

TRAINING AT THE BEACH

Outlook :mac²⁰¹¹



INFORMATION TECHNOLOGY SERVICES

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Section 1: Getting Started

Microsoft Office Outlook with Exchange is an integrated email package that includes applications like Mail, Calendar, Contacts, Tasks, Notes and Journal. Outlook used as a client to Microsoft Exchange Server provides many more features than if used alone:

- Share calendar information, address books and folders with colleagues
- Track messages and meeting requests
- Access email from your own computer, a shared computer, the Internet or a handheld device
- Unified password for network and email access

Outlook Applications

Outlook 2011	Purpose
Mail	Send and receive email messages.
Calendar	Scheduling appointments and meetings easily
Contacts	Organize email addresses to quickly send mail or schedule meetings.
Tasks	Keep track of tasks and to do items.
Notes	Save random bits of information in a 'notepad'.
My Day	Tool for viewing the days appointments and tasks
Reading Pane	Read emails in the Reading Pane without double clicking to open them.

Opening Outlook

To open Outlook, go to the Dock and choose the yellow "O" Outlook Icon.



Important: If you are part of CCPE, COE, Foundation or 49er Shops, currently your computer login does not automatically log you into the Outlook client (this will change in the future). To login to the Outlook client, use your BeachID account.

- Username = campus-domain/999999999 (CampusID)
- Password = BeachID password
- Click Remember my credentials
- Click OK.

	Account Information
0	Enter your account information for "Paul Gettier"
User name:	010459304
Password:	
	Cancel OK

The Interface

Outlook operates in a multi-pane window. You can collapse, expand, drag and increase or decrease each pane's size or shape. Each pane is dynamic; for example, if you click a folder in the Navigation Pane, the folder contents open in the View Pane. Select an item in the View Pane and the item details open in the Reading Pane.



Nav. Pane

View Pane



Outlook Menu

The Outlook Menu is where you will find Outlook administrative functions – like saving, printing, account options, out of office replies, mailbox cleanup and rules and alerts. The File tab is present no matter where you go within the application.



The Outlook Menu: (Will get you to view your Outlook Preferences)



Section 2: Mail

There are three tabs in the Mail interface. The names of these tabs remain the same no matter which folder you are in, although the commands may change slightly.

The Home Tab

When you open Outlook, the Home tab is displayed by default and contains the most common commands for working with your email.



New Commands

The first group on the Home tab is **E-Mail -New**. Click the **E-mail** button to open a new, blank mail message or **New** to choose from a menu of Outlook items, like appointment, task, note, etc. *Shortcut*: Key **Command+N** for new mail.



Delete Commands

The next group contains commands for deleting messages.

Hightlight a message and select delete and it will be sent directly to your Deleted Items.

Shortcut: Key Command+Del



Respond Commands

The Respond group contains the standard responses **Reply**, **Reply** all and **Forward** as well as commands that allow you to reply with a **Meeting** request or an option to forward the message as an **Attachment**. options.



Clean Up a conversation to delete all redundant messages (apply to a conversation, a folder or a folder and its subfolders).



Send a message to the Deleted Items folder with the Delete button. Shortcut: Command+Delete

Move Commands

The **Move** button provides a list of folders as well as advanced move commands and the ability to create a simple rule for this conversation.

The **Rules** button expands into a menu offering quick rules and the ability to manage and create rules.

Finally, the **Junk** command pesents option for marking senders and mail items as Junk Mail. (See Junk Mail section for more infor on Junk)



Setting Email Preferences

Email Signature

Email signatures saved in other applications on campus will not be migrated over to the new email system. These must be recreated.

To create a signature, go to **Outlook > Preferences**

Outlook	File	Edit	View N
About O	utlook	ation	
	-gion		
Preferen	ces		ж,
Work Of	fline		
Turn Off	Office	e Remi	nders
Services			
Hide Ou	tlook		жH
Hide Oth	ners		₹ ₩
Show Al	1		
Quit Out	tlook		жQ

Click the **Signatures...** button and click **New**. Enter a name for the signature (you can store multiple signatures) and click **OK**.



Select the Standard Signature from the Left Pane, and enter what you would like your signature to read:

tandam Claustics uses	1 Provide 1
Standard	This is a test signature Pete Prospector Pete Prospector.pete@csulb.edu

To make this your default signature click **Default Signatures**.

Account	Default signa	iture
Prospector Pete	Standard	+
	Cancel	ОК

Select **Standard** from the Drop Down Menu.



If you want to choose whether to include this signature on a message-by-message basis do not set this to be your default. Instead when composing new mail choose the signature drop down and select your standard signature from the menu.

Message	e Options	
Send From:	Calibri	Edit Signatures Standard
To:		C
Cc:		
ubject:		

Rules

A rule is an action that Microsoft Outlook performs automatically upon incoming or outgoing messages, based on conditions that you have specified. You can create a rule by clicking the Rules button from the Home Ribbon within Outlook.

E-mail	New	Delete	Reply	Reply All	Forward	Meeting	Move	Rules*	Categorize	Follow Up	Filters	Find a Contact
-				Arrande	By Conv	erestions A		Edit Rules				

By clicking the **Edit Rules** drop down option you will be presented with the list of current rules.

To create a new rule click the + button.

Fuchanaa	I I I I I I I I I I I I I I I I I I I	
exchange		
IMAP		
POP		
Outgoing		
	1	

To create a new rule fill out the Edit Rule Dialog Box:

Rule Name: Name the Rule a suitable title here

Add Criterion: Will allow you to set more variables for the rule to follow **Add Action:** Allows you to set specific actions on what to do with mail

Sample Rule:

tule name: Training Email Rule If Add Criterion Remove Criterion Execute if all criteria are met From Contains Training.Mailbox@csulb.edu Then	•
If Add Criterion Remove Criterion Execute if all criteria are met From Contains Training.Mailbox@csulb.edu Then	•
Add Criterion If all criteria are met From Contains Training.Mailbox@csulb.edu	
From Contains Training.Mailbox@csulb.edu	
Then	
Add Action 🛛 🗱 Remove Action	
Move message 🗧 Email Project 2 (Prospector P 🛟	
Do not apply other rules to messages that meet these criteria	

In this example rule all mail sent from <u>training.mailbox@csulb.edu</u> will be moved to the subfolder name Email Project 2. Be sure the Enabled Check Box is selected if you wish to have the rule effective. When

you have completed filling out all rule data hit OK to save the rule. The rule will now be in place and apply to all future messages.

In order to run the newly created rule against all mail that resides in your mailbox currently select the **Rules** option from the Home Ribbon and choose the rule you created.



This will run the rule against all mail you currently have in your Mailbox.

Out of Office Greeting

You can set up Microsoft Outlook 2011 to automatically respond to people who send you send an email message. This helps inform people that you aren't in the office or that your response might be delayed.

In order to establish an Out of Office message, go to the Ribbon > Tools > Out of Office.

🖾 Ho	ome Organ	nize Tools								
		2,			2	R -	(III)		MARNAN TUE 2	ONLINE
My Day	Out of Office	Public Folders	Import	Export	Sync Services	Schedules	Mailing Lists	Progress	Errors	Online Mode

Out of Office Greeting – Inside My Organization

You will be presented with the following Out of the Office options. Here you can set a time range for your automatic replies to be sent by checking the "I am out of the office between" box and specifying a date and time range.

	Out of Office Ass	istant	
Account:	Prospector Pete		
O Do not send	Out of Office messages		
Send Out of (Office messages		
0			
Reply to messa	ges with:	200	
I will be out of 9/05/2011. Ple assistance. Thanks, Prospector Pe	the office until next wee ase email or call Bugs Bu ete	k. I will be n unny for imn	eturning on nediate
More optio	ns		
I am out of	the office between:		
Start date:	Wed, Aug 31, 2011		1: 00 PM
End date:	Mon, Sep 5, 2011		1:00 PM
Send replies	outside my company	to:	
Address B	ook contacts only		
Anyone ou	itside my company		
Reply once to e	ach sender outside m	y company	with:
I will be out of 9/05/2011. I wi you for your pa	the office until next wee Il be checking Emails up tience.	k. I will be n on my retur	eturning on rn. Thank
Thanks,			÷
		Cancel	CON
		Calicer	

Or you may simply turn Out of Office messages on and turn them off manually upon your return.

If you do not specify a time and date range *do not forget to turn automatic replies off* when returning from your absence.

There are two options within the Out of office message options. One is for replies to email within CSULB and the other section is for automatic replies outside of CSULB. If you wish to have automatic replies go to everyone that sends mail during your absence be sure to fill out both areas within these option.

Out of Office Greeting – Outside My Organization

In order to set Automatic replies to go to mail senders outside of CSULB choose the "**Send replies** outside my company" check box.

Specify the text of your reply message in the given space and click **OK**.

	Out of Office As	sistant	
Account:	Prospector Pete		
Do not send	Out of Office messages		
Send Out of C	omce messages		
Reply to messa	ges with:	200	
I will be out of 9/05/2011. Pleasistance. Thanks, Prospector Pe	the office until next we ase email or call Bugs B te	ek. I will be n unny for imn	eturning on nediate
More ontio	ne		_
I am out of	the office between:		-
Start date:	Wed, Aug 31, 2011		1: 00 PM +
End date:	Mon, Sep 5, 2011		1:00 PM
Send replies	outside my compan	y to:	
Address B	ook contacts only		
Anyone ou	itside my company		
Reply once to e	ach sender outside n	ny company	with:
l will be out of 9/05/2011. I wi you for your pa	the office until next we Il be checking Emails u tience.	ek. I will be n oon my retur	eturning on n. Thank
Thanks,			
		Concel	OF

The Folder Tab

Outlook gives you the ability to create your own folders to manage your mail. In this section, we'll learn about creating, renaming, deleting, and using folders.

Creating Folders

Folders appear in the navigation pane below your email address. Folders can contain mail items or additional folders. If a folder contains additional folders, a triangle appears just to the left of the folder name. To expand a folder and view the additional folder(s) inside, click the triangle.

To create a new folder, click the Organize tab and click **New Folder**:



In the **Name Field**, type a **name** for your folder. Note: To create a folder for mail items have you Inbox selected when creating a new folder, to create a new folder for Calendar items have you Calendar selected then choose new folder, etc...



If a folder has a triangle next to it, it contains sub-folders. Click the triangle to hide or show sub-folders.



Renaming Folders

If you decide to change the name of a folder; Hold down **Control and Click** on the folder with your mouse. Choose **Rename Folder** from the menu pop-up.



Your cursor will appear in the folder name. Type a new name and click **Enter**. Note that default folders (such as Inbox and Junk Email) cannot be renamed.

Moving Folders

To move a folder simply click and hold the folder and drag and drop it to its new location. Or you can use **Control+Click**, which will present you with a menu. Choose **Move Folder** and type the destination folder you wish to use.



Deleting Folders

To delete a folder, select it and click **Delete** on the Home tab.



This will move the folder and its contents to the Deleted Items folder.

Moving Messages to Folders

Moving messages to your folders is easy – just click the message and drag and drop it to the desired folder (hold down the **Command** key to select multiple items at once).

Alternatively, select the message(s) and click the **Move** button on the Home tab. Then choose a recently used folder in the list, or click the Copy to Folder command to find the folder you wish to use.

	12
=2	1
	-
Mos	10

Searching Mail

Outlook's search tools will help you perform a thorough search of your inbox and other folders in very little time.

Using the Search Box

To perform a basic search, type what you're looking for in the search box. (To search for mail select your Inbox/Sent Items/Drafts, to search for calendar items choose your calendar select your Calendar, etc....)



Filtering Email

You can also use the Filter command on the Home tab to quickly sort through messages. To start, click **Home > Filters** and choose a preset criterion:



Then, only the messages that match that criterion will be shown in the current folder.

<u>Junk Mail</u>

Receiving Junk Mail

To Block a Sender, select the option **Block Sender** from the **Junk** menu button. Note: You cannot block a sender within the @csulb.edu domain.



If you accidentally block a sender, you can unblock by going to Junk > Junk Email Protection > Blocked Senders tab. Highlight the sender's email address and delete it

ages from addresses or domains that you include on the Blocked lways treated as junk mail. To add addresses or domains to the lis in the text box, and use commas to separate them. domain is the part of the e-mail address that follows the @ sign (f domain for someone@example.com is example.com). ted Senders ing.Mailbox@csulb.edu	Senders list st, type or example,
ages from addresses or domains that you include on the Blocked lways treated as junk mail. To add addresses or domains to the lis in the text box, and use commas to separate them. domain is the part of the e-mail address that follows the @ sign (f domain for someone@example.com is example.com). ced Senders ing.Mailbox@csulb.edu	Senders list st, type or example,
ced Senders ing.Mailbox@csulb.edu	22
ing.Mailbox@csulb.edu	
	- 1. P
e about junk e-mail protection	

You can **Control + mouse click** any message and choose the Junk menu to see options for dealing with messages.

	in a man bon	
Open Message	1	Sent: Monday, A
Print		To: Prospecto
Reply		
Reply All Forward		From: Kerri Sore Sent: Friday, July
Mark as Unread	To: Robert Oyam Cc: Training Mail	
Attachments		Subject: training
Sender	•	Markens hash
Junk Mail Priority		Block Sender
Follow Up Categorize	*	-Kerri
Rules	•	
Move View Source		
Delete		
	Open Message Print Reply Reply All Forward Special Mark as Unread Attachments Sender Junk Mail Priority Follow Up Categorize Rules Move View Source Delete	8/1/11 Open Message Print Reply Reply All Forward Special Mark as Unread Attachments Sender Junk Mail Priority Follow Up Categorize Rules Move View Source Delete

These same options can also be found on the Junk menu on the Home tab:



Junk E-mail Options

The level of junk email protection is automatically set to Low. If you choose to increase it, be sure to check your junk folder often for items that shouldn't have been blocked.

outlook can	move mess	ages that appear	to be junk e-ma	il to a special Junk
What level of	junk e-ma	il protection woul	d you like?	
None				
Turn junk	e-mail prot	ection off.		
Low				
Catch the	most obviou	us junk e-mail.		
High				
Catch mos Check the	it junk e-ma junk e-mai	ail. (Some valid me I folder often.)	ssages may be c	aught as well.
Exclusive				
Only deliv domains i Manager.	er messages n the Safe D Reroute all	s from corresponde omains list, or to a other incoming me	ents in the Addres addresses in the M essages to the Jur	ss Book, from Mailing List 1k E-mail Folder.
Delete me	ssages from	the Junk E-mail fo	older older than	30 day

Safe Senders Tab

Here you can specify domains that you do not want to be blocked using the safe domain tab.

	Level	Safe Domains	Blocked	Senders	-
Messages from nail. Type the part of the e-	n domains or safe domain nail address	the Safe Doma s, using comma that follows the	ins List will ne s to separate @ sign (for ex	ver be treated them. The dor ample, examp	as junk nain is the le.com)
afe Domain					
yfriendsdom	in.com myfrie	ndsdomain.net m	yfriendsdomain	org	1
					111
					11
					_
					1.1

Section 3: Contacts

Outlook's contacts folder gives you a place to store important information about the people you communicate with. You can use the information in this folder to address emails, schedule meetings, assign tasks, and more.



Opening the Contacts Folder

To open the Contacts folder, click the **Contacts** button in the Navigation Pane or use the **Command+ 3** shortcut.



When the folder opens, you will see a structure much like any mail folder, with the ribbon interface, Navigation Pane, and central window.



The Home Tab

The Home tab is the central place for basic contact commands:

Send/Reco	eive	Undo	Redo	Print	My Day	(2) Help									Q Search This Folder
De Hor	me	Organ	ize	Tools	-										
	-		1	-	6	0.000	0				1.		-		Find a Contact
Contact (Contact	Group	New	Delete	E-mail	Meeting	IM	Forward	Map	Categorize	Follow Up	Private	Details	List	Contacts Search

Here are its options:

Button-Option	Function
Contact-Contact Group	Creates a new contact or contact group
New	Drop down menu with multiple options
Delete	Removed the selected contact
Email	Starts a new mail message to the selected contact
Meeting	Open a meeting request to the contacts selected
Forward	Allows you to forward this contact and info to another recipient
Categorize	Allows you to group and color code your contacts according to category
Follow Up	Marks this contacts as needed a follow up
Private	Marks this contact as private to you, even if sharing your contacts list
Details-List	Changes the contacts list view
Find a contact - Contacts Search	Allows you to use the searching capabilities to retrieve contacts information

Creating a New Contact

To create a new contact you can use the **Contact** button on the Home tab. Or you can use the shortcut **Command+N.**



You will see a new contact window appear.

00						C
	🖺 🙆 🙃	1				0.0
Contact						1.
Save & Close Delete	E-mail Mee	ting IM	Forward Mag	Categorize	Follow Up	Private
	First Nam Job Title Office, Depart	e Last Na	me any	Castification		
General	Organization	Details	Notes	Certificates		0
Pho	ine 🛨					
Mob We	oile ‡ (xxx) x ork ‡ (xxx) x	xx-xxxx xx-xxxx				
Interr	net 🛨					
Work E-m	nail ‡ someor	ne@example.c	om			
Addre	ess 🛨					
W	ork : Street City,St Country	ate ZIP				
Perso	nal Đ	I				2.46

You can then fill in the optional contacts fields. Once your information is filled in, click **Save & Close** to save your changes and return to the Contacts folder.

Editing Contacts

To edit a contact, double click it to open it. You can then edit the contact and click **Save & Close** once you've made your changes.

Creating Contact Groups

To save a group of email addresses in a group for easier access, create a contact group. To create a group, from the Contacts folder, click the **Contact Group** button.



Click the **Add button** and type the names of the users you wish to have in the group.



In the list that appears select the user you wish to add to the group. Click the **Add button** to add additional users to the list. Perform this step for each user you wish to have in the group.

Searching for Contacts

To search for a contact, type the contact's name in the **"Find a Contact"** field in the Find group of the Home tab



When you press **Enter**, Outlook will display the contact if it finds it. An error will be displayed if the contact is not found.

Section 4: Calendar

To open the calendar, click the **Calendar** button in the Navigation Pane or use the **Command+ 2** shortcut.



You will see a structure much like any mail folder, with the ribbon interface, Navigation Pane, and central window.

00	200	Calendar	0
3 00 0			Q Search This Folder
Send/Receive Undo Redo Pri	nt My Day	Help	Search
Home Organize Too	ls		10
Meeting Appointment New Tod	ay View Date	Control Control Control Find a Contact Day Work Week Month Open Calendar Permissions Image: Contacts Search	
✓ September 2011 ►	(1+)	Thursday, September 1, 2011	
SMTWTFS	ali day		
2 3			
11 12 13 14 15 16 17	11 am		
18 19 20 21 22 23 24			
25 26 27 28 29 30			
	Noon		
🔻 🖃 My Calendars			
Prospector Pete	-		
On My Computer	1.00		
SMART FOLDERS	1 pm Tes	t Appointment - Coffee Time!	
	2 pm		
	-		*
	3.000		
	2 pm		
	4 pm		
Mail			
Calendar	5 pm		
Contacts			
Tasks	6 pm		
Notes			
I	1 item	All folders are up	to date. Sconnected to "Prospector Pete" 4-0-24

Using the Calendar Navigation Pane

At the top, you will see a "mini" calendar. The current day is highlighted. You can click any date to go to it or you can use the arrows beside the current month to go back or forward in the calendar.

Then, in the My Calendars section, you will see all your available calendars.

Customizing Calendar Views

You can change the appearance of your calendar using the view options on the Home and Organize tabs . The Home tab offers these options:

			0-0-0-0
Dav	Work	Week	Month

Notice that the current view is highlighted in dark gray. Let's review each choice.

- 1. Day View one day at a time
- 2. Work View a week, Monday through Friday
- 3. Week View a seven-day week
- 4. Month View a month in low, medium, or high detail

You can also use the Organize tab to customize your view with more options:



Let's review the commands:

Group	Commands
New Calendar	Will create a new "sub" calendar in your mailbox.
Categories	Allows administration for your Colorized Category list.
Day/Work/Week/Month	Changes your Calendar view to the associated option

Scale	Changes the scale to view more in the same window.
Grid/List	Changes Calendar between classic grid view and a detailed list view
Open calendar	Allows you to Open another users shared calendar
Permissions	Allows you to set permissions for other to have access to your Calendar

Creating and Editing Appointments

There are several ways you can create a new appointment. Like a mail message, if you're in the Calendar folder, you can use the **Meeting** or **Appointment** command on the Home tab or the **Command + N** shortcut.

20		H -				0-0-0-0				
Meeting	Appointment	New	Today	View Date	Day	Work	Week	Month	Open Calendar Perm	nissions

A new appointment window will open. Click **Save & Close** when finished entering data.

day	
am	
am	
am	
mile-	No. Mandau
am	New Appointment
	New All Day Appointment
000	d Day View
	Work Week View
	Week View
pm Test Appointment - Coffee Timel	Month View
	List Format
pm	List Polimat
0.00	

You can also double-click a location in the calendar to place an appointment there, or **Control + click** and choose either **New Appointment or New Meeting:**

:

With any of these actions, you will see the **New Appointment** window.

When the time for the appointment comes, Outlook will remind you of it.

 Office Reminders
Test Appointment - Coffee Time! Now
Snooze 🔹 Dismiss 🔹 🎢

You can choose to **Snooze** or **Dismiss** this reminder, open the item by clicking on the Calendar Icon.

To edit an appointment, double-click to open, make your changes and click **Save & Close**:

00	Test Appointment – Coffee Time! – Appointment	0
Appointme	ent	-
Save & Close	Delete Invite Status: Busy Reminder: None Recurrence Time Zone Categorize Private	
Subject: Location:	Test Appointment – Coffee Time!	
Starts:	9/ 1/2011 1:15 PM All day event	
enus:	9/ 1/2011 2.45 PM Duration: 1.5 Hours -	

Updating by double clicking the appt is easy!

Understanding the Appointment Tab

When you are in the calendar and an event is selected, you will see the **Appointment** tab.

Send/Receive	Undo Redo	Print	My Day	() Help					Calendar
Home	Appointment	Or	ganize	Tools					
**		Status:	Busy	3		0.			×
Open Delete	Invite Rer	ninder:	15 Minute	s	•	Recurrence	Categorize	Private	Close

Its commands are as follows:

Command	Function
Open	Opens the appointment selected
Delete	Deletes the selected appointment
Invite	Invite attendees to an already existing meeting/appointment
Status	Allows you to set certain variables to tag for this appointment
Reminder	Sets the reminder timer for notifications on this appointment
Recurrence	Allows to make this appointment recurring according to a schedule
Categorize	Allows categories to be assigned to your appointments
Private	Will mark this appointment unreadable even by those that have access to share your Calendar

Using the My Day Feature

No matter what section of outlook you are in you will see a My Day button.



This feature allows you to view your daily schedule and task list. To use this feature click the My Day button.

The My Day application has two parts:

The first section shows your Daily Calendar View



In the second section you see your current tasks, and any contacts that you have flagged.

There are also some additional options on the bottom.

Scheduling Meetings with Exchange Server

One of the most powerful features of Exchange Server mailboxes is the ability to easily view others' time commitments and to schedule and manage meetings.

Scheduling a Meeting

To schedule a meeting with other Exchange users based on their availability, click **Meeting** on the Home tab of the Calendar.



Or choose New I> Meeting on the Home tab in any other folder

Alanti	Today	View Date
New Street	E-mail M	Message
	Meeting	
	Appoint	ment
œ.	Contact	
	Contact	Group
J.	Task	
0/	Note	
P	Folder	

This will open the Meeting Request window:

000	Untitled – Meeting	0
Meeting		1
Send	Scheduling Cancel	e Private
From:	Prospector Pete (Prospector Pete)	\$
To:		E
Subject:		
Location:		
Starts:	9/ 1/2011 📋 2:30 PM 🗌 All day event	
Ends:	9/ 1/2011 3:00 PM Duration: 30 Minutes +	
This invita	ation has not been sent.	
Message	Scheduling Assistant	

Fill in attendees, subject of the meeting, location if desired, and start and end time and date.

00	Mac-Outlook 2011 Training - Meeting	0
	👝 🗅 🎁 🚳 🕰 🔚	
Meeting		10
Send	Scheduling Cancel	• Frivate
From:	Prospector Pete (Prospector Pete)	\$
To:	Kerri Sorenson Paul Gettier	
Subject:	Mac-Outlook 2011 Training	
Location:	CSULB LAC LAB3 - 103	
Starts:	: 9/ 1/2011 🛅 2:30 PM 🗔 All day event	
Ends:	9/ 1/2011 3:00 PM Duration: 30 Minutes ‡	
1 This invita	tation has not been sent.	
Message	Scheduling Assistant	
Please let me	e know ASAP if you can make itThanks!	

You can set up a recurring meeting just as you would a recurring appointment, with the Recurrence command on the Meeting tab:

	in 19 💼		2						
Meeting									1~
			2	Busy	\$ 0.	9	2	-	
Send	Scheduling	Cancel		15 Minutes	Recurrence	2	Check Names	Categorize	Private

And, you can use the Options group to choose how this time will appear in the recipient's calendar (i.e. if it will leave their time free), and set when the reminder for the meeting will appear:



Once your options are set, type a short message if desired:

	Mac-Outlook 2011 Training - Meeting	0
	🧫 🗅 🎁 🚳 🖾 🖀	
Meeting		10
Send	Scheduling Cancel	Private
From:	Prospector Pete (Prospector Pete)	+
To:	Kerri Sorenson Paul Gettier	E
Subject:	Mac-Outlook 2011 Training	
Location:	CSULB LAC LAB3 - 103	
Starts:	: 9/ 1/2011 📰 2:30 PM 🗆 All day event	
Ends:	9/ 1/2011 3:00 PM Duration: 30 Minutes \$	
1 This invita	tation has not been sent.	
Message	Scheduling Assistant	
Please let me	e know ASAP if you can make itThanks!	

Click **Send** to complete the meeting request.

Responding to a Meeting Request

When someone invites you to a meeting, a meeting request will arrive in your inbox and will look like this:



You have the option to **Accept** the request, **Decline** it, or mark your presence as **Tentative**. You can also propose a new time (if the meeting organizer has allowed it) or view your calendar (which is conveniently also previewed in the email).

The Accept, Tentative, and Decline options all offer additional choices:



You can later change your response by finding the meeting in the calendar use **Control+Click**, and choosing a new option.

pm LAc103 Paul.Gettier@csulb.edu	Open Print		
pm	Reply Reply All		
mq	Accept Tentative	-	
	Decline	•	
	Forward	_	
tem	Private		

Tracking Responses

When you are the meeting owner and participants respond to the meeting request, you will automatically get a notification like this:



The information will automatically be added to the meeting entry in the calendar. To see all responses to the meeting open the Calendar item and choose **Scheduling Assistant:**

cheduling	Cancel		Busy None	*	Recurr	ence	2 Check Names	Categorize Privat
Prospector Pet	te (Prospe	ctor Pete)						:
Paul Gettie	r							E
Mac-Outloo	k 2011	Training						
CSULB LAC	LAB3 -	103						
Starts: 9/ 1/2011 🛅 2:30 PM 🗌 All day event								
9/ 1/2011		3:00 PM	Duration:	30 Minutes	\$			
ion has been	sent.							
Scheduling /	Assistant	t						
ours only					2		1.1.12	Friday, 5
1 (1997 B-10)		12pm	1pm	2.pm		3 biu	4.pm	gam
1	0					1	- 00	
Pete (o					Mac-	Test		
ir (0							
					1.1.1			
	Prospector Per Paul Gettie Mac-Outloo CSULB LAC 9/ 1/2011 9/ 1/2011 ion has been Scheduling a ours only	Cancel Prospector Pete (Prospector Peter Paul Cancel Prospector Peter (Prospector Peter Paul Cancel Prospector Peter (Prospector Peter Paul Cancel Prospector Paul Cancel Prospector Paul Cancel Paul C	Cancel Ca	Image: Cancel Prospector Pete (Prospector Pete) Paul Gettier Mac-Outlook 2011 Training CSULB LAC LAB3 - 103 9/ 1/2011 9/ 1/2011 2:30 PM 9/ 1/2011 3:00 PM Duration: ion has been sent. Scheduling Assistant ours only 12pm 12pm	Cancel Prospector Pete (Prospector Pete) Paul Gettier Mac-Outlook 2011 Training CSULB LAC LAB3 - 103 9/ 1/2011 2:30 PM 9/ 1/2011 3:00 PM Duration: 30 Minutes ion has been sent. Scheduling Assistant Pete (o	Image: Second secon	Cancel Prospector Pete (Prospector Pete) Paul Gettier Mac-Outlook 2011 Training CSULB LAC LAB3 - 103 9/ 1/2011 2:30 PM 9/ 1/2011 3:00 PM Duration: 30 Minutes For a state of the sta	Image: Cancel Prospector Pete (Prospector Pete) Paul Gettier Mac-Outlook 2011 Training CSULB LAC LAB3 - 103 9/ 1/2011 9/ 1/2011 2:30 PM 9/ 1/2011 3:00 PM Duration: 30 Minutes For sent. Scheduling Assistant Scheduling Assistant Pete (o Mac- Test

Here you can see Paul Gettier has accepted the Invitation and the item has been updated.

You will then see a list of attendees and their responses:

Note that you can click the Response field for each recipient and choose a response (**Accepted**, **Declined**, **Tentative**, **or None**) as appropriate. This is useful if someone responds to the request via phone or in person.

Adding and Removing Attendees

To add or remove invitees, open meeting from the calendar, click the **Scheduling Assistant**, and click **Add New** button:

and an interest of the second									
Send Update	Scheduling	Cancel	€ 	Busy None	*	Recurr	ence	2 Check Names	Categorize Privat
From:	Prospector P	ete (Prospe	ector Pete)						:
To:	Paul Getti	er							1
Subject:	Mac-Outlo	ok 2011	Training						
Location:	CSULB LAC	LAB3 -	103						
Starts:	9/ 1/201	.1	2:30 PM	🗆 All day e	vent				
Ends:	9/ 1/201	1	3:00 PM	Duration:	30 Minutes	\$			
This invita	ation has bee	n sent.							
Message	Scheduling	Assistan	t						
Show work	hours only				-	2			Friday, 5
			12pm	1pm	2pm		3pm	4 pim	gam
All Attendee	s	0	<u>14</u>				-		
	or Pete (o					Mac-	Test		
Prospecto	ier	0							
Prospecto Paul Gett									
Prospecto Paul Gett Add New	v						1		

You will then be able to choose the new attendees (or remove existing attendees) and send an update:



You will be prompted if you want to send a message to all attendees or just the attendees that were affected:



Cancelling a Meeting

You will also see a Cancel Meeting command within the Calendar item. To cancel a meeting, open the item and click cancel

000	Mac-Outlook 2011 Training - Meeting	0
	😹 🗈 💼 📾 🖓 📋	
Meeting		10
Send Update	Scheduling Cancel	e Private
From:	Prospector Pete (Prospector Pete)	\$
To:	Paul Gettier Kerri Sorenson	E
Subject:	Mac-Outlook 2011 Training	
Location:	CSULB LAC LAB3 - 103	
Starts:	9/ 1/2011 🚞 2:30 PM 🗌 All day event	
Ends:	9/ 1/2011 3:00 PM Duration: 30 Minutes +	
This invit	ation has been sent.	
Message	Scheduling Assistant	

Please let me know ASAP if you can make it.....Thanks!

1.

This will delete the meeting from your calendar and send a cancellation message to each attendee (if desired).

Section 5: Tasks

Using tasks is a great way to manage the things you have to do. To open the Tasks folder, click the Tasks button in the Navigation Pane (or Command + 4 shortcut). Note that any tasks shown in red are overdue.



Understanding the Home Tab

The Home tab is the central place for basic task commands:



Let's look at its options:

Group	Commands					
Task	Creates a new task item					
Email-New	Starts a new Email Message or a new items selected from the drop down					
Mark Completed	This function will take a current open Task and mark it as being completed					
Delete	Will delete the currently selected Task					
Categorize	Allows you to set a category for the selected task					
Follow Up	Flags the task for follow up based on specified criteria					
High-Low Priority	Sets the priority level in the Task					
CSULB	46	Information Technology Services				

Filters	Sorts tasks based on Date/Start Date/Competition Dateetc.
Flagged-Overdue-Completed	Displays tasks with these criteria set

Creating a New Task

To create a new task from scratch, click the **Task** button or use the shortcut **Command + N**.



You will now be presented with a Ne task. Fill out all data you wish to include and Hit Save & Close.

000	Untit	led Task			0
	5	****			分县
Task					^
Save & Close Mark Complete	Delete	O- Recurrence	Categorize	Follow Up	*
o Due: No date			Ø Start:	No date	
A Reminder: None					
					-

This is much like the New Appointment window. Type a subject, set a start date and a due date, add a reminder if you wish, and add notes. Then, click **Save and Close.**

Editing a Task

Like other Outlook items, you can double-click a task to open and edit it.



Note the **Check Box** to mark the Task completed.



You can also **Control + Click** on a task to see editing options, or use the Home tab to edit tasks.

Open Print	
Mark as Comp	lete
Reply Reply All Forward	
Recurrence	•
Priority	1 h
Follow Up	•
Categorize	•
Move	•
Delete	

Customizing Tasks Views

There are many different ways that you can view your tasks. The Home tab offers these options:



You can also use the Organize tab to customize your view:



Arrange By being the most customizable option offering several Task filtering options:



The options available on the Organize tab include:

Group	Commands
Categories	Show Tasks associated within certain categories
Arrange By	Arrange your tasks by: Account, Category, Completed Status, Date Completed, Date Modified, Due Date, etc
Reading Pane	Changes the orientation of the Reading Pane – Top, Bottom-Off
Flagged-Overdue-Completed	Allows you to filter Tasks based on these criteria

Section 6: Notes

Next, we will take a look at Notes. This is an electronic version of sticky notes. You can jot almost anything down in these notes and save them.



Opening the Notes Folder

To open the Notes folder click the **Notes** button in the Navigation Pane. (By default, it is located in the bottom row of the Navigation Pane.)

Mail	
Calendar	
Contacts	
Tasks	
Notes	

You can also use the **Command + 5** shortcut.

Creating a New Note

To create a new note click the New Note button or use the shortcut Command + N



You will then see a sticky note appear on your screen.



Type your text and click the **X** in the top right hand corner when you're done. Your changes will automatically be saved.

1

Editing a Note

To edit the text of a note, double click it.

Section 7: Office Web App (OWA)

Outlook Web App (OWA) is the web-based version of Outlook Exchange. To access OWA, you need a web brower and an internet connection.

Logging In

Go to <u>http://mail.csulb.edu</u>. Enter your **Email address** (<u>firstname.lastname@csulb.edu</u>) and your **Password**. Click **Sign In**.

Domain\user name:	prospector.pete@csulb.edu
Password:	•••••
	Sign in

If this is your first time logging in, you'll be prompted to select a **Language** and **Time Zone**. For low vision or screen reader users, you can opt to use the blind and low vision experience by checking the box. Otherwise, click **OK** to continue.

If you have lo settings, you Web App for can modify th	w vision and use a screen reader or high contrast can select the check box below to optimize Outlook this and all subsequent sessions. After you sign in, you his choice at any time using Options.
	Use the blind and low vision experience
Choose the l	anguage you want to use.
Landnade.	English (United States)
cangaage.	
Time zone:	
(UTC-08:00)	Pacific Time (US & Canada) 📃 👻
	ОК

The OWA Interface

OWA operates in a multi-pane window, very similar to the Outlook client. You can collapse, expand, drag and increase or decrease each pane's size or shape. Each pane is dynamic; for example, if you click a folder in the **Navigation Pane**, the folder contents open in the **View Pane**. Select an item in the **View Pane** and the item details open in the **Reading Pane**.

Navigation Pane	View Pane		signiout Prospector Pete -
5			Find Someone Options * 🔞
Favorites	New + Delete + Move + Filter + View +	3	subject has been
Prospector Pete	Search Entire Mailbox	P - X	changed
Inbox (2)	Conversations by Date - Newer	t on Top	changed
Drafts Sent Items	Jian Dian Victoria Cleaveland	11:12 AM	🔹 Robert Oyama 🛛 🔦
Deleted Items Junk E-Mail	ubject has been changed Robert Qyama	10:40 AM	To: Prospector Pete
Notes Search Folders	Change Bryon Jackson	10:21 AM	ок.
144444	Thank You Kerri Sorenson	10;20 AM	-Robert
🔄 Mail 🗄 Calendar	Prospector Pete Account Kerri Sorenson	10:09 AM	From: Prospector Pete Sent: Monday, July 18, 2011 10:20 AM To: Bryon Jackson; Javier.Guzmanx; Jes Jackson: Javier.Guzmanx: Jesse Santan
Contacts	Last Week Can I use this account? Kerri Sorenson	Tue 7/12	Sorenson; Matthew.Blackx; Robert Oya Sean.Hernandezx; Shenandoah.Bennet Training Mailbox; Wayne Pierson

Feature Differences

Most features found in the full Outlook client are also found in Outlook Web App (OWA). The following table highlights the major differences between features in OWA and the full client.

Feature	Supported in Outlook	Supported in Outlook Web App
Search folders	Full functionality	Can't create Search folders. Can view default Search folders and custom Search folders that you previously created using Outlook.
Message editing tools	Full functionality	Limited
Notes	Full functionality	View only
Journal	Full functionality	View only

Feature	Supported in Outlook	Supported in Outlook Web App
Monthly calendar view	Full functionality	View and edit. You can't print.
Searching	Full functionality	Not available in Calendar
Custom dictionaries	Yes	No
Import and export data from other data sources, such as .pst files, database files, other messaging and contact systems, other calendaring applications	Yes	No
.pst file support	Yes	No
Send to Office OneNote	Yes	No
Hierarchical address book	Yes	No
Delegate control	Yes	No
RSS subscription and management	Yes	No
Voting buttons	Yes	No
Propose new time for meetings	Yes	No
Related search through right-click	Yes	No
Natural language search	Yes	No
Windows SharePoint Services lists	Yes	No
Outlook Today page	Yes	No
To Do Bar	Yes	No
Customize navigation pane	Yes	No
Pasting inline images	Yes	No
Task request	Yes	No
Automatic formatting of calendar items	Yes	No
Secondary time zone in calendar view	Yes	No

<u>Email</u>

Creating New Email

To create new email, click the New button from within your mailbox.



A second window will appear with your blank email. Type the recipient's email address in the To field. If you need to lookup a recipient's email address in Contacts, click the To link and the Global Address Book will open. Double-click the recipient's name and click Ok. The recipient will be added to the To field.



Once you've completed your email message, click Send in the upper left hand corner. Your mail has been sent and the individual email window will close, taking you back to the original mailbox.

🔮 https://ma	ail. csulb.edu /owa/?ae=Item&a=New&t=IPM.Note&cc=MTQuMS4zMjMuN
Send 🔒	🔋 🛄 🍢 🕴 🌲 🚏 - Options HTML
То	Kerri Sorenson
Cc	
1010	Meet you at the pyramid

Responding from within the Reading Pane

From the Reading Pane, you can respond to an email, using the buttons in the upper right corner. Reply to only the sender by clicking the Reply button.



To Reply to All recipients, click the Reply All button.



To forward an email, click the Forward button.



Responding from within the email

If you double-click and email from the navigation pane, it will open in a secondary window. The respond commands are located in the upper left corner of the window:



Click Reply to reply to only the sender, Reply All to reply to the sender and all other recipients or Forward to forward to another recipient.

Deleting Mail

To delete an email, click the Delete button in the View pane. The item will be moved to the Deleted Items recycle container. You can also choose to Ignore Conversation. New messages that are part of a conversation that a user has chosen to ignore are sent straight to the deleted items folder.

Outlook Web App

Mail > Inbox 7 Item	s			
Favorites	New - Delete - Move - Filter -			
Prospector Pete	Searc 🗙 Delete			
> 🔁 Inbox	Ignore Conversation			
Drafts [1]	Vesterday			
Sent Items	A Cost Harmandory			

Organizing Mail

Creating New Folders

To create mail folders, in the navigation pane, right-click the location in which to place the folder. For example: If you want a folder inside the Inbox, right-click the Inbox and click Create New Folder.

 Prospecto 	r Pete	Search
	Open Open in New V	Vindow
ت ا 🖸 ا ا ا	Move Folder Copy Folder	1
Þ 📮 S	Délete Rename	
	Remove from I	Favorites
	Create New Fo	lder
0	Mark All as Rea Empty Folder	ad i

A blinking cursor will appear. Type the name of folder and Enter.



To move mail from any location to a folder, drag it from the view pane and drop it in the folder.

Note: Any folders you create in the client will also appear in the OWA interface and vice versa.

Renaming and Deleting Folders

To rename a folder, right-click on the folder in the navigation pane and click Rename. The folder name will be highlighted. Type the new folder name and key Enter. To delete a folder, right-click it and click Delete.



Contacts

Personal Contacts

When you click on the Contacts button in the navigation pane, you will be taken to your personal contacts by default.

To create a contact from scratch, click **New > Contact**.



Complete the contact information and click Save & Close to finish.

CSULB Campus Contacts

E Find Someone

To view the Global Address List, click the address book icon next to "Find Someone" from anywhere

within OWA.

CSULB

From here, you can browse the entire campus employee community.

<u>Calendar</u>

Once you have entries on your calendar, upon login reminder alerts will appear in a dialog box. The number in the upper right hand corner indicates how many total alerts you have. You can choose to Dismiss the alert, Dismiss All at once, Open Item or Snooze. Clicking Snooze will remind you again in five minutes (default).

		41
Reminders		
Hunch Wernesday, May 11, 2011 12:00 PM Distrywhere	1 hour	58 minutes overdue
Dismiss all	Open item	Dismiss
5 minutes	Y Sr	ooze
urchson, barbara ivi	V1	1.11.1

Viewing Your Calendar

To view your calendar, click the Calendar button in the navigation pane.

View your calendar in different formats by clicking the Day View, Work Week View, Week View, or Month Vew button.



Scroll to different months by either clicking the forward and backward arrows in the navigation pane, or by clicking the month itself.



Creating New Calendar Entries

To create a new calendar entry from scratch, double-click a time slot or day on your calendar. Note that in Day, Work Week or Week view, the default entry type is an appointment. In the Month view, the

default calendar entry type is an "All Day Event" – you will have to uncheck the All Day Event box to specify start and end times.

Start time:	Wed 7/20/2011	~	2:00 PM	~	All day event
End time:	Wed 7/20/2011	*	3:00 PM	*	

To invite others to a meeting, click the Scheduling Assistant tab. Enter the recipient's name under your own. To see a list of campus contacts to invite, click the address book icon next to "Select Attendees."

Appointment Schedulin	ig Assistant			
Start: Wed 7/20/2011	2:00 PM	Y End: Wed 7/20/2011	🖌 3:00 PM	
Show only working h	ours			
3 Select Attendees	12:00 PM 1:00 PM	2:00 PM 3:00 PM 4:00 PM	Thu 8:00 Suggested Times	
Prospector Pete			< July 2011 -	>
I			SMTWTFS	
			3 4 5 6 7 8 9	

When you have completed your entry, click Send (or Save and Close if you didn't invite other recipients). The calendar entry will appear on your calendar.

20 2:00 PM 3:00 PM Follow Up; I

Receiving Meeting Invites

Calendar invites will arrive in your mailbox. The calendar icon in the upper left hand of the mail item indicates it is a calendar invite. Within the body of the notification, you can click the check sign \checkmark to accept a meeting, the question mark ?to request more information from the sender or the 'x' \times to decline the meeting.



Section 8: Outlook Help

Using the Help Screen

To open Help from within Outlook, click the icon in the far right corner of the interface (or **F1** shortcut key).



When you perform either of these Help commands, the Help screen will open. Type your search term in the search box or click a topic from the list that appears.



Other campus resources:

- Technology Help Desk x54959 or its@csulb.edu
- ITS Training Website <u>http://training.csulb.edu</u>
- Your local technical coordinator