

Microsoft Outlook 2011



EASTMAN
SCHOOL OF MUSIC
UNIVERSITY of ROCHESTER

Table of Contents

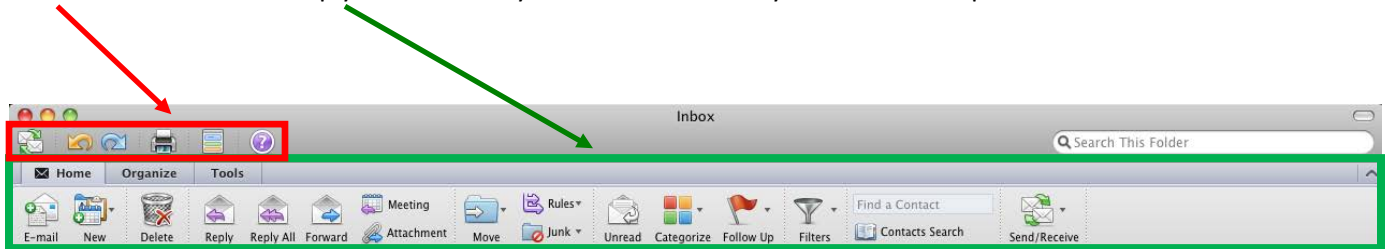
New in Microsoft Office 2011	4
Appearance of Microsoft Outlook	5
Email	6
Reading New Email	6
Sending a New Email Message	6
Replying to and Forwarding Messages	7
Deleting Email Messages	7
Sorting Messages	8
Working with Attachments Adding Attachments.....	8
Opening Attachments.....	8
Saving an Email Message as a Draft.....	9
Spell Check	9
Storage Space	9
Junk Email	10
Creating a Signature	10
Setting up Schedules.....	11
Setting up Rules	11
Creating Filters.....	12
Out of Office Assistant	12
Contacts	13
Create a New Contact.....	13
Create a New Group	13
Finding Contacts	14
Organizing Contacts	14
Sending a Contact or Contact Group	14
Opening Another Person’s Contacts (or other folder)	14
Calendar	15
Calendar Views	15
Set Calendar Preferences.....	15
Adding a New Calendar Meeting.....	16
Adding a New Calendar Appointment.....	16

Reoccurring Calendar Events	16
Changing/Deleting Calendar Events	16
Mark an Event as Private	17
Show you are Free/Busy During an Event	17
Sending Meeting Requests	17
Changing Requested Meetings	17
Canceling Requested Meetings	17
Receiving a Meeting Request	18
Sharing Your Calendar/Opening Another Person's Calendar	18
Tasks	19
Creating a New Task	19
Completing a Task.....	19

New in Microsoft Office 2011

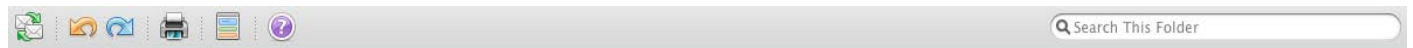
Microsoft Office 2011 introduces Microsoft Outlook for Mac 2011. Microsoft Outlook replaces Microsoft Entourage as the new Mac personal information management application that is bundled with Microsoft Office 2011. Microsoft Outlook 2011 can be used for email, calendaring, contact management, tasks, and notes.

Microsoft Office 2011 improves the interface that was introduced in Microsoft Office 2008 by redesigning the **Toolbar** and **Ribbon** to help you more easily access the features you need to complete tasks.



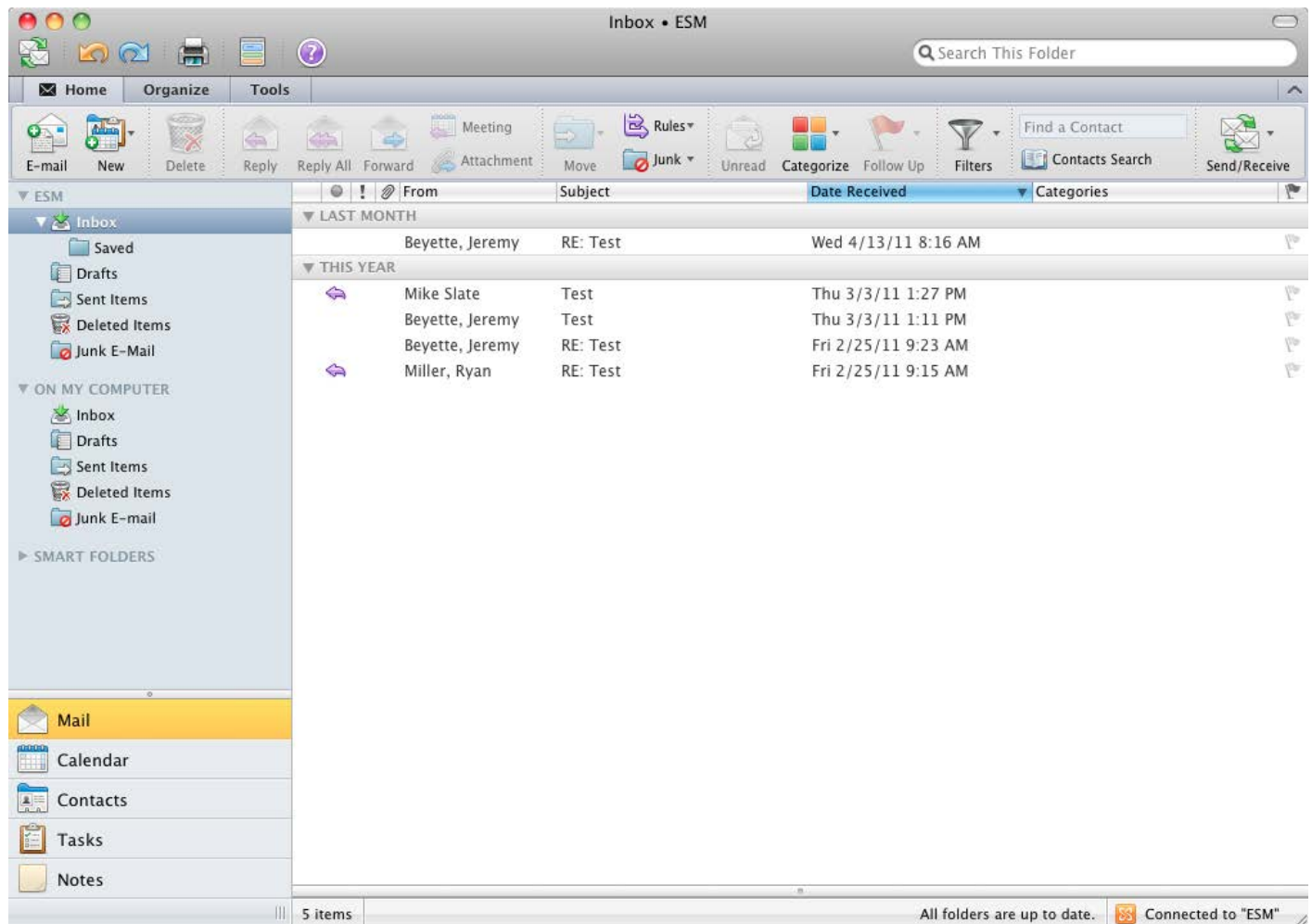
Toolbar

The Toolbar is displayed at the top of each Outlook window. This includes the main Outlook window along with individual windows, such as an email or calendar window. The toolbar can be turned off for each area by selecting **View → Hide Toolbar**. The toolbar can be turned on for each area by selecting **View → Show Toolbar**.



Appearance of Microsoft Outlook

After opening Microsoft Outlook, you will be prompted to enter your username and password. The username should be entered the same way that you use to login to your ESM computer/email.

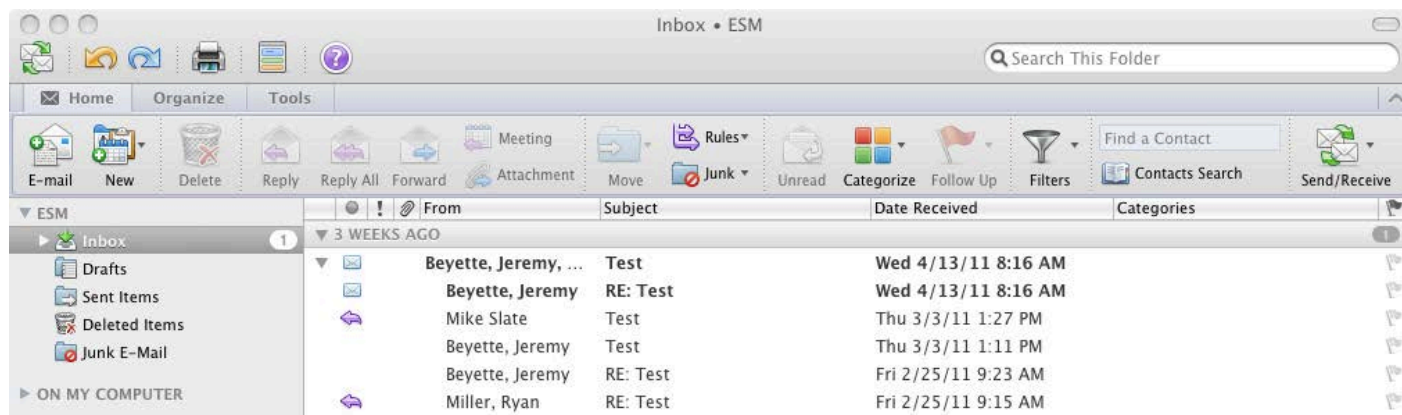


The left hand panel of the window lists your **ESM** mail folders, including Inbox, Drafts, Sent Items, Deleted items, and Junk E-mail. The **On My Computer** area is not used for your Eastman email. Make sure you are using the folders under the **ESM** heading.

Email


Reading New Email

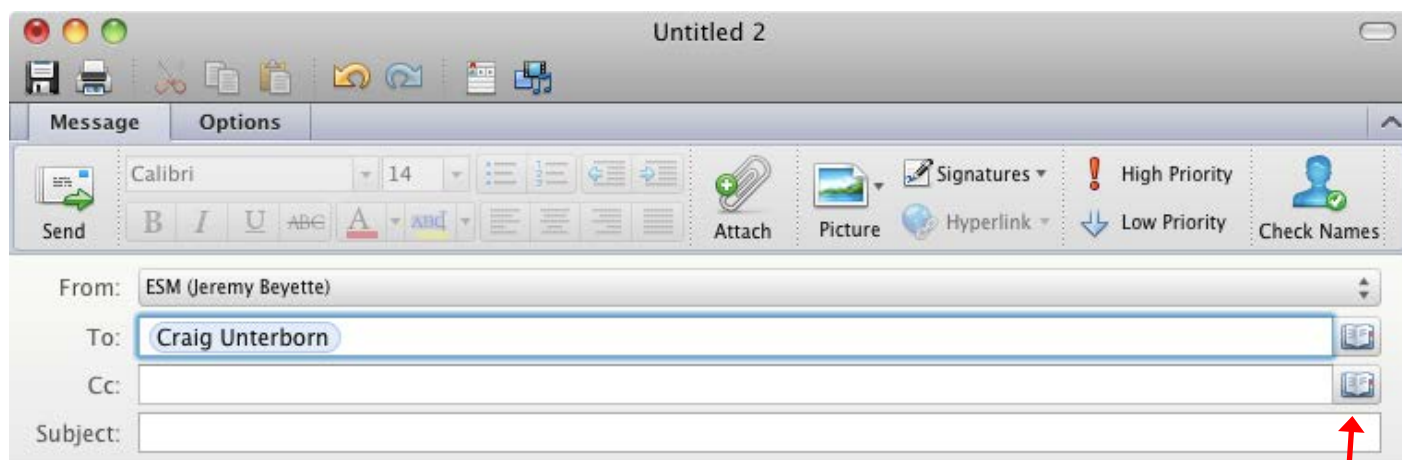
To open new mail messages, click on the **Inbox** folder under ESM. All new messages are highlighted in bold. Select the message you want to read by double clicking it.



The example above is displayed in Conservation mode, a new feature within Outlook that groups together messages that belong to the same conversation. To turn off conversation mode, select Organize on the ribbon and click on the Conversations icon.

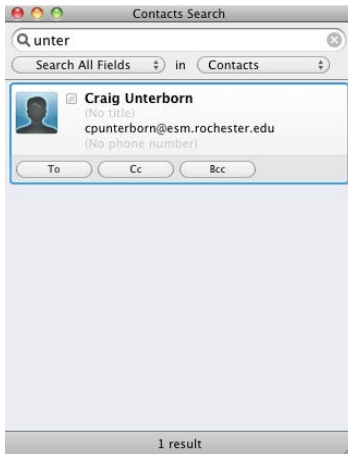
Sending a New Email Message

To send a new email message, click on the E-mail button  while in the Inbox.



Enter the recipient's email address on the **To:** line. If the recipient is a community member within the University of Rochester, you can search for them from within Outlook. Click the Address Book icon to the right of the To: line.

A **Contacts Search** window will appear. Begin entering the name of the community member you are seeking. The results list will automatically begin returning results. When the appropriate result is found, click on To, Cc, or Bcc within the desired result and that recipient will be added to the appropriate line of the email message.



The subject of the email should be entered into the **Subject:** line and the body of the message should be entered below that. Once you are finished, click **Send**. If you are not online, the message will be stored in the **Outbox** until you have an Internet connection. Once a message is sent, it will remain in the **Sent** folder until deleted.

Replying to and Forwarding Messages

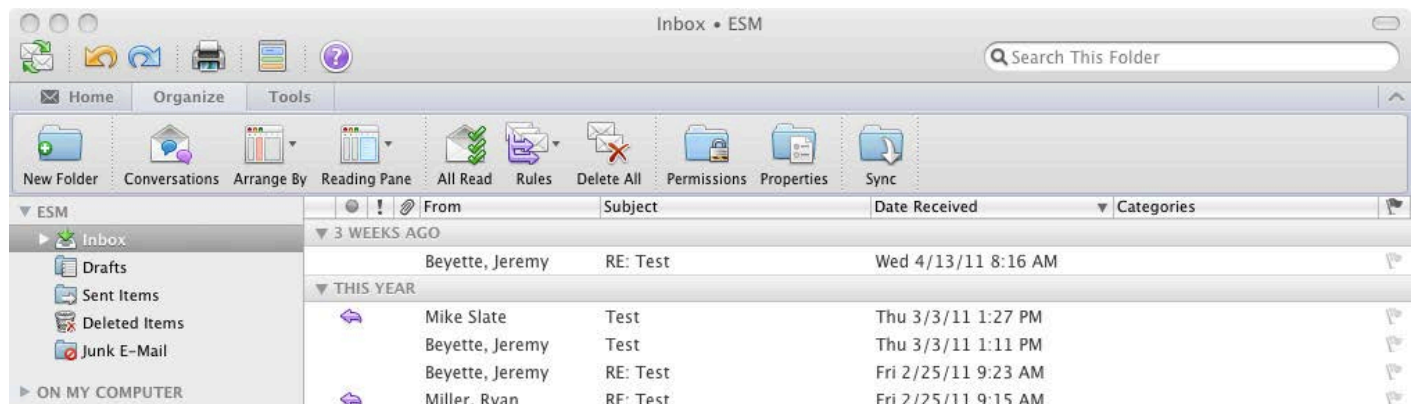
If you wish to reply to an email, click the **Reply** button on the Home ribbon and complete your message just as you would a new email. If you wish to reply to all senders, including those copied in on the received message, click **Reply All**. By default, replying includes the original message at the bottom of the email. To forward a received email to another person, click on the **Forward** button in the toolbar and then add the email address(es) you want the message to be forwarded to.

Deleting Email Messages

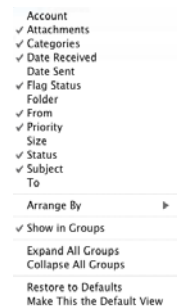
To delete a message, select the message and click the Delete button on the Home ribbon or use the **Delete** key on your keyboard. In order to delete multiple consecutive emails, click on the top message you wish to delete, then hold down the **Shift** key and click on the bottom message you want to delete. To select multiple non-consecutive messages for deleting, use the **Command (Apple)** key instead of the **Shift** key and click each message that you wish to remove. To select all messages within a mail folder, go to **Edit → Select 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, hold Control and click on the Deleted Items folder and select **Empty Folder**.

Sorting Messages



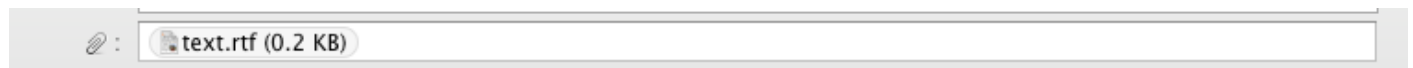
Email messages can be sorted by Subject, Date Received, Sender, Size, etc. depending on how you want to view your messages. Usually it is easiest to sort mail by date received, putting your most recent emails at the top. Clicking on the bar that says **Date Received** until the sort triangle is pointing down will keep the most recent emails at the top. If one of the categories that you like to have in view or that you like to sort by seems to be missing from the bar, hold control and click on the sort bar. Categories that are on your bar will be checked. You may add or remove categories by clicking on the category name.



Working with Attachments

Adding Attachments

A file attachment can be added a new message, reply, or forward. Once you have a message open you want to add a file to, click the **Attach** icon from the Ribbon. You can also drag the file to the text box of the email window. After the file has been attached, the file should be listed next to the attachment icon under Subject.



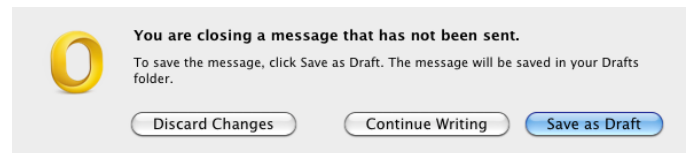
Opening Attachments

A new message that has a paperclip icon indicates that it has an attachment. To save the attachment, open the email message, control-click on the attachment and then click **Save As**. You can then save the file to the desired location. To only open the attachment, and not save it, control-click on the attachment and click **Open**.

Saving an Email Message as a Draft

If while working on an email that you are not able to finish and send, you can save the message as a draft to be worked on or sent at a later time. Just click on the Red button within the new email and it prompt you with this message on the right.

Also, you can go to **File**→**Save**. Both options will save the draft to the **Drafts** folder.

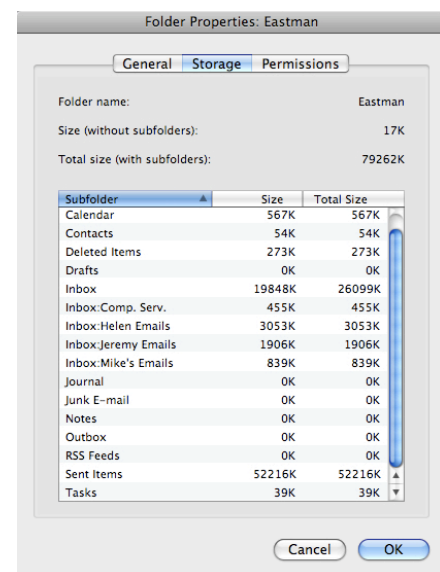


Spell Check

Within Outlook, spell check is on automatically, and works similar to the spell check found in Microsoft Word. Misspelled words will be underlined in red, and some spelling is automatically corrected. To start the spell check manually, select the **Options** ribbon and click **Spelling**. To change AutoCorrect settings, go to **Outlook** → **Preferences** and click on **AutoCorrect**.

Storage Space

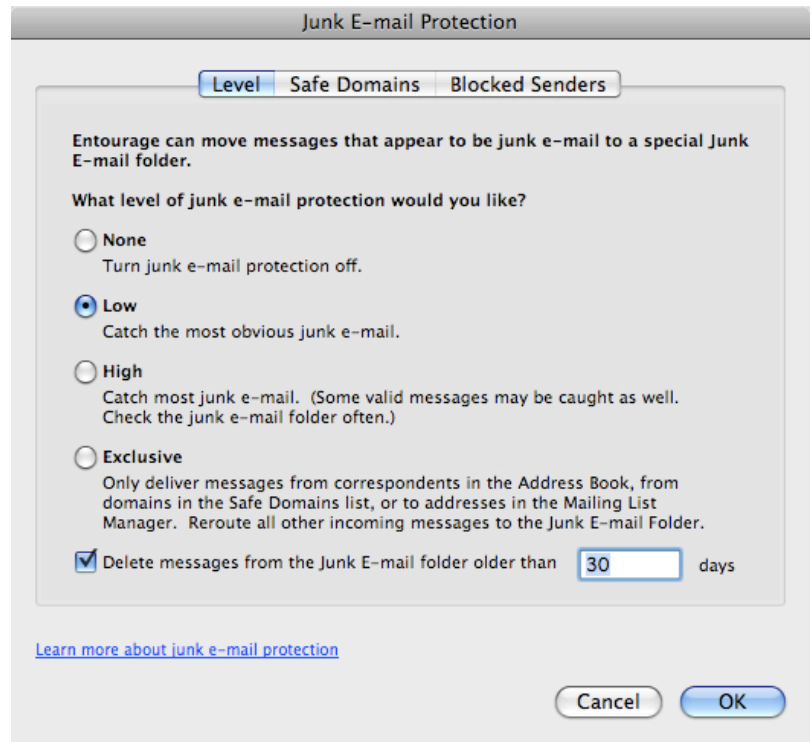
Eastman faculty & staff have an email storage quota set to 500000K. To check your storage size, hold Control, click on **Eastman** and go to **Folder Properties**. Click on the **Storage** tab and a window appears giving the size of each of your folders. You can now look through the list and see which folders are largest in size. If you are getting emails warning you that you are at your quota, you may want to move some of the items from the larger folders to Folders on My Computer (explained below) or delete emails that are no longer needed.



Junk Email

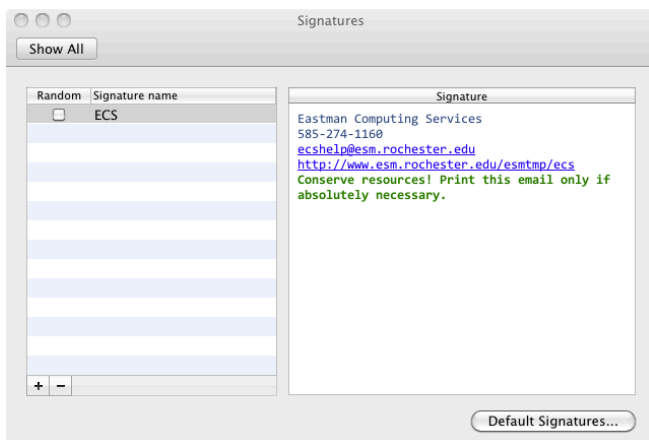
Everyone gets junk email that they do not want. The University provides a junk mail filtering service that is usually effective, stopping emails from even making it to your inbox. Instead, an email is periodically sent out listing all the emails blocked by the filter. This way, you can be sure that email that is not junk is not being stopped from arriving to your inbox. To make changes to your University spam filtering settings, you can go to: <http://www.rochester.edu/it/spam>.

Outlook also has a built in Junk filter that can provide further help. To change the protection level, go to **Tools → Junk E-mail Protection**. You can change the level and also add addresses to Safe Domains if they are being incorrectly marked as junk.



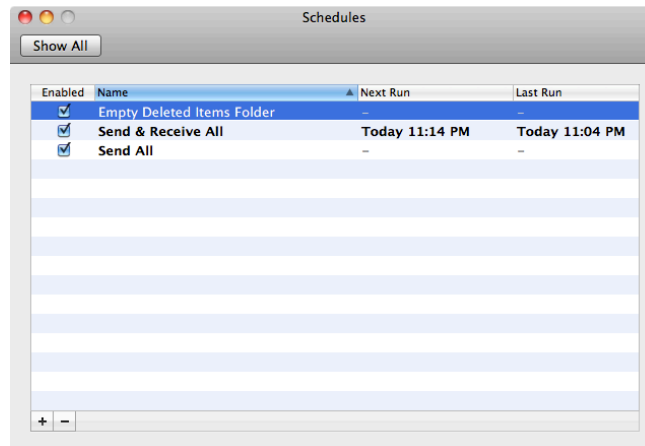
Creating a Signature

1. Go to **Outlook → Preferences → Signatures**
2. Click the + icon in the lower left.
3. Enter a name for your new signature and enter your signature in the area to the right.
4. Click the red close button in the upper left to close the Signature window.



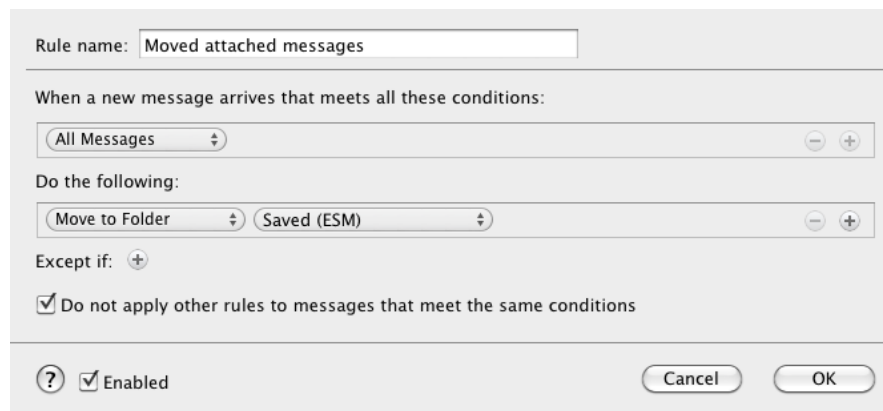
Setting up Schedules

Schedules can be set up for sending, receiving, and deleting mail. You can set up a schedule to delete messages from a certain folder on a schedule or on exit. By default, a schedule sends and receives all mail at a reoccurring time. To create a new schedule, go to **Tools – Run Schedule – Edit Schedules...** Click the + button in the lower left hand second of the Schedules window and specify the schedule information.



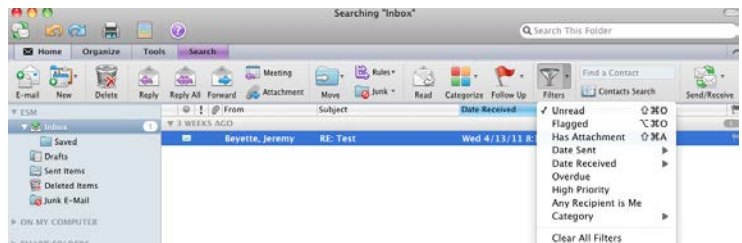
Setting up Rules

Rules can do an assortment of tasks when new messages arrive. Mail can be sorted as it is received in your inbox. You can also flag messages from an individual or move messages based on content, etc. All this is done with Rules. To set a rule, go to **Tools → Rules...**, click on the **ESM** listing on the left and click the + icon. Name your rule and setup your **IF** and **THEN** criteria. Make sure the Enabled box is checked in order for the rule to go into effect.



Creating Filters

A filter is an easy way to view only messages that meet conditions that you specify. For example, you can apply a filter so that you only see unread messages. 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. While in the folder you want to filter, click **Filters** on the Home Ribbon and select the filter option. Click on **Filters** to remove the filter.



Out of Office Assistant

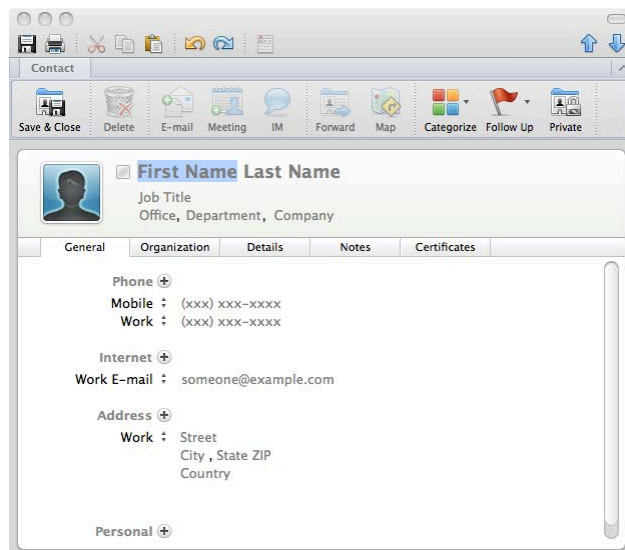
With the Out of Office assistant, this gives you the ability to automatically send replies to the people who send you an email. You can customize it to send to not only internal email addresses but external email addresses as well. To manage these settings, click on Tools > Out of Office.

A screenshot of the 'Out of Office Assistant' dialog box. The title bar says 'Out of Office Assistant'. The 'Account:' field is set to 'ESM'. There are two radio buttons: 'Do not send Out of Office messages' (unselected) and 'Send Out of Office messages' (selected). Below this is a text box labeled 'Reply to messages with:'. Under the 'More options' section, there is a checkbox 'I am out of the office between:' which is unchecked. Below it are 'Start date:' (Fri, Oct 12, 2012) and 'End date:' (Sat, Oct 13, 2012) fields, each with a calendar icon and a time dropdown set to '12: 00 PM'. There is a checked checkbox 'Send replies outside my company to:' with two radio buttons: 'Address Book contacts only' (unselected) and 'Anyone outside my company' (selected). At the bottom is a text box labeled 'Reply once to each sender outside my company with:'. At the very bottom are 'Cancel' and 'OK' buttons.

Contacts

Create a New Contact

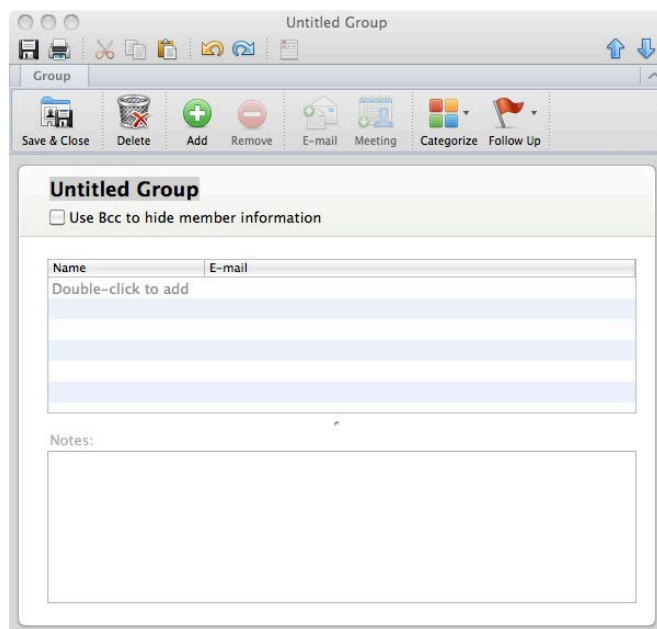
To create a new contact, select **Contacts** on the navigation menu, go to **Contacts** under the **Eastman** folder and click on **Contact** on the ribbon. You may then enter the contact's information. When you have finished, click on the **Save & Close** button on the ribbon.

A screenshot of the Outlook 'Contact' form. The ribbon at the top includes 'Save & Close', 'Delete', 'E-mail', 'Meeting', 'IM', 'Forward', 'Map', 'Categorize', 'Follow Up', and 'Private'. The form has a header section with a placeholder for a profile picture, a checkbox, and fields for 'First Name' and 'Last Name'. Below this is a section for 'Job Title' and 'Office, Department, Company'. The main body of the form is divided into tabs: 'General', 'Organization', 'Details', 'Notes', and 'Certificates'. The 'General' tab is active, showing fields for 'Phone' (with a plus icon), 'Mobile' (with a plus icon), 'Work' (with a plus icon), 'Internet' (with a plus icon), 'Work E-mail' (with a plus icon), 'Address' (with a plus icon), and 'Personal' (with a plus icon). Each field has a small plus icon next to it, indicating it can be expanded.

Create a New Group

Groups are often helpful when there is a need to send out emails to a large number of contacts. Rather than having to enter email addresses every time a new message is sent, you can create a group that saves all the emails in one list. To create a new group, select **Contacts** on the navigation menu, go to **Contacts** under the **Eastman** folder and click on **Contact Group** on the ribbon. Enter a group name and then add the email addresses you want in the group. As you start typing a name, Outlook will auto populate the name if it finds it the address book, recently used contacts, or the Global Address List. After you are finished entering addresses, click the **Save & Close** button on the ribbon.

To send to a group, open a new email message, and then write the name of the group in the **To:** line. The name should appear as you begin typing it.

A screenshot of the Outlook 'Untitled Group' form. The ribbon at the top includes 'Save & Close', 'Delete', 'Add', 'Remove', 'E-mail', 'Meeting', 'Categorize', and 'Follow Up'. The form has a header section with the title 'Untitled Group' and a checkbox labeled 'Use Bcc to hide member information'. Below this is a table with two columns: 'Name' and 'E-mail'. The table has a header row and several empty rows. Below the table is a section labeled 'Notes:' with a large text area for entering notes.

Finding Contacts

To search for a contact, select **Contacts** on the navigation menu and then enter the name of the contact in the **Find a Contact** text box in the upper right area of Outlook and then press the return key. A contacts search window will appear to show you any found contacts based on the search criteria entered.

Organizing Contacts

Once you have a large amount of contacts, it may be beneficial to organize them for quicker searching. In Outlook, the best way to organize contacts is to create **Categories** for each contact. If you open a contact, you'll notice a Categories button on the ribbon. Select this button and then select the category to assign to the contact. If the default categories don't work for you, click Categories and then select Edit Categories... From here, you can create new categories, delete categories, and rename categories. To view only the contacts that belong to a certain category, enable/disable the category options in the navigation menu.

Sending a Contact or Contact Group

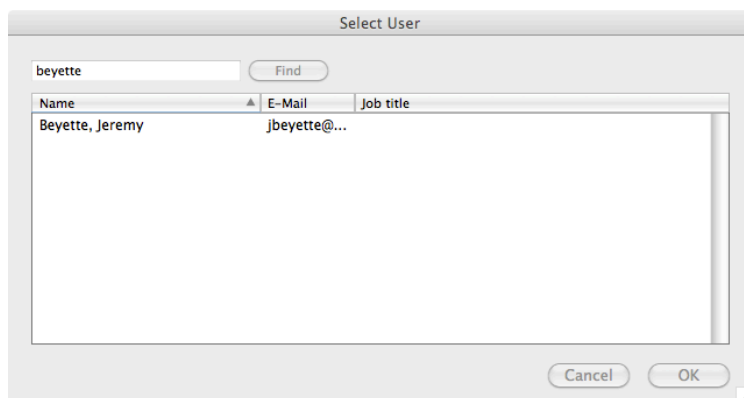
To email contact information to another person, open the Contact and select **Forward** on the ribbon. A new email message will open with the contact included as an attachment in a .vcf file format. The recipient can double click this file to have the contact added into their email program.

Opening Another Person's Contacts (or other folder)

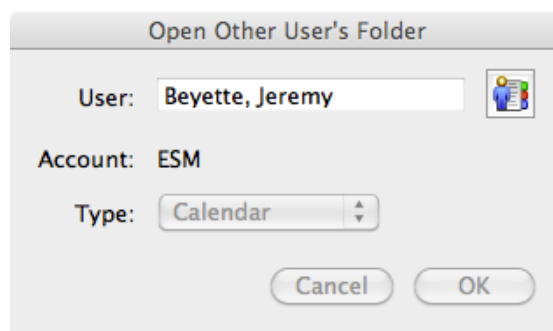
To open another user's contact list, first be sure that the person has given you permission and made you a delegate for Contacts.

Click on **File → Open → Other User's Folder...**

Click on the contacts icon on the right hand side of the window. In the 'Select User' window that appears, enter the name of the person and click Find. Click on the correct person listed in the found results and click OK.



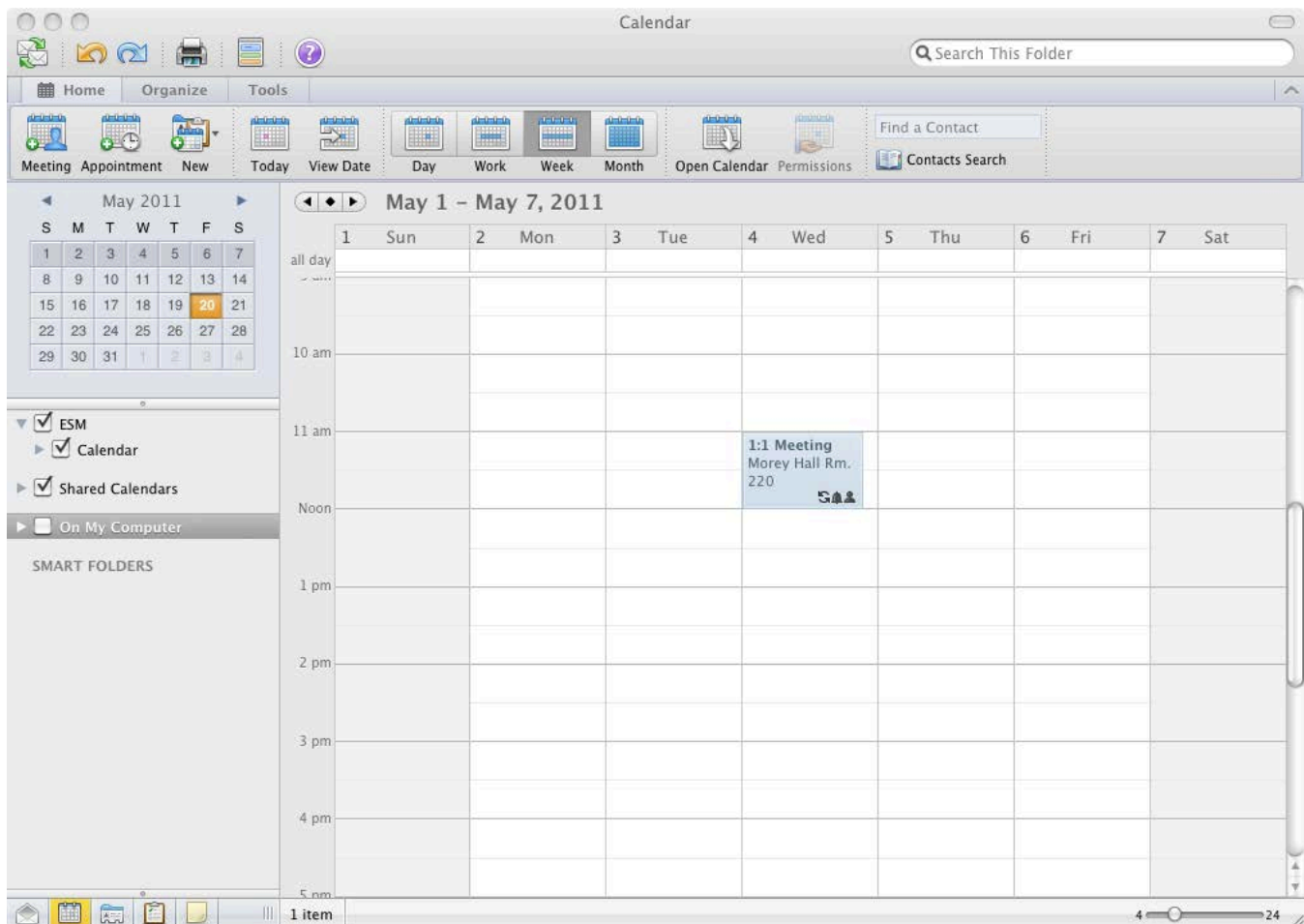
In the 'Open Other User's Folder' window, select the type of folder (Calendar, Contacts, Inbox) that should be opened and click OK.



Calendar

Calendar Views

The calendar is a useful tool for keeping track of important dates, meetings, and appointments. Once you are in the calendar folder, there are several viewing choices. The views are all buttons on the ribbon: **Day**, **Work**, **Week**, and **Month**. You can also go to **View** → (the view you want). Click the **Today** button on the ribbon to automatically move the view to today's date. Click the **View Date** button to easily select a specific date. In all views, a small calendar of the month will be visible for quick navigation. Click on a date in the small calendar to automatically move Outlook to that date. Below is an example of Week view.

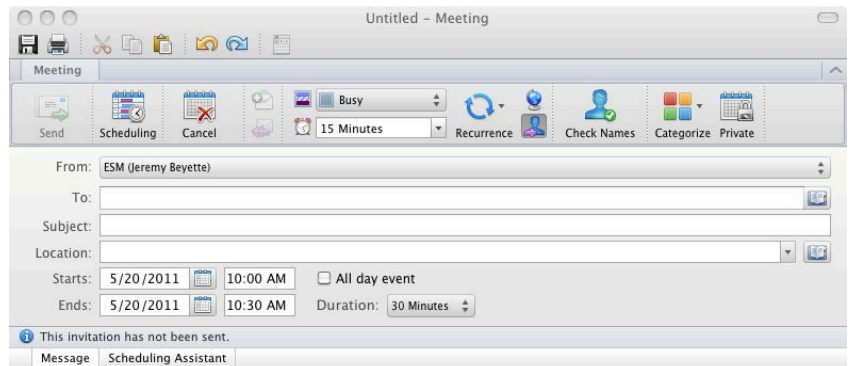


Set Calendar Preferences

1. Go to Outlook → Preferences...
2. Click on **Calendar**
3. Select the work days/time you want to show on your calendar
4. Set default reminder time for appointments and meetings
5. Select a time zone

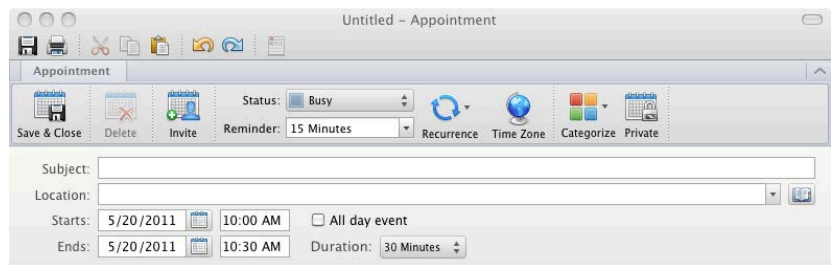
Adding a New Calendar Meeting

A meeting is a calendar event that includes other people. To create a new meeting, while in the Calendar view, click on the **Meeting** button on the ribbon. Enter the **Invitees**, **Subject**, **Location**, **Start time**, and **End time** of the meeting. Check the box **All day event** if there is no specific time for the event. You can add attachments, add a message, change the priority, set reminders, or print the appointment. When finished creating your meeting, click the **Send** button on the ribbon.



Adding a New Calendar Appointment

An appointment is a calendar event that does not include other people. To create a new appointment, while in the Calendar view, click on the **Appointment** button on the ribbon. Enter the **Subject**, **Location**, **Start time**, and **End time** of the meeting. Check the box **All day event** if there is no specific time for the event. You can add notes, set reminders, or print the appointment. When finished creating your appointment, click the **Save & Close** button on the ribbon.



Reoccurring Calendar Events

For calendar events that occur every week or every month, or at some other interval of time, there is no need to create a new event for each occurrence. From within a calendar event, click the **Recurrence** button on the ribbon and select one of the predefined recurrence options or click **Custom...** and enter in the recurrence information. When you want to change/cancel one meeting within a reoccurring series, be sure to open just the single occurrence. Open the series to make changes to all appointments. Upon opening a recurring appointment, you will be prompted to open a single occurrence or the series.

Changing/Deleting Calendar Events

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

Mark an Event as Private

Open the calendar event you wish to make private and then click the **Private** button on the ribbon.

Show you are Free/Busy During an Event

Open the appointment/meeting you wish to change, click on the pull down menu next to Status and select Free, Tentative, Busy, or Out of Office.

Sending Meeting Requests

To change an appointment into a meeting request, open the appointment and then click on the **Invite** button on the ribbon. Add email addresses just as you would for sending an email on the **To** line. The recipient will receive an email 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

Before scheduling a meeting, it is often best to see when your attendees will be available. The best way to do this is to start with a new meeting and then invite the desired attendees. Then click on the tab that says **Scheduling Assistant**. The free and busy times for each attendee will appear next to their name. You may scroll through the dates with the scroll bar near the bottom of the window.

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.



Canceling Requested Meetings

If you need to cancel a meeting you requested, you should notify the people you invited. Open the meeting from your calendar and click **Cancel** on the ribbon. This will send a cancellation notice to everyone you invited. If you (the meeting organizer) are canceling one meeting out of a reoccurring series, make sure you open the single occurrence of the meeting and then click **Cancel**. If you are ending a recurring series of meetings, open the meeting series on your calendar, set a new end date, and then send an update. This keeps the past meetings on everyone's calendars, but future occurrences after the end date are removed.

Receiving a Meeting Request

If you are invited to a meeting, a special icon will appear with the new email message. Opening the message will display who has been invited to the meeting along with the subject, location, and date/time it is to occur. You can then choose Accept, Tentative, or Decline. 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.

Sharing Your Calendar/Opening Another Person's Calendar

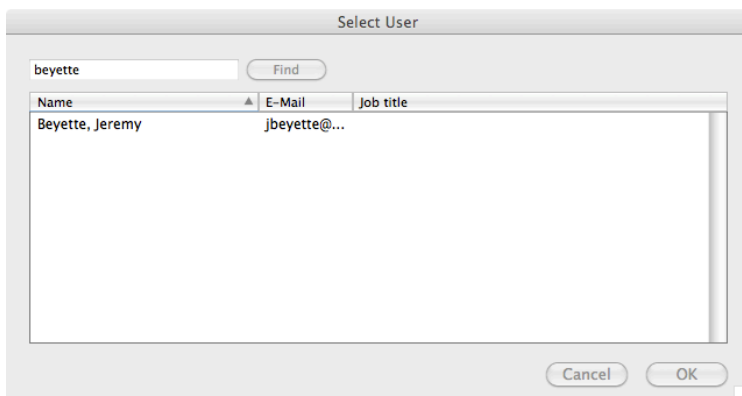
In some instances, you may want to share your Calendar with another person within Eastman or the University. In order to do this, you first need to delegate permissions to the person that will be accessing your calendar and set their permissions level.

To delegate permissions, hold control on the keyboard and then click Calendar under ESM on the navigation menu. Click on Sharing Permissions... Click Add User, enter the user's name and click Find. Select the name from the list and click OK. Set the permission level for the user and click OK.

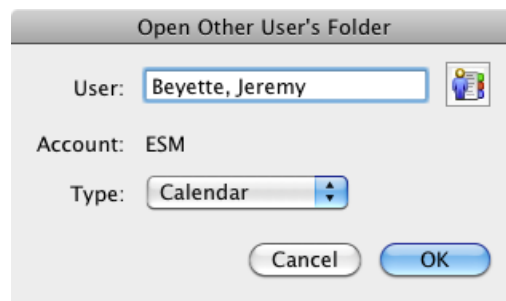
To open another user's calendar, first be sure that the person has given you permission and made you a delegate for their calendar.

Click on **File → Open → Other User's Folder...**

Click on the contacts icon on the right hand side of the window. In the 'Select User' window that appears, enter the name of the person and click Find. Click on the correct person listed in the found results and click OK.



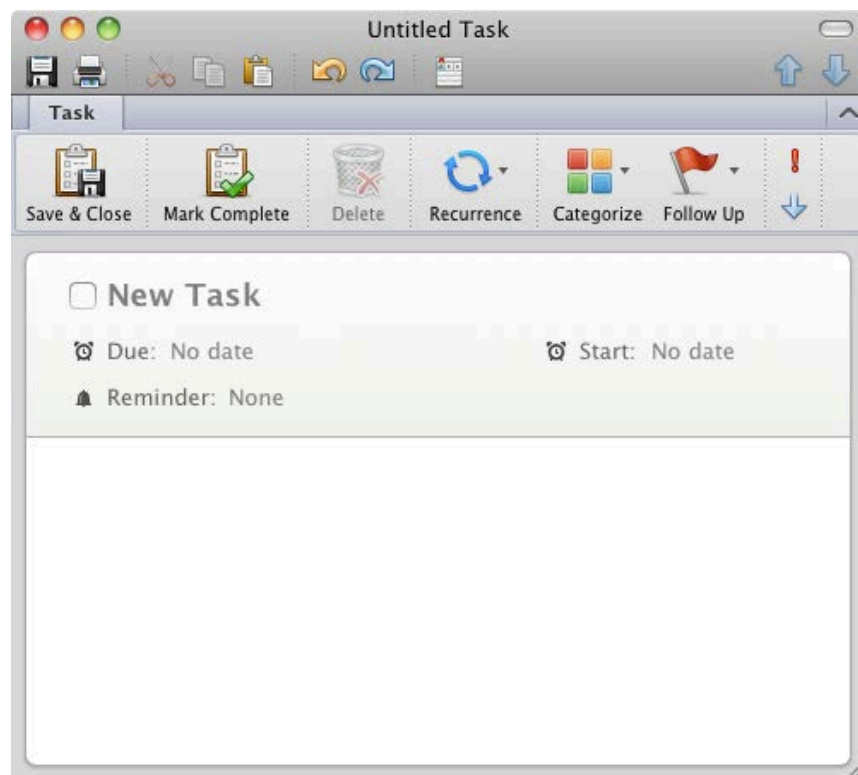
In the 'Open Other User's Folder' window, select the type of folder (Calendar, Contacts, Inbox) that should be opened and click OK.



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, select Tasks from the navigation menu and then click **Task** on the ribbon. Fill out Task Name, Due date, Start date, and a Reminder as needed. When you are finished, click **Save and Close** on the ribbon.



Completing a Task

Once you have completed a task, go to the Tasks folder. To have the task be marked as complete, check the box to the left of the Task Title.

