wizard.

To have this rule apply to all your e-mail accounts and Inboxes, select the **Create this rule on all accounts** check box on the last page of the Rules Wizard.

If you want to run a rule **periodically** but not all the time, do the following:

- On the Rules and Alerts dialog box, turn the rule off by **clearing the check box** next to the rule.
- Click **Run Rules Now**.
- In the Run Rules Now dialog box, under Select rules to run, **select the check box** next to the rule you want to run.
- Select the **folder** that you want to apply the rule to.
- Select the **category** of messages that you want to apply the rule to. For example, you can apply the rule only to unread messages in a folder.
- Click **Run Now**.

Flag messages



Flagging a message is easy, and you have six colors to choose from. You can designate one color to indicate important messages in your Inbox. You can even set a reminder with the flag — to remind you to reply to or act on the message.

Exercise 6: Use Flags to Categorize Emails

1. Select the **message** you would like to flag.
2. **Right Click** on it.
3. Select **Follow Up**.
4. Select **Flag** desired.

Recall a sent message

Need to recall a message? You can do that for email accounts that are on the Microsoft Exchange Server only. You can only recall messages that have not been opened.

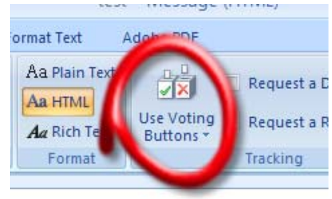
Exercise 7: Recall a Sent Message

1. Double click the message in your **Sent Items** folder
2. Click **Other Actions>Recall this message**.

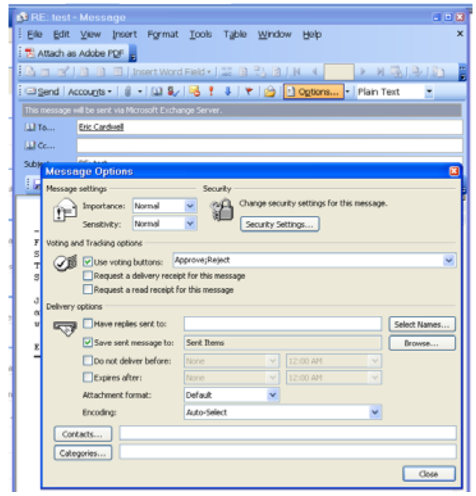
Voting Options

In order to vote, users must be using **Outlook 2003**.

Exercise 8: Voting Options



1. Create a **new message**
2. Click **Options** tab.
3. Check the arrow **Use Voting Buttons**.



There are several default responses. If these do not meet your needs, you can create your own by deleting the existing responses & typing in new ones. Be sure to separate each response by a semicolon.
Once you have entered the criteria, you can also request a delivery receipt of this message and/or a read receipt of this message. If you would like either of these, check the appropriate box.

4. Click **Close** to save the changes.

Exercise 9: Respond to a Vote Request

1. Open the e-mail **message**
2. Click on the **button** with your response
3. **Send** the response.

To Track the responses

4. Open the **original message** you are tracking
5. This message is usually located in the **Sent Items** folder.
6. Click the **Tracking** tab.

By default, responses that do not contain comments are recorded in the original message, and responses that contain comments are kept in the **Inbox**. You can have Microsoft Outlook automatically delete the blank responses.
You will also receive an e-mail each time a user responds.
If you need to, you can copy & paste the responses into Excel.

Send replies to another person

Exercise 10: Have replies to an email sent to another person

1. Create a **message**.
2. Click **Options** tab.
3. Click **Direct Replies To**
4. Type the **name** of another person, or click **Select Names** to select from a list (*you cannot have replies sent to a distribution list*)

Send a message from someone else

Exercise 11: Send an email on behalf of someone else.

1. Start a new **message**.
2. Click the **Options** tab and select the **Show From** button.
   Note: Even though you can click **From** and select any name from the Global Address Book, you are allowed to send a message only on behalf of someone who has granted you that permission.

3. In the **From** box, type the name of the person you are sending on behalf of. If you leave the box blank, the message is sent from you.

Calendar

This section will cover how to invite others to a meeting and track their responses, view group schedules, open another person's calendar, and print a calendar

Exercise 12: Create an Appointment With Invitees

1. Start a **New Appointment**
2. Enter the **details** for the appointment
3. Click **Invite Attendees**
4. Select at least **2 others** in the class to invite to the meeting and **type** their address on the To line.
5. Click **Send**.
6. Open your Inbox and **Accept** the meeting request.

Exercise 13: Check the Tracking of the Meeting.

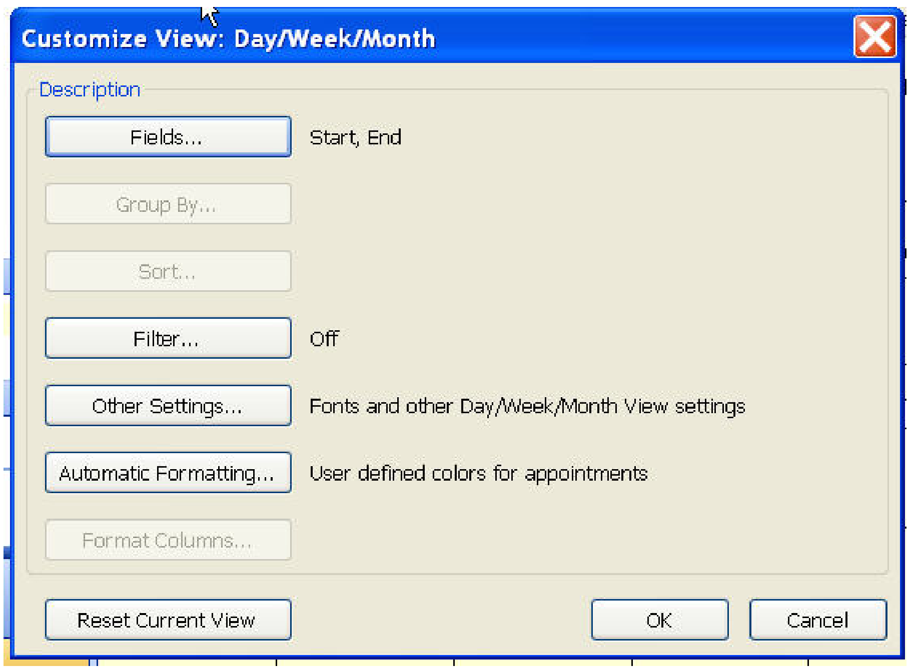
1. Go to **Calendar** View
2. Open the **Appointment**
3. Click the **Tracking** Tab

Exercise 14: Open a Shared Calendar

1. Click **Open a Shared Calendar**
2. Enter the **Name** of the person who has shared their calendar
3. Click **OK**

Exercise 15: Calendar Options

1. In Calendar View click **Tools>Options**
2. Click **Calendar Options**
3. Click **Free/Busy Options**
4. Enter the **number of months** you wish to have published on the server
5. Click **OK** and **OK** to save your change



Exercise 16: Customize your Calendar

1. In Calendar View, right click in the **calendar area**, NOT on an appointment
2. Select **Customize Current View**
3. Click **Other Settings**
4. Set your **Time interval**, and **Font size** for your Day and Week views
5. Click **OK** and **OK**.

Tasks

This section provides steps for organizing and sharing your tasks to keep you on track and up-to-date and working with a team. Outlook tasks allow you to keep your projects and to-do list current as you work on them.

Organize tasks

Outlook has several categories of organization for tasks. Choose the ones that fit your work style.

Exercise 17: Organizing tasks

1. Create some **new tasks**.
2. In the Current View, click **Detailed List**
3. Fill in the **additional information** about the task
4. Click **Task Timeline**
5. Return to **Mail** to view the tasks in the **To-Do Bar.**

Share tasks

If you are working on a project team, you may need to share the tasks with team members.

Exercise 18: Sharing tasks

1. Click **Share My Tasks…**
2. In **Tasks Properties>Permissions**, click **Add…**
3. Choose the project **team members**
4. Click **OK**
5. Assign **Permissions** to each team member
6. Click **OK**
7. Click **Open Shared Tasks…**
8. Type the **account name** or click **Name…** to locate the team member