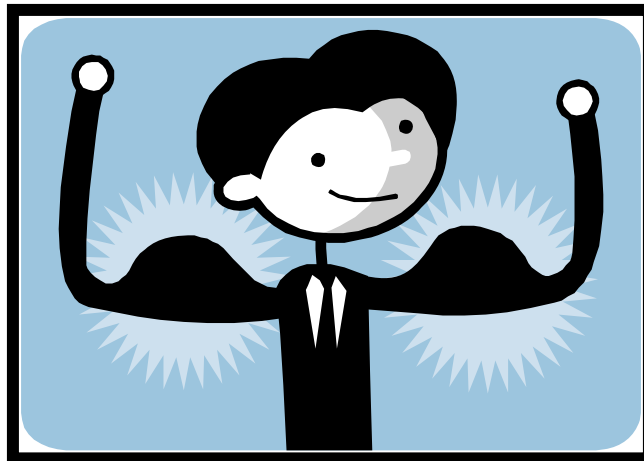


# OUTLOOK E-MAIL & CALENDARING FOR SUPPORT STAFF AND POWER USERS



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## Objectives

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

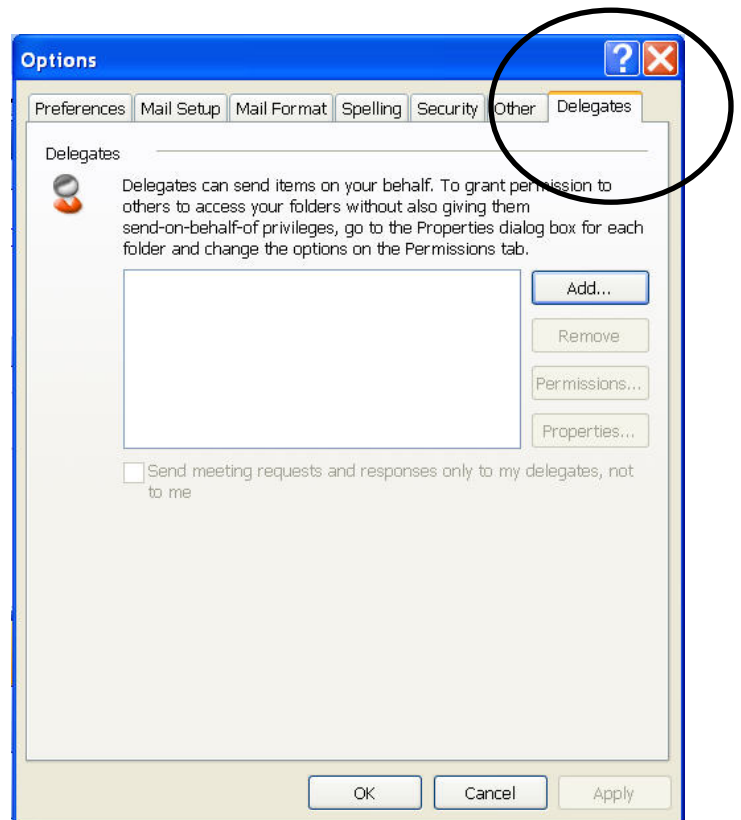
- ❖ E-mail options
  - Setting delegates and permissions
  - View another person's e-mail
  - Set the security level of an e-mail
  - Setup Rules for processing e-mail
  - Using Flags
  - Recall a sent message
  - Voting Options
  - Creating Rules
  - Send replies to another email address
  - Send email on behalf of someone else
- ❖ Address Book
  - Share distributions lists
- ❖ Calendar
  - Create an appointment and invite others
  - Tracking
  - Sharing
  - View multiple calendars
  - Create a desktop shortcut
  - Printing the calendar (formats)

## E-Mail Options

### Delegates

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.

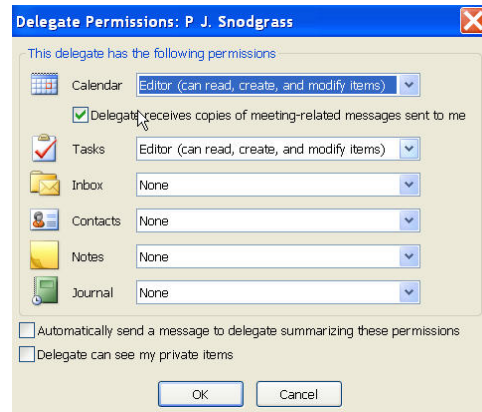


### Exercise 1: Set a Delegate on the Inbox

1. Click Tools>>Options.
2. Click the Delegates tab in the Options dialog box.
3. Click Add to select a person as a delegate.
4. Select a name from the Add Users dialog 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.)*

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 then click the Advanced tab
6. Click Add and type the mailbox name of the person you want to add to your profile.

### Set Importance/Sensitivity 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

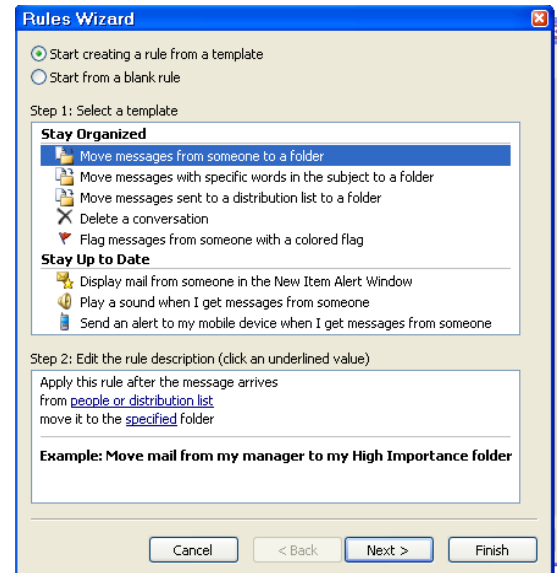
Exercise 5: Create a Rule for Your Inbox

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).

1. Click **Start from a blank rule**, and then click **Next**.
2. Under **Select when messages should be checked**,
3. Select **Check messages when they arrive** or **Check messages after sending**, and then
4. Click **Next**.



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.

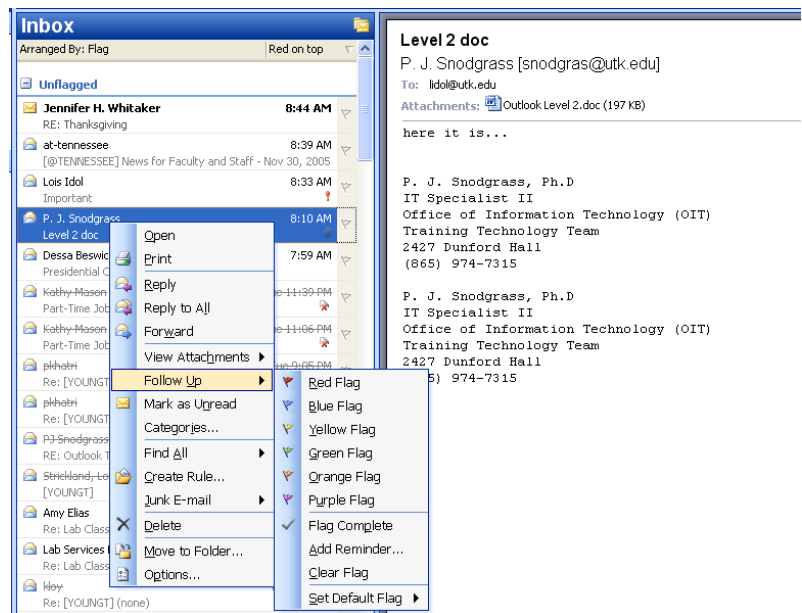
To have this rule apply to all your e-mail accounts and Inboxes, select the **Create this rule on all accounts check box** on the last page of the Rules Wizard.

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

1. On the **Rules and Alerts** dialog box, turn the rule off by clearing the check box next to the rule.
2. Click **Run Rules Now**.
3. In the **Run Rules Now** dialog box, under **Select rules to run**, select the check box next to the rule you want to run.
4. Select the folder that you want to apply the rule to.
5. 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.
6. Click **Run Now**.

### Exercise 6: Use Flags to Categorize Emails

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.



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

### Exercise 7: 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.

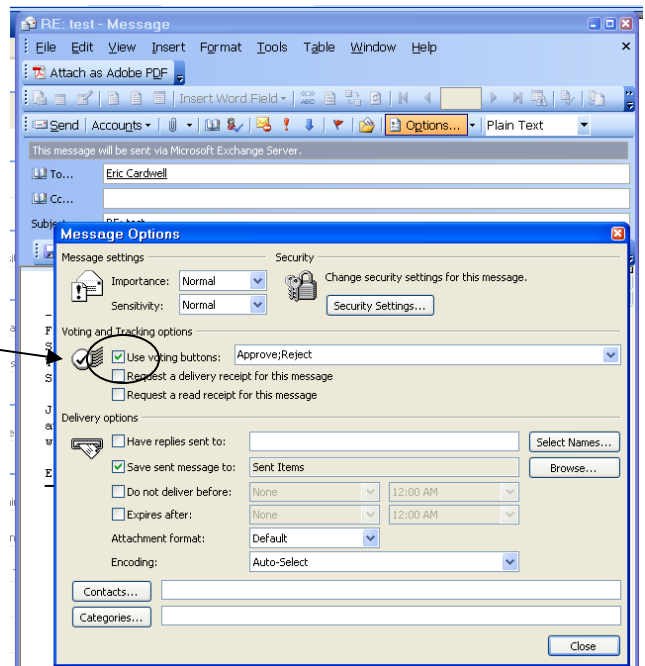
1. Open the message in your **Sent Items** folder and then choose **Actions>>Recall This Message**.

### Exercise 8: Voting Options

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

1. Create a new message
2. On the Menu bar, Click **Options**.
3. Under **Voting and Tracking Options**,
4. Check the box marked **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.

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

### Exercise 9: Respond to a Vote Request

1. Open the e-mail message & click on the button with your response & send the response.

To Track the responses

1. Open the original message you are tracking
2. This message is usually located in the **Sent Items** folder.
3. 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.

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

1. Create a message.
2. Click **Options**.
3. Under **Delivery options**, select the **Have replies sent to** check box.
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)

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

1. On the **File** menu, point to **New**, and then click **Mail Message**.

**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.

2. 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.

If you do not see the **From** box above the **To** and **Cc** boxes, do the following: In the message window, on the **E-mail** toolbar, click the arrow on the **Options** button, and then click **From**. If you are not using Microsoft Office Word 2003 as your default editor, in the message window, on the **View** menu, click **From Field**.

## Calendaring

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 Others
4. Click the Add option.
5. Select at least 2 others in the class to invite to the meeting.
6. Click Send.

(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

### Exercise 15: Create a Desktop Shortcut

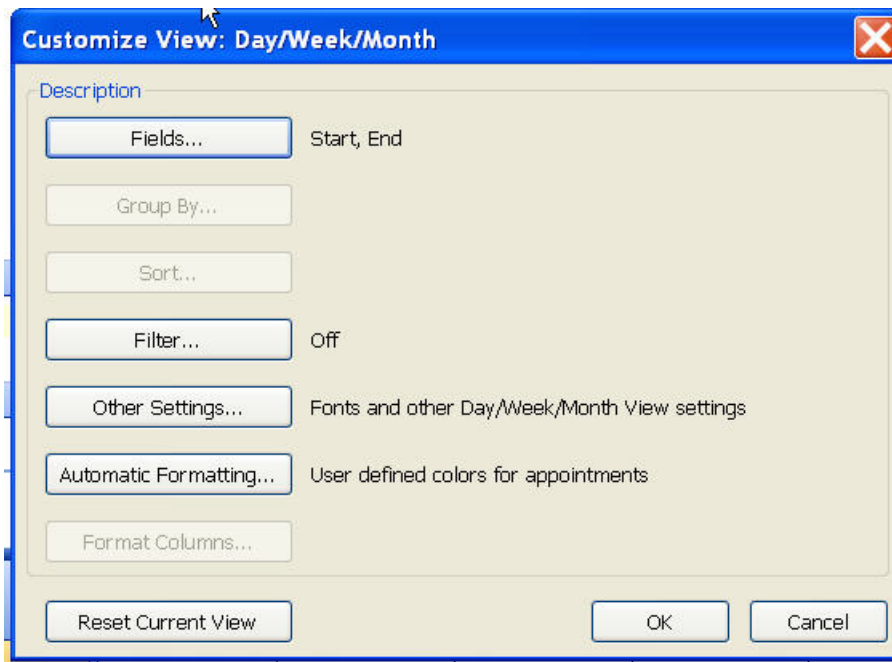
You can create a shortcut to a calendar in a Public Folder, if you have rights to that calendar.

1. Navigate to the Public Folders
2. Click the folder with a calendar in it
3. Right click on the calendar
4. Select **Send Link to the Folder**
5. Put your email address in the To:
6. Send the email
7. Open the email
8. Right click on the Calendar attachment
9. Save it to your Desktop

Set the Free/Busy time you publish, change your time interval and font size

### Exercise 16: 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 twice to save your change



### Exercise 17: Customize your Calendar

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