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# **Outlook User's Manual**

7/03





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#### **Outlook Overview:**

Welcome to *MS Outlook*. *Outlook* is a desktop information manager designed to assist you in sending and managing electronic mail, tracking contacts, as well as scheduling and managing appointments, meetings, events, and tasks.

Because *Outlook* is a product of *Microsoft*, it follows all the conventions of the other *Microsoft* products. Most of the screens are organized and look like the other *Microsoft* applications you have been using.

#### Standard Features:

In *Outlook*, information is organized into folders.



In the FOLDER VIEW, you see all of your folders at once in the Folder List.

In the **OUTLOOK BAR VIEW**, your folders are separated into sections, Outlook Shortcuts, My Shortcuts and Other Shortcuts.



The **folders** listed in the *Outlook* shortcuts provide quick access to any of the folders. These include:

#### Inbox –

Create, send, forward and reply to email messages Organize messages

#### Calendar –

Create appointments Plan meetings or events Review tasks

#### Contacts -

Create, store, and gain access to names, addresses and other contact information

#### Tasks –

Create and manage *To Do/Tasks* items Assign tasks to yourself or others in teams, departments, or organizations

#### Deleted Items –

Manage all deleted items

#### Contacts:

*Outlook* gets email addresses from the Contacts folder. Besides email addresses, you can keep street addresses, web page addresses, and phone numbers of all types. Basically, the information contained in Contacts can be quickly accessed for keeping in touch with your client base.

#### Adding Contacts:

1. Click on the **Contacts** icon or folder.



2. Click on the New Contact icon.

🙆 Contacts - Mi	crosoft Outlook
<u> </u>	avorites Tools Actions Help
🖳 <u>N</u> ew 🕶 🎒	📓 🗙 🔻 🎯 🗸 🎲 Find 🐫 Organize 🔯
Outlook Shortcuts	Contacts .
🔊 🗖	
Calendar	
<b>i</b>	R
Contacts	

# a. Create a contact from an e-mail message you receive

- 1. Open the e-mail message that contains the name you want to add to your contact list.
- 2. In the **From** field, right-click the name you want to make into a contact, and then click **Add to Contacts** on the shortcut menu.

From:	Hoverse	n. Tessica Fiessica.	en@maiguette.ed
To:	Eric F. S	Properties	
Cc:		Add to Contacts	
Subject:	RE: do r	Look up Contact	
·	• • •		

3. Complete all the pertinent fields and all the other fields in the contact screen. Remember, the more information you enter, the greater the future value.

Im Joe Schmoe - Contact	
Elle Edit View Insert Format Tools Actions Help	
🔜 Save and Close 💽 🎒 🕴 🔻 🏈 🔂 🌫 🔺 + 🛧 - 🕄 🗸	
General Details Activities Certificates All Fields	
FullName         Joe Schmoe         ∞         Business          (515) 555-5555	
Lob bite: Home (515) 111-2222	
Compary: Iowa Realty Business Fax	
File as: Schmoe, Joe Mobile	
Addres S501 Westown Plowy	69
West Des Moines, IA 50266	00
This is the mailing address	
Joe is the best client ever. He has bought 42 houses from me in 12 months.	×
1	
	*
Categories	Private 🗖

4. Click Save and Close.

Page 7

An **arrow** or **drop-down arrow** indicates there are selections that you can use to save you time and provide consistency in data.

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🔚 Joe Schmoe - Co	ontact			
Eile Edit View Ins	ert F <u>o</u> rmat <u>T</u> ools <u>A</u> ctions <u>I</u> olo			
Save and Close	3 5 0 🔻 🔗 🗟 🔊 •		🔹 - 😰 -	
General Details	Activities Certificates A	ll Fields		
Full Name	Joe Schmoe	m	Business	(515) 555-5
Job title:		-	Assistant	(515) 111-2
Company	, Towa Realty		✓ Business	
company.		r i	Business 2	
File as:	Schmoe, Joe		Business Fax	
Address	3501 Westown Pkwy		Carback	lioeschmoe@
	West Des Moines, IA 50266		Company	Send usir
Business 💌			✔ Home	
			Home 2	
	🔽 This is the mailing address		Home Fax	
loe is the best cli	ent ever. He has hought 42 ho	uses f	ISUN Mobile	hs
obe is the best ch	shi evel. The has bodyni 42 ho	03631	Other	13.
			Other Fax	
			Pager	
			Primary	
			Radio	
			Telex	
			TTY/TDD	

Note: You may enter up to three E-mail addresses for each contact. The format for this will be the *name* followed by the @ sign followed by the *host.domain* 

An example of an email address would be: joeschmoe@iowarealty.com or jerryjones@firstrealtyhomes.com.

#### Adding A Nickname

You may also add a nickname for your contact. Nicknames are a convenient way to organize and address your emails.

To add a nickname:

- 1. In the **Contact View** screen select the **Details** tab.
- 2. In the Nickname field type the contact's Nickname

🖼 Untitled - Contact		×
Eile Edit View Insert Format Tools Actions Help		
📙 Save and Close 🕞 🎒 🕕 🔻 🎸 🖺 🌫 🗸	<b>*</b> • • • •	
General Details Activities Certificates All	Fields	
Department: IT	Manager's name:	
Office: Corporate	Assistant's name:	
Profession:		
Nickname:	Birthday:	None
Spouse's name:	Anniversary:	None
Online NetMeeting settings		
Directory server:		
E-maiį alias:		Call No <u>w</u>
Internet Free-Busy		
Address:		
J		
		Turno Ni aknomo
		Type NICKHalle

#### **Viewing Your Contacts:**

Your Contacts list can get very long, so *Outlook* offers a number of different ways to find and view contact(s).

This is the default view:



#### Creating a Group:

When you regularly send emails to the same group of people, you can create a "group" to save time and ensure accuracy of email addresses. A contact must exist prior to becoming a member of a group.

If you wanted to email all of the CRS's in your office, you can create a group and email them all at once.

In a message, recipients see their names *and* the names of all other recipients on the **To...** line of the message.

#### NOTE: In Outlook 2000, groups are referred to as Distribution Lists.

#### To create a Distribution List:

From the Contacts folder:	<u>A</u> cti	ions	Help		
	<u>=</u>	<u>N</u> ew	Contact	Ctrl+N	
1 Click Actions		New	⊆ontact from Sam	e Company	
		New	Distribution List	Ctrl+Shift+L	
	둽	New	Message to Conta	ct	W
	<b>U</b>	New	Letter to Contact		
2. Click New Distribution List	-	New	Meeting Request t	o Contact	
	'	New	Appointment with	Contact	
	Ð	New	Task for Contact		
		New	Journal Entry for	Contact	
This is the		Lijnk			Þ
Distribution List icon					•



9. Click Save and Close	🛱 IowaRealtyIT - Distribution List	
	Eile Edit View Insert Tools Actions Help	
	Save and Close 🛛 🚑 🕺 🖻 💼 💌	🗄 🗙 🔺 🖉 🔅
	Members Notes	
	Name: IowaRealtyIT	
	Select Members Add New	<u>R</u> emove
	🗅 Name 🔺	E-mail
	💶 Chris Bupp	chrisbupp@iowarealty.com
	💶 Dale Koeningsberg	dalekoenigsberg@iowarealt;
	🔲 Jackie Johnson	jackiejohnson@iowarealty.c

#### To Add/Edit/Delete Members On A Distribution List:

Once a distribution list is created, it is easily updated to reflect changes in the group. To update an existing list:







5. Click OK.



# Email

This section provides a basic overview of using the *Outlook* email functions. It explains the processes of addressing the email, and replying and forwarding messages.

### Inbox

1. Make sure **Inbox** is highlighted in your list of folders or icons.

Reply Reply to All S Forward 🔁 <u>N</u>ew 👻 8 Inbox ! 🗋 ヤ 🛿 From Folder List × 🖃 🥨 Outlook Today - [Personal Wissner, Carol K 🌾 Bank - 1st Class 🖉 Tami Kitner A 🔞 Bills Ernie Bottom 🔞 Brenda 🛿 Wissner, Ca္လွ 🧒 Calendar Diane Williams 🌾 Cedar Rapids (1) A IRCMonitor 🔞 Citrix Ø Kelly Stuber 🔞 Contacts Q Curtis Rother 🔞 Deleted Items (28) Tim Dunn í 🖄 Downloads Terry Fitzpatrick 🚯 Drafts (3) Jackie Johnson 🗄 í 🏠 Forms a, Ø Kelly Stuber í 🔞 🔞 🔞 helpdesk@iowareal... 🖄 Handybase Ø Mail Delivery Subsy... 🔉 Inbox (2) Earl Short 🔞 Jeff 😗 Journal @ Earl Short 🔞 Leadership MLS A 8 Earl Short 🔞 Marie A Earl Short 📸 Midamerican a. Tim Dunn

File Edit View Favorites Tools Actions Help

🕒 Inbox - Microsoft Uutlook

### To Compose a Message or Send an Email

🕒 Inbox - Microsoft Uutlook 1. Click the **New button** at the top left of your toolbars. <u>File Edit</u> View Favorites Tools Actions H 😰 <u>N</u>ew D: 🕵 Reply 🕵 Reply Inbox 1 D 🕆 🛛 F Folder List × ∃-🚭 Outlook Today - [Personal X 倾 Bank - 1st Class A ÛΤ 🔞 Bills A Е 倾 Brenda A 0 \ 🦚 Calendar D 倾 Cedar Rapids (1) A IF 🔞 Citrix nν

3. Enter the email address:

There are a number of ways to enter the email address in the **To**... or **Cc...** fields. A. Type the full email address **ex:** jerryjones@iowarealty.com

⊠ Untitled - Message (Plain Text)	
Eile Edit View Insert Format Tools Actions Help	
] 🖃 Send 🔚 🕺 🛍 😰 Options 🍹 ] 🔹 🗸 🔹	А В ;≘ 类
To jerryjones@iowarealty.com	
<u></u>	
<u>B</u> cc	
Subject:	
	~
Ι	~

OR

B. Type the Nickname in the To: box. Ex: Joe

C. Click the	e To box				
$\mathbf{X}$	🖾 Untitled - Message (Plain Text)				
	Eile Edit View Insert Format Tools Actions Help				
	🛛 🖃 左 🛍 🔛 Options 🎽 🗸 🔹 🛃 🔚 🗮	»> ▼			
	To <u>.</u> jerryjones@iowarealty.com				
	<u></u> Cc				
	<u>B</u> cc				
	Subject:				
		]			

4. Click on the name you want to email and click the appropriate buttons...

То->,	Select Names	? 🛛
or	Type name or select from list: Find	
Cc->,	Contacts  Message Recipients	
NOTE: CC means "Courtesy Copy" or "Carbon Copy" and is used to keep someone in the loop of the discussion. or	Name       E-Main       To ->       Important         Important       Chris Bupp       chrisbup       Chris Bupp       chrisbup         Important       Chris Bupp       chrisbup       Chris Bupp       chrisbup         Important       jackiejoh       Important       Important         Important       jackiejoh       Important       <	>
the <b>Bcc-&gt;</b> address box.	Bcc ->	>
<b>NOTE: Bcc</b> means "Blind Courtesy Copy" or "Blind Carbon Copy" and is sent covertly—no one who gets the message knows who got blind copies.	New Contact     Properties       OK     Cancel	>

5. Click OK.

#### OR

# Add a contact after typing in the email address

		🔯 Untitled - Message (Plain Text)	
1.	After you type the email address, hot the Tab key on your keyboard.	File       Edit       View       Insert       Format       Tools       Actions       Help         Image: Send       Image: Send	• •
2	Pight₋click the address and	⊻ Untitled - Message (Plain Text)	
۷.	from the menu options click	Eile Edit View Insert Format Tools Actions Help	
	Add To Contacts.	🖃 Send 📕 🐰 🖻 💼 📰 Options 💝	- *
		Image: Constant       Properties       Cc       Add to Contacts       Look up Contact       Cut       Copy       Paste       Clear       Select All	



Once an address has been entered, complete the email by entering the subject and message.

#### Enter Your Message Text:

1. Enter a brief description of your message in the Subject area. The Subject information can be seen in a summary of the recipient's Inbox providing information on the topic as well as the urgency of the message.

#### NOTE: Research indicates that messages with no subject are typically read last.

2. Enter the body of the message.

#### **Customize Your Inbox**

There are several options for customizing your **Inbox**. Most are beyond the scope of this manual. However, there are some that may be important for you to add or change.

#### 1. Adding Bcc: Field

If you do not see a **Bcc**: field and find it necessary to add this, open a new message:

	🖂 Untitle	ed - Message (Plain T	ext)	
2. Click on View	<u>Eile Entit</u>	, <u>V</u> iew Insert Format I Pre⊻ious ►	ools <u>A</u> ctions <u>H</u> elp Detions <b>X</b>	• *
3. Click on " <b>Bcc Field</b> ": ————————————————————————————————————	<u>To</u> <u>C</u> c <u>B</u> cc Subject:	Ne <u>x</u> t Eonts Message Header Bcc Field Coptions		
		×		

#### To Read A Message

1. Double click on the message you want to open.



#### Reply and Forward A Message

Most of the messages you receive will typically need a reply and some will need to be shared with someone else. **Replying** and **Forwarding** are even easier than creating a new message.

#### To Reply to a message:

- 1. Open the message you want to Reply to.
- 2. To reply to only the sender of the message,

click <b>Reply</b> .						
	<u>File Edit V</u> ie	w Fav <u>o</u> rites <u>T</u> o	ols <u>A</u> ctions	Help		
	] 😰 <u>N</u> ew ▼		eply 🕵 Rep	ly to All 😡 For <u>w</u> ard	🗈 🗙 📑 Send/Receive	🍃 Find 🛛 🖓 Organize
	Inbox			7		
	Folder List	×	1000	From	Subject	
	∃-🚭 Outlook `	Today - [Personal		Wissner, Carol	TRIO Ver. 6 Pre-Prod	
	👘 🔯 Bank	< - 1st Class	0 🖂	Tami Kitner	Fwd: Meeting: HomeServices	- CMA
	🦟 🎲 Bills			Ernie Bottom	Meeting: HomeServices - CMA	4
NOTE: To rep the <u>To and Co</u>	oly to all of t <mark>c boxes</mark> , cli	the recipient ck <b>Reply to</b>	s in All			

#### To Forward A Message:

1. Select the message you want to forward



- 2. Click Forward
- 3. Enter recipient names in the To..., Cc... and Bcc... fields
  - a. To select recipient names from a list, click the **To**, **Cc**, or **Bcc** button.
- 4. Click Send

**Note**: You can Forward multiple messages at once, if you select all of them first, then click on Forward.

#### Attaching A Document To Your Email Message

One of the advantages of using email is the fast and efficient transfer of full documents. Attaching documents in *Outlook* is very easy.

1. Create and save the document you wish to send to others. (REMEMBER where you saved it.)



- 5. Navigate to the file you want to
- 6. Double-Click on the file.

Insert File							? ×
Look <u>i</u> n:	՝ My Docur	ments	•	] + 🗈 🔍 🗙	📑 🎫 т	ools 🗸	
History History My Documents Desktop Favorites	Adobe Agent Tech Citrix Data Sout Designer Tr desktop Download s HanDBase Hawaii pics Logos Misc progs Misc progs MLXchange My eBooks My Music	nShop software	In Mi NF Su Su Su Su Su Su Su Su Su Su Su Su Su	y Webs use tive setup sktop ax Coversheet leageReimbursement .Xchange Tips and Teo ami CMA doc	chniques		
	 File <u>n</u> ame:				•	In	<u>s</u> ert ▼
	Files of type:	All Files			<b>T</b>	Ca	incel

Attachment - Message (Plain Text)	×
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] I Send 🔚 Send Options ♥ ] • ▲ B I U 声音 言 任 任 傳 傳	» •
To Jackie Johnson	
<u></u>	
<u>B</u> cc	
Subject: Attachment	
This will be a memo with an attachment.	^
	V
FAQs for Forum on	

When you have attached a document, an **icon** will display at the bottom of the memo.

**NOTE:** You can attach several documents to the same memo. However, a large number/size of the documents may cause the transfer of the memo to be slow or not be sent at all.

#### Managing Your Email

Managing your email boxes, **Inbox** and **Sent Items**, is critical for both your organization of responses as well as the server space.



**NOTE**: When you delete a memo, it will reside in the **Deleted Items** folder until you remove it permanently from the **Deleted Items** folder. This allows you the option of moving the memo back to its original location. However, it is highly recommended that you empty the **Deleted Items** folder at the end of each day.

#### **Organize Your Email in Folders**

- 1. On the **File** menu, point to **New**, and then click **Folder**.
- 2. In the Name box, enter a name for the folder.
- 3. In the **Folder contains** box, click the type of <u>items</u> you want the folder to contain- for example **Emails** or **Contacts**.

Create New Folder	? ×
Name:	
Personal emails	
, Eolder contains:	
Contact Items	•
Select where to place the folder:	
Personal Folders Calendar Contacts Contacts Deleted Items Drafts Inbox Sournal Notes Contacts Contact	
OK Cano	el

- 4. In the Select where to place the folder list, click the location for the folder.
- 5. You may now drag and drop emails or contacts into the folders. This can be useful for archiving old messages.

#### Adding a Signature to Your Email

A Signature is text that you specify that will be added to each and every outgoing email. This is an excellent way to avoid having to sign your name and contact information when sending an email.

- 1. On the Tools menu, click **Options**, and then click the **Mail Format** tab.
- 2. Click Signature Picker, and then click New.

In the **Enter a name for your new Signature** box, enter a name.

3. Under Choose how to create your Signature, select whether to start from scratch or use an existing signature.



To select a file to base your signature on, click **Use this file as a template** and type the path and file name in the box, or click **Browse** to select from a list.



- 4. Click Next.
- 5. In the **Signature text** box, type the text you want to include in the signature.

You can also paste text to the **Signature text** box from another document.

6. To change the paragraph or font format, select the text, click **Font** or **Paragraph**, and then select the options you want. These options are not available if you use plain text as your message format.

Edit Signature - [Sig1]	? ×
Signature text	
This text will be included in outgoing mail messages:	
Eric F. Sanders	<u> </u>
Iowa Realty Response Line (515) 453-5757	
"I think a good product would be 'Baby Duck Hat.' It's a fake baby duck, which you strap	•
Eont Paragraph Clear Advanced Edit	
VCard options	
V= Attach this business card (vCard) to this signature:	
(None>	-
New vCard from Contact	
<u>Einish</u> Canc	el

Quick Sheet Summary For Email

#### Creating a New email:

- 1. On the File menu, point to New, and then click Mail Message
- 2. Enter recipient names in the To, Cc, and Bcc boxes
  - a. To select recipient names from a list, click the To, Cc, or Bcc button
- 3. In the Subject box, type the subject of the message
- 4. In the text box, type the message
- 5. Click Send

#### Reply To A Message

- 1. Open the message you want to reply to
- 2. To reply to only the sender of the message, click Reply

**NOTE:** To reply to all of the recipients in the **To..., Bcc...,** and **Cc** boxes, click **Reply to All** 

#### Forward A Message

- 1. Click Inbox
- 2. Select the messages you want to forward
- 3. Click Forward
- 4. Enter recipient names in the To, Cc, and Bcc boxes
  - a. To select recipient names from a list, click the To, Cc, or Bcc button
- 5. If you are forwarding multiple messages, type the subject of the message in the **Subject** box
- 6. Click Send

### Calendar

*Outlook* has a powerful calendar feature that allows you to track your schedule, attach memos, insert contacts and view your list of tasks. Click on the **Calendar** icon or Folder.

\_

🙆 Calendar - M	licrosoft	Outlook														-	6	×
<u> </u>	Fav <u>o</u> rites	<u>T</u> ools <u>A</u> ction	s <u>H</u> elp															
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Outlook Shortcuts	Caler	nda <b>r</b> .											Ja	nua	ary 2	20, 2	003	ø
			М	onday, Januar	ry 20		^	I	•	Janua	ry 200:	3		Feb	ruar	/ 200	3	►
									<u> </u>	M T 0.31	W T	F S	S	M	ΤW	'T	F	5
Outlook Today	am								5	6 7	8 9	10 11	2	3	4 5	6	7	8
	8								12 1	3 14 3	l5 16 22 23 -	17 18 24 25	9 16	101	1 12	2 13	$\frac{14}{21}$	.5
Calendar	9.00								26 2	7 28 2	29 30 3	31	23 :	24 2	5 26	20	28	1
													2	3	4 5	6	7	8
1 🕅	10 00								) 🗹	TaskP	ad							<b>A</b>
Contacts	<b>. .</b> 00									Click H	iere to	add a ne	ew Task					
	11-00									Open	House	Treats						
	12.pm																	
Tasks	12																	
	1-00																	-
	- 00																	
Notes	2.00																	
(***)	300																	
My Shortcuts	4.00																	
Other Shortcuts	- 00																	
New Group	5~						<b>~</b>			0								-

#### Set An Appointment

*Outlook* provides visual cues in setting appointments. This allows you to choose the month, date and time on the same screen.

	🙆 Calendar - Mi	icrosoft Outlook					
	<u> </u>	<sup>-</sup> av <u>o</u> rites <u>T</u> ools <u>A</u> ctior	is <u>H</u> elp				
	<u>N</u> ew - 🎒	Go to To <u>d</u> ay	Day 5 Work Week 7 Week 31	Mooth 🏻 🎒 Find	🏭 Organize 🛛 🕻	0	• 2 •
	Outlook Shortcuts	Calendar.				Januar	y 22, 2003 🧖
	Outlook Today Calendar Contacts	8 <sup>am</sup> 9 <sup>00</sup> 10 <sup>00</sup>	Wednesday, January 22		Innuary 2     S M T W     S M T W     S 0 31 1     S 7 30 31 1     S 7 1     S 7 28 29     V     TaskPad     Click here     Open Hou	OO3         Febr           T         F         5         M         T           2         3         4         -         -         -           9         10         11         2         3         4           0         10         11         2         3         4           13         24         25         16         17         18           90         31         23         24         25         2         3         4           20         31         23         24         25         2         3         4           to add a new Task	uary 2003 W T F 5 1 5 6 7 8 12 13 14 15 19 20 21 22 26 27 28 1 5 6 7 8 12 13 14 15 19 20 21 22 26 27 28 1 5 6 7 8
1. Choose the <b>time</b> by clicking on the line to the right of the time on the calendar.	Tasks Tasks Notes Notes Notes Notes Notes Other Shortcuts	12 <sup>pm</sup> 1 <sup>00</sup> 2 <sup>9#</sup> 3 <sup>00</sup> 4 <sup>00</sup> 5 <sup>00</sup>					
2. Double click on the <b>blue line</b> to get the <b>Appointment</b>	Eile     Edit     View       Save and Close       Appointment	ppointment Insert Format e 🞒 🛛 € Attendee Availab	<u>T</u> ools <u>A</u> ctions <u>H</u> elp ▶ Recyrrence   @ <sup>3</sup> In_vite Ati	tendees	i † ;	• • • • •	· 2 .
Screen →	Subject: Location:	6	▼	e meeting us	ing: Micros	oft NetMeeting	
	Start time <u>:</u> End ti <u>m</u> e:	Wed 1/22/20 Wed 1/22/20	003   11:00 AM  003   11:30 AM	▼ □ All d	a <u>v</u> event		
	Remind	er: 15 minutes	Sho <u>w</u> time as	Busy	•		
l	IF						

To set an appointment, go to the **month** and **date** on the **calendar** 

#### The Appointment Screen

This screen allows you set/adjust the date/time, add attendees (from Contacts), provide a subject line and enter a description of the meeting.

An invaluable aspect of it is the opportunity to set the **location** of the meeting in addition to all the other components.

🛄 Open House - Appointment	
File Edit View Insert Format Iools Actions Help	
🛛 🔚 Save and Close 🏼 🎒 🕕 Recurrence 👰 Invite Attendees 🚦 🖡 🗙 🔺 🔹 🔹 😨 🗸	
Appointment Attendee Availability	
Subject: Open House	
Location: Pleasant Hill This is an online meeting using: Microsoft NetMeeting	
Start time:         Wed 1/22/2003         ▼         11:00 AM         ▼         □ All day event	
End time: Wed 1/22/2003 1:00 PM	
- Reminder: 15 minutes Show time as: Busy	
Realtor Open House in the Pleasant Aill area	<u>^</u>
Subject: Enter	
the Appointment <b>Time</b> : if the dates and	
times are not correct,	
correct them	~
Contacts	Private
	Duran (

**Memo:** Enter the notes associated with the meeting

#### **Calendar Views**

In *Outlook*, there are several ways of viewing your calendar. The **toolbar** at the top of the screen indicates which **view** is showing.

			]	/
🙆 Calendar - M	licrosoft O	utlook	/	
<u> </u>	Fav <u>o</u> rites <u>T</u>	ools Actions Help		
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Outlook Shortcuts	Calenc	lar 🗸		January 22, 2003 🧐
<b>4</b>		Wednesday, January 22		▲ January 2003         February 2003         ▶           5         M         T         W         T         F         5         M         T         W         T         F         5         M         T         W         T         F         5         M         T         W         T         F         5         M         T         W         T         F         5         M         T         W         T         F         3         1         1         X         4         1         1         X         1         X         X         1         X         X         1         X<
Calendar	8 <sup>-am</sup> 9 <sup>-00</sup>			5         6         7         8         9         10         11         2         3         4         5         6         7         8           12         13         14         15         16         17         18         9         10         11         12         13         14         15           19         20         21         23         24         25         16         17         18         19         20         21         22           26         27         28         29         30         31         23         24         25         6         7         8
1	10.00	公会 Open House (Pleasant Hill)		Click here to add a new Task
Contacts	11 <sup></sup> 12 <sup>pm</sup>	k	-	Open House Treats
Tasks	1 <sup>00</sup> 2 <sup>00</sup>			
My Shortcuts Other Shortcuts	3 <sup>00</sup> 4 <sup>00</sup>			
New Group			~	

#### Click on the "Work Week" view.

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	Eavorites	Tools Action	c Help						
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	Calen	dar <sub>+</sub>		<u></u>	/ork Week			January 20 - January 24	~
- <b></b>		Mon 20	Tue 21	Wed 22	Thu 23	Fri 24	^	January 2003 February 2003	▶
Outlook Today Calendar Contacts Tasks	8 <sup>am</sup> 9 <sup>00</sup> 10 <sup>00</sup> 11 <sup>00</sup> 12 <sup>pm</sup> 1 <sup>00</sup>			Żứ Oper Hous (Plea Hill)	≷∆≦ Lunc with ⊂lien	之 Staff Meet		3       M       1       X       1       1       1         29       30       31       1       2       3       4       1         5       6       7       8       9       10       11       2       3       4       5       6       7       8       9       10       11       12       13       14       15       16       17       18       19       20       21       22       26       27       28       29       30       31       2       3       4       5       6       7       8       1       15       15       15       17       18       19       20       21       22       26       27       28       12       3       4       5       6       7       8       12       3       4       5       6       7       8       12       3       4       5       6       7       8       12       3       4       5       6       7       8       12       3       4       5       6       7       8       12       3       4       5       6       7       8       12       3       4	
Notes My Shortcuts Other Shortcuts New Group 4 Items	2 <sup>00</sup> 3 <sup>00</sup> 4 <sup>00</sup>						~	Mail Delivery Error - click here	4

Change to the "Week" view.

G Calendar - M	icrosoft Uutlook			
<u> </u>	Fav <u>o</u> rites <u>T</u> ools <u>A</u> ctions <u>H</u> elp			
] 🛅 New 🔹 🎒	🐨 🗙 🛛 Go to To <u>d</u> ay 🛛 🚺 Da <u>y</u>	🖸 Work Week 👔 Week 🚮 Month 🗎	🔋 Find 🍓 Organize 🛛 📴 🛛 😰	*
Outlook Shortcuts	Calendar .	Week	January 20 - January 2	Ø
Outlook Today	Monday, January 20	Thursday, January 23 ▲ 12:00pm ≹∆é Lunch with Client	January 2003         February 2003           5         M         T         F         5           29         03         1         2         3         4           5         6         7         8         9         10         1         2         3         4         5         6         7           12         13         14         15         16         17         18         9         10         11         12         13         14           19         20         24         25         16         17         18         19         20         11           26         27         28         29         03         31         23         4         5         6         7           23         4         5         6         7         8         9         10         11         12         13         14           19         20         21         23         4         5         6         7           23         4         5         0         31         23         4         5         6         7	▶ 5 1 8 15 22 1 8
Contacts Tasks	Tuesday, January 21	Friday, January 24 9:00am ≵∆ś Staff Meeting 1:30pm ≵∆ś Dentist appt.		
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#### **Moving Appointments**

Outlook makes it very easy to move appointments using the different views of the calendar.

If you are only changing the time of the appointment, click on the "Day" view.



To move an appointment to a different date AND time, click on the "Work Week" view.



#### Changing appointment to a different day.

	Calendar - Microsoft Outlook													
	Elle Edit View Favgrites Iools Actions Help													
To move an	🔜 New 🗸 🖨 🎦 🗙 Go to Toglay 🖪 Day 🛐 Work Week 👔 Week 🚮 Month 🐉 Find 🎇 Organize 📴 📿 💝													
appointment to a	Outlook Shortcuts Calendar													
different day click on		Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun	^						
the "Month" view.	Outlook Today	December 30	31	January 1, 03	2	3	4							
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	Calendar	6	7	8	9	10	11							
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Click on the appointment	Tasks	13	14	15	16	17	18							
and drag it to the new							19							
date.	Notes	20	21	22 11:00am Open Hou	23 12:00pm Lunch with	24 12:00pm Profession	25							
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Notice your cursor	My Shortcuts					9:00am Staff Meel								
changes to	Other Shortcuts					R	2							
this shape	New Group													
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#### Recurring Appointments:

There are appointments that occur on a regular basis...these are called "recurring appointments". I.e. staff meetings that occur at the same time each week/month.

To set an appointment as a recurring appointment, open the **Calendar** icon;



	Exactly Staff Meeting - Appointment								
3. Double click on the	Eile Edit View Insert Format Tools Actions Help								
appointment	🔄 🔄 Save and Close 🖉 🎚 🗘 Recurrence 🖓 Invite Attendees ! 🖡 🗙 🔺 🔹 🔹 📿								
	Appointment Attendee Availability								
	A This appointment occurs in the past.								
	Subject: Staff Meeting								
	Location: This is an online meeting using: Microsoft NetMeeting								
4. Click on <b>Becurrence</b>	Start time:         Mon 1/20/2003         I 10:00 AM         I All day event           End time:         Mon 1/20/2003         I 11:00 AM         I								
	-11- Reminder: 15 minutes Show time as: Busy								
		~							
	Categories	Private 🗖							

	Appointment Recurrence							
5. Check the <b>time</b> to ensure it is correct.	Appointment time tart: 10:00 AM  End: 11:00 AM  Duration: 1 hour							
If it isn't you can correct it from this screen.	Recurrence pattern         C Daily       Recur every         Image: Sunday       Image: Monday         Image: Weekly       Image: Sunday							
6. Click the <b>pattern of</b> recurrence	C Monthly Thursday Friday Saturday							
The most important field in the Recurrence window is the <b>range of recurrence</b> .	Range of recurrence         Start:       Mon 1/20/2003         C       End after:         10       occurrences         End by:       Mon 3/24/2003							
7. Set the range. If you do not enter an "End	OK Cancel Remove Recurrence							
by" date, it will default to 10 occurrences.								

8. Click OK

**NOTE:** unless the appointment occurs only once or twice a year, typically, you do not want to enter a range longer than 12 months.

Enter all other	📰 Staff Meeting - Recurring Appointment
information on the	Eile Edit View Insert Format Tools Actions Help
appointment	🔄 Save and Close 🛛 🕼 🕂 Recurrence 👰 Invite Attendees 🕴 🗼 🗙 🔺 👻 🖉 🗸
screen. I.e.	Appointment Hendee Availability
reminders,	Subject: Staff Meeting
notes, etc.	Location: This is an online meeting using: Microsoft NetMeeting
	Recurrence: Occurs every Monday effective 1/20/2003 until 3/24/2003 from 10:00 AM to 11:00 AM.
	🔆 🔽 Beminder: 15 minutes 💌 💽 Show time as: Busy 💌
	All office saff is required to attend.
	Contacts
9. Click Save a	nd Close

# The appointment will have the **Recurrence** indicator next to the appointment.

Calendar.

If the appointment is a recurring appointment, the icon will look like this:

If you set a **reminder**, the icon will look like this:

Outlook Shortcuts

#### To Move One Appointment In A Recurring Series:

If you have a schedule change for one appointment, click on the appointment and drag it to the new time/day.

You will see a **new icon** that indicates this is still a recurring appointment but has been moved from the normal day/time.

₩ V Staff Meeting



Monday, January 27





Click on	📰 Staff Meeting - Recurring Appointment
Recurrence	Eile Edit ⊻iew Insert Format Iools Actions Help
	🖳 Save and Close 🖉 🎼 🕀 Recurrence 🧖 Invite Attendees 🕴 🕇 🗙 🔺 👻 🚽 👔
	Appointment Attendee Availability
	Subject: Staff Meeting
	Location: This is an online meeting using: Microsoft NetMeeting
	Recurrence: Occurs every Monday effective 1/20/2003 until 3/24/2003 from 10:00 AM to 11:00 AM.
	→ C Reminder: 15 minutes • OK Show time as: Busy •
	All office staff is required to attend.
	I
	Contacts   Private □

	Appointment Recurrence
Change the information.	Appointment time Start: 10:00 AM  End: 11:00 AM  Duration: 1 hour
change the information for the ENTIRE series of appointments.	Recurrence pattern         C Daily       Recur every         Image: Weekly       Sunday         Image: Weekly       Sunday         Image: Weekly       Sunday         Image: Weekly       Tuesday         Image: Weekly       Tuesday
Click OK	C Yearly Range of recurrence Start: Mon 1/20/2003 C No end date C End after: 10 occurrences C End by: Mon 3/24/2003
Page 39	OK Gancel Remove Recurrence

An **alert screen** will confirm that all appointments in this series will be set to this date and time.



#### Tasks

A task is a reminder to you of items that have to be completed with no specific time allocated for doing it but one that you wish to track to completion.

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[	Outlook Shortcuts	Caler	nda <b>r</b> .										Jar	nuar	/ 20,	2003	: 🧆
	a 🔼			Mono	lay, January	/ 20		^		Janua	ary 200	3		Febru	ary 20	103	►
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#### Create a Task:

To create a task, open the **Day** view of the Calendar. Look at the bottom right corner of the screen to see the "Task" area.

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∫ <u>E</u> ile <u>E</u> dit <u>V</u> iew	Fav <u>o</u> rites	<u>T</u> ools <u>A</u> ctions <u>H</u> el										
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<u>a</u>			Thursday	, January 23			^	<b>4</b> J	anuary 2003		February 2003	з 🕨
								<u>5 M</u>	TW T	F 5	SMTWT	F 5
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Double click on a specific task to show the **task details**.

Enter the <b>subject</b>	🛛 Untitled - Task												
and all other important information.	<u>File E</u> dit <u>V</u> iew Insert F <u>o</u> rmat <u>I</u> ools <u>A</u> ctions <u>H</u> elp												
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	Task Details												
	Subject: Super Bowl Pot Luck												
	Due date: None 💽 📬 Status: Not Started												
	Start date: None Priority: Normal V % Complete: 0%												
	- Reminder: None None Owner: Marie Penkake												
	Contacts Private Categories												

	Super Bowl Pot Luck - Task	
	Eile Edit View Insert Format Iools Actions Help	
	📙 Save and Close 🐰 🖹 💼 🕼 🗘 Recyrrence 😰 Assign Task 🆓 🍃 🗙 🔺	🕈 • 🛛 🕄 🗸
	Task Details	
	Subject: Super Bowl Pot Luck	
Included in the <b>Due/Start</b> dates is a calendar function that makes it very easy to assign dates <b>NOTE</b> : There is no time assigned to the defaulted due date.	Due date:       None       Status:       Not Started         Start date:	
	Categories	Private 🗆

	Super Bowl Pot Luck - Task					
	Eile Edit View Insert Format Tools Actions	Help				
	🛛 🔚 Save and Close 🕺 🛍 💼 🕼 🔂 Recyr	rence 😥 Assig <u>n</u> Task 🖓 🍃 🗙 🔺 🗸	🔹 • 🛛 🗸			
	Task Details					
	Due in 3 days.					
	Subject: Super Bowl Pot Luck					
Enter any <b>notes</b>	Due date: Sup 1/26/2002	- Stature In Decorrect				
regarding this task.		Not Started	-			
		Completed	<u>↓</u>			
	🕂 🗹 Reminder: Sun 1/26/2003 🔽	B:00 AM Waiting on someone else				
Click Save and	Making Chili		~			
Close.						
			~			
	Contacts		-			
NOTE: A Reminder						
provides visual		January 2003	_ N			
and/or audio alerts whe	en a task due date is		<u>-</u>			
approaching.			4			
			18			
Use the calendar to set	the date you wish to be	19 20 21 22 23	25			
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		Today				
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	Outlook Shortcuts	Calen	dar.		January 23, 2003 🧐
	Gutlook Today		Thursday, January 23 🧧	January 2003           5         M         T         F         S           29         30         1         1         2         3         4           5         6         7         0         10         11	February 2003
Once you have saved a	Calendar	9 <sup>00</sup>		12 13 14 15 16 17 18 19 20 21 22 24 25 26 27 28 29 30 31	9 <b>10</b> 11 12 13 14 15 16 <b>17</b> 18 19 20 21 22 23 <b>24</b> 25 26 27 28 1
task, you will see it on the	Contacts	10 <sup>00</sup> 11 <sup>00</sup>		Click here to add a new	v Task
Calendar screen.	Tasks	12 <sup>pm</sup>	えば Lunch with Client	Cake for Doug's BD     Open House Treats	
When you have	Notes	1 <sup>00</sup> 2 <sup>00</sup>			
completed a task, check mark	Deleted Items	3 <sup>00</sup> 4 <sup>00</sup>			
it off or return to the task window and change the	My Shortcuts Other Shortcuts	5			
status.	New Group	6			

Most of the functions	Complete Outlook Manual - Task	
for an appointment, are also available for Tasks.	File       Edit       View       Insert       Format       Iools       Actions       Help         Save and to:       Image: Save and	• • 🛛 •
For example, you can attach a file	O Due in 7 days.       Subject:   Complete Outlook Manual	
	Due date:       Thu 1/30/2003       Image: Status: Status: Image: Status: Status: Priority: Normal Image: Wormal Image: Wormal Image: Status: Normal Image: Status: S	₹ ÷
and/or set a task as a <b>recurring event</b> .		
	Contacts Categories	Private 🗆

# Deleting Completed Tasks:

	📴 Calendar - Microsoft Outlook 📃 🗖 🔀					
	Eile Edit View Favorites Iools Actions Help					
To delete a task that is completed.	<u>N</u> ew •	🖹 🗙 🔤	Go to Today 🚺 Day 🚺 Work Week 👔 Week 🚮 Month 😫 Find 🔮	Org	anize 📴	• 🛛 •
	Outlook Shortcuts Calendar January 23, 2003 🤣					
	<u> 4</u>		Thursday, January 23	^		February 2003 ►
	Outlook Today				29 30 31 1 2 3 4	
Right click on the task and choose <b>Delete (X)</b> from the menu choices.		8			5 6 7 8 9 10 11 12 13 14 15 16 17 18	2 3 4 5 6 7 8 9 <b>10</b> 11 12 13 14 15
	Calendar	9 00			19 20 21 22 24 25 26 27 28 29 30 31	16 <b>17</b> 18 19 20 21 22 23 <b>24</b> 25 26 27 28 1
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	Contacts 11 <sup>00</sup>	10			Click here to add a new	w Task
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	Tarte	1.00		=	Den Open	
	🔌 📮			-		_
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