Microsoft Outlook 2010

Prepared by Computing Services at the Eastman School of Music – July 2010

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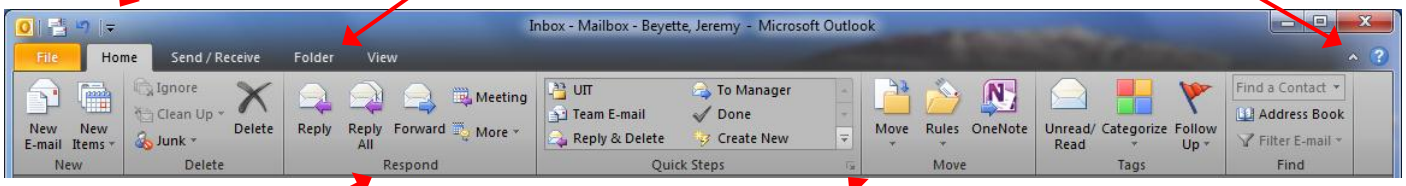
Microsoft Office Interface

Microsoft Office 2010 improves the ribbon interface that was introduced in Microsoft Office 2007. The Microsoft Office Ribbon is a set of tools that are grouped together in a related set of tabs.

Quick Access Toolbar
Tools shown here are always visible. You can add your favorite tools to this toolbar.

Ribbon Tabs
Click any tab on the ribbon to display the tools that are related to that task.

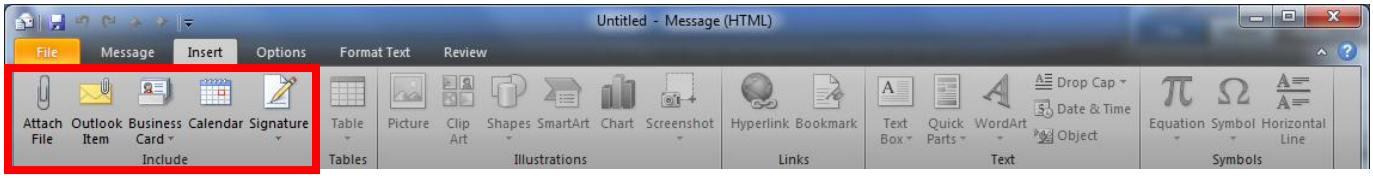
Hide the Ribbon
Click this icon to minimize the ribbon and provide more work space.



Ribbon Groups
Each ribbon tab contains groups, and each group contains a set of related tools. Here, the **Respond** group on the **Home** tab contains tools for responding to e-mail messages

Dialog Box Launchers
Dialog box launcher icons next to any ribbon group label can be clicked to open a dialog box with more options for that group.

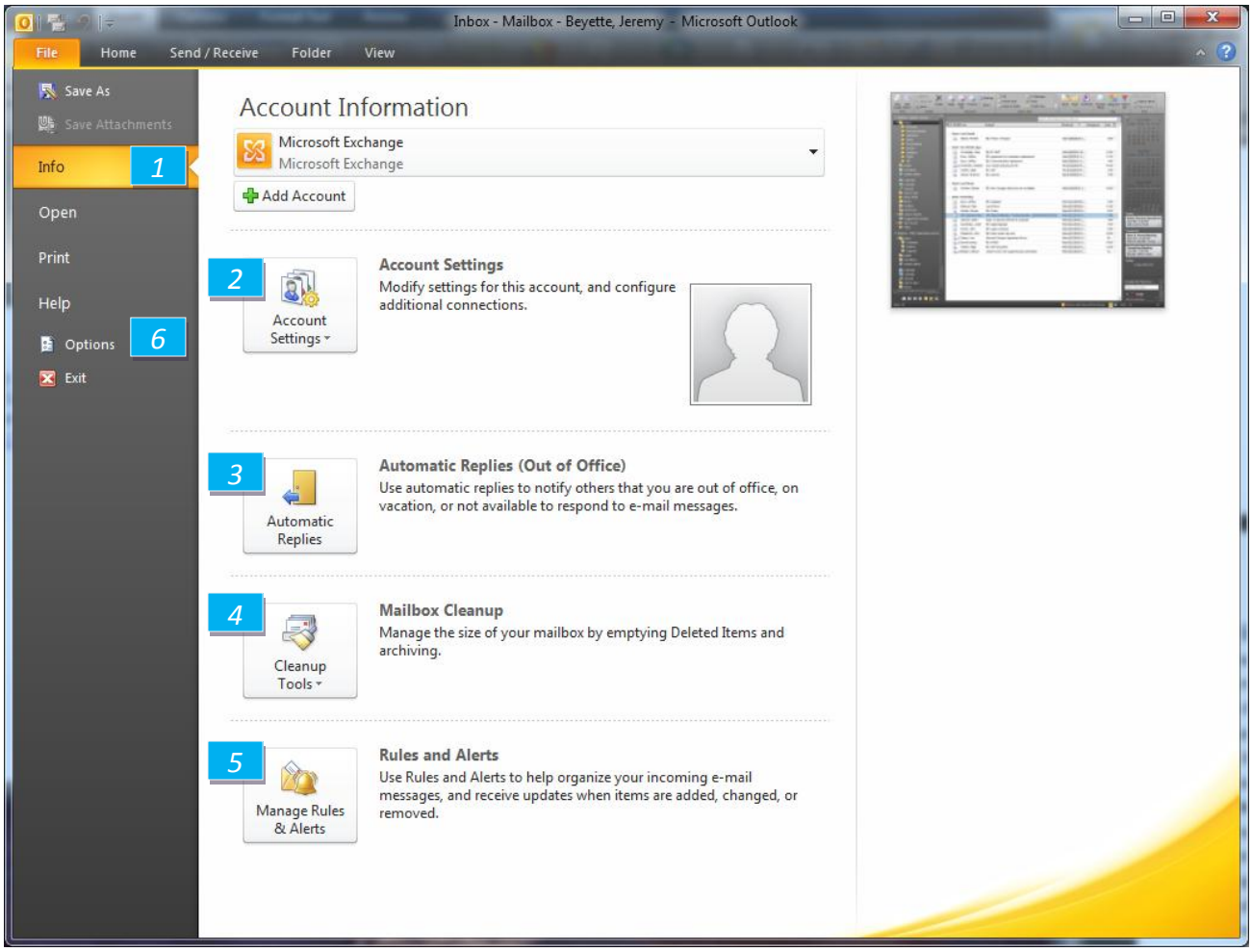
Tools on each ribbon tab are further organized into logical groups called ribbon groups. In the example below, Insert is the active tab of the Ribbon and objects that can be attached to an e-mail message can be found in the Include group of the Insert tab.



File Ribbon Tab

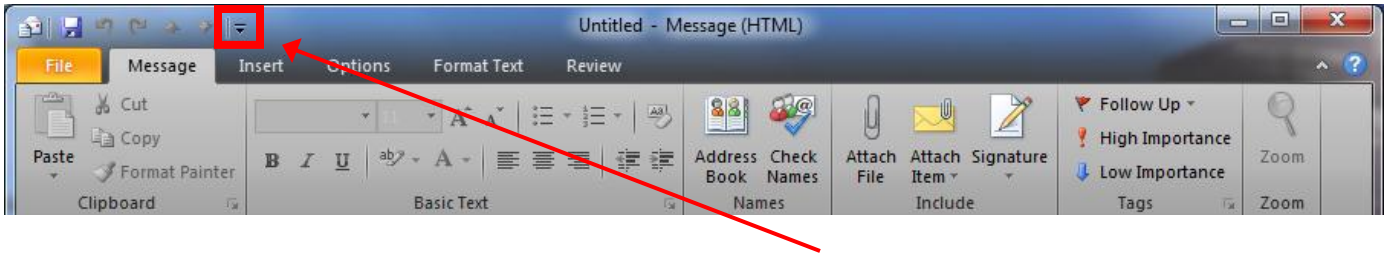
The Microsoft Office Button that was introduced in Microsoft Office 2007 and was found in the upper-left corner of select areas of Microsoft Outlook 2007 has been replaced with a **File** tab on the ribbon in Microsoft Office 2010. Clicking on **File** will open a full screen menu that will default to the *Info* view {1}. This view contains Account Settings {2}, Out of Office messages {3}, cleanup tools {4}, and rules {5}.

Selecting *Options* {6} opens the Outlook Options menu in which the settings of Microsoft Outlook 2010 can be configured. Settings include configurations for mail, calendar, contacts, tasks, language, ribbon customization, and the Quick Access toolbar.



Microsoft Office Quick Access Toolbar

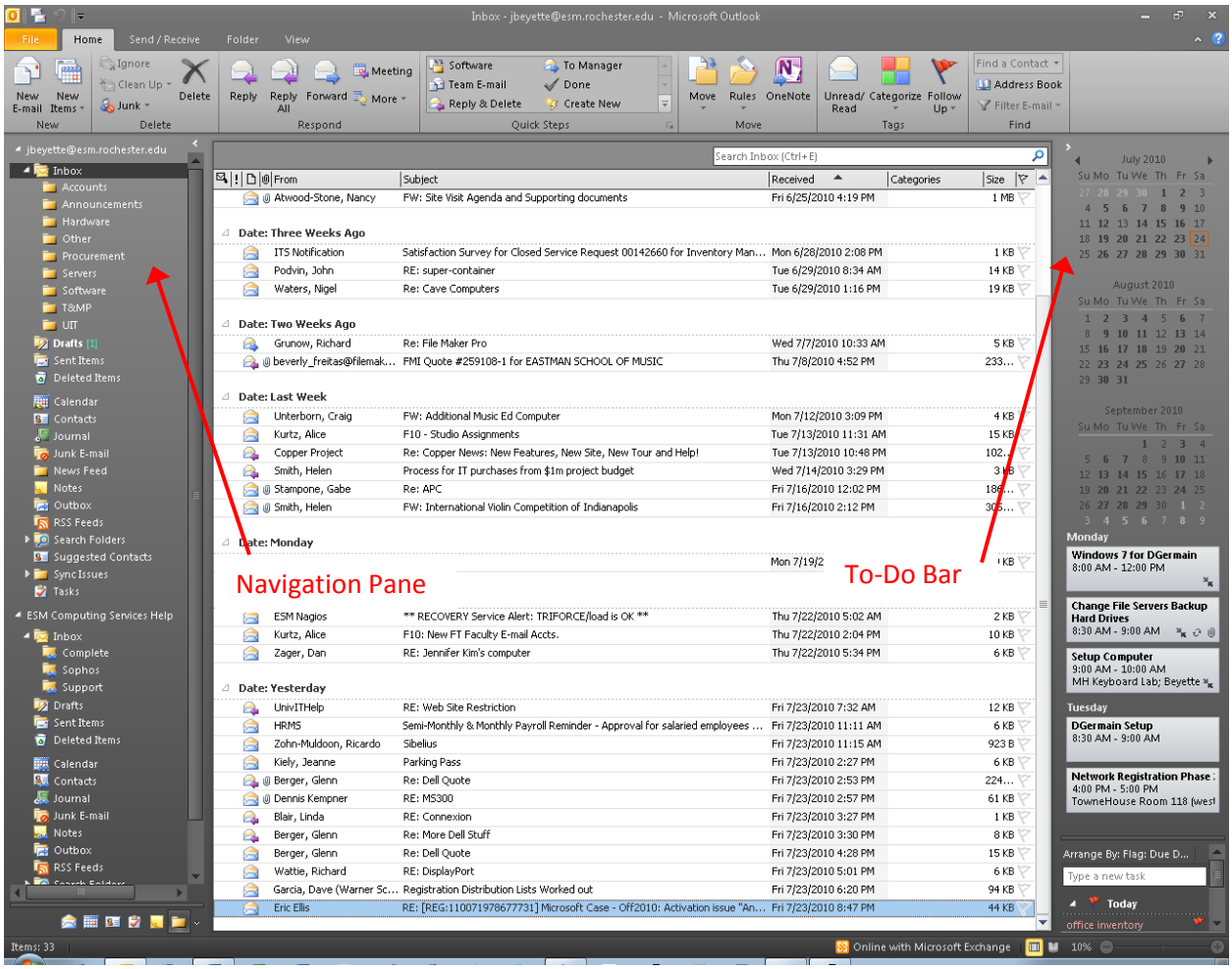
The Microsoft Office Quick Access Toolbar allows for a customizable toolbar displaying a set of commands independent of the tab on the Ribbon that is currently displayed..



To customize the Quick Access Toolbar, click the down arrow to the right of the commands. A popup menu will appear with available commands. Click on the command to add it to the Quick Access Toolbar. If you don't see the command you want in the popup menu, select **More Commands** from the menu. This will open a new window that will allow you to select from all available Office commands. You will also find the option to display the Quick Access Toolbar below the ribbon.

Appearance of Outlook

After opening Outlook, you will be taken to your Inbox and the following screen will be displayed:



The left hand panel of Outlook lists the mail folders (Navigation Pane). If you do not see this list, click the **View** tab → **Navigation Pane** → **Normal**. The navigation pane contains the following components:

Inbox – The Inbox is where new e-mail messages arrive until moved to another folder or deleted.
Drafts – Messages that you start are stored here until sent out. If composing a message, you can close it and retrieve it from this location at a future time.
Sent Items – Once a message has been sent, it will be stored in the Sent Items folder. This allows you to see when an e-mail message was sent and gives you the ability to reference messages you sent to others.
Deleted Items – Items that have been deleted from Microsoft Outlook are stored here until permanently deleted. All items can be removed from here by right-clicking on Deleted Items and selecting **Empty Folder**.
Calendar – The calendar and scheduling component of Microsoft Outlook. This allows you to manage your calendar, organize meetings, and manage other people's calendars.
Contacts – The contact management component of Microsoft Outlook. This allows you to manage contacts and contact groups.
Journal – This component allows you to automatically record actions that are performed in Microsoft Outlook.
Junk E-mail – E-mail messages that are classified as junk are automatically sent to this folder.

Notes – This component allows you to create 'sticky notes' within Microsoft Outlook. Notes are useful if you have a short note that doesn't belong in an e-mail message, appointment, task or contact.
Outbox – Messages are stored in this folder very briefly before being sent. After clicking the Send button on an e-mail message, the message will be stored in Outbox for a few seconds before being sent to the e-mail server.
RSS Feeds – This provides an easy way for you to read the latest postings to your favorite Web sites.
Search Folders – A virtual folder that provides a view of all e-mail items that match specific search criteria.
Tasks – The task component of Microsoft Outlook. This allows you to create tasks or "to-do" items, track the status of the task, and assign tasks to another person.

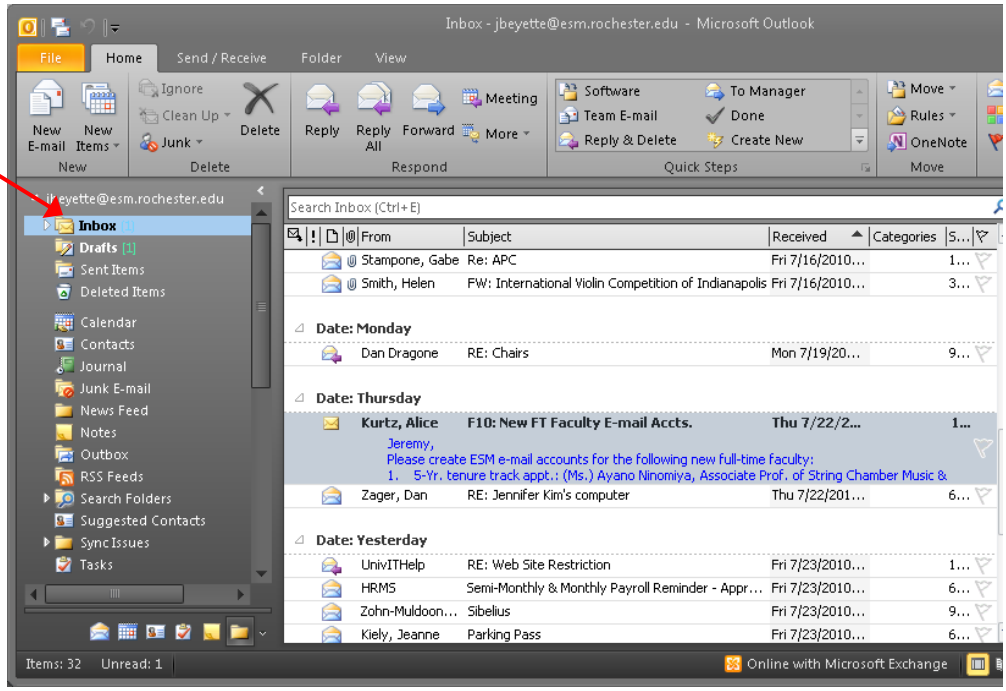
The center panel displays the content of e-mail, calendar, contacts, notes, and tasks.

The right hand panel of Outlook displays the To-Do Bar. This bar can be configured to show mini calendar months, upcoming appointments, and your task list. The To-Do Bar can be turned off completely by going the **View** tab → **To-Do Bar** → **Off**.

E-mail

Reading New E-mail

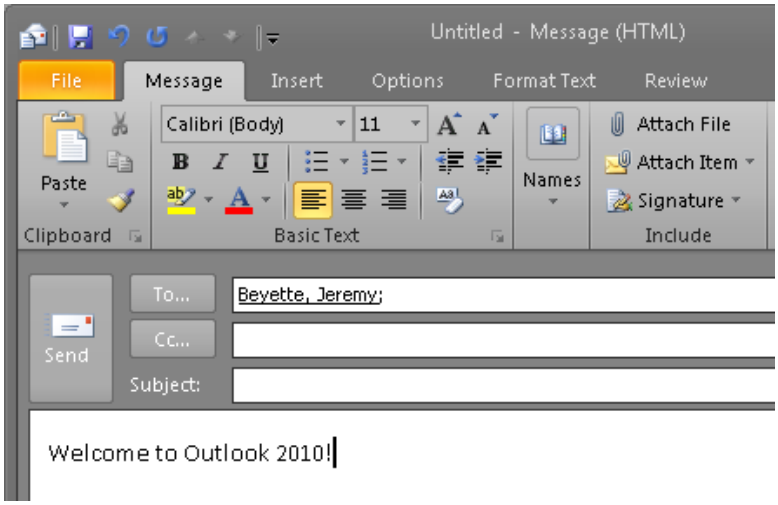
To open new mail messages, click on the **Inbox** folder in the Navigation Pane. All new messages are highlighted in bold. The number of unread messages will appear in parenthesis next to the Inbox folder. Select the message you want to read by double clicking it.



Sending a New E-mail Message

To send a new e-mail message, click on the New E-mail button on the Home tab of the ribbon. Enter the recipient's e-mail address in the **To…** line, or if the recipient is a contact or part of the University of Rochester, you can simply type their full name. For multiple recipients, make sure you separate addresses with semicolons. If you click on the **To…** button, the Eastman address list or global address list will open, and you can search and select the name(s) you want, press **To→** and then click ok. To send a copy of an e-mail to another person that is not the main recipient, put their name in the **Cc…** line.

The subject of the e-mail should be entered into the **Subject:** line and the body of the message should be written below that. When the message is finished being composed, click **Send**. If you are not online, the message will go to the **Outbox** until you have an Internet connection.



Replying to and Forwarding Messages

If you wish to reply to an e-mail, click the **Reply** button in the ribbon and complete your message just as you would a new e-mail. If you wish to reply to all senders, including those copied in on the received message, hit **Reply to All**. By default, replying includes the original message at the bottom of the e-mail.

To forward a received e-mail to another person, click on the **Forward** button in the ribbon and then add the e-mail addresses you want the message to be forwarded to. To change replying and forwarding options, go to **File → Options → Mail**, and then scroll down to **Replies and forwards**.

Deleting E-mail Messages

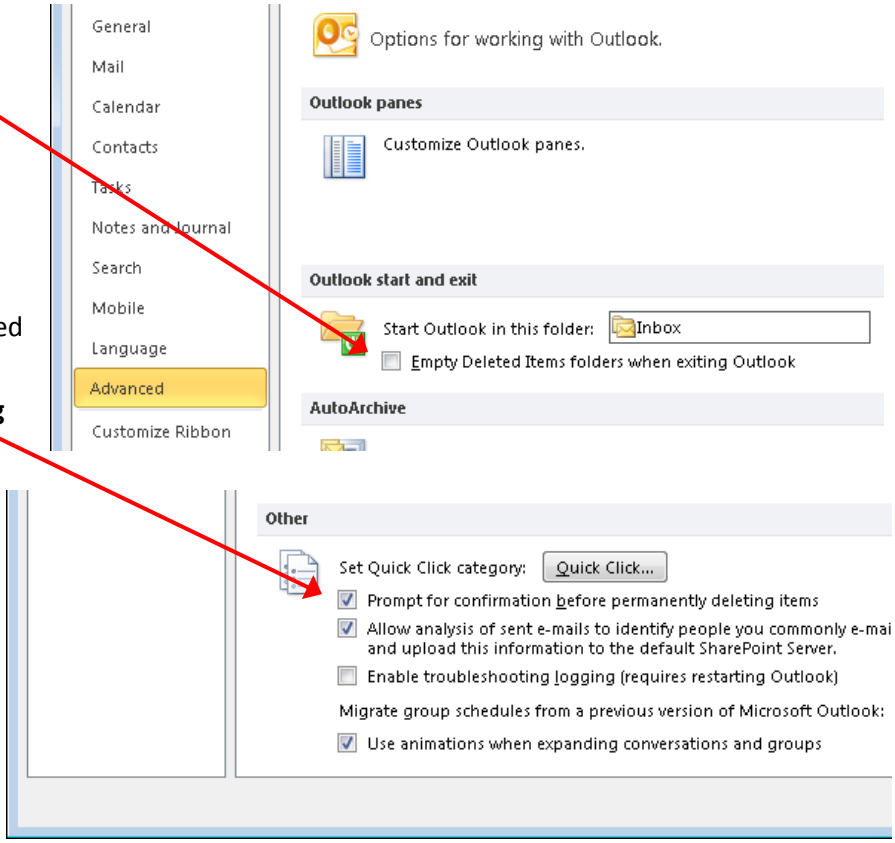
To delete a message, click on the message and then click the icon on the ribbon or use the **Delete** key. To delete multiple e-mails simultaneously, click on the top message you wish to delete, hold down the **Shift** key, click on the bottom message you wish to delete, and then click the icon or use the **Delete** key. To select multiple messages for deleting that are not in a row, hold the **Ctrl** button and select the messages one by one that you wish to delete. To select all messages within a mail folder, right-click on a folder and select **Delete All**.

When messages are deleted, they are kept in the **Deleted Items** folder. These messages still count towards your quota limit, so they must be permanently deleted from the Deleted Items folder. To empty the entire deleted items folder, right-click on **Deleted Items** and select **Empty Folder**.

To delete the Deleted Items folder when you exit Outlook, select **File → Options → Advanced**.

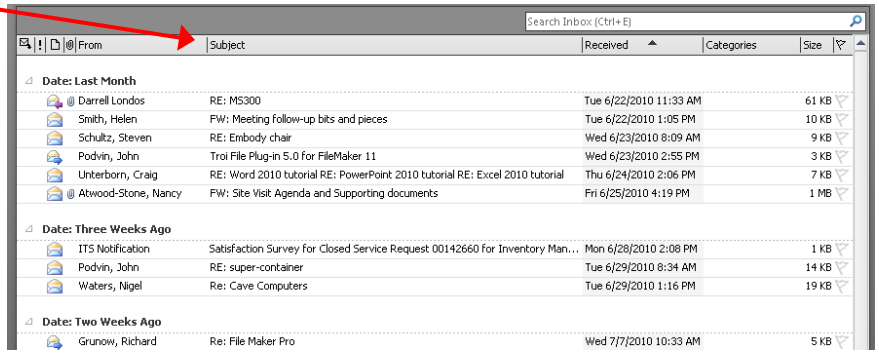
Select the **Empty Deleted Items folders when exiting Outlook** check box.

To be notified before you empty the Deleted Items folder, select the **Prompt for confirmation before permanently deleting items** check box. Click **OK** when you are done.

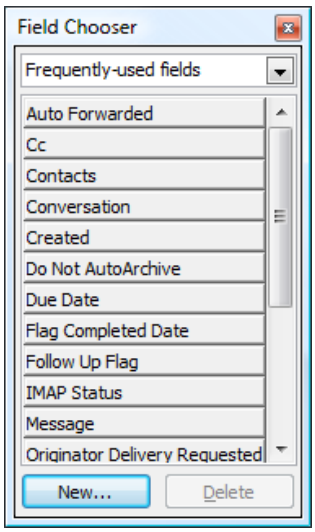


Sorting Messages

E-mail messages can be sorted by Subject, Date Received, Sender, Size, etc. depending on how you want to view your messages. Usually it is easiest to sort mail by date received. To sort by the desired category, click on the category header, such as **Subject**.



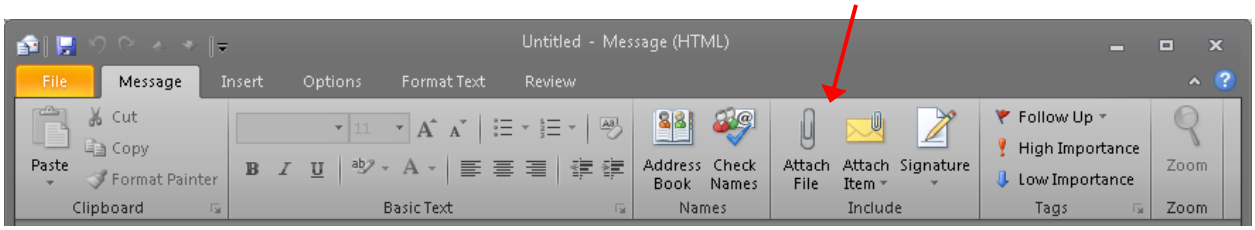
If one of the categories that you would like to have in view or that you like to sort by seems to be missing from the bar, right click on the category header and select **Field Chooser**. Then drag the field that you want from the Field Chooser window to where you want it on the category header bar. When you are finished adding any new fields, you can X out the Field Chooser window.



Working with Attachments

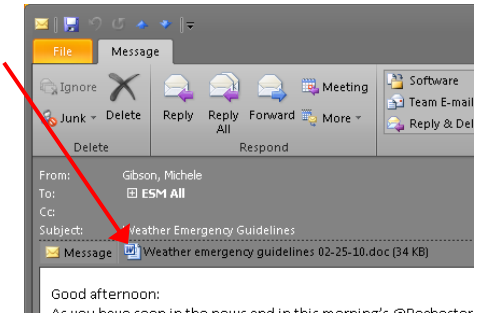
Adding Attachments

A file attachment can be added to a message. Click the **Attach File** button on the ribbon and browse for your file. A file can also be dragged into the body of the e-mail window. After the file has been attached, a logo of the file and its name should appear within the header or body of the message.



Opening Attachments

A message that has a paperclip icon indicates that it has an attachment. To open the attachment, open the e-mail message and then double click on the attachment. You will be prompted to Open or Save the attachment. If you plan on editing the document, it's best to save the attachment to your Documents folder and then open from there.

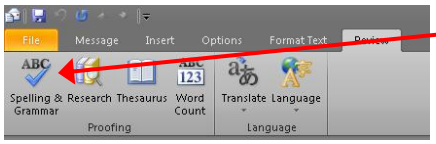


Saving an E-mail Message as a Draft

If you are not able to finish writing an e-mail message, you can save the message as a draft to be completed at a later time. Close the message and when prompted if you want to save the changes, select **Yes**. The draft will then be saved in the **Drafts** folder. To return to this message, go to your **Drafts** folder and double click the message to open.

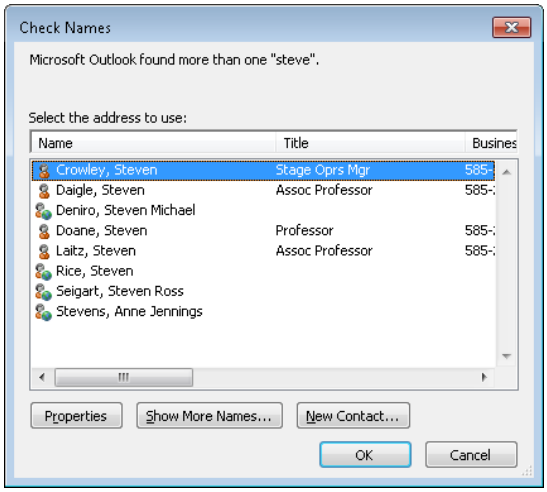
Spell Check

Before sending your message, it is a good idea to use Spell Check to make sure that you do not have any errors in your e-mail. To start the spell check, click the **Review** tab and then click the **Spelling & Grammar** icon.



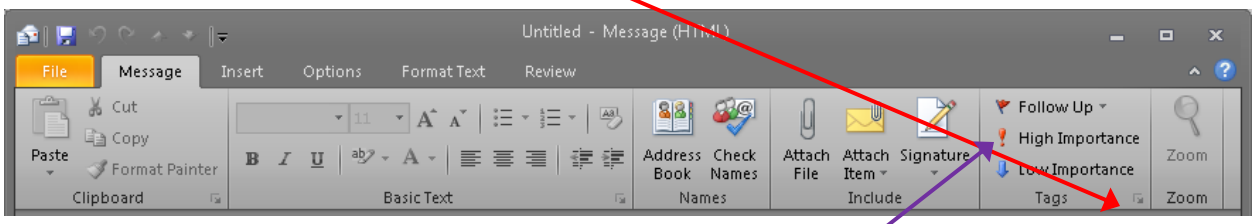
Check Names

When filling in the **To…** line with addresses you want to send to, if you are not sure about a name, use the Check Names feature. For example, you cannot remember the last name of the person you wish to email, write the first name and then click the **Check Names** icon on the ribbon. You will be given options to choose the correct name.



Message Options and Priority

To change the options for a mail message, such as priority, sensitivity, delivery receipts, and other delivery options, open the Tags dialog box by clicking the expansion arrow next to Tags in the Message ribbon tab.

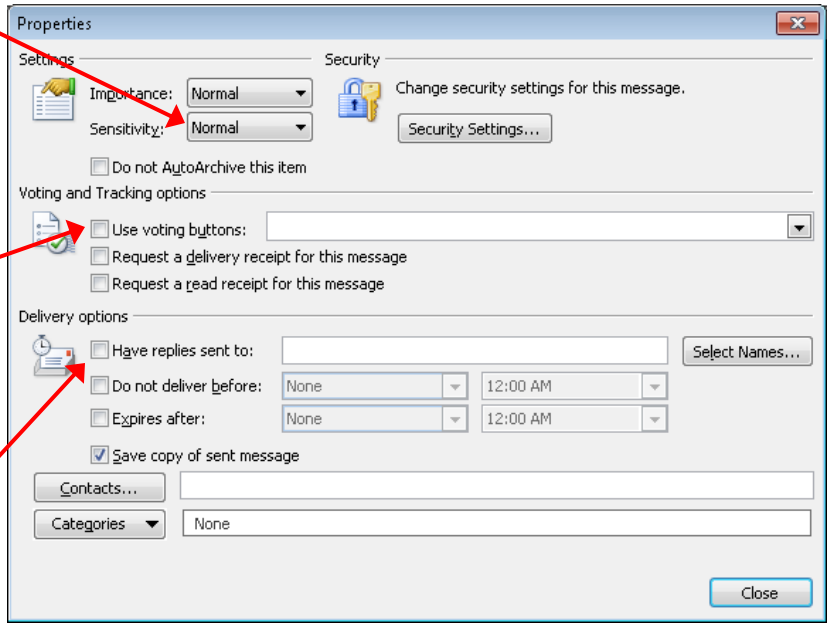


E-mails can also be marked with high priority by clicking on the icon on the ribbon. Make sure you use the high priority icon with caution; constant use will make recipients not take the priority seriously.

The level of importance for e-mail messages can be set to indicate whether the message needs the recipients' immediate attention or can be read later. Messages marked with high or low importance will display an icon next to the message in the recipients Inbox. In addition, you can include a sensitivity setting to indicate how the recipient should treat the contents of the message.

Polls can be setup by using the voting buttons option. This allows you to send a question out to a group of recipients and then have results tabulated automatically when recipients respond to the poll. Note that this only works among Microsoft Outlook users; Entourage is incapable of using this feature. Receipts can be requested for when a message is delivered and when a recipient reads the message that you sent.

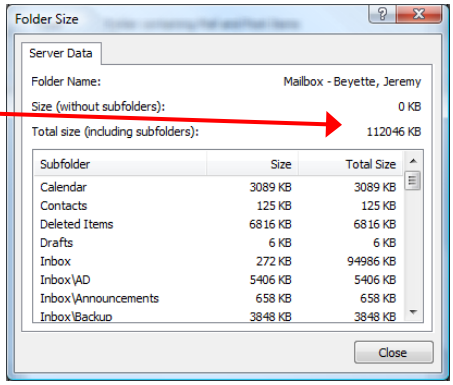
Replies to your message can be automatically sent to another recipient. Messages can also be automatically delivered at a specified date and time.



Storage Space

Each person has an e-mail storage quota set to 500000K. To check your storage size, right click on **username@esm.rochester.edu** in the Navigation Pane and select **Data File Properties…** Click on the **Folder Size** button and a window appears giving the size of each of your folders.

Total Used Quota



You can now look through the list and see which folders are large in size. The example here shows a Deleted Items folder that is larger than the others. If you are getting e-mails warning you that you are at your quota, you may want to move some of the items from the larger folders to a Personal Folder File (explained below) or delete e-mails that are no longer needed.

Saving E-mails (Personal Folders File)

Older e-mail messages can be moved to a personal folders file so that they no longer count against your e-mail storage quota.

To create a new personal folders file, perform the following steps:

File → Account Settings → Account Settings

Click on 'Data Files'

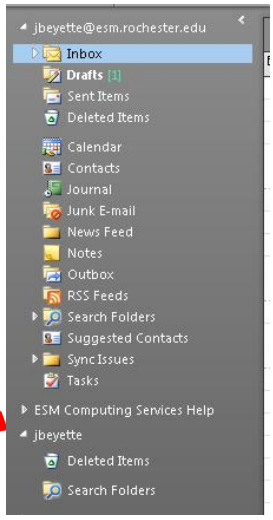
Click the Add button

Navigate to your H: drive and type in *username*.pst where *username* is your e-mail account username (ex. jbeyette). Saving the file to your H: drive will make it accessible only by you and ensure that the file is backed up on a nightly basis.

Click the OK button.

Click Close.

The folder should appear within the Navigation Pane. You can create folders within your personal folder to organize saved e-mail messages.

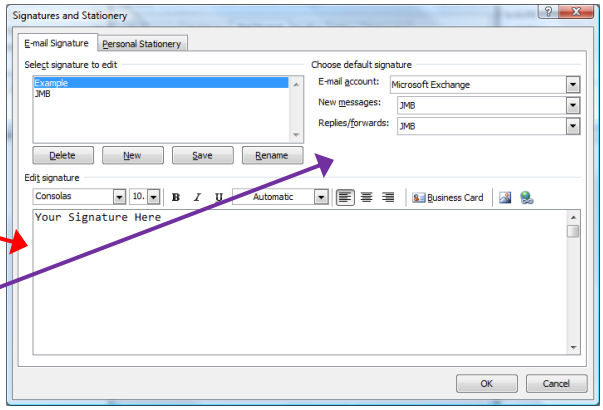


Junk E-mail

Everyone gets junk e-mail that they do not want. The University provides a junk e-mail filtering service that is reasonably effective, stopping e-mails from even making it to your inbox. Instead, an e-mail is periodically sent out listing all the e-mails blocked by the filter. This way, you can be sure that e-mail that is not junk is not being stopped from arriving to your inbox. Spam settings can be managed at: https://www.rochester.edu/it/spam.

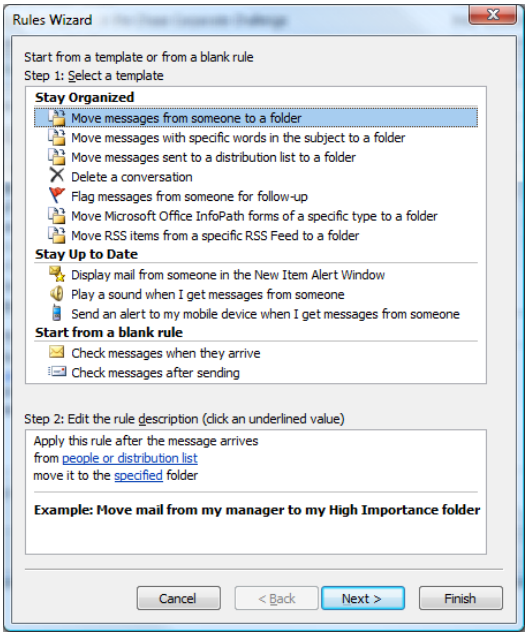
Creating a Signature

1. Go to **File** → **Options** → **Mail** and then click the **Signatures** button.
2. Cclick **New**. Enter a name for your new signature and click OK.
3. Enter your signature in the **Enter Signature** box.
4. Select if you want a signature to appear by default when you compose a new message or reply/forward a message.



Setting up Rules

Rules can be set up for a variety of purposes. You can set up a rule to move messages from a specific address into a certain folder. You can also flag messages from an individual or move messages based on content, etc. All this is done with Rules. To create a rule, go to **File** → **Manage Rules & Alerts**. Then click on the **New Rule…** button. The Rules Wizard will allow you to create a rule from a template or start from scratch. Select the option you want on each part of the wizard and click **Next** to move on to the next part of the Wizard. Click on **Finish** when you have completed.



Creating Filters

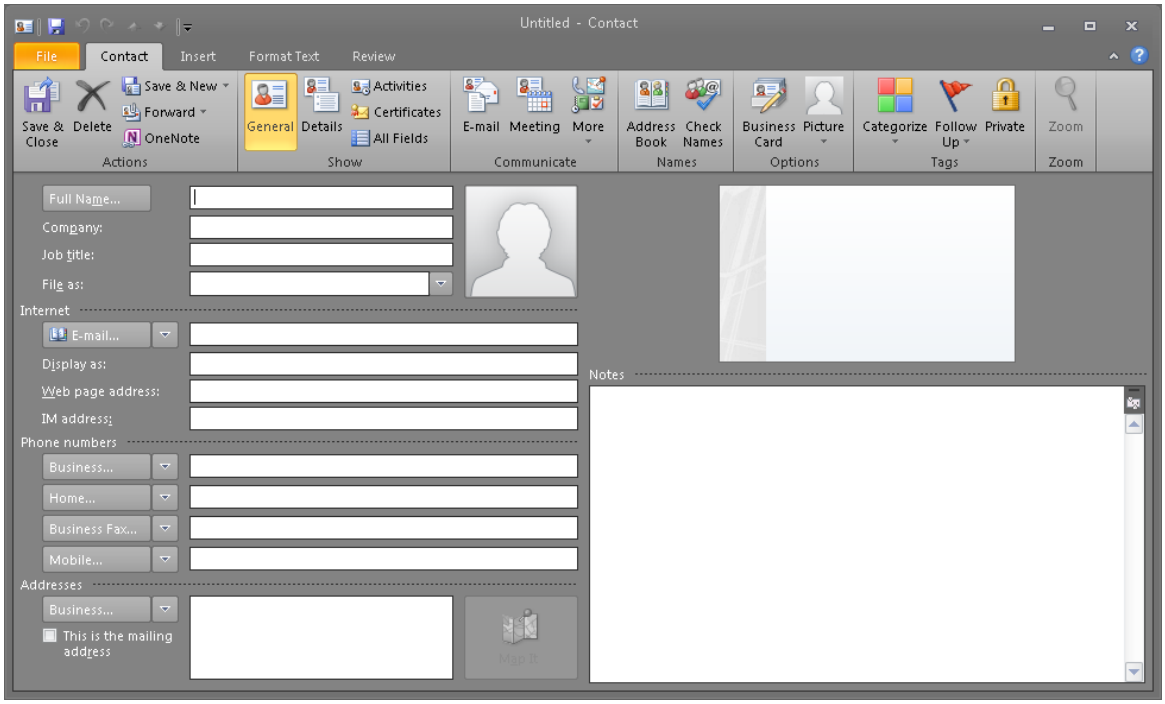
A filter is an easy way to view only those messages or items that meet conditions you specify. For example, you can apply a filter so that you only see messages that contain the word "audition" in the subject. The items that are not displayed when a filter is applied are still in the folder and can be seen again by removing the filter.

1. Click on the folder that should have the filter applied.
2. Click on the **View** tab, click on **View Settings**, and click **Filter**.
3. Select the filter options you want and click **OK**.
4. To filter using additional criteria such as a category or importance level, click the **More Choices** tab and then select the options you want.
5. To remove the filter, repeat step 2 above. Then click the **Clear All** button and click **OK** until you are back at the message folder.

Contacts

Create a New Contact

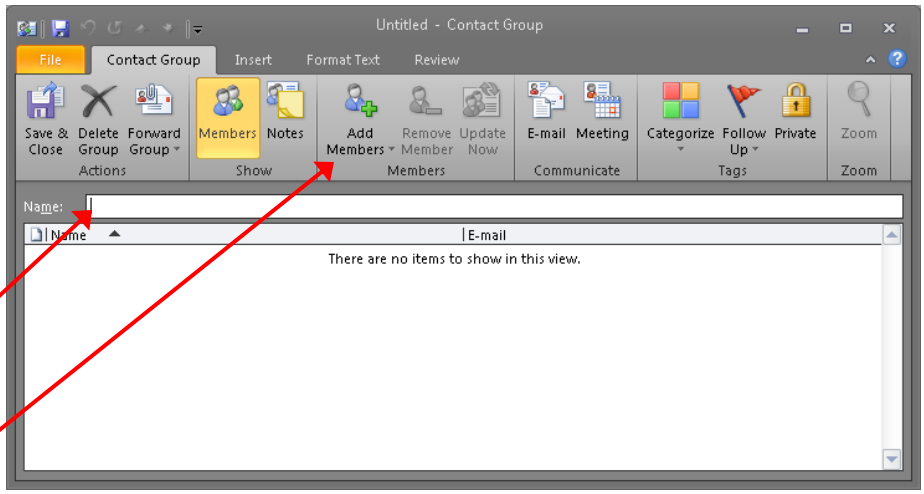
To create a new contact, go to Contacts and then click the **New Contact** icon on the ribbon. You may then enter the contact's information. If you enter their full name and e-mail, then when filling out the **To…** line, you can simply write their full name rather than their e-mail address. Tab through the contact window to enter other details about the person or company. When you have finished, click on the **Save and Close** button.



Create a New Contact Group

Contact groups are often helpful when sending out e-mails to a large number of contacts. Rather than having to re-enter e-mail addresses every time a new message is sent, you can create a contact group that saves all the e-mails in one list.

To create a new contact group, go to Contacts and then click the **New Contact Group** icon on the ribbon. Enter a name for the contact group.



If the addresses are part of the Eastman List, Global Address List, or a personal contact, click on **Add Members** and then on 'From Outlook Contacts' or 'From Address Book'.

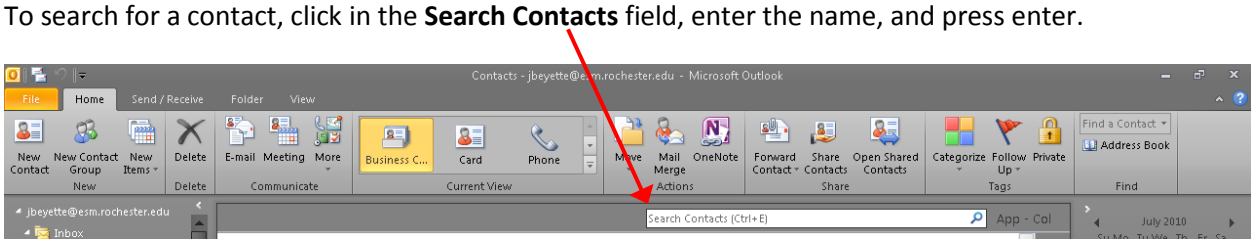
If you have new addresses that aren't already in the system as part of the University or as a personal contact, click **Add Members** and then on 'New E-mail Contact'.

After you have added all of the e-mails, click the **Save and Close** button.

To send to a contact group, open a new e-mail message, and write the name of the list in the **To…** line. The name should become underlined and bold. If you created the contact group in the past, it is often a good idea to open the list and click on the **Update Now** button. This will make sure all the e-mails are up to date.

Finding Contacts

To search for a contact, click in the **Search Contacts** field, enter the name, and press enter.

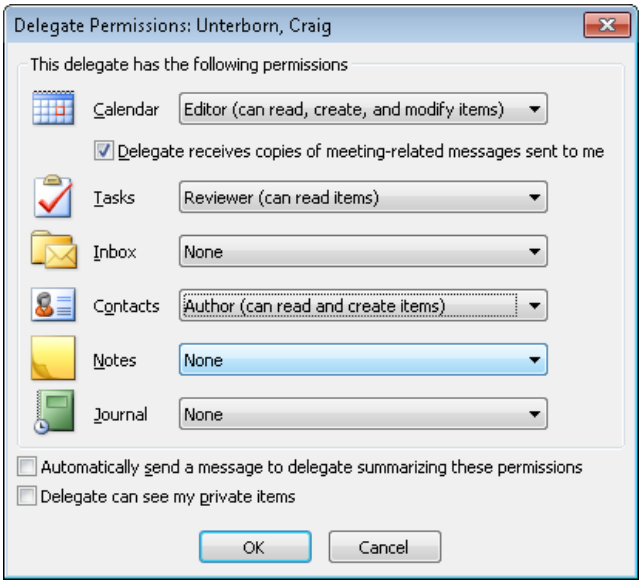


Sending a Contact or Contact Group

To e-mail contact information to another person, while in the contact folder, right-click on a Contact or Contact Group, select **Forward Contact → As a Business Card**. This will open a new e-mail with the contact information attached.

Delegating Permissions (Sharing folders)

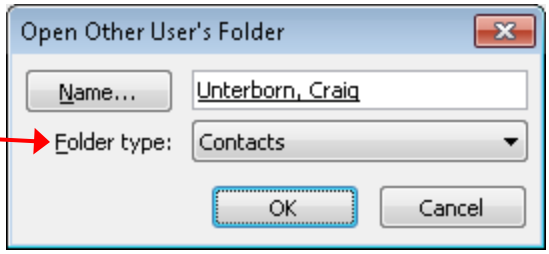
In some instances you may want to delegate permissions for someone else to have access to your Contacts, Calendar, Tasks, or Notes. To add someone as a delegate, go to **File → Account Settings → Delegate Access**. Click on the **Add…** button and then find the name of the person and click on **Add→**. Their name should appear in the right hand side box. Then click on **Ok**. The Delegate Permissions window should open. You can then change the level of permissions for this person for each folder. In this example, the person has permission to edit (read, create, and modify) the calendar; review (read) the tasks; and author (read and create) contacts.



Opening Another Person's Contacts (or other folder)

To open another's contact list, first be sure that the person has given you permission and made you a delegate for Contacts. Then go to **File → Open → Other User's Folder…** Click on the **Name…** button, find the name of the person and click **Ok**. In the **Folder type:** drop down, select the folder that you wish to view.

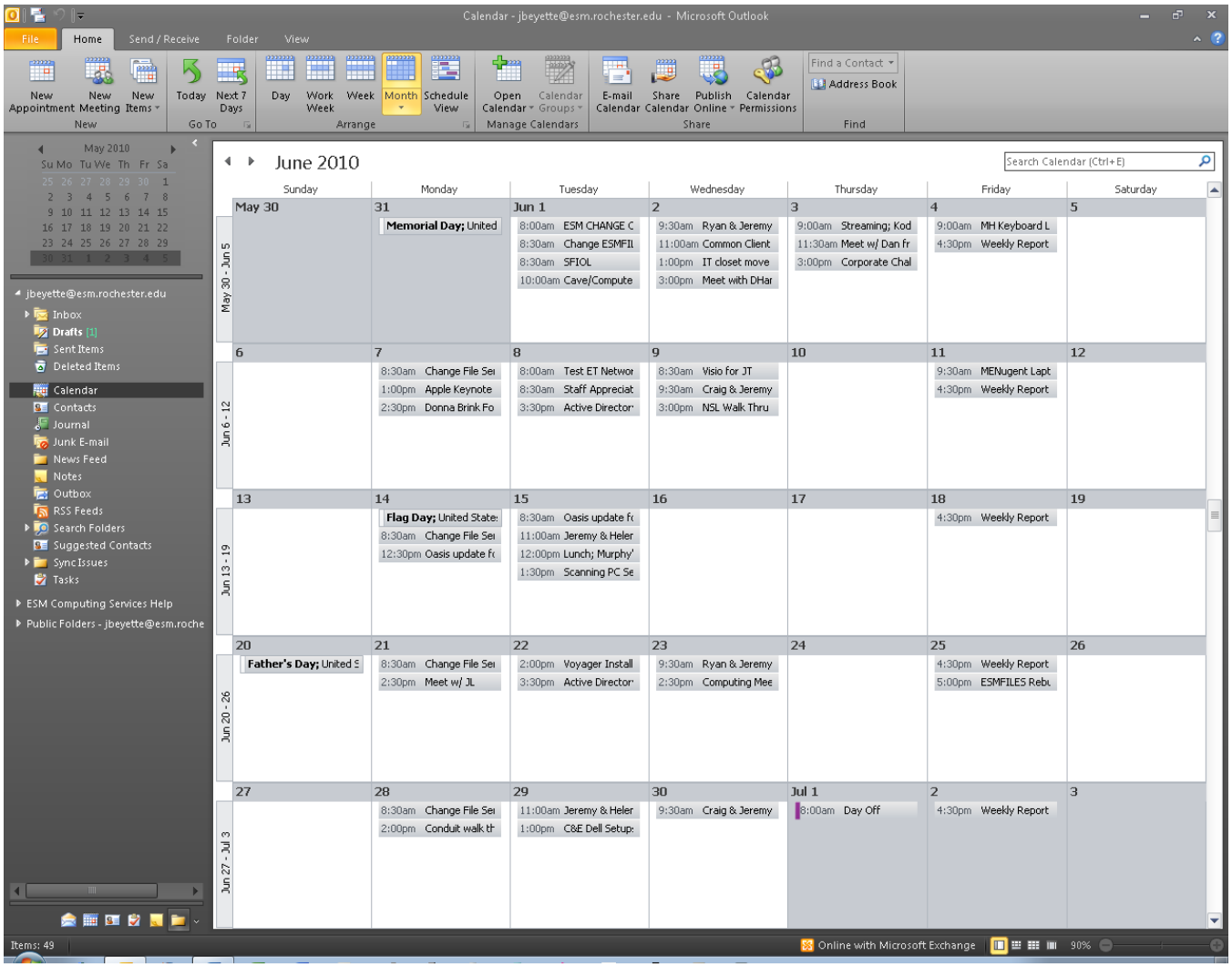
In this case, select **Contacts** and click **Ok**.



Calendar

Calendar Views

The calendar is a useful tool for keeping track of important dates, meetings, and appointments. Once you are in the calendar, you have several view icons on the ribbon to choose from: **Day, Work Week, Week, Month,** & **Schedule View**. Within the Month view, you can select how much detail you want to show (Low, Medium, High). Use the **Today** icon to automatically move the view to today's date. When on the Week or Month view, double clicking on a day will take you to the Day view of that particular day. Use the **Next 7 Days** icon to display the next 7 days in week view. Below is an example of a Month view with High details.

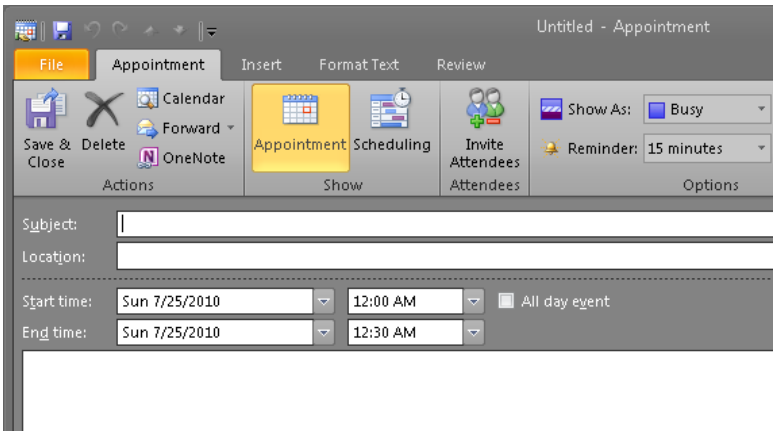


Set Calendar Preferences

1. Go to **File → Options → Calendar**.
2. Under **Work time**, select the start and end time you want for your work hours and what days you want as part of your work week.
3. Under **Calendar options**, select Default reminder to have Outlook 2010 remind you automatically of all appointments. Then, in the drop-down box, select the amount of time before appointments you want to receive the reminder. You can change this time for individual appointments when you create them.
4. To have Outlook 2010 automatically display holidays for different countries or religions, click Add Holidays, select the locations whose holidays you would like added to your Outlook Calendar and click OK.
5. To extend your calendar free/busy information for meeting request purposes, click the Free/Busy Options button and enter how many months of free/busy information you would like available on the server. By default, this value is set to 2 months, but if you have a lot of meetings scheduled for the long term, it is best to increase this value.
6. Under **Time Zones**, **select** a time zone.
7. When you are finished, click OK.

Adding a New Appointment

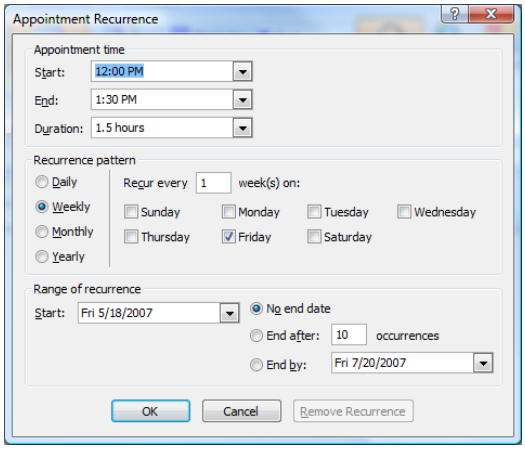
To create a new appointment, while in the Calendar, click on the **New Appointment** icon. Then enter the **Subject**, **Location**, **Start time**, and **End time** of the appointment. Check the box **All day event** if there is no specific time for the event.



You can add attachments, change the priority, set reminders, or print the appointment. When finished creating your appointment, click **Save and Close**.

Recurring Appointments

For appointments that occur every week or every month, or at some other interval of time, there is no need to create a new appointment for each occurrence. Click on **Recurrence…** if the meeting repeats on a set schedule, and set the appropriate dates and times.



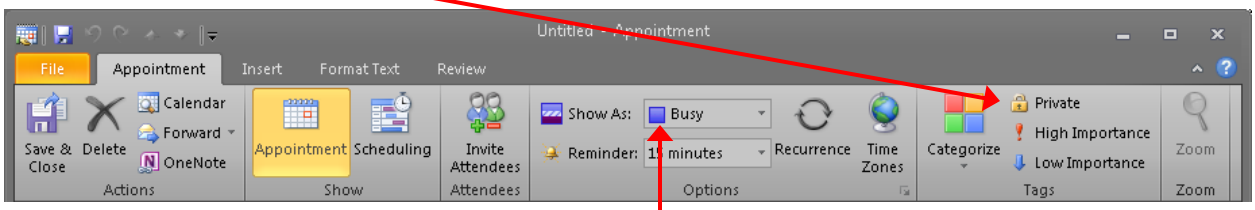
When you want to change/cancel one meeting within a recurring series, be sure to open just the single occurrence. Open the series to make changes to all appointments. When you open a recurring meeting, you will be prompted to open a single occurrence of the series.

Changing/Deleting Appointments

To edit an existing appointment, double click on the meeting. When finished editing, click **Save and Close**. To change the time of the appointment, drag the appointment to the time slot you want while in the calendar. You can also resize the appointment to change the length or click within the appointment box to change the title. To delete, double click to open and then click the delete button on the Office ribbon.

Mark an Appointment as Private

1. Open the calendar item you wish to make private
2. Click the **Private icon** on the Office ribbon.



Show you are Free/Busy during an Appointment

1. Open the appointment/meeting you wish to change
2. Change the pull down menu that says **Show As** to: Free, Tentative, Busy, or Out of Office

Sending Meeting Requests

To change an appointment into a meeting request, click on the **Invite Attendees…** button on the ribbon. Then click on the **To…** button, select contacts just as you would for sending an e-mail. The recipient will receive an e-mail requesting them to accept, accept tentatively, or decline the meeting invitation.

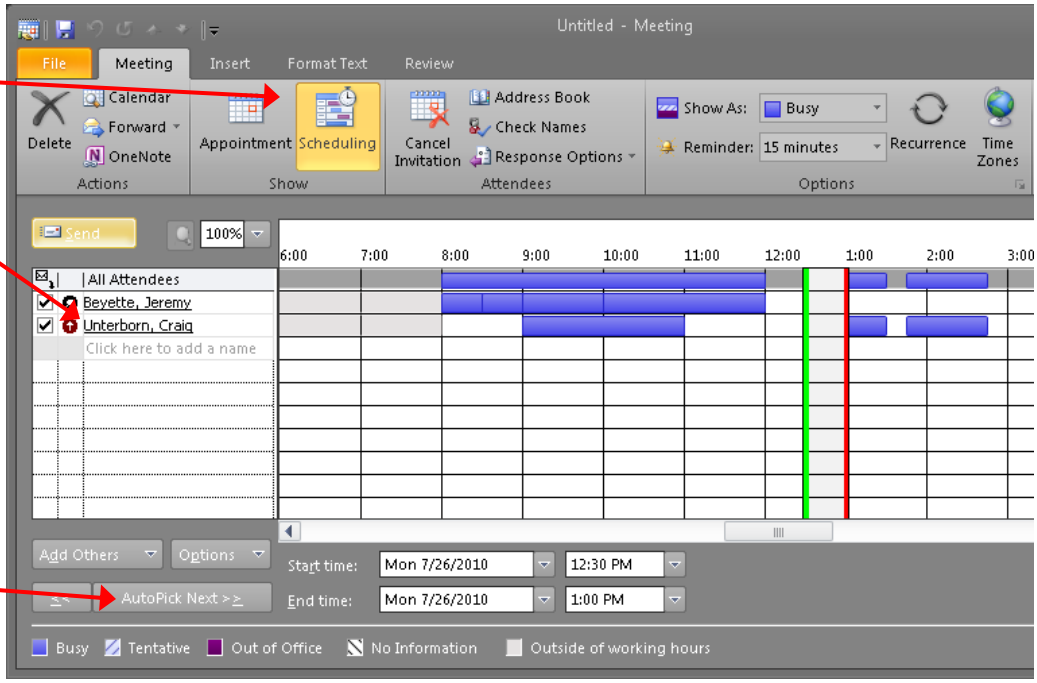
Write a message you want sent to your recipients in the body, and be sure to fill out the subject, location, start time, and end time just as you would for an appointment. You will receive confirmation of people who accept the invitation.

Availability of Meeting Attendees

Sometimes before scheduling a meeting, it is best to see when your attendees will be available. The best way to do this is to start with a new meeting. Then click on the icon that says Scheduling (next to Appointment tab).

Enter in the names of the attendees on the left hand side and then their free and busy times should appear under the dates shown. You may scroll through the dates with the scroll bar near the bottom of the window.

A feature called **AutoPick Next** will automatically find the next time that all attendees are available for the specified meeting length.



Changing Requested Meetings

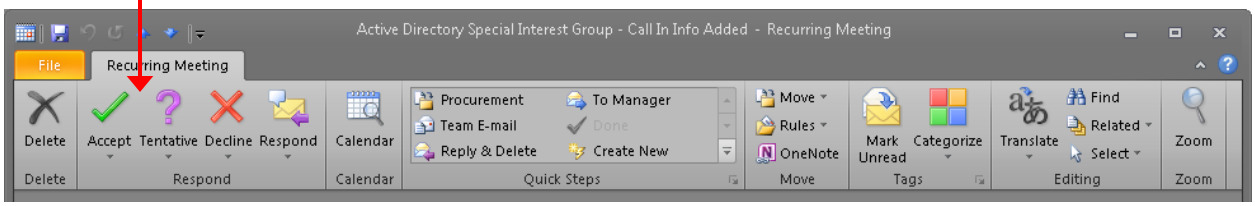
After editing a meeting request that you had previously sent out, make sure to click on **Send Update** to send the updated request to all recipients. Any changes you make to time, location, subject, and attendees will send an update to all invited people.

Cancelling Requested Meetings

If you need to cancel a meeting you requested, open the meeting and then click **Cancel Meeting** and then **Send Cancellation**. If you are cancelling one meeting out of a series of recurring meetings, make sure you open the occurrence of the meeting. If you are cancelling a recurring series of meetings, open the meeting as a series before cancelling the meeting.

Receiving a Meeting Request

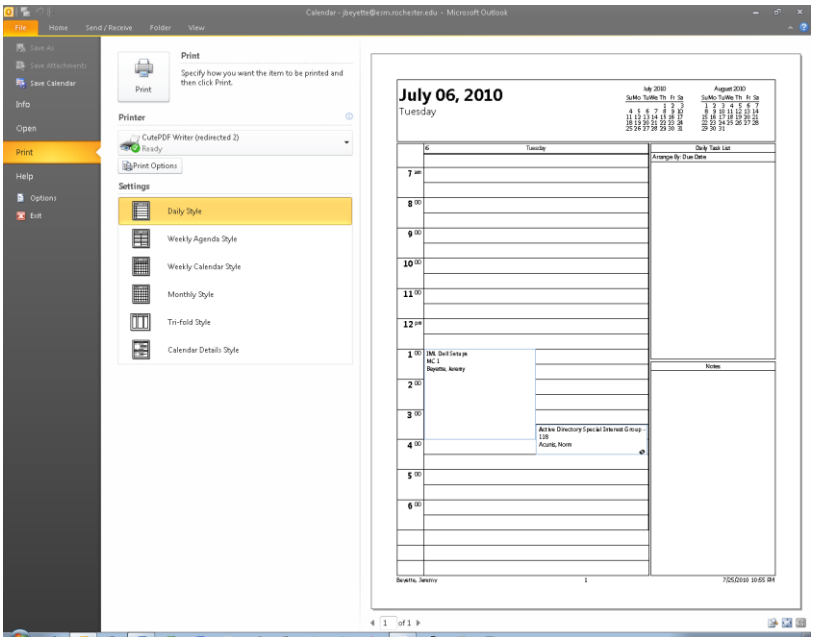
If you are invited to a meeting, a calendar icon will appear next to the e-mail message. After opening the message, you will see information about the meeting, such as date, time, location, description, and who has been invited. You can then choose **Accept**, **Tentative**, **Decline**, or **Propose New Time**. If you are not sure if you can make it or not, you should choose Tentative so that the meeting shows on your calendar until you decide. The person who requested the meeting will receive an update on your decision.



Printing Calendar Items

Go to **File → Print**. Outlook displays a list of available print styles. Select the style you desire. If you wish to make further changes, click the **Print Options** button and then the **Page Setup** button.
Choose the options that you want, and then click on **OK** followed by **Preview**.
If everything looks correct, click the **Print** button at the top of the window.
If not, click the **Print Options** button and then the **Page Setup** button and make changes until satisfied.

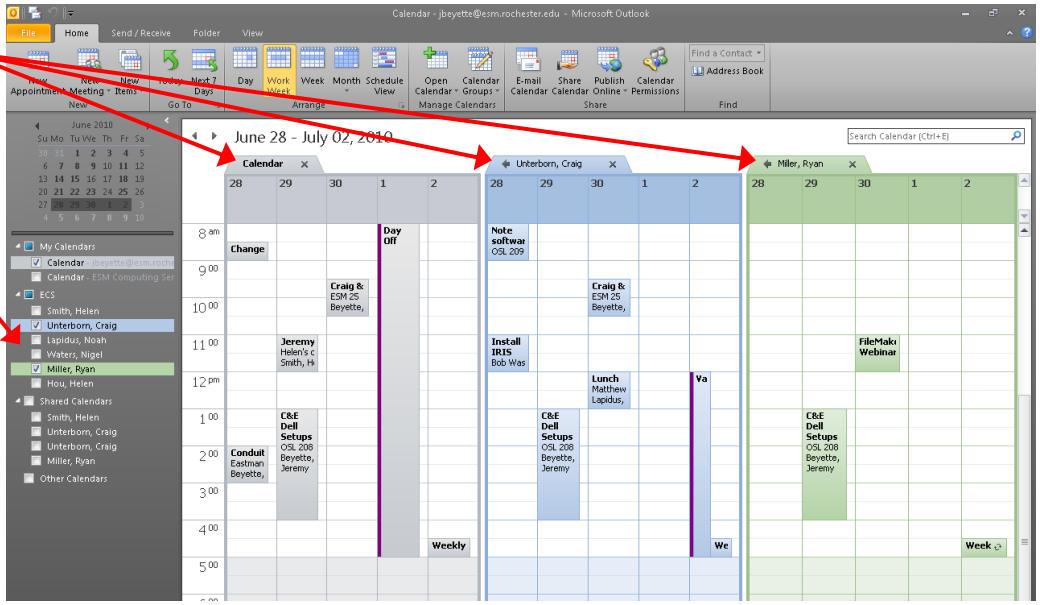
To print just one event, click on it and go to **File → Print**, select **Memo style** and click **Print**.



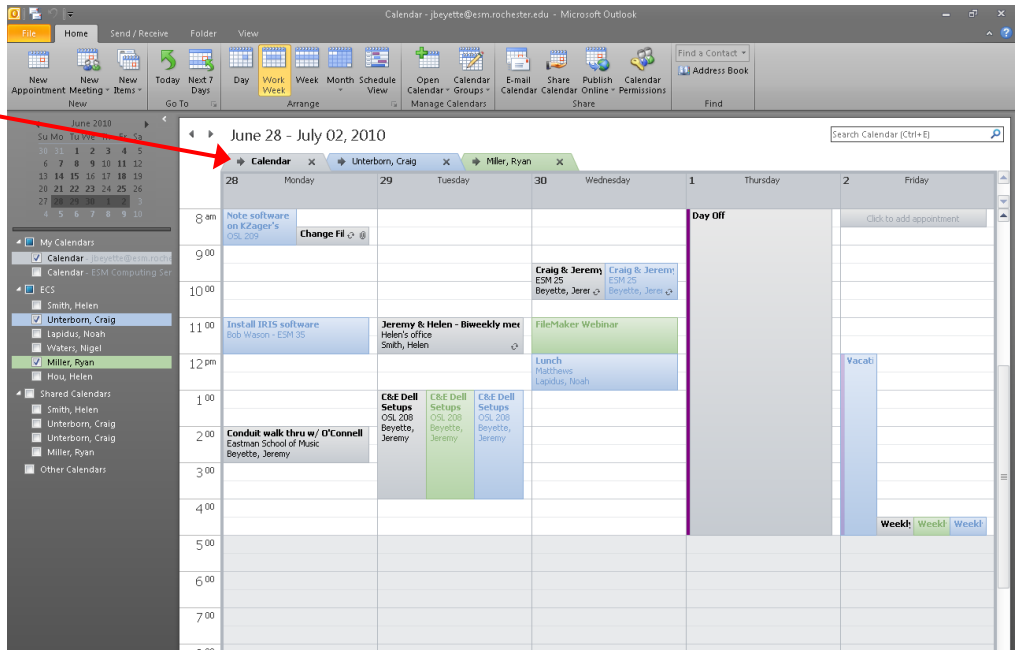
Sharing Your Calendar/Opening Another Person's Calendar

In some instances, you may want to share your Calendar with another person here at the University. In order to do this, you first need to delegate permissions to the person that will be accessing your calendar and set their permissions level. For step-by-step instructions, see ***Delegating Permissions***, page 17. The person that will then be opening your calendar will need to follow the instructions on how to do so. This can be found under ***Opening Another Person's Contacts (or other folder)***, also on page 17. Make sure when following these steps to use the Calendar folder rather than the Contacts folder. After opening another user's calendar for the first time, you can go to the calendar and select the user from a history list.

You can open user's calendars side-by-side by selecting which calendars you want to see.



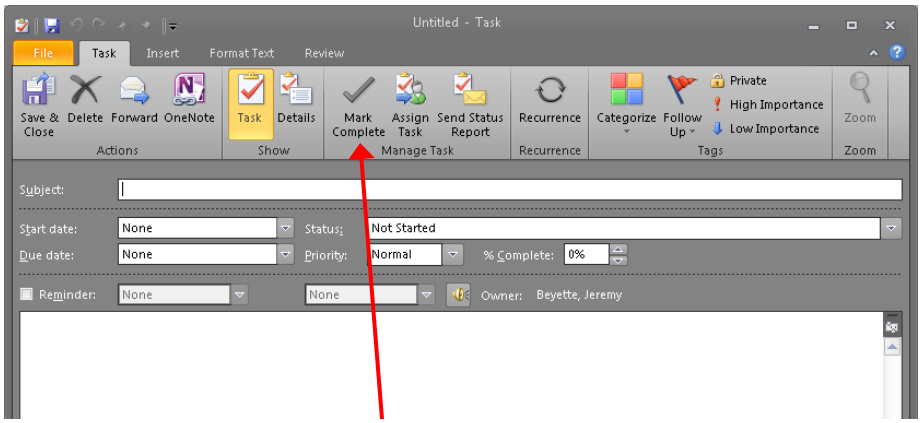
You can also overlay users calendars on top of each other by clicking the arrow on each user tab to more easily find potential meeting times. In the example to the right, the first user's calendar items are in gray, the second are in blue, and the third are in green. Selecting a user will put the focus on that user, in this case, the first user.



Tasks

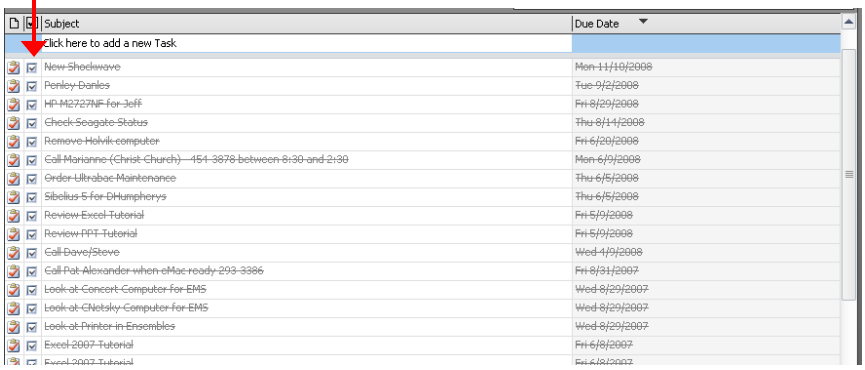
Creating a New Task

Tasks can be used to remind you of important things that need to be done. To create a new task, go to **Tasks** and then select **New Task** on the ribbon. Fill out Subject, Start date, Due date, Status, Priority, % Complete, and a Reminder as needed. When you are finished, click **Save and Close**.



Completing a Task

Once you have completed a task, go to the Tasks folder. To mark the task as complete, check the box to the left of the task subject. You can also open the task item and use the **Mark Complete** button on the ribbon. This method will give you the opportunity to enter any additional notes regarding the task.



Assigning a Task

To assign a task to someone else, click the **Assign Task** button on the ribbon, enter the name of the person who will be assigned the task, and click the **Send** button. Once the person has marked the task as complete, you will receive an update for your task list that the task has been completed.