

## Section 1 - Overview

### Personal Information Manager (PIM)

Microsoft Outlook is more than just an e-mail program; it is a Personal Information Manager (PIM). Outlook is intended to help you organize your projects and events both at work and at home to communicate with others so that your plans may be carried out efficiently and effectively.

### What we will cover today

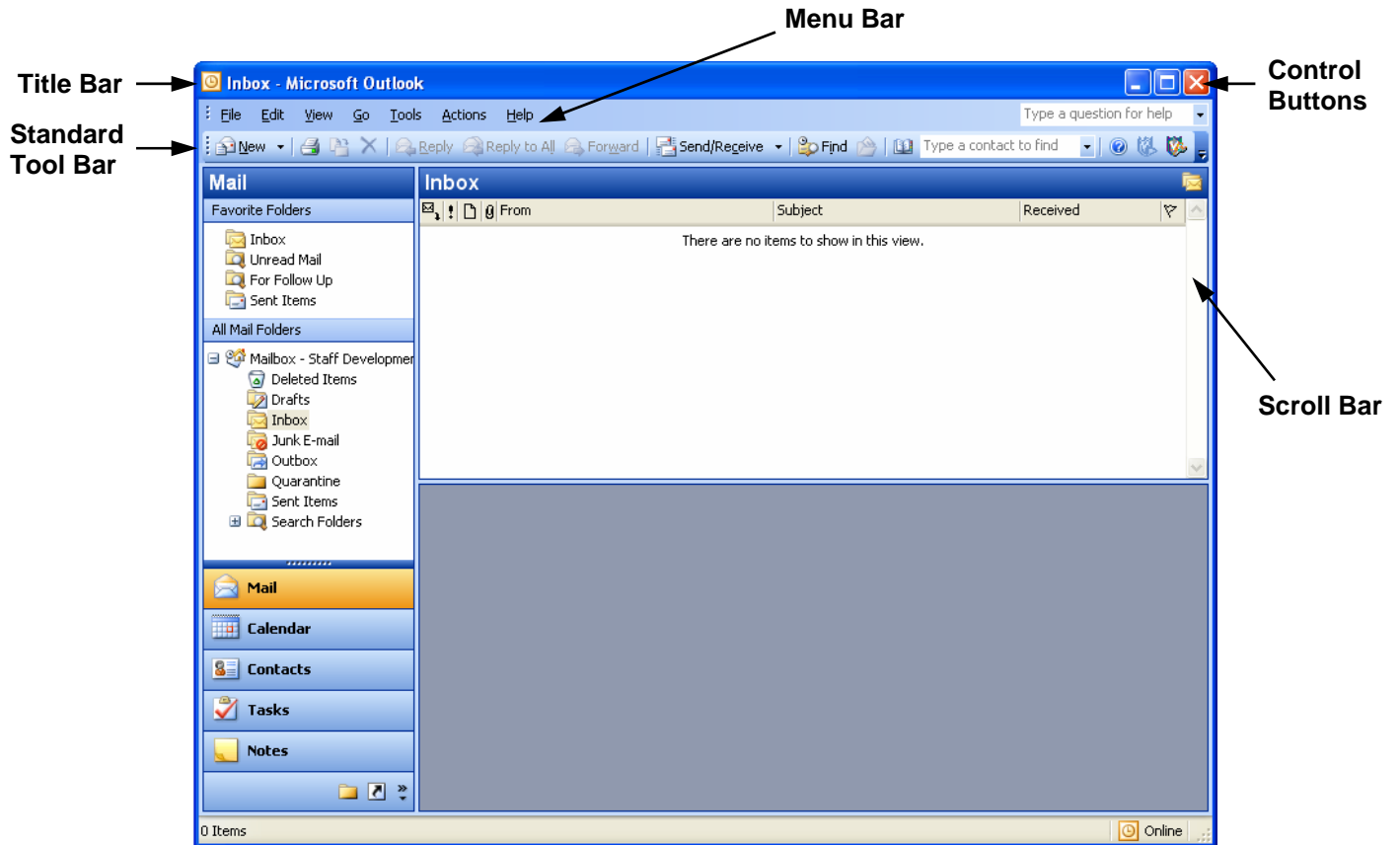
1. **Calendar** – the on-line version of your desk calendar, where you can **schedule appointments and group meetings**.
2. **Tasks** – the “To Do” list, where you can **assign and track tasks**.

## Section 2 – Review: Opening Outlook

### Starting the Program

1. Click on the **Start** button at the bottom left corner of your screen and choose **All Programs / Microsoft Office / Microsoft Office Outlook 2003** (or use the **Start / E-mail** shortcut.)
2. If necessary, close the Office Assistant.
3. Examine the Outlook Window. Like other Windows-based programs, Outlook contains several standard features:
  - a. **Title Bar** – contains the name of the program and the current function name
  - b. **Menu Bar** – contains standard menu items, such as **File, Edit, Help**, etc.
  - c. **Standard Toolbar** – contains shortcut buttons to items that are also contained within menus.
  - d. **Scroll buttons** (when necessary) – used to scroll horizontally and vertically when a window cannot contain all the information available for that window.
  - e. **Control buttons** – used to minimize, maximize, and close the program window.

(See image, next page)



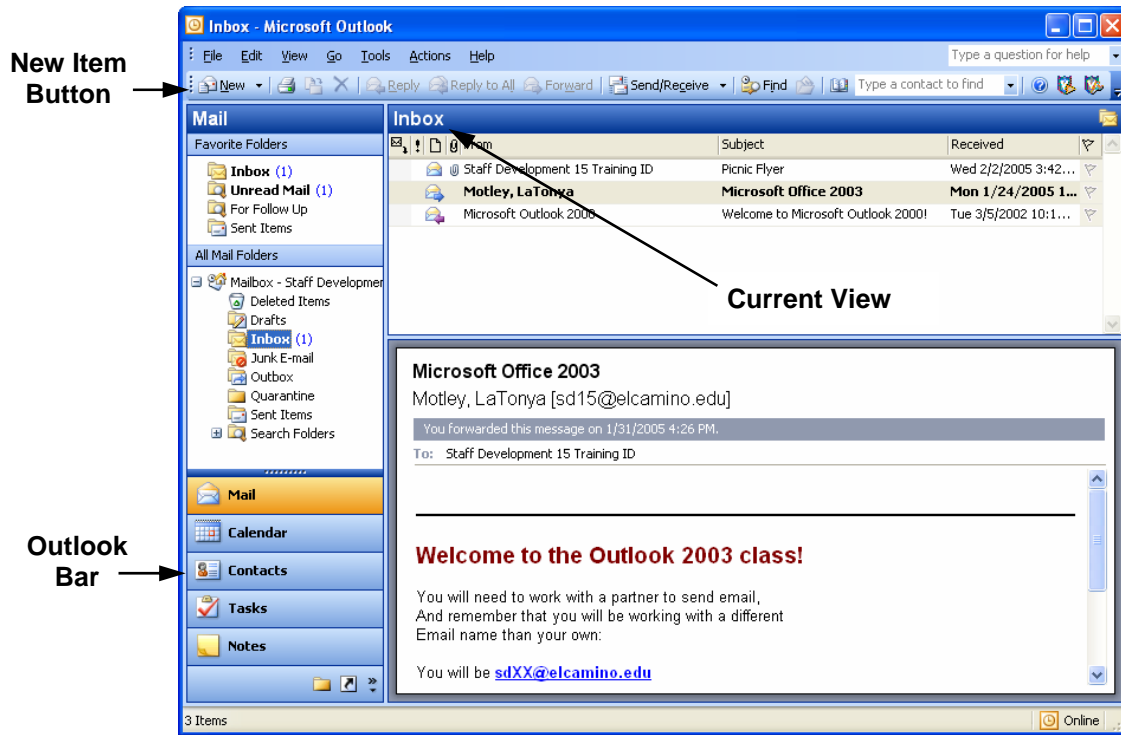
4. The **Outlook Window** also contains several other features specific to Outlook:

- a. Buttons in the **Standard Toolbar** specific to each function in Outlook – contains Reply, Reply to All, Forward, Address Book, etc.



- b. **Current View box** – contains the name of the subprogram being used to view and sort the information in the function
- c. **New Item button** – used to start the process of entering new information; this button changes depending on the function being viewed.
- d. **Outlook Bar** – contains shortcuts to the major functions.

*(See image, next page)*

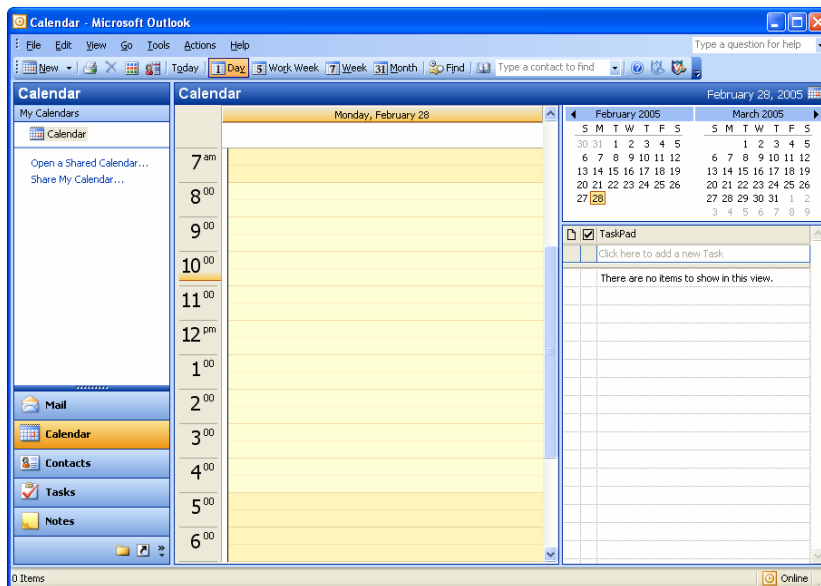


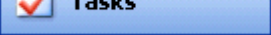
**Viewing the Functions**

1. When Outlook is first opened, it should show the **Inbox**.

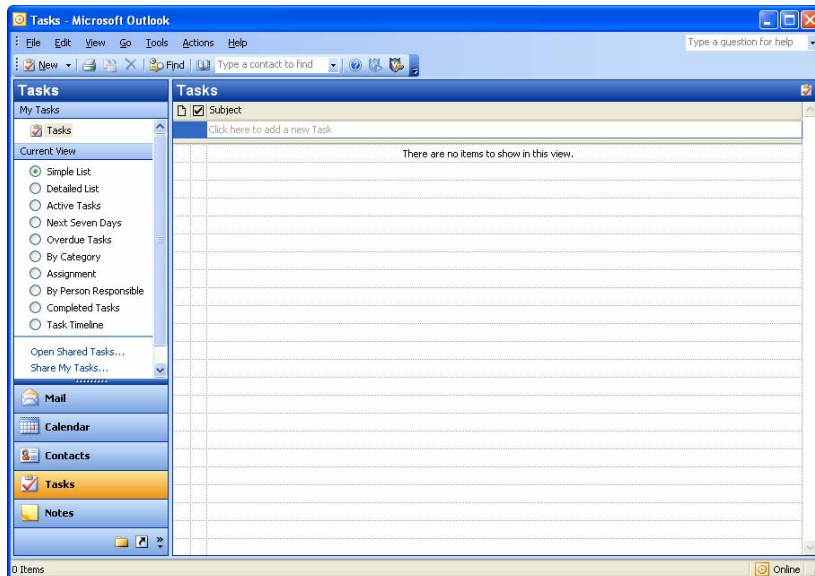
2. Click on the **Calendar** icon  **Calendar** on the Outlook Bar.


The Calendar displays.




3. Click on the **Tasks** icon  on the Outlook Bar.

The Task List displays.



4. Click on the **Contacts** icon  on the Outlook Bar.

The Contact List displays.

5. Click on the **Mail** icon  to return to the Inbox.

**NOTE:** As you open different functions, the **New Item button** changes, as do many of the other buttons on the toolbar.

## Section 3 – Using the Calendar

Everyone has a schedule. You may have meetings to attend, and committees to organize. We will use the group-scheduling feature of Outlook to assist you in juggling these tasks.

All items scheduled with the Outlook Calendar are called “**appointments.**” By definition, an appointment involves **meeting with another person**; a “**meeting**” is simply **an appointment you make with more than one other person.**

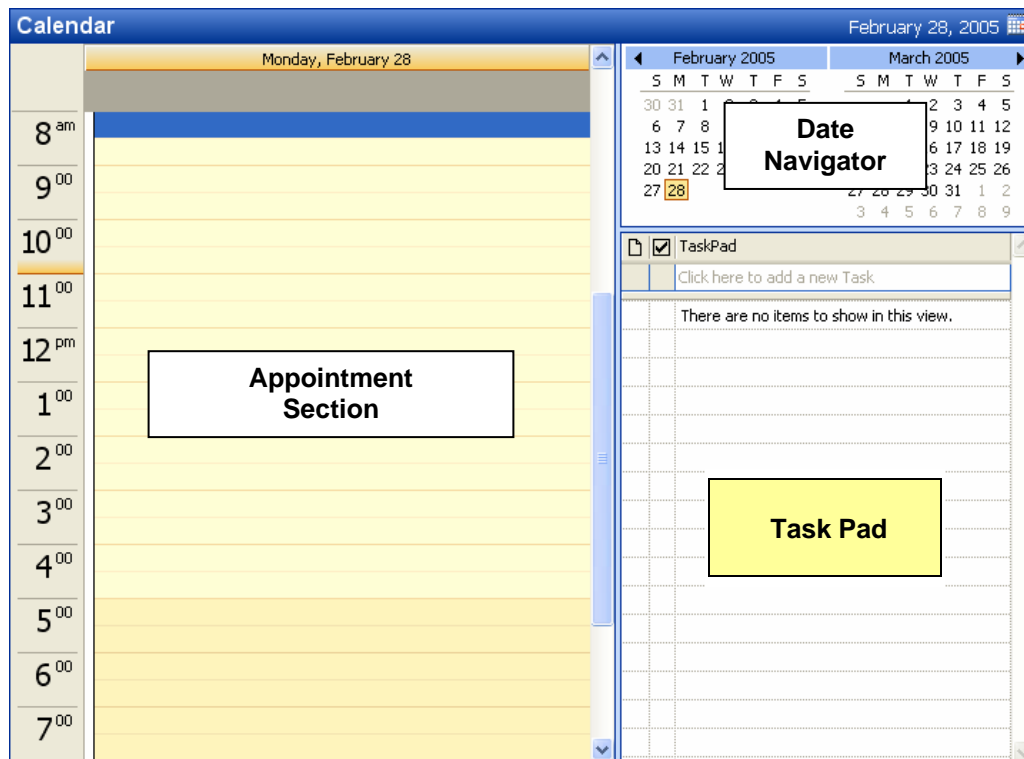
### Entering and Editing a New Appointment



1. Click the **Calendar** icon on the Outlook Bar. Ensure that the **View / Arrange By / Current View** shows **Day/Week/Month**.



The Calendar displays. Note that the **New Item** button on the toolbar has changed to **New Appointment** (*roll over the button to see the description*).



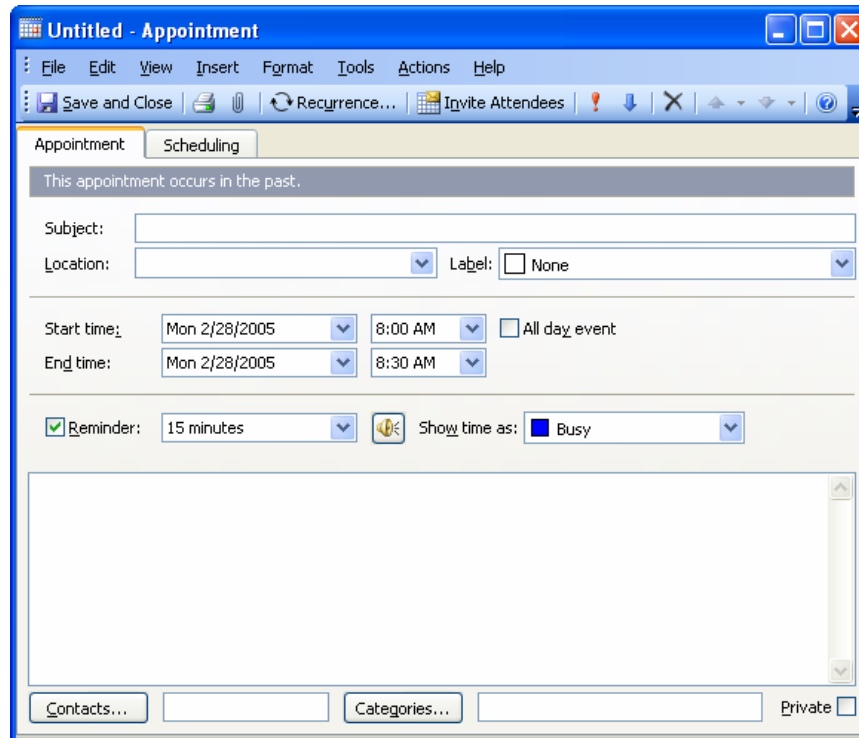
The **Day/Week/Month** calendar view has **three main areas** to work with: the **Appointment Section**, the **Date Navigator**, and the **Task Pad**.

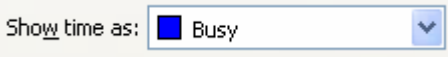
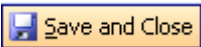


You can move from month to month with the **left and right arrows**   in the date navigator panel. We will start by returning to today's date:

2. Click on the **Today** button. 
3. Click the **New Appointment** button .

A blank untitled appointment card displays.




4. Type the **Subject** of your appointment as “**ECC Committee Meeting.**” (Note that the Title Bar and the button on the Windows Task Bar change when you leave the Subject field.)
5. Press **Tab** to move to the **Location** box and type the location “**East Cafeteria.**”
6. Because you began this appointment by clicking the New Appointment button, the appointment **defaults to a Start time of 8:00 am.** Click the **down arrow** next to **Start Time: <Month>** and select **next Wednesday.** Also change the **Start Time** to **9:00 am.**
7. Note the availability of the **Reminder** (alarm) and the “**Show time as**” box (defaults to Busy.) .
8. Click on **Save and Close**  to accept the appointment card as entered.
9. Observe the new appointment. The **Date Navigator** displays a **red square around today's date,** and **bolds the appointment date.**

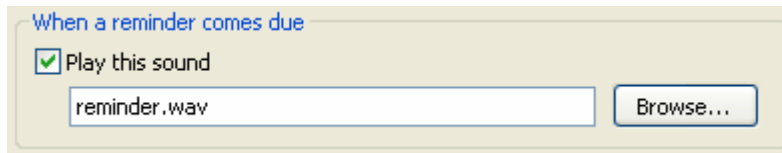
10. By simply selecting the appointment date and double-clicking on the appointment, we can **edit** it. Let's add information. Type: "**Bring the latest proposal**" in the appointment notes area. **Save and Close** the Appointment.

### Entering Additional Appointments

You can also create new appointments by simply **double-clicking** on the appropriate time slot in the Appointment Section.

1. Click on the **Today** button.
2. Scroll down and click the area for **6:30pm** to preset the start time, instead of clicking on the New Appointment button.
3. Type "**ECC Soccer Game**" as the subject and "**Soccer Field**" as the location.
4. Put a check mark in the "**Reminder**" box.

Click on the bell  to see the sound that plays by default



5. In the "**Show Time as:**" drop-down list, select "**Out of Office**". Be sure to click on **Save and Close** to complete the item.
6. Now, try **drag-selecting** a start through end time in a **blank area** of the Appointment section, then **right-click** and select **New Appointment** (or click the **New Appointment** button) to preset these as new start and end times.

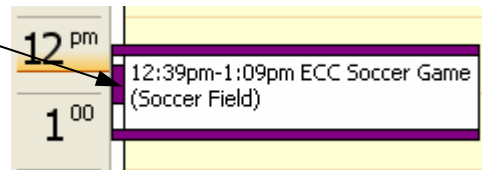
### Moving Appointments and Receiving an Appointment Reminder

1. Now try **dragging** the start and end times for the **ECC Soccer Game**, to move the appointment so that it will remind you **during this class**.

**Note:** that you are not limited to times ending in **":30"** or **":00"**  
You can set the **start times** and **reminder times** to start at odd intervals, such as **1:47pm**.

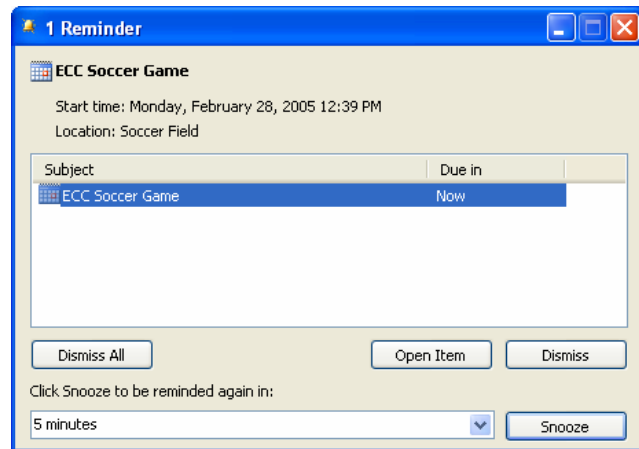
If you want to **open the item** immediately after changing the time this way, you must click away to **deselect the item** – then **click back to open**. Confirm your new start/end time(s) by opening the item.

2. You can also **drag** from the **left bar** of an appointment to **move** it intact to a different time spot on that same day.



3. Your reminder will pop up and look similar to this:

If your computer is set-up properly, it will also play a chime sound whenever a reminder pops up.



### Viewing the Calendar and Changing Calendar Views

- Items set with a **reminder** display a chime.
- In **Day view**, items set as **Busy** have a **solid blue** border, while **Tentative** items have **broken blue** and **Out of Office** items have **purple**.




1. Change from **Day view** to **Week view** by clicking on the **7 Week** button on the toolbar.

The entire week's appointments display.

2. Change to **Month view** by clicking on the **31 Month** button.

The entire month's appointments display.

3. Change back to **Day view** by clicking on the **1 Day** button (Today will again show a red box.)

4. You can also search for an appointment with the **Find** button , or view the appointments by **Category**. (See next section.)

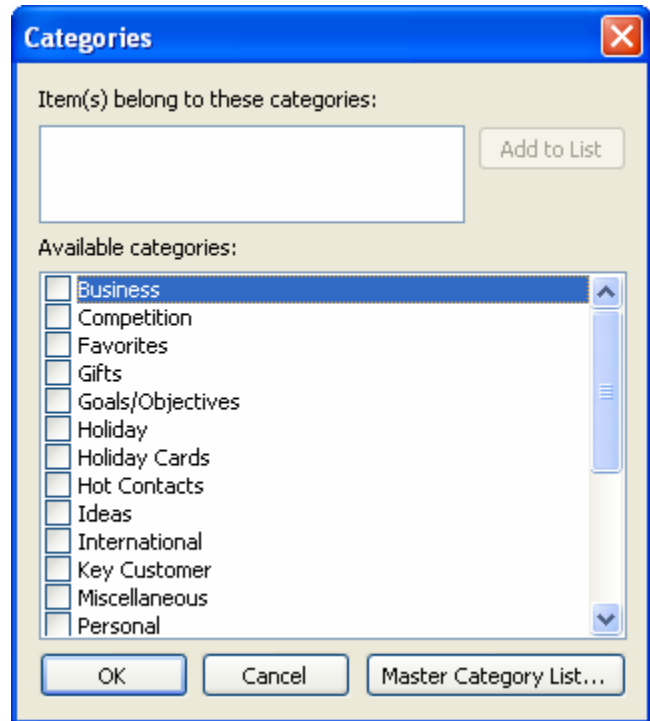
### Assigning Categories

Categories may be used to help sort and prioritize items in Outlook. Although any item can be assigned a category (including e-mail messages), categories are most helpful for appointments, tasks, and contacts. **Categories are a way to organize things without using folders.**

1. Let's edit the **ECC Soccer Game** appointment card by double clicking on it.
2. Click the **Categories** button at the bottom.

The Categories dialog box displays.

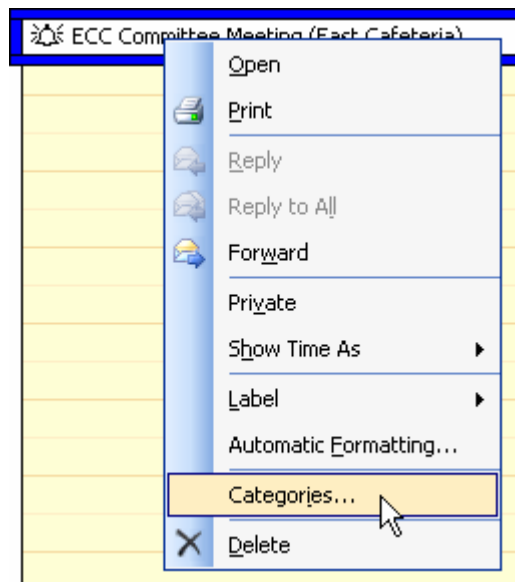
3. We could select any category by checking the box next to the category. But, we will type our own category of "**Sports**" in the blank box at the top of the window, then click on **Add to List** to add it to the existing category list. Click **OK** and **Save and Close**.



4. Go back to the **ECC Committee Meeting** entry and put a check mark in the category of "**Business**".

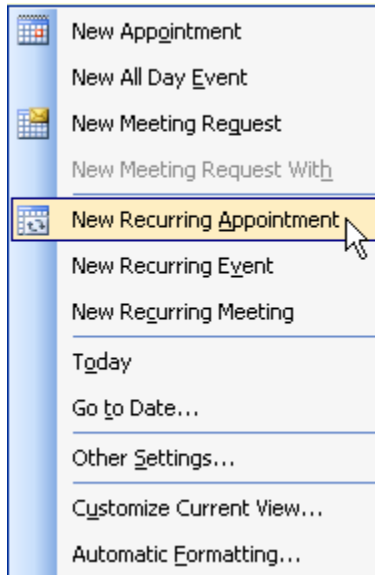
You can do this by simply **right-clicking** and choosing categories.

**NOTE:** You can also assign **more than one category** to any of your appointments.



### Setting a Recurring Appointment

When an appointment or meeting occurs regularly (such as an annual event, a monthly Division or Department meeting, or a weekly team meeting), you can establish the item's recurrence on the appointment card, and Outlook will complete your calendar for you.



1. Begin a new appointment:  
**Click on next Monday in the Date Navigator view, and then right-click on 9:00am.**
2. Choose **“New Recurring Appointment”** from the shortcut menu that pops up.

The **Appointment Recurrence** dialog box displays.

(NOTE: You could have also clicked on the **New Appointment** button, and then clicked the **Recurrence** button

 **Recurrence...** on the toolbar.)

Set the recurrence as **indicated below**. Click **OK**.

 A screenshot of the 'Appointment Recurrence' dialog box. The 'Appointment time' section shows Start: 9:00 AM, End: 10:30 AM, and Duration: 1.5 hours. The 'Recurrence pattern' section has 'Monthly' selected, with 'The first Monday of every 1 month(s)'. The 'Range of recurrence' section has 'Start: Mon 3/7/2005' and 'No end date' selected. At the bottom are buttons for 'OK', 'Cancel', and 'Remove Recurrence'.

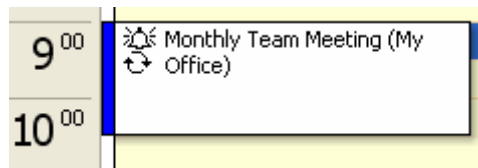
The **Untitled - Recurring Appointment** dialog box is displayed.

Now, we need to set details about this recurring meeting:

1. In the **Subject** field, type “**Monthly Team Meeting**”
2. In the **Location** field, type “**My Office.**”
3. In the **Categories** field, let’s choose “**Business**”
4. **Save and close.**
5. Look at the next few months with your **Date Navigator**, and note that **every 1<sup>st</sup> Monday is bold**, indicating at least one appointment on those days.

#### NOTES:

- a. Outlook defaults to the **day and time of the original appointment**. The day and time of the recurring appointments may be different. If so, change the recurrence, **not the original**.
- b. Keep in mind that recurring appointments rarely take place on a particular date (e.g., the 16<sup>th</sup> of each month), since a date may fall on a weekend. Normally, you should select the option for the recurrence to take place on a particular day (e.g., the third Wednesday) of the month. **A recurring appointment looks like this:**



#### View by Categories

Now that we have assigned categories to a few appointments, let's change the view to see how categories help organize appointments.

Click in the **View / Arrange By / Current View** menu and select “**By Category.**”

We see all appointments organized by category. We can also assign our own custom views by choosing **View / Arrange By / Current View / Define Views....**

### Inviting Others to a Meeting

Since the calendar information resides on the network, Outlook can “check” the availability of other people prior to your inviting them to a meeting provided the network is properly set-up. This powerful tool is a valuable time-saver, since it prevents the kind of back-and-forth negotiating for meeting times and miscommunication common to paper-based and phone-based organizations.

1. Begin a **New Appointment** as indicated below. At this point, you are using your **best estimate** of a good meeting and date time.

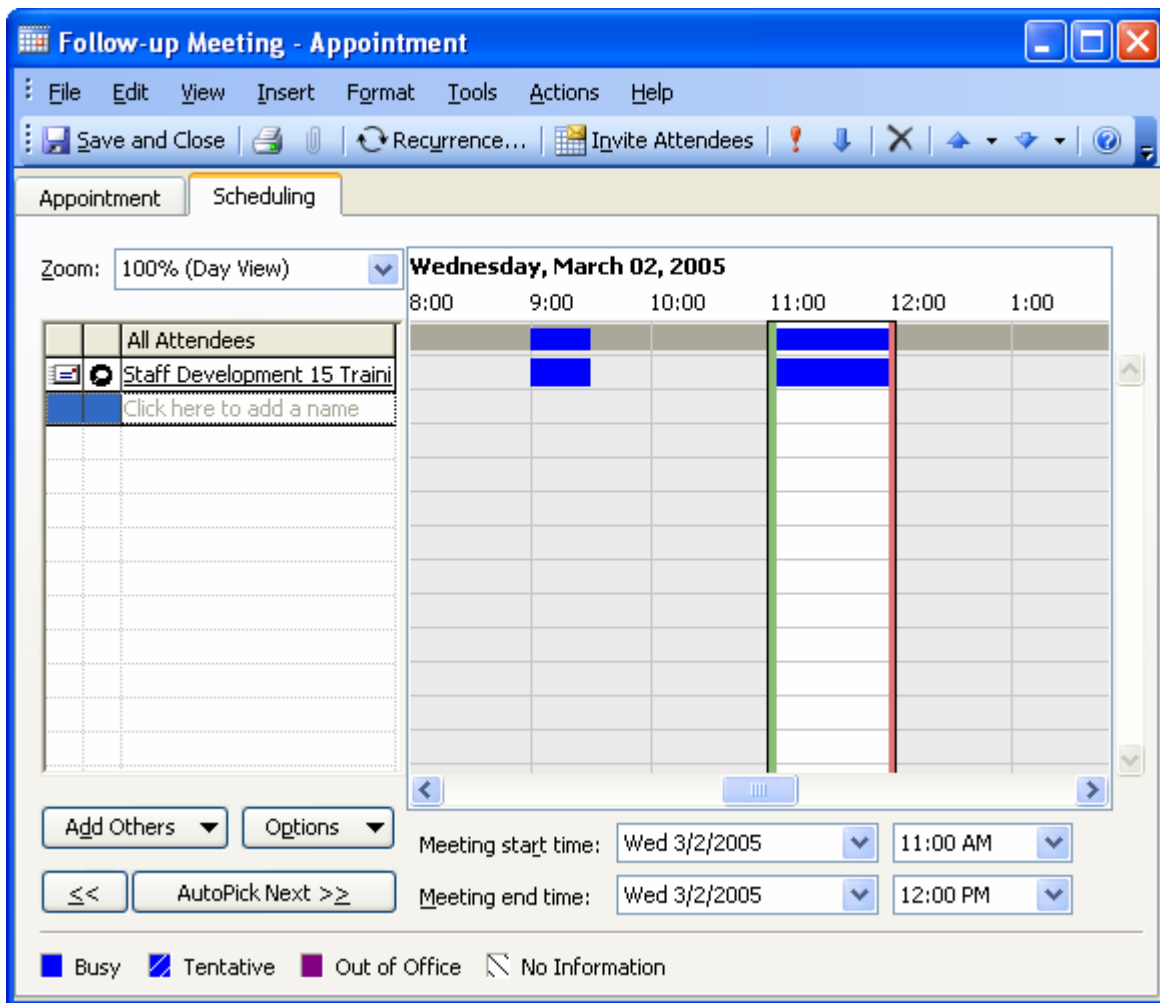
**Instructions:** If your class email user ID is an **even** number (SD02, SD04, SD06, SD08, SD10, SD12, or SD14), you will plan a meeting for next **Monday**.

If your ID is **odd** (SD01, SD03, SD05, SD07, SD09, SD11, or SD13), you will plan the meeting for next **Wednesday**.

The screenshot shows the 'Follow-up Meeting - Appointment' dialog box in Outlook 2003. The 'Scheduling' tab is selected. The subject is 'Follow-up Meeting'. The location is 'Board Room' and the label is 'None'. The start time is 'Wed 3/2/2005 11:00 AM' and the end time is 'Wed 3/2/2005 12:00 PM'. The 'All day event' checkbox is unchecked. The reminder is checked and set to '30 minutes'. The 'Show time as' is set to 'Busy'. The description text is 'This is a follow-up to the important ABC meeting we had last month.' The category is 'Business' and the 'Private' checkbox is unchecked.

2. After entering all details about the meeting, click the **Scheduling** tab on top of the card.

The Meeting Planner dialog box displays. (This box also pops up when you go to the menu item **Actions / Plan a Meeting...**)



Since you haven't invited anyone yet, the **All Attendees** section shows only when YOU are busy, based on what you have entered in your calendar for the proposed meeting date.

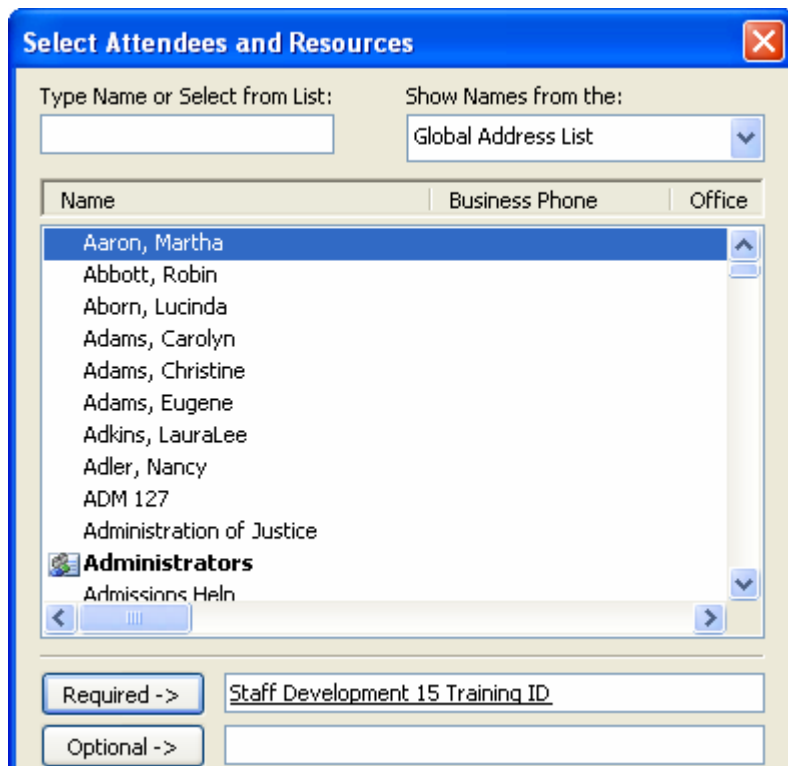
Once you **Add Others**, you will see other busy, out-of-office and tentative times. Once the attendees start responding to this meeting request, a **Tracking** tab will be created, where you can see who has accepted the invitation to the meeting.

The **Options** button allows you to only select working hours, or to expand the view so that you see more of the week.

The **AutoPick** allows you to push the time of the meeting block up and down, based on the availability of the attendees in your list.

3. Click the **Add Others** button at the bottom left of the Meeting Planner card and select **Add from Address Book**.

The **Select Attendees and Resources** dialog box displays.

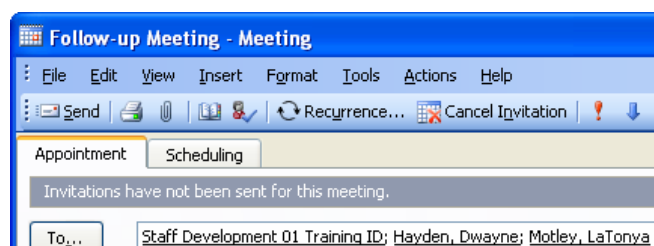


4. Select **your partner** as indicated by the instructor, and **your real email** address (ie: jdoe) and click on the **Required** button. Select **Staff Development 15**, and **Imotley** and click on the **Optional** button. These two buttons are used, depending on whether this attendee is required to be at the meeting or is receiving the invitation as a courtesy.
5. When the attendees are placed in the proper areas on the dialog box, click **OK**.

The server can check the Outlook calendars of the attendees and display the results in the **All Attendees** row at the top of the **Meeting Planner**, *without having the attendees, or the network administrator, having to set up Outlook to share calendars!*

NOTE: Attendee availability is color-coded (**broken blue** for **Tentative**, **solid blue** for **Busy**, **purple** for **Out of Office**). This information comes from the “**Show time as**” box on the appointment cards entered by the attendees at the time they scheduled their own appointments.

Also note that, if you click on the **Appointment tab**, the Meeting Planner card has changed to an e-mail screen, with a **Send** button instead of a **Save and Close** button.



### Using AutoPick

Scheduling a meeting with others always begins with a **guess**... instead of asking, “Can these five people make it to a meeting Wednesday from 10:00 a.m. to 11:00 a.m.?”, you really should be asking, “**What is the best one-hour block of time for these five people?**”

By checking the availability for other attendees, Outlook is able to show you if your first guess was a good one, and can assist you if it was not.

1. Click back on the **Scheduling** tab. Note the **green** and **red vertical bars** in the Meeting Planner schedule window. These represent the **proposed start and end times** of your meeting.
2. Click the **AutoPick Next >>** button.

Outlook chooses the best available block of time for your meeting.

3. Click **AutoPick Next >>** again.



Outlook advances to the next available block of time. If there are no conflicts, it steps to the **next half hour** block of time.

4. Use the Back button (<<) to go back one pick.


### Sending Invitations

1. Determine the best date and time for your meeting. Keep in mind that if attendees have **other items scheduled right before or after** your meeting, they may not be able to get to your meeting on time, or they may have to leave early.
2. Click the **Send** button.

The meeting notices are sent to the attendees email addresses you designated, and the **item is added to your calendar** with the revised date and/or time you chose.

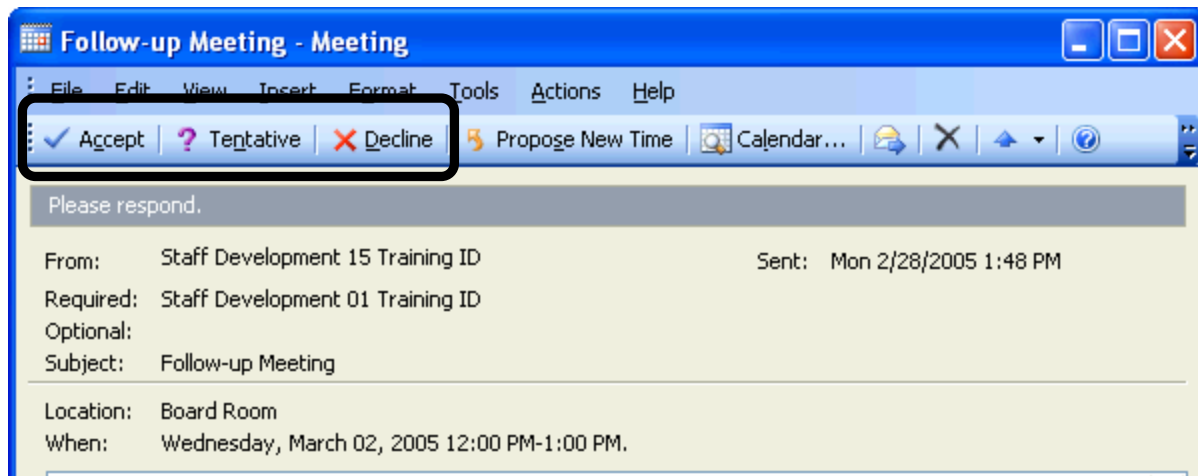
3. Click on the **Calendar** icon to view your meeting request.

### Receiving Invitations

1. Click the **Inbox** icon on the Outlook Bar. Meeting requests are designated with a special status icon . Find the meeting request sent by your partner.
2. **Double-click** the meeting request message to open it.

The message displays.

**Note:** the buttons at the top left to **Accept**, **Decline**, or **Tentative** for the meeting.



3. Select either **Accept** or **Tentative** for this meeting,

**The meeting is added to your calendar**, and a dialog box displays asking if you wish to Send the response now (default), Edit the response before sending (add comments), or Don't send a response.

**NOTE:** If you were sent an invitation as a courtesy, (i.e. so that you would know the meeting is happening, but are not required to attend), you might choose not to respond.

4. Click **OK** to send the reply without editing. **Notice that the original meeting request message has disappeared.**



5. The instructor (**SD15**) will decline this meeting, so watch the screen:

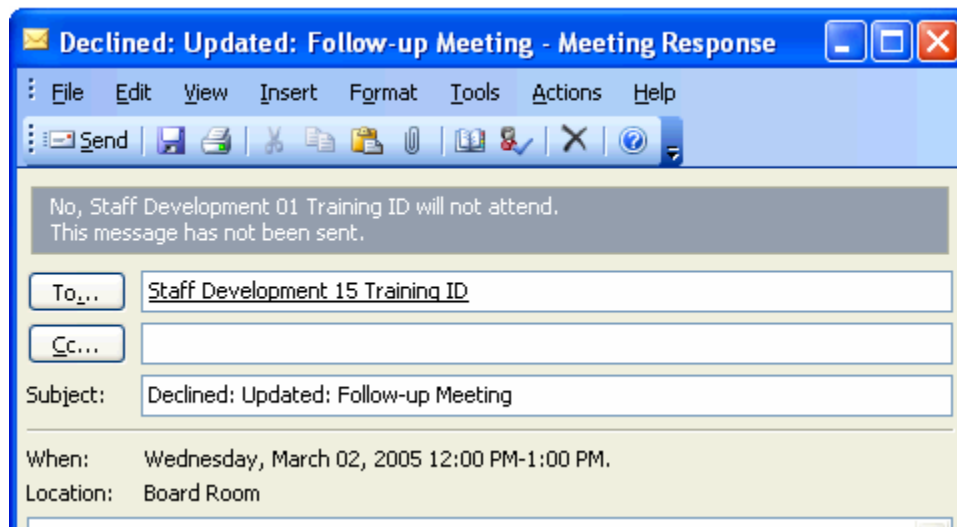
If you need to decline a meeting:

- a. Click the **Decline** button.

A dialog box displays asking if you wish to send a reply or edit the response.

- b. Note that **Edit the response before sending** is already selected by default. Click **OK**.

A Reply message window displays.



- c. Below, type your reason for the decline.
- d. Click **Send** to send the reply. The meeting **will not be added** to your calendar, and the **meeting request will be deleted**.

### **Checking Attendee Replies**

1. Click the **Inbox** icon on the Outlook Bar. Responses from your prospective attendees are marked with special status icons from the system.
2. **Double-click** the response message to open it.
3. **Close** the message when finished.

**Checking Attendee Status in the Calendar**

1. Click the **Calendar** icon on the Outlook Bar.
2. Use the **Date Navigator** to find the date of the meeting, and then find the meeting in the **Appointment Section**.
3. **Double-click** on the meeting in the **Appointment Section** to open the appointment card.
4. Click the **Tracking** tab to view attendee responses.

The following responses to this meeting have been received:

Name	Attendance	Response
Staff Development 15 Training	Meeting Organizer	None
Staff Development 01 Training	Required Attendee	Accepted
Staff Development 02 Training	Required Attendee	Tentative
Staff Development 03 Training	Required Attendee	Declined
Click here to add a name		

**NOTE:** You can STILL invite others, even at this point!


**Canceling a Meeting**

1. Navigate to the **date and time** of your proposed meeting.
2. **Right-click** on the proposed meeting and choose **Delete**.
3. You will be asked to let Outlook **Send cancellation and delete meeting**.

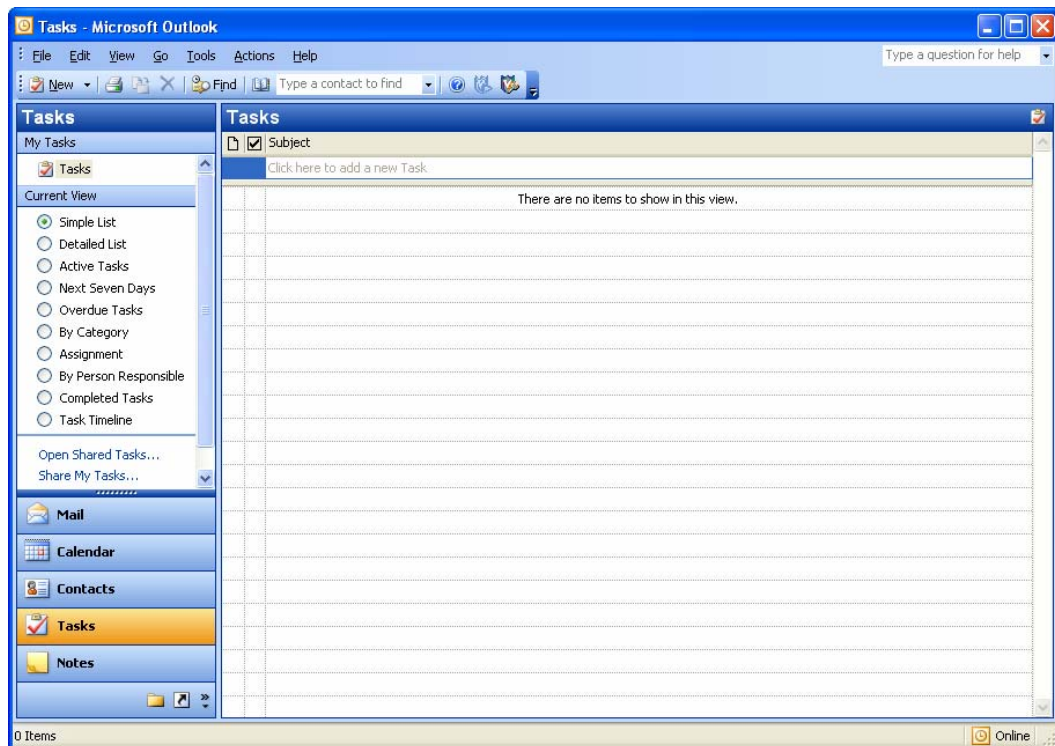
## Section 4 – Using Tasks

Similar to Calendar items, Tasks are “To Do” items that **do not involve scheduling with other people**, and thus do not have to take place at a particular time. Normally, tasks must simply be done by a particular date. Tasks can occur just once, or be recurring.

### Entering a New Task

1. Click the Task icon  on the Outlook Bar.

The Task List displays. Note that the New Item button on the toolbar has changed to New Task.



2. Ensure that the **View / Arrange By / Current View** shows **Simple List**.
3. Click the **New Task** button .

A blank Untitled - Task card displays.

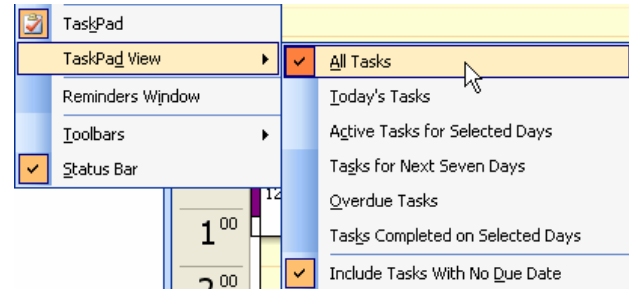
4. Type the **Subject** of your task as “**Status Report**”. Note that the Title Bar and button on the Windows Task Bar change when you leave the Subject field.
5. In the **Due date** section, click the **down arrow** for the due date, and choose the **last workday of this month**.
6. The system defaults to no **Start date**. (However, it may be necessary for you to start this task some days prior to its due date.)
7. Note the availability of the **Status**, **Priority**, **% Complete**, **Reminder**, and **Categories** fields.
9. Click on **Save and Close** to accept the task card as entered.
10. Back under **Tasks**, your new task is listed.

NOTE: Your task is also listed in the **task pad** area of the **Calendar**, when using the **Day/Week/Month** View. (See next Section.)

### Viewing Tasks in the Calendar

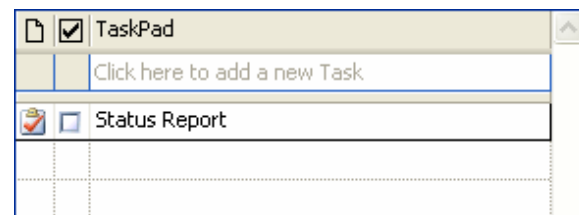
1. Click the **Calendar** icon on the Outlook Bar.
2. Ensure that the Current View box shows **Day/Week/Month** and that the **1 Day view** is selected.
3. Note the presence of a small Task Pad at the bottom of the right corner of the screen in all views (**Day, Week, and Month.**)

To configure what tasks will be visible on the Calendar Task Pad, choose **View / Task Pad View**. (The system defaults to **All Tasks**).



### Entering Additional Tasks

1. **Double-click** the area of the Task Pad that reads, "**Click here to add a new task.**"



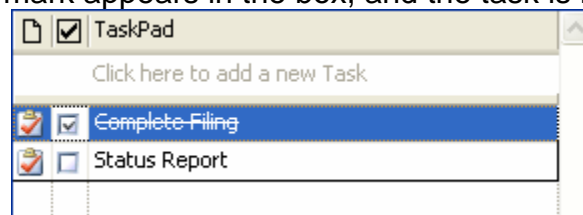
2. Create a new task with the subject "**Complete Filing**" and have the due date set to **tomorrow**.
3. Be sure to click on **Save and Close** to complete the item.

**NOTE:** Items set with a reminder **do not display a chime**, but you will be reminded anyway.

### Completing a Task

1. Click in the **check mark** box next to **Complete Filing**.

The check mark appears in the box, and the task is lined out.



2. If desired, you can **right-click** the task and **delete** it.

### Editing a Task

To make changes directly in the task card,

1. **Double-click** the **Status Report** task.
2. Click inside the field(s) to be edited and make the changes as follows: **completion** at **50%**, and **priority** as **High**. **Save and Close** the task.

### Setting a Recurring Task

Tasks are often recurring, as are meetings. Because it would be impractical for Outlook to copy an infinite number of tasks with recurring dates, the system handles recurring tasks in a slightly different way than recurring appointments (which can be copied to the specific dates involved.) Instead, **Outlook generates a new task with a new due date each time the previous task is marked as complete.**

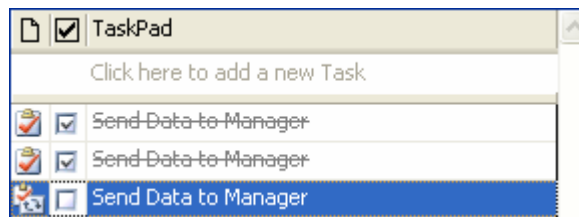
1. Begin a **New Task** with the subject “**Send Data to Manager**”, due **tomorrow**.
2. After entering all details about the task, click the **Recurrence** button on the toolbar.

The Task Recurrence dialog box displays.

3. Set the recurrence as a **Weekly** event. Click **OK**, then **Save and Close** the task.

### Checking Recurrence Regeneration

1. Mark the **original** recurring task as complete by **checking** the box.
2. Outlook lines out the original task, then generates a **new task** with a **new due date**.



3. **Double-click** the task to open it and verify that the due date has changed.


### Assigning a Task to Others: Task Requests

As you begin entering a task, you are listed as the “**owner**” of that task. Occasionally, you will want to assign a task to another person. Rather than sending them an e-mail message, phone message, or paper request, you can send them a **Task Request**.

If accepted, the task is automatically entered onto **their Task List**, as well as being maintained on **your own Task List for tracking purposes**.

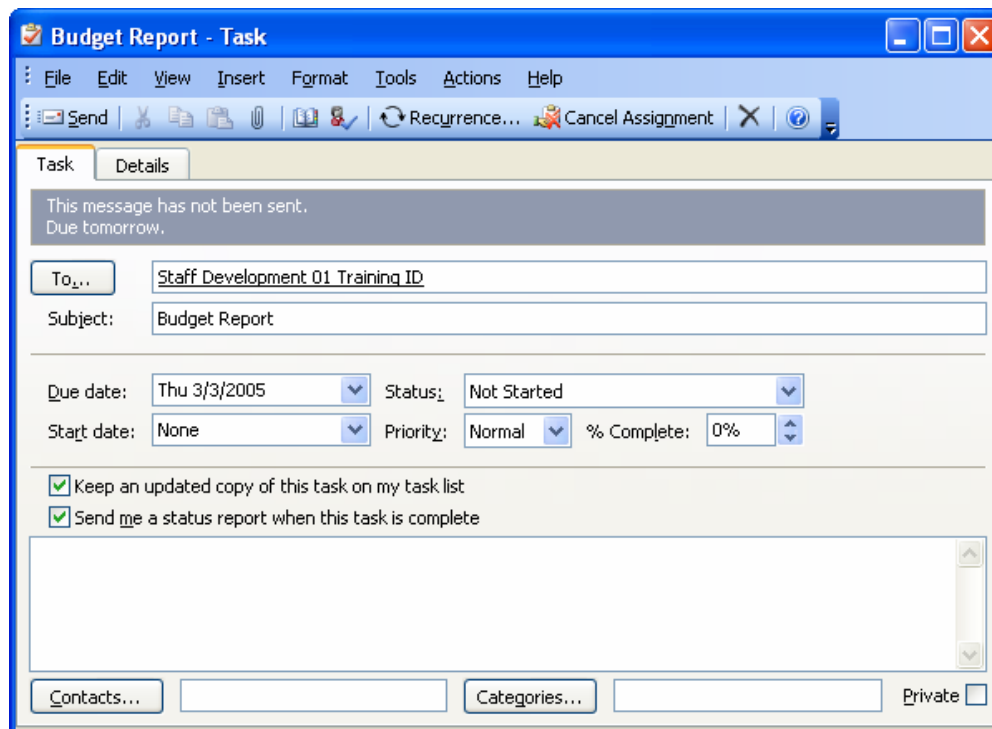
1. Begin a new task with the **Subject** of either:

“**Fiscal Report**” (Even IDs: SD02, SD04, SD06, SD08, SD10, SD12, or SD14) or “**Budget Report**” (Odd IDs: SD01, SD03, SD05, SD07, SD09, SD11, or SD13) and a **Due date** of next **Thursday**.

2. After entering all details about the task, click the **Assign Task** button  on the toolbar (the “handoff”).

The task card changes to an **e-mail** message.

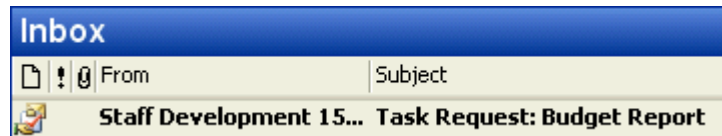
3. Select your **partner** as the new owner of the task. Notice that you can assign the task to **more than one person** at a time, sort of like “cc’ing” in email.



4. Be sure to check the boxes to “**Keep an updated copy of this task on my task list**” and to “**Send me a status report when this task is complete.**”
5. Click **Send** to send the task request.

### Receiving Task Requests

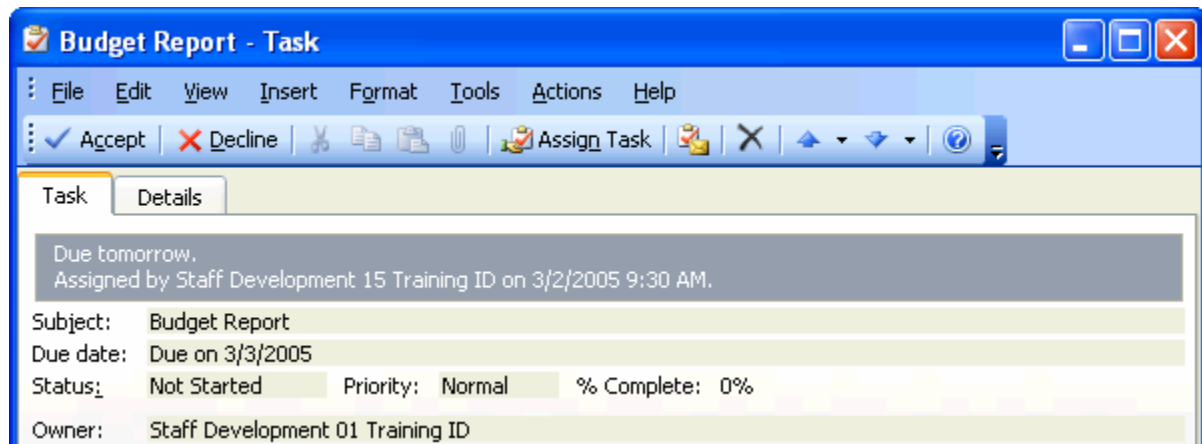
1. Go to your email **Inbox** and look for notification that **a task has been assigned to you**. Task requests are designated with a special status icon (the “handoff”).



2. **Double-click** the message to open it.

The message displays. Note the buttons at the top left to **Accept** or **Decline** the task.

3. If you wish to **accept the task**,
  - a. Click the **Accept** button. The **task is added to your Task List**, and a dialog box displays asking if you wish to send a reply or edit the response.
  - b. Click **OK**. Notice that the original task request message has disappeared.



4. If you wish to **decline this task**,
  - a. Click the **Decline** button. A dialog box displays asking if you wish to send a reply or edit the response by adding a comment.
  - b. Click **OK** to **Send** the response. Notice that the original task request message has disappeared.

**Checking Task Request Replies in the Inbox**

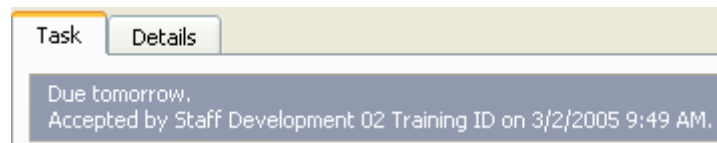
1. Click the **Inbox** icon on the Outlook Bar. Responses from your **prospective owner** are marked with a special status icon from the system.



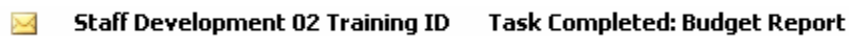
2. **Double-click** the response message to open it.
3. **Close** the message when finished.

**Checking Task Status in the Task List**

1. Click the **Task** icon on the Outlook Bar.
2. **Double-click** to open the assigned task.
3. Actions noted by the **new owner** of the task appear on your task card as well.

**Task Completed Notification**

When the responsible owner of a task checks that task is complete, the system **automatically notifies the requestor** of the task's completion with a mail message, provided that the requestor checked the box marked "**Send me a status report when this Task is complete**" at the time the task was assigned.



## NOTES: