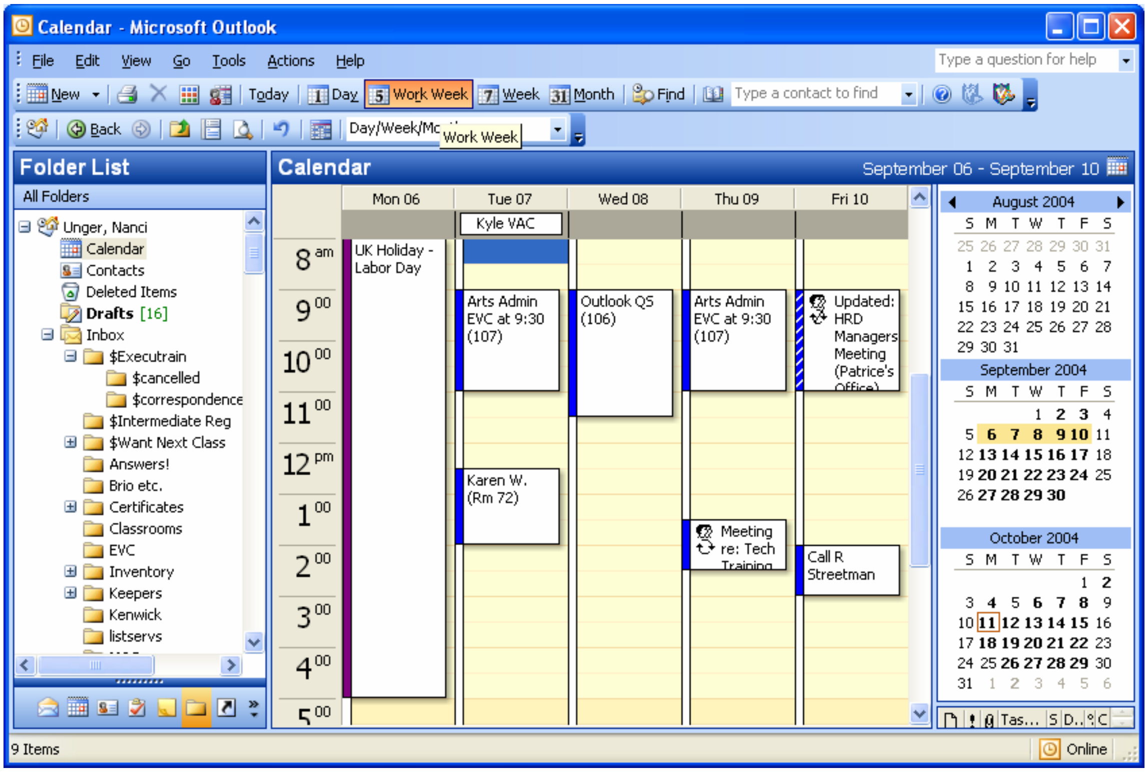
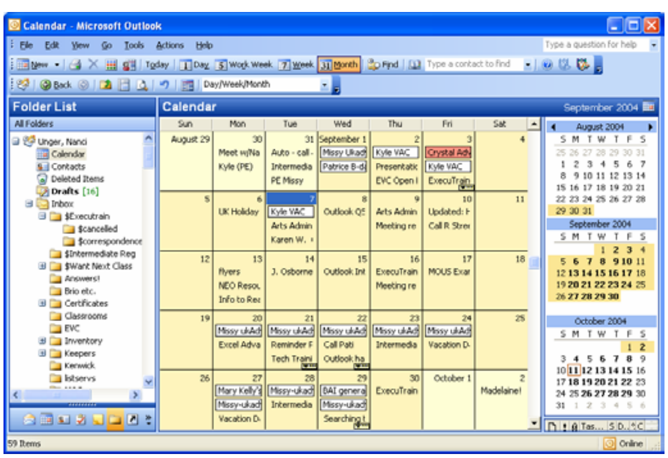
Outlook 2003 Calendar



The Calendar Standard Toolbar

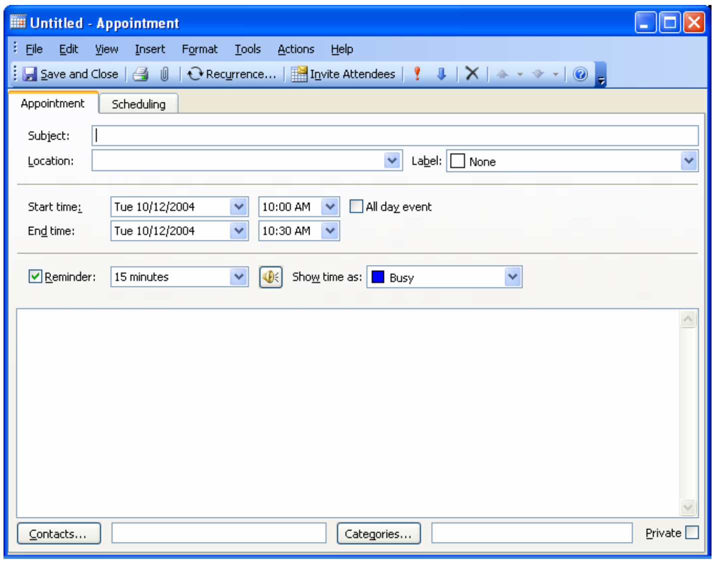
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15



1 = Create new appointment
2 = Drop-down menu to create new items
3 = Print
4 = Delete
5 = Calendar Coloring
6 = View Group Schedules
7 = Go to Today (select the current date)
8 = Day: Show current day
9 = Work Week: Show 5 days
10 = Week: Show 7 days
11 = Month: Show month (see left)
12 = Find
13 = Address Book
14 = Type a contact name to find
15 = Help

<u>APPOINTMENT</u>: an activity that does not involve inviting other people or reserving resources.

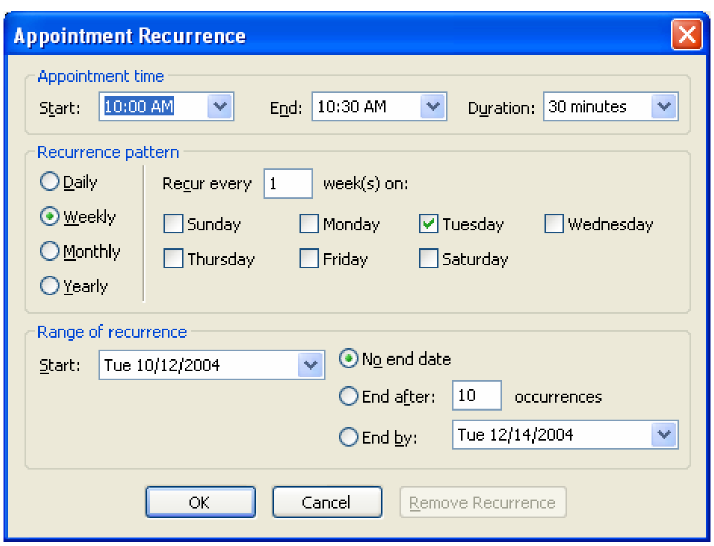
To create a new appointment, either open a new appointment form or type directly on the calendar. Add a subject, location, starting time, etc., and a reminder if you wish. You can designate the time an appointment takes as busy (displayed on the calendar with a dark blue line), free (no line), tentative (light blue line), or out of office (purple line). Double-click on an appointment on your calendar to open it, and single-click to select it.



<u>Create an Appointment</u>

1. In the monthly calendar pane, select the month and date.
2. In the schedule pane, double-click the time when the appointment is to begin.
3. The **Untitled – Appointment** dialog box appears, with the **Appointment** tab displayed.
4. In **Subject** text box, enter subject of appointment.
5. In **Location** text box, enter meeting place.
6. In **Start time** and **End time**, enter dates and times (or use drop-down menus to display calendars).
7. Select **Reminder** check box to specify when you want to be reminded.
8. In **Show Time As** drop-down list, choose how you want to display the time in your calendar (and on the Exchange server, if you are on it).
9. Use the large text box to enter information you want to include about the meeting.
10. Click **Categories** button to assign a category to an appointment.
11. Click **Save and Close** button to return to the calendar.

<u>Schedule a Recurring Appointment</u>

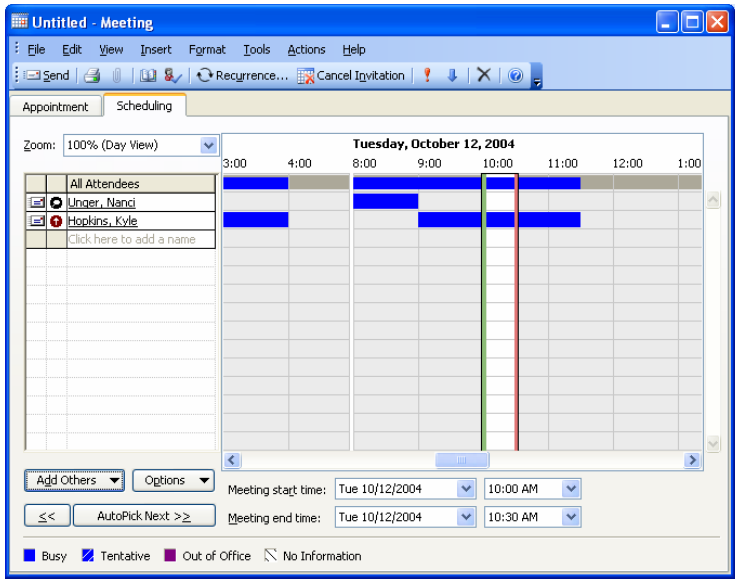


1. Open the Calendar, and on the toolbar choose **Actions → New Recurring Appointment.**
2. The Appointment Recurrence dialog box appears on top of Appointment dialog box.
3. In Appointment Time area, enter **Start**, **End**, and **Duration** times.
4. In **Recurrence Pattern** area, indicate the frequency of the appointment (Daily, Weekly, Monthly, or Yearly). When you select an option, the **Recurrence Pattern** choices change.
5. Enter day, month, and other options as needed.

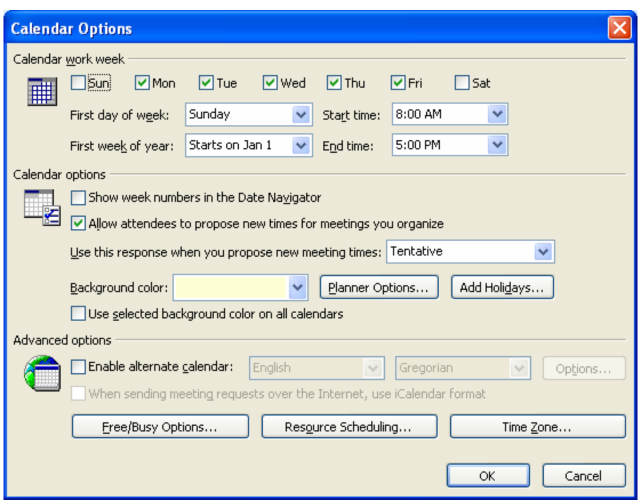
6. In **Range of Recurrence** area, enter:
   Start – date when recurring appointments begin
   No End Date – if appointments are not on a limited schedule
   End After – if there is a specific number of appointments
   End By – if the appointments end on specific date
   Click OK to close the **Appointment Recurrence** box
7. The Appointment dialog box appears
8. Fill in desired information, then click **Save and Close** button

<u>MEETING</u>: an appointment to which you invite people and resources

<u>Create a Meeting</u>



1. Choose **Actions → Plan Meeting.**
2. **Plan a Meeting** dialog box appears.
3. Enter names of attendees or click on the **Invite Attendees** button
4. After you've selected the attendees, press **Enter.**
5. Open **Meeting Start Time** drop down list to select date from calendar.
6. Open **Meeting End Time** drop down list to select time.
7. Note the time grid to the right of each attendee name showing availability.
8. When finished, click the **Make Meeting** button. The **Meeting** dialog box will appear and you can enter the details.
9. When you're ready to send meeting invitations via email, click the **Send** button.
10. Close the window by choosing **File → Close** or click on the **X** in the upper right corner.



<u>Set your Calendar Preferences</u>

1. Go to **Tools → Options**
2. Go to the **Preferences** tab,
3. Click on the **Calendar Options** button.

This will open a dialog box that lets you specify your calendar work week, Date Navigator week numbers, calendar background color, time zone(s), and more. After you've chosen your settings, click on the **OK** button.

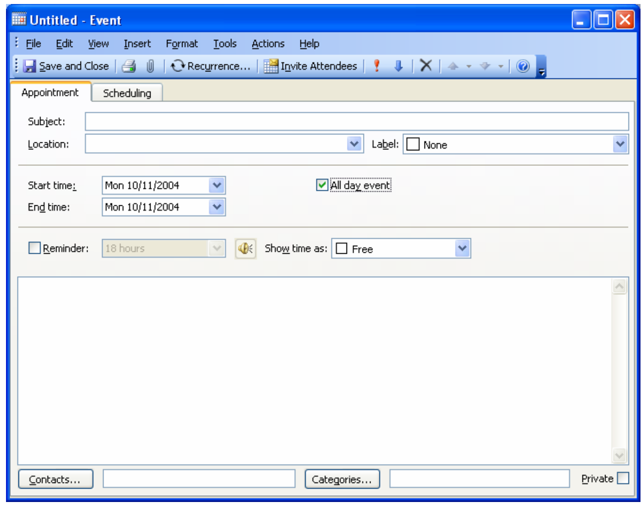
<u>EVENT</u>: an activity that lasts at least 24 hours

Examples include a conference or a vacation. An **annual** event, such as an anniversary, occurs yearly on a specific date, while a **standard** event occurs once and can last for one day or several days.

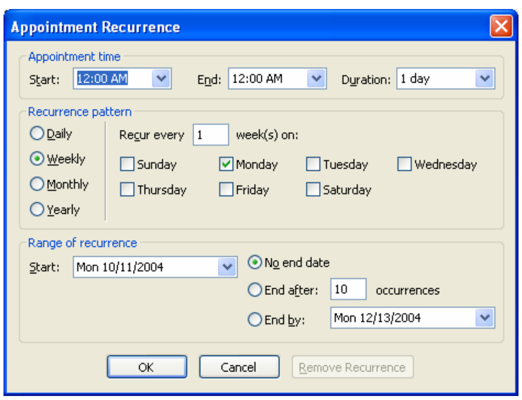
Events and annual events appear in the calendar as banners, not blocks of time. An all-day appointment displays time as **Busy** when viewed by others, while an event or annual event displays time as **Free**.

<u>Schedule an Event</u>

1. Choose **Actions → New All Day Event.**
2. The **Event** dialog box appears.
3. Fill in Subject, Location, Start Time, and End Time.
4. Make sure **All Day Event** box is checked (only difference between Event and Appointment).
5. Click **Save and Close**.

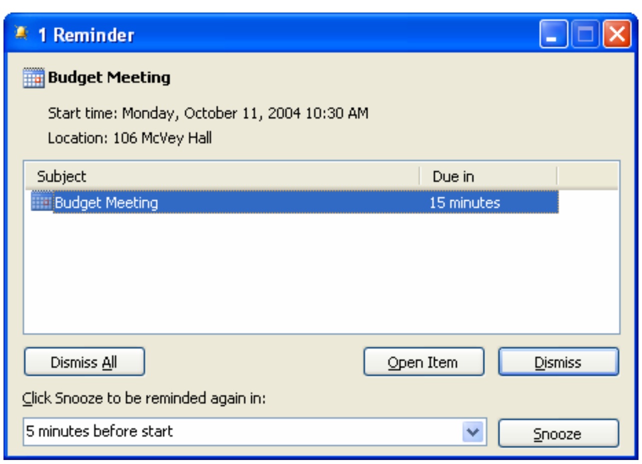


<u>Schedule a Recurring Event</u>



1. Open a new **All-Day Event** form and click the **Recurrence** button.
2. The **Appointment Recurrence** dialog box opens; fill in information and click OK.
3. The **Event** dialog box appears; complete your information, then click **Save and Close**.

To edit an event: Double-click the event on your calendar. Outlook opens the event form so you can change time, date, and other details.



Note to Self…

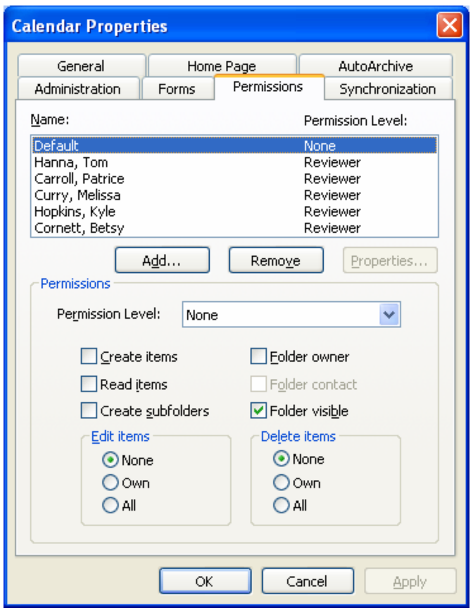
Outlook will remind you of your appointments and meetings if you select the Reminder checkbox in the Appointment or Event dialog box.

When the alert appears, you can either **Dismiss** it or press the **Snooze** button to be reminded again.

Sharing and Delegating Items and Folders

Outlook on the Exchange server lets you share items and folders a couple of ways.

<u>**Use this:**</u>	<u>**To do this:**</u>
Shared Private Folders	Give one or more persons permission to read, modify, create, or delete information in one or more of your private folders. Example: You want your manager to see your calendar.
Delegate Access	Give someone permission to send messages on your behalf, accept meeting and task requests for you, or manage information in your private folders. Example: You want someone to help you manage your e-mail and calendar.



To set SHARING permissions (one folder at a time)

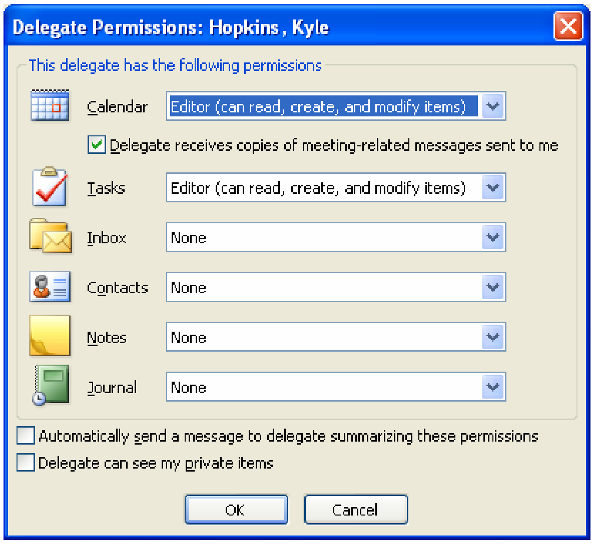
1. If the Folder List is not visible, click **View → Folder List**
2. Right-click the folder you want to share, and then click **Properties** on the shortcut menu.
3. Click the **Permissions** tab.
4. Click **Add**.
5. In the **Type Name** or **Select from List** box, type or select the name of the person to whom you want to grant sharing permissions.
6. Click **Add**, then click **OK**.
7. In the **Name** box, click the name of the person you just added.
8. In the **Roles** box, click the permissions you want, then click **OK**.

<u>**In this Role:**</u>	<u>**You have these permissions:**</u>
Owner	Create, read, modify, and delete all items and files and create subfolders, ***and change the permission levels others have for the folder.***
Publishing Editor	Create, read, modify, and delete all items and files, and create subfolders.
Editor	Create, read, modify, and delete all items and files.
Publishing Author	Create and read items and files, create subfolders, and modify and delete items and files you create.
Author	Create and read items and files, and modify and delete items and files you create.
Reviewer	Read items and files only.
Contributor	Create items and files only. The contents of the folder do not appear.

DELEGATE Access

To give another person delegate access means that person has "send-on-behalf-of" permissions; if the delegate has access to your Inbox, the delegate can **reply** to your mail on your behalf. Message recipients see the manager's name in the **Sent On Behalf Of** box and the delegate's name in the **From** box.

The delegate can also **organize meetings** on your behalf, **respond to meeting requests** sent to you, and **respond to task requests** sent to you.



To grant Delegate access:

1. Go to **Tools → Options**
2. Select **Delegates** tab
3. Click **Add** button to get **Add Users** dialog box
4. In **Add Users** box, select name of person you want as delegate and click **Add**, then **OK**
5. The **Delegate Permissions** box will appear; select the permissions you want, click **OK**.

Tip: If you have granted someone Delegate access, you can still keep items out of their view. Open the item and click the **Private** check box in the bottom right corner of the item's form (as long as you haven't selected "Delegates can see my private items" on the Delegate tab).

A delegate must have both Editor permission in a manager's Calendar or Tasks folder and Reviewer permission in the manager's Inbox to accept meeting or task requests for the manager. HOWEVER -- If a manager selects **"Send meeting requests and responses only to my delegates, not to me"** on the Delegates tab (**Tools → Options**), then the delegate does not need Reviewer permission in the manager's Inbox because the meeting requests and responses will go directly to the delegate's Inbox.

In this role:	**You can:**
Author	Read and create items, and modify and delete items you create. (Example: create task and meeting requests in the manager's Task or Calendar folder, and then send either item on the manager's behalf.)
Editor	Read and create items, and modify and delete any item. (Example: reply to messages, task requests, and meeting requests for the manager).
Reviewer	Read items only (Example: read messages in another person's Inbox).
Custom	Perform activities defined by the manager.

Note: If you have Author or Editor permission, any items you create while the shared folder is active are stored in the other person's folder.

To open another person's folder

1. Go to **File ➔ Open**, and then click **Other User's Folder**.
2. In the **Name** box, type the name of the person who granted you sharing or delegate access permission, or click **Name** to select from a list.
3. In the **Folder** box, click the folder you want to open.

To schedule an appointment for another person

(If you are not a delegate, you must have Author or Editor permission to do this.)

1. Open the other person's Calendar.
2. Go to **File ➔ New**, and then click **Appointment**.
3. In the Subject box, type a description.
4. In the Location box, enter the location.
5. Enter **Start** and **End** times.
6. Click **Save and Close.**

To schedule a meeting for another person

1. Open the other person's Calendar.
2. Go to **File ➔ New**, and then click **Meeting Request**.
3. In the **To** box, type the attendee names or click **To** to select from a list.
4. In the **Subject** box, type the location of the meeting.
5. In the **Location** box, type the location of the meeting.
6. Enter the **Start** and **End** times.
7. Select other options you want.
8. Click **Send**.

To respond to meeting requests for another person as a delegate

1. Open the other person's Inbox if their meeting requests are not being sent directly to you.
2. Open the meeting request.
3. Click **Accept**, **Tentative**, or **Decline**.

Organize Your Email

Tips for effective email management:

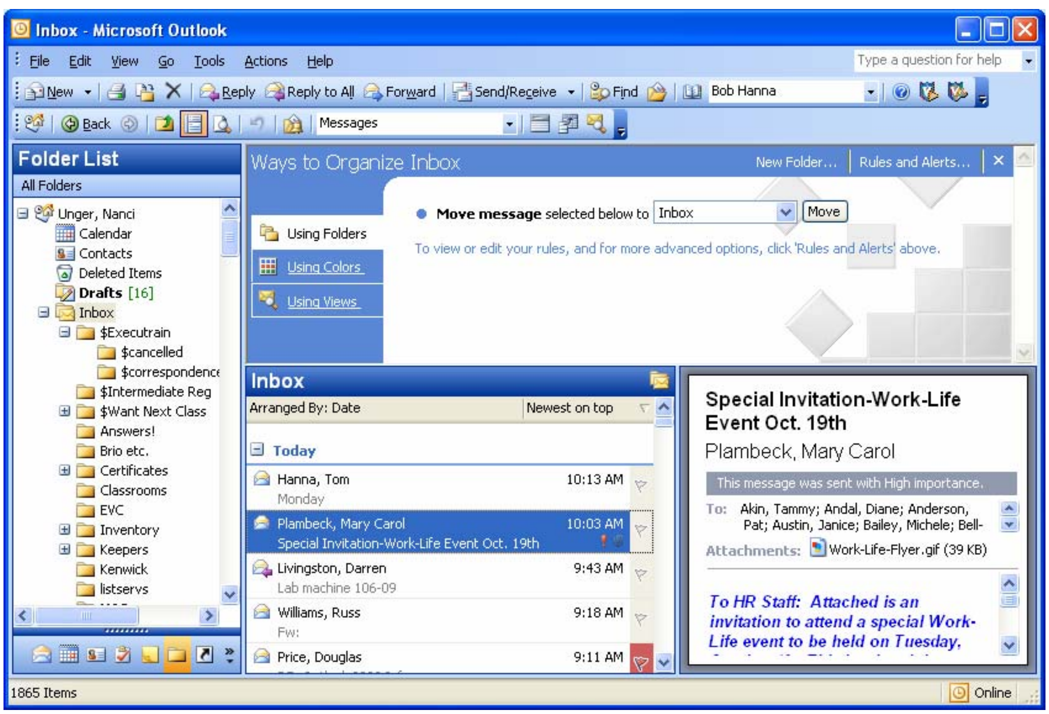
1. Reserve your Inbox for messages that are most likely to require your immediate attention. Everything else can be filtered out to an appropriate folder.
2. Create a folder and associated rule for all listserve messages to clear your Inbox for higher priority messages, and visit the listserves messages when time allows.
3. Use colors and fonts to draw your attention to important messages.

While in any Outlook folder you can open the **Tools** menu and click on the **Organize** button to open a panel that contains useful shortcuts. When in a mail folder, one of the options offered is to move the selected message to another folder. You can also create "rules" (more on these later) by clicking on the Rules and Alerts button.

Also available from the **Organize** panel is the ability to apply colors and formatting to selected messages. For example, you could make messages from your boss catch your eye by having them appear in red. From the *Automatic Formatting* option in the upper right hand corner you can change the color, style and size of the font used for any message or series of messages.

Using the Organize feature

1. Open the Inbox folder. (For some options you will need to have messages in the Inbox.)



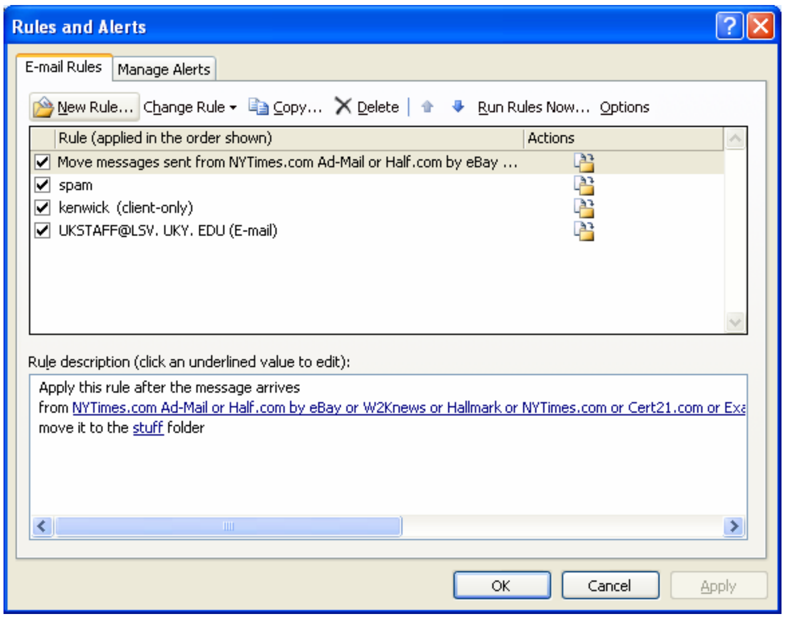
2. Open the **Tools** menu and click **Organize**. The **Ways to Organize Inbox** dialog box will open at the top of the message pane.
3. Three options are available on the left side of the dialog box: **Using Folders**, **Using Colors**, and **Using Views**. You can do any of the following:

- Click **Using Folders** to create new folders, open **Rules and Alerts** (Rules Wizard), and move messages to other folders. You can easily create a rule to move messages from a certain sender into another folder upon delivery.
- Click **Using Colors** to color code messages by sender.
- Click **Using Views** to select how you see messages in your Inbox.

4. When you are finished, click the **X** in the upper right corner to close the dialog box.

You can also organize messages that have already been moved to other folders by opening the **Tools** menu and then clicking the **Organize** button.

Rules



An email **rule** (sometimes referred to as a filter) will search messages for specified characteristics and perform an action on messages that have the desired traits.

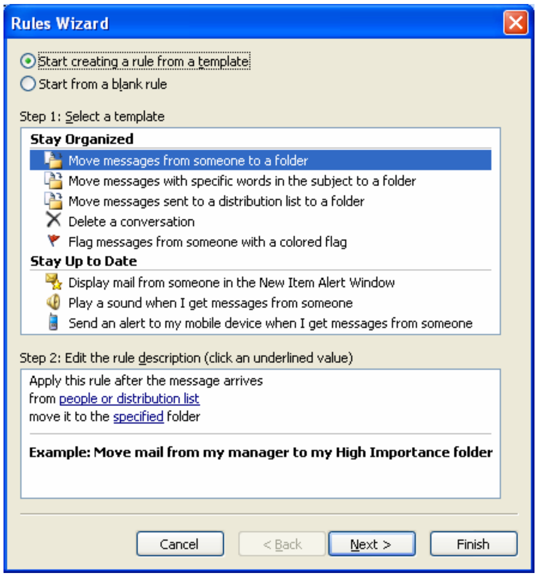
For example, you can:

- Filter out messages from a particular sender or listserv and automatically move them into the appropriate folder.
- Put a color or importance stamp on messages from a specific sender.
- Print a copy of every email you send to a specific recipient.

Rules are primarily used to help manage incoming mail, although they can also be used on existing or sent messages.

The most common type of rule is one that checks messages when they arrive. You can also apply rules to messages after you send them or if they've already been moved out of the Inbox. (Note: Filtered or moved messages will **still** appear as unread.)

For basic rules, Outlook provides the **Rules and Alerts** feature, also known as the **Rules Wizard**.



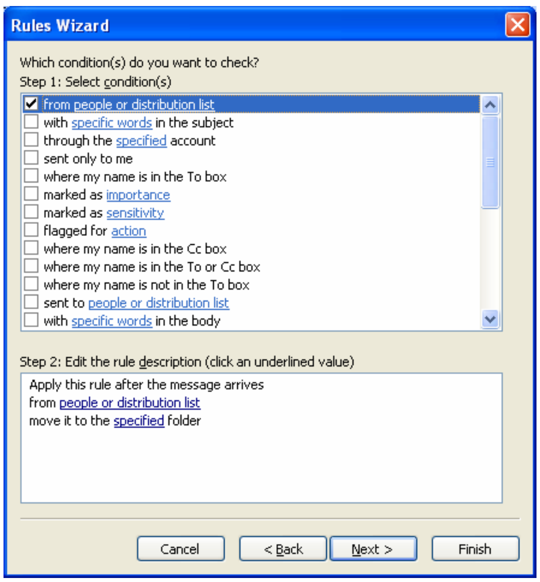
Using the Rules Wizard

1. While in the Inbox, open the **Tools** menu and click **Rules and Alerts**.

2. Click **New.** Choose to start creating the rule from a template or from a blank rule.

Select the type of rule

Begin by selecting "Check messages when they arrive." Click the **Next** button to move forward through the Rules Wizard.



Set the criteria for the rule

Now choose the criteria that the rule should look for. The first thing to ask when creating a rule is, "what is it about this type of message that will differentiate it from all other messages?" Generally, a message to an email list has the name of the list in the To: field.

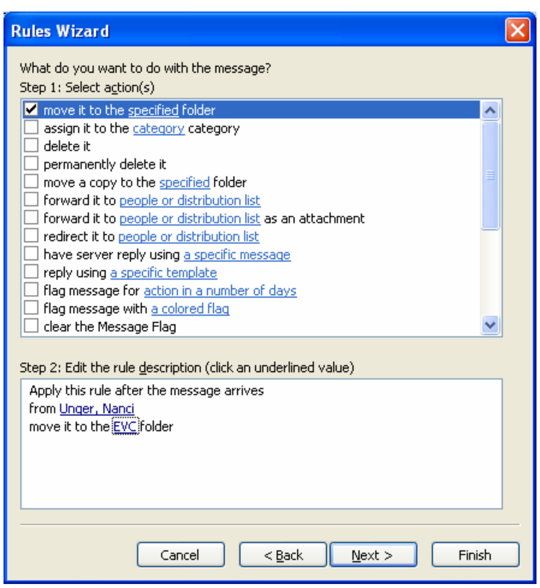
For example, to apply a rule to messages from the UKSTAFF listserv, you would:

1. Scroll down and select "with specified words in recipients address."

2. In the description box below, click on the highlighted "specified words."

3. Enter the name or a part of the name of the list, in this example *UKSTAFF@LSV.UKY.EDU*

4. Click the **Next** button.

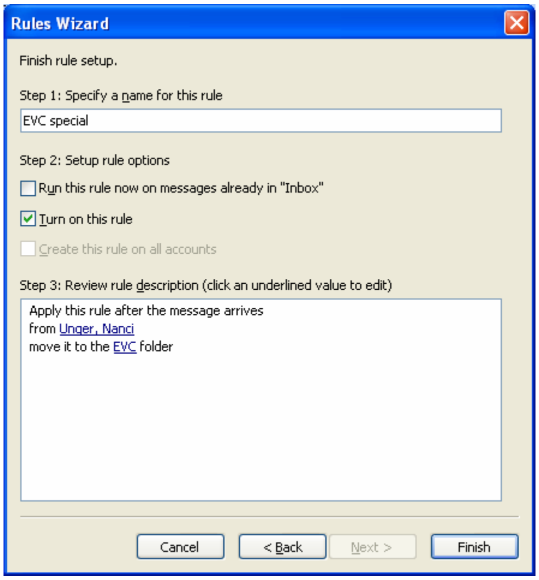


Next, you will need to select a condition (or conditions) that you would like to check for. To select one, click the box to the left of the text. A check mark will appear. To remove the condition, click the box again.

If there is an underlined option in the "Rule description" box that you have not edited, click it to change the option.

Click the "Next" button.

Now select what you want to do with the message. Check the option (or options) you want. If there is an unedited underlined line of text, click it to specify its value.



Click the **Next** button.

Check exceptions (if any) to your rule. Again, if there is an unedited underlined value, click it to specify the value.

Click the **Next** button.

Select any necessary options and click the **Finish** button.

Your rule will now be set to filter your mail accordingly.

Outlook Web Access

You can access your Outlook email on the Web! Go to the site:

http://exchange.uky.edu

and the Microsoft Exchange Server screen will appear. (You can change your Outlook password from this screen.) Click on "Microsoft Outlook Web Access." A login box will appear. The login box will ask for your Outlook userid and password. You will need to type your domain (ad for "Active Directory") with a backslash in front of your userid:

ad\userid

Then enter your password and click the OK button. Outlook will open and you can access your email, calendar, contacts, and folders. **When you are ready to exit Outlook, be sure to click on the Logout link and then close your browser.**

TIP – Add the Outlook Web Access site to your browser bookmarks so you can find it easily.